Creating New Company Portals and Inviting Customers

You can create new companies within your Workforce portal in bulk by importing a spreadsheet, or one at a time/individually. See Section I for the bulk/import method, and section II for instructions individually/manually. Account codes must be set up by the lab before they can be added to Workforce. See sections III & IV for instructions on inviting users to your company portals once they have been created.

I. Method 1: Bulk Company Import via CSV File to create multiple company portals at once (see section II for instructions on adding individual company portals)

1. Log into Portal Administrator/Master portal
2. Select Administration
3. Select Portal Information
4. At the bottom of the page click Company Import
5. Download Example CSV template
6. Complete the required information on the company template for each of the portals that will be imported/created noting that the file is a CSV file and will not accept special characters
    a. For company portals that will require more than one lab account code, create an additional row for each lab account code ensuring that all other company information (aside from the lab account code) is the same as the others that should belong to that company portal.
    b. For your convenience, use the Company Portal import template that is available from the Workforce Support team, (workforcesupport@crlcorp.com). This template will format the account data from the CRL ref 1 account spreadsheet correctly per the Workforce CSV file requirements and greatly reduce time spent on formatting.
7. Save the CSV file
8. Select Browse
9. Locate the CSV file and select choose file
10. Select Next
11. Select Submit for Validation
12. Review any errors that will prevent companies from importing correctly, if none proceed to step 13, if there are errors see below.

* **If errors are present within the file see below***

a. Review the error messages to determine what needs to be corrected. Open the saved file, correct the errors and save the changes.
b. Select the back button
c. Choose the corrected file
d. Select Next
e. Select Submit for validation
f. Again, review for errors-if errors are still present repeat steps a-e
g. If no errors, select Import file

13. Select Import file
14. Log out of the Workforce portal and log back in. The Company Portals that were just imported are now available to select and users can be invited to access them. See section III below for instructions on inviting Users or Section IV for inviting Company and/or Location Administrators.

II. Method 2: Individual Company Portal Creation

1. Log into Portal Administrator Portal (Master/Top portal)
2. Select Administration
3. Select Portal Information
4. Enter the name of the company that you are creating a company portal for noting that special characters are not accepted, and company name must be greater than 3 characters, but no more than 32 characters
5. If desired, enter in a Company Code (*this is not the lab account code, but would be if you would like to associate a unique company code to the company which is required for Randomization users)
6. Enter the correct information into all the required fields marked with a red asterisk
8. Click the save button at the bottom right side of the page
9. Log out and back into the portal and the new company just added will be available to select, see section III for inviting users to portals.
10. To add lab accounts to the portal, (required in order to obtain lab results from within the portal), go to the Portal Administrator/Master portal
11. Select Administration, then select Company Information
12. Locate the company you're adding the lab accounts for by typing the company name in the company name drop down menu and select it when it appears
    a. Select lab details
    b. Select add new
    c. Select CRL as the lab
    d. Enter the CRL lab account code for the company portal you're creating
    e. Select check account
    f. Select submit from the add window
    g. Select submit again from the lab detail window
    h. Exit the lab details window

i. Click the Update button at the bottom of the Company Details window to save all changes

III. Inviting your customers to access Company Portals: User Roles (No admin permissions)

1. Log into the company portal that you want to invite the user to access
2. Select Administration
3. Select User Information
4. Click the Add User button
5. Enter the user's email address, mobile phone number, as well as first and last name
6. Select one of the following roles you'd like the user to be assigned based on the access/permissions that are associated with each role: * Do not select Collector, Lab Administrator or HR Manager roles*

   a. **Program Administrator and Designated Employer Representative** (both roles have the same permissions)
      i. Site Search
      ii. Ordering
      iii. Results (tracking status)

   b**. DER Random**
      All the access listed above, plus access to view, but not make edits to the Randomization tab.

   c. **Hiring Manager**
      i Site Search
      ii. Order

7. If you have created locations for the company portal that you are inviting the user to access, (not required), enter the name of the location you want the user to have access to from the Location drop down area
8. Once all required fields have been completed, click the Save button at the bottom right side of the page. An invitation will be sent to the user and will allow them to create their password and access the portal they were invited to.

IV. Inviting your customers to access Company Portals: Company Admin and Location Admin (Admin Permissions)

1. Log into your main/Master portal
2. Select Administration
3. Select User Information
4. Select Add User
5. Enter the required fields and select the role that you would like to assign to the user
6. In the Company Name drop down, start typing the company name that you're adding a user for and select it when it appears:

   a. **Company Administrators** have the below privileges to ANY/ALL Locations added to the company portal they are assigned to

i. Administration: Invite and remove users to their company portal or to specific locations created within the company portal
ii. Order
iii. Results/Status
iv. Randomization (view and edit all)
v. Orphaned Results

b. **Location Administrators** have the privileges listed below, but ONLY for a single location under the company portal that they are assigned to, whereas the Company Administrator has access to any/all locations within the company portal. To add a user to this role, a location must be created beneath the company as part of the company portal setup process outlined in Section I above.

i. Administration (can invite other users to their company portal and manage those users themselves)
ii. Order
iii. Results/Status
iv. Randomization (View only, no editing)
v. Orphaned Results

c. **Portal Administrators** have access to all tabs and all functions within all companies and all locations within your Workforce portal. This role should only be granted to members of your own organization only. Please reach out to workforcesupport@crlcorp.com if a new member of your team needs to be assigned this role. Please provide first and last name, email address and mobile phone number within the request.