Enterprise Version 15R1 Changes

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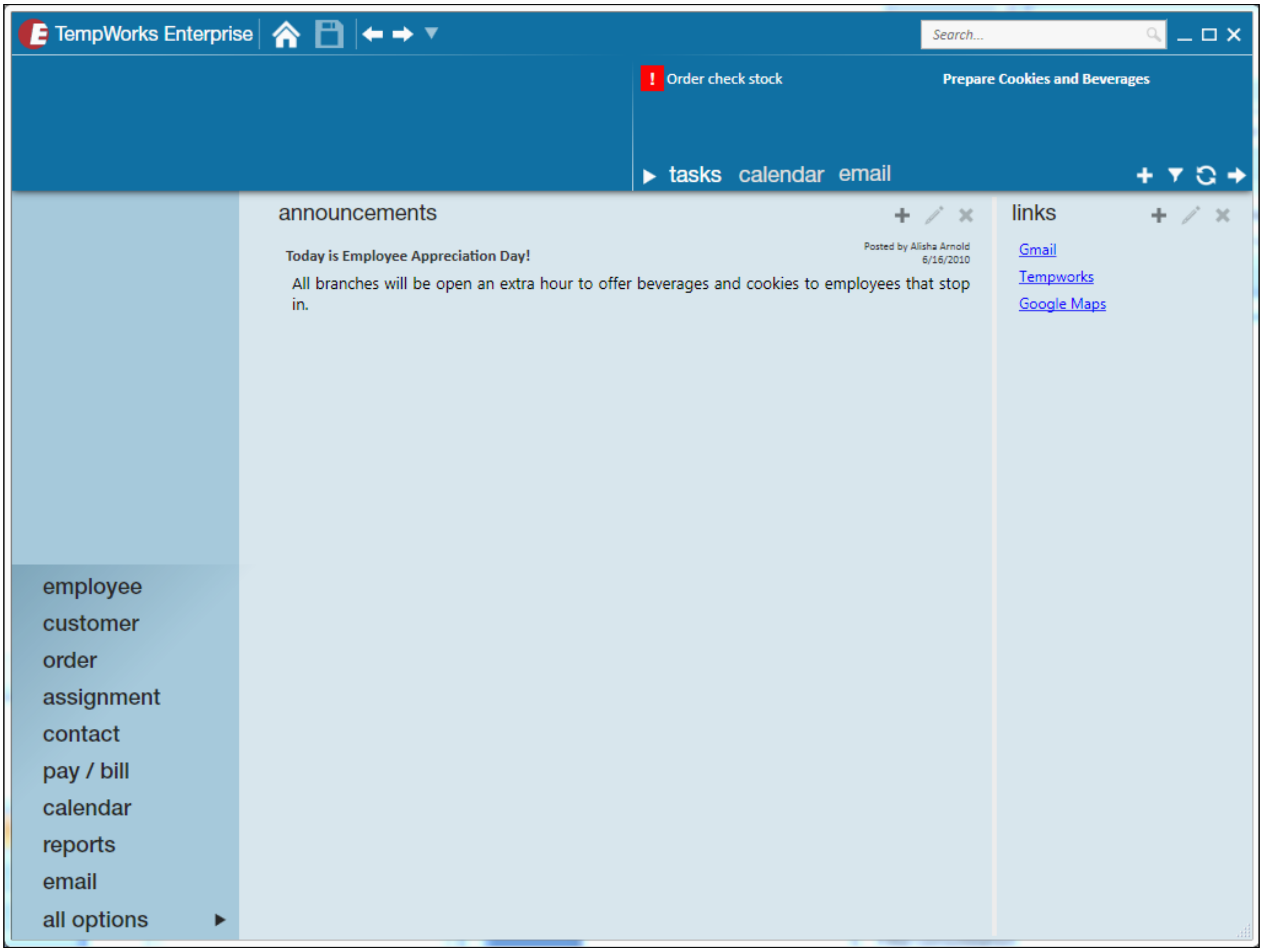
Updated User Interface

TempWorks' Enterprise has a new look that allows for customization of the **Home** screen and navigation bars that you use most frequently.

