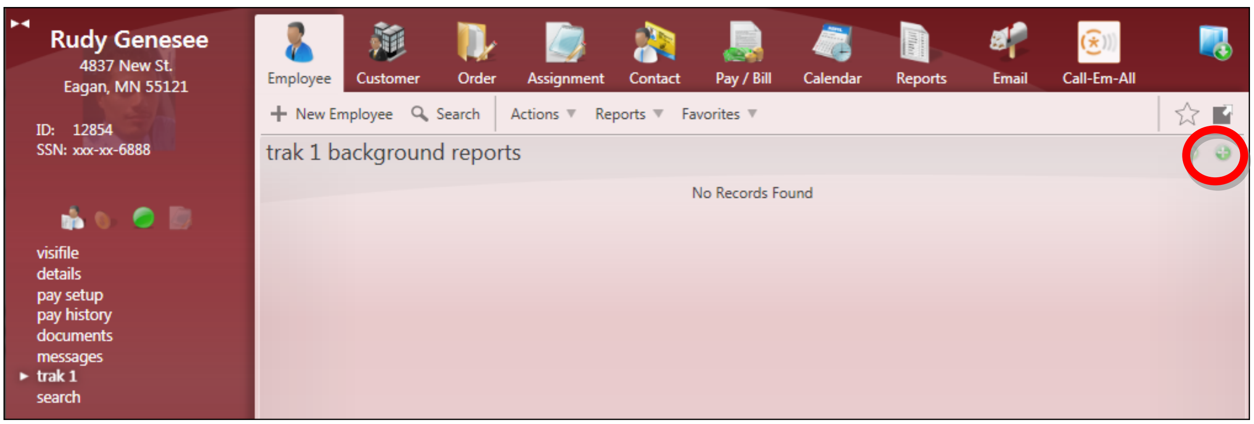
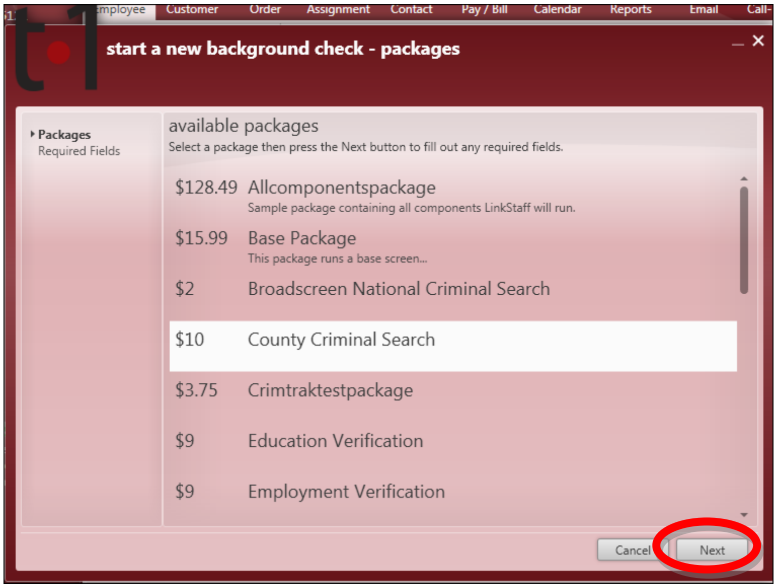
14R2 Enterprise Trak-1 Integration

***Important** - The Enterprise Trak-1 Integration functionality is not included with the "out of the box" TempWorks' Enterprise software solution. It is an additional module that needs to be enabled for your system and will also require that an account be established with Trak-1 Technology at www.trak-1.com.

The Enterprise Trak-1 integration allows the user to export **Employee** data to Trak-1 with just a few clicks. By using the details in the ***Trak-1 Submission Wizard*** information can be submitted to Trak-1 for background checks, education and employment verification and more. Trak-1 completes the requested service for the **Employee** selected and then when it's completed the results are automatically uploaded as a PDF to the **Employee's Documents** area.