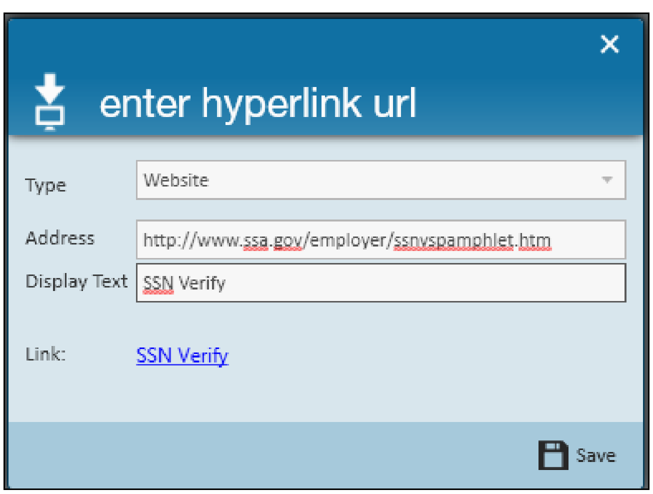
When Enterprise is opened the log in prompt to the left will be displayed. Enter your *User Name* and *Password*.

Once the *User Name* and *Password* have been entered click on the ➡ button or hit the *Enter* key on your keyboard to log in. To cancel log in, click on the ☒ button in the upper right.

Enterprise will open to the **Home** screen as shown below. The main record tabs have been moved to the left side of the screen and **Tasks** now display in the upper right, just below the **Universal Search**.



The **Home** screen integrates a **Dashboard** where ***Announcements*** and ***Links*** can be added. The users' company hierarchy will determine which other users will be able to view ***Announcements*** that they post. For instance, a *Branch*-level user would only be able to post an ***Announcement*** that would be visible to other users in that same *Branch*, whereas an *Entity*-level user would be able to post ***Announcements*** to all users in the same *Entity*.