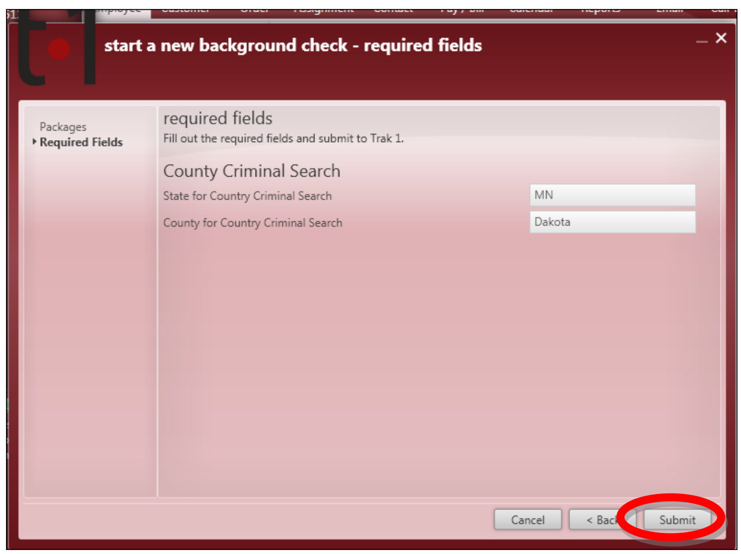
To export the **Employee's** information to Trak-1, open the **Employee's** record to the **Trak-1** form and click on the  button (as circled above).



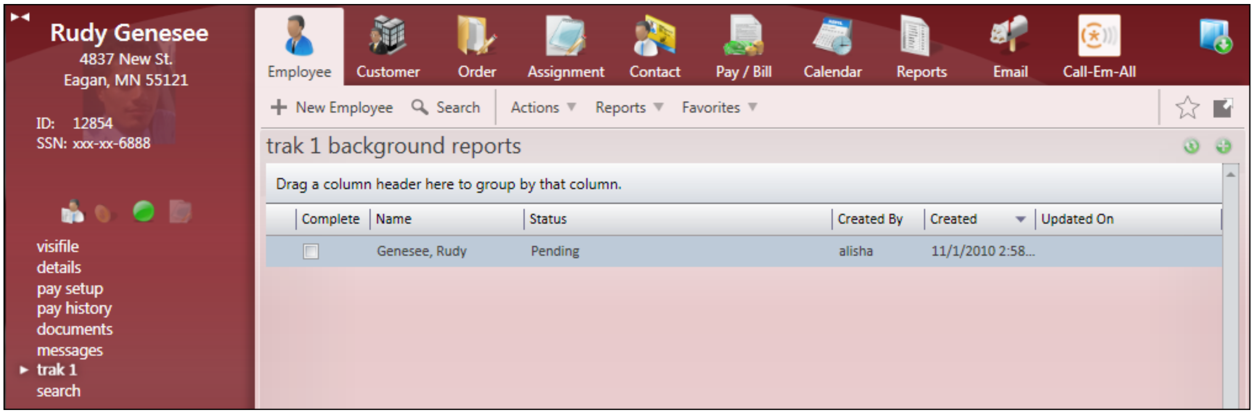
When the button is clicked from the **Employee Trak-1** form the ***Trak-1 Submission Wizard*** is opened to the ***Start a New Background Check - Packages*** form. Select the package from the list by clicking on it. Then click *Next*.

*Note – The rates that are listed next to each package and the packages available will be determined by your company's contract with Trak-1.

In the ***Start a New Background Check – Required Fields*** form Enterprise will pull information from the **Employee's** record to populate the necessary fields. Then click *Submit*.



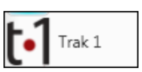
*Note – Enterprise can only populate information from the **Employee's** record that has been saved in the database. If a field is displaying the required indicator (), then the information was not able to be pulled from the **Employee's** record. All required fields must be completed before you will be able to click the *Submit* button.



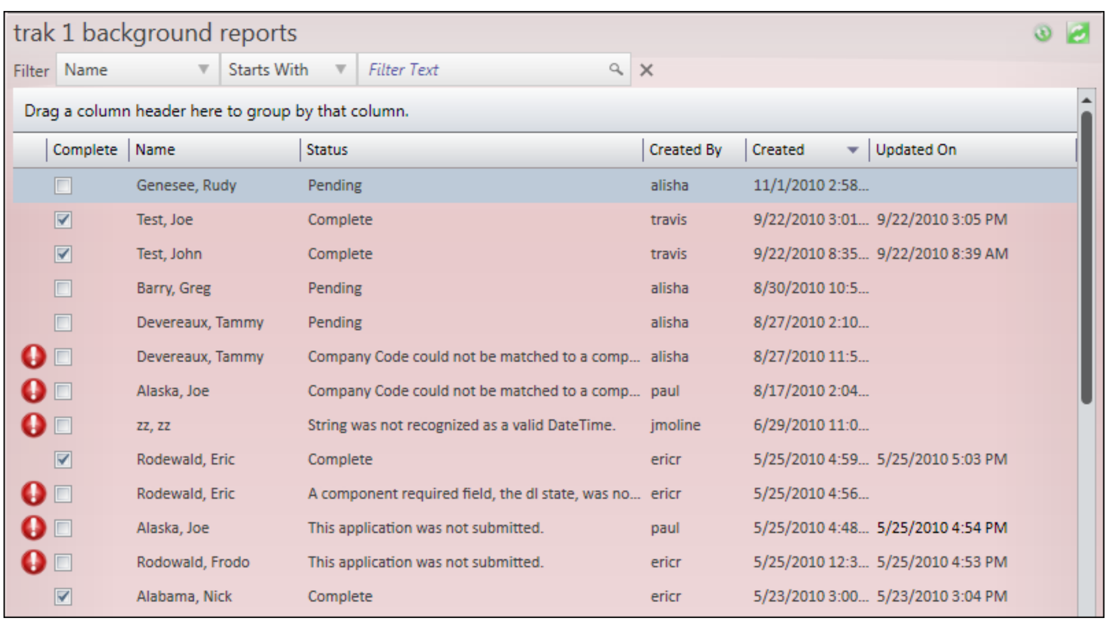
Clicking *Submit* on the previous form will close the ***Trak-1 Submission Wizard*** and return the user to the **Employee Trak-1** form. You will be able to see the report that was just submitted is now listed in a "Pending" *Status*. Once the report has been completed, the *Complete* check box will be checked off and the *Status* will be updated to "Complete". You can right-click on the report line to update or view the report (once completed).

*Note – When the background check is completed, an **Alert** can be turned on to notify users that it has been received.

To open the **Trak-1** form, scroll over the icon in the upper right corner of the screen. Then select **Trak-1** from the drop down menu.

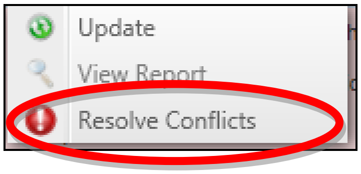


The button in the upper right refreshes the information for the selected line. The button updates the information for all Background check reports listed.



Complete	Name	Status	Created By	Created	Updated On
☐	Genesee, Rudy	Pending	alisha	11/1/2010 2:58...	
☑	Test, Joe	Complete	travis	9/22/2010 3:01...	9/22/2010 3:05 PM
☑	Test, John	Complete	travis	9/22/2010 8:35...	9/22/2010 8:39 AM
☐	Barry, Greg	Pending	alisha	8/30/2010 10:5...	
☐	Devereaux, Tammy	Pending	alisha	8/27/2010 2:10...	
☐	Devereaux, Tammy	Company Code could not be matched to a comp...	alisha	8/27/2010 11:5...	
☐	Alaska, Joe	Company Code could not be matched to a comp...	paul	8/17/2010 2:04...	
☐	zz, zz	String was not recognized as a valid DateTime.	jmoline	6/29/2010 11:0...	
☑	Rodewald, Eric	Complete	ericr	5/25/2010 4:59...	5/25/2010 5:03 PM
☐	Rodewald, Eric	A component required field, the dl state, was no...	ericr	5/25/2010 4:56...	
☐	Alaska, Joe	This application was not submitted.	paul	5/25/2010 4:48...	5/25/2010 4:54 PM
☐	Rodowald, Frodo	This application was not submitted.	ericr	5/25/2010 12:3...	5/25/2010 4:53 PM
☑	Alabama, Nick	Complete	ericr	5/23/2010 3:00...	5/23/2010 3:04 PM