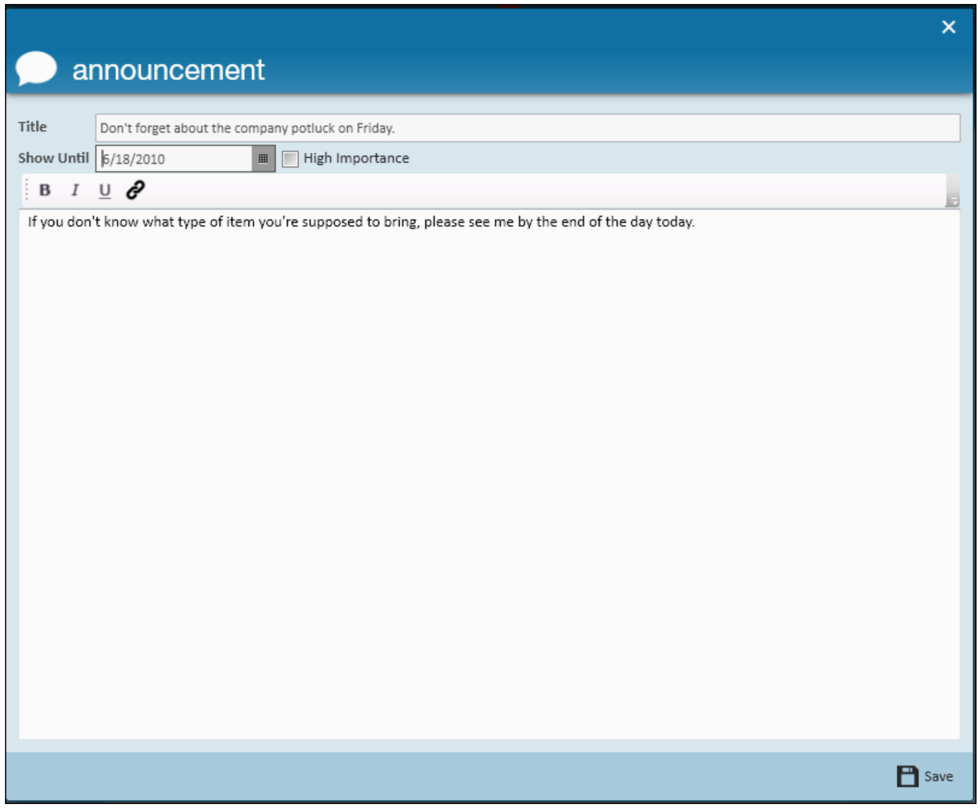


To add a new *Link*, click on the button in the ***Links*** area. In the form to the left select the *Type* ("Website", "Secure Website", or "Email") then enter in the website *Address*.

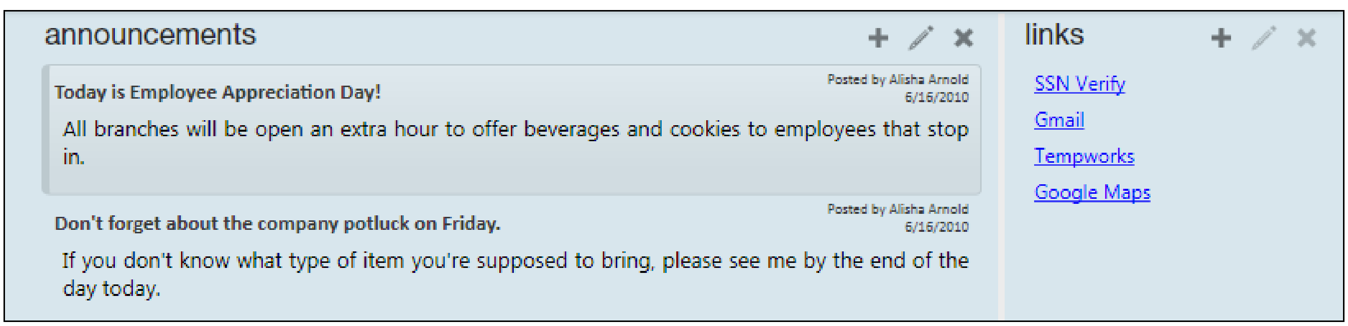
In the *Display Text* field indicate the name you want to display in the ***Links*** area for the hyperlink. Then click *Save* to add and close the form.

To add a new *Announcement*, click on the button in the ***Announcements*** section. In the form to the right enter the *Title* and select the date that it should *Show Until*.

In the text field at the bottom enter any additional information about the *Announcement*. Then click *Save* to add and close the form.