In the Trak-1 form you will see a list of all of the background checks that have been submitted to Trak-1 for all **Employees** in your database. If an exclamation point appears in front of the report on this list there is an error that needs to be addressed before the background check can be completed.



To fix errors, right-click on the line and select *Resolve Conflicts*. This will navigate the user to the Trak-1 website to address the error and continue the background check report process.

If the *Status* on the report is "Complete" and the *Complete* check box is checked off, you can right-click on the line to bring up the menu above and select *View Report* to view a PDF copy of the background check results.

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REPORT SUMMARY

TempWorksTestClient - Base Package

Prepared for:

TempWorksTestClient, Joanie April
on 5/23/2010 3:04:14 PM

Subject of Report:

Name: Nick A Alabama
DoB: Jan 1, 2000
SSN: XXX-XX-5565
Address:
456 Main St
Sherman, CT 06784
Email:
imapdummyaccount@gmail.com

Report Summary:

Broadscreen Clear

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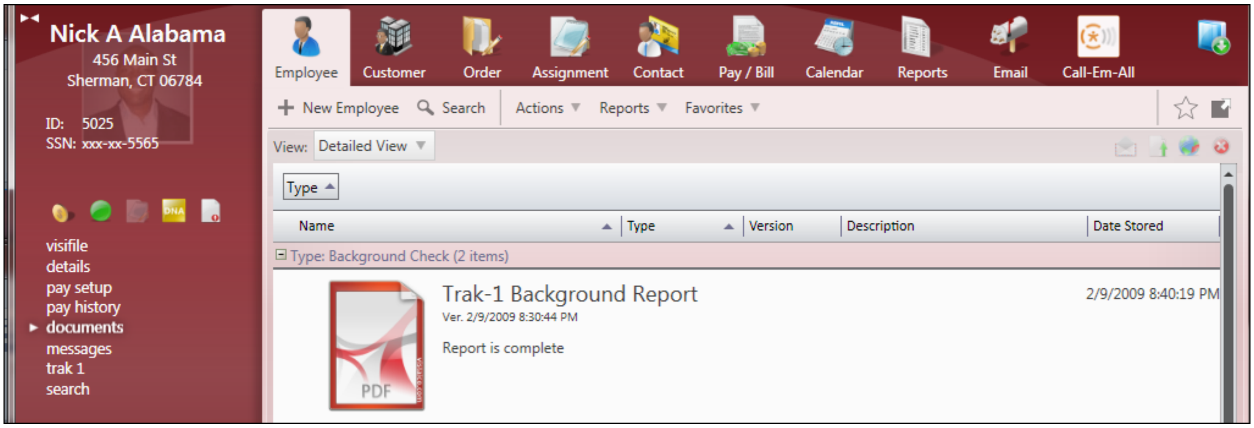
With the report viewer open you can use the up and down errors to scan through the different pages of the report.



The completed report is automatically attached to the **Employee's Documents** form as a PDF. Double-click on the document to open and view from this form.

Still Have Questions?

For more information about Enterprise Trak-1 Integration contact our customer support group at 651.452.0366 or by sending an email to support@tempworks.com.

To schedule training on utilizing the Trak-1 functionality, submit suggestions on how to improve this document, or to request documentation on other Enterprise functionality please contact the training department at trainers@tempworks.com.

For pricing quotes on enabling the Trak-1 Integration in Enterprise please contact your TempWorks sales representative directly or send an email to sales@tempworks.com.