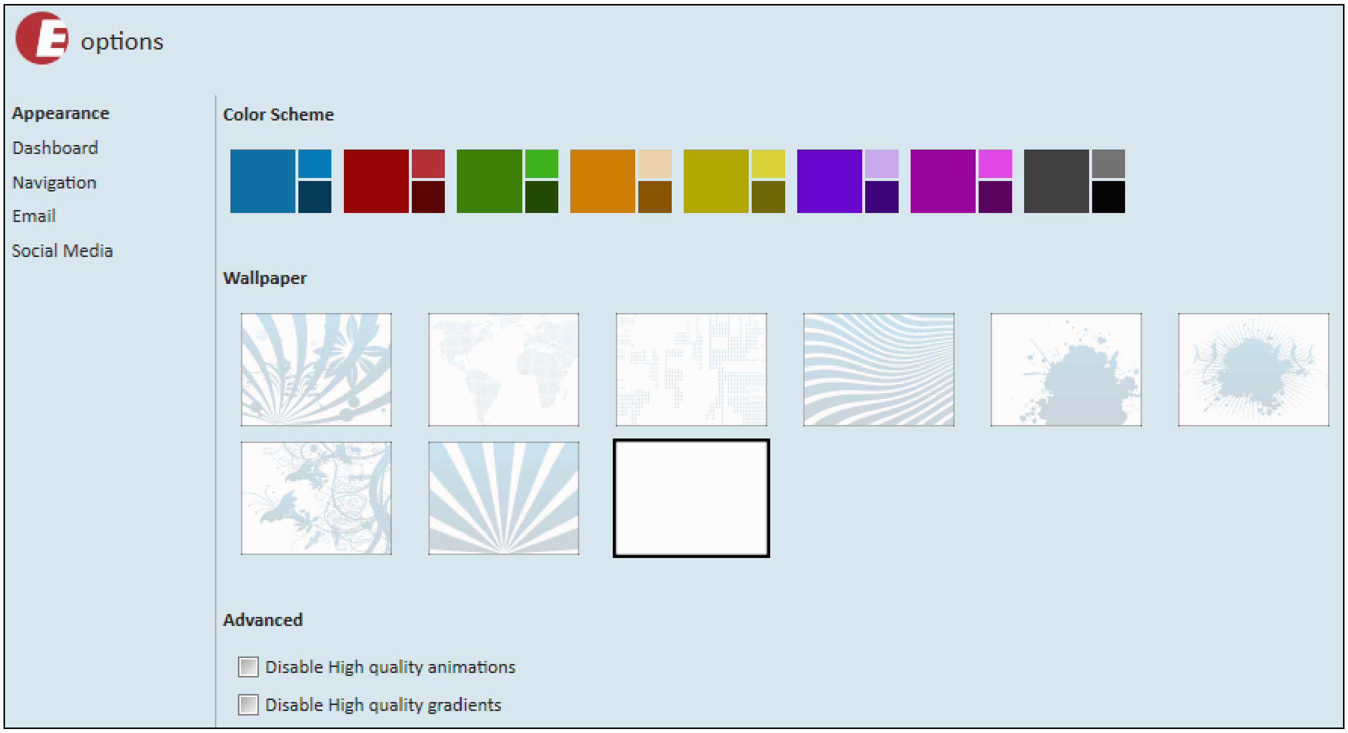


Announcements and *Links* can be edited or removed by selecting the items and then clicking on the button to edit or the button to delete. A user can return to the **Home** screen at any time by clicking on the button next to the *E* menu.

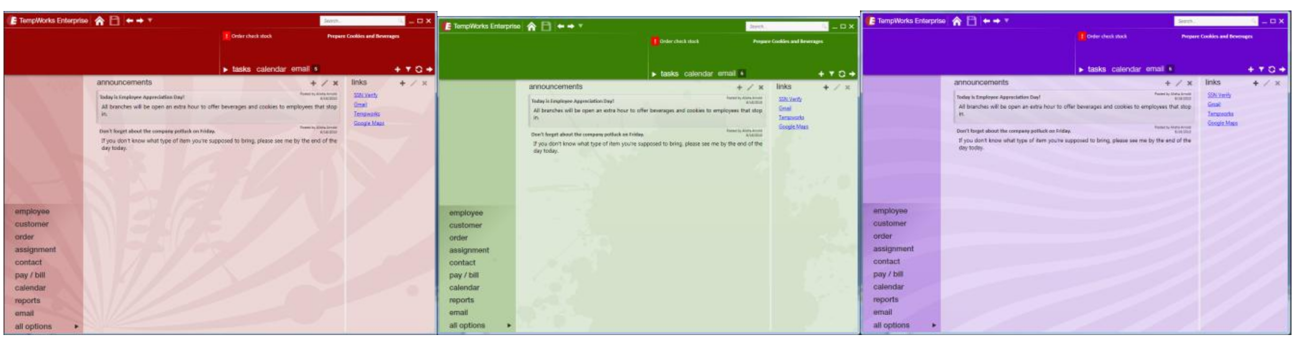


Additional Screen Customization Options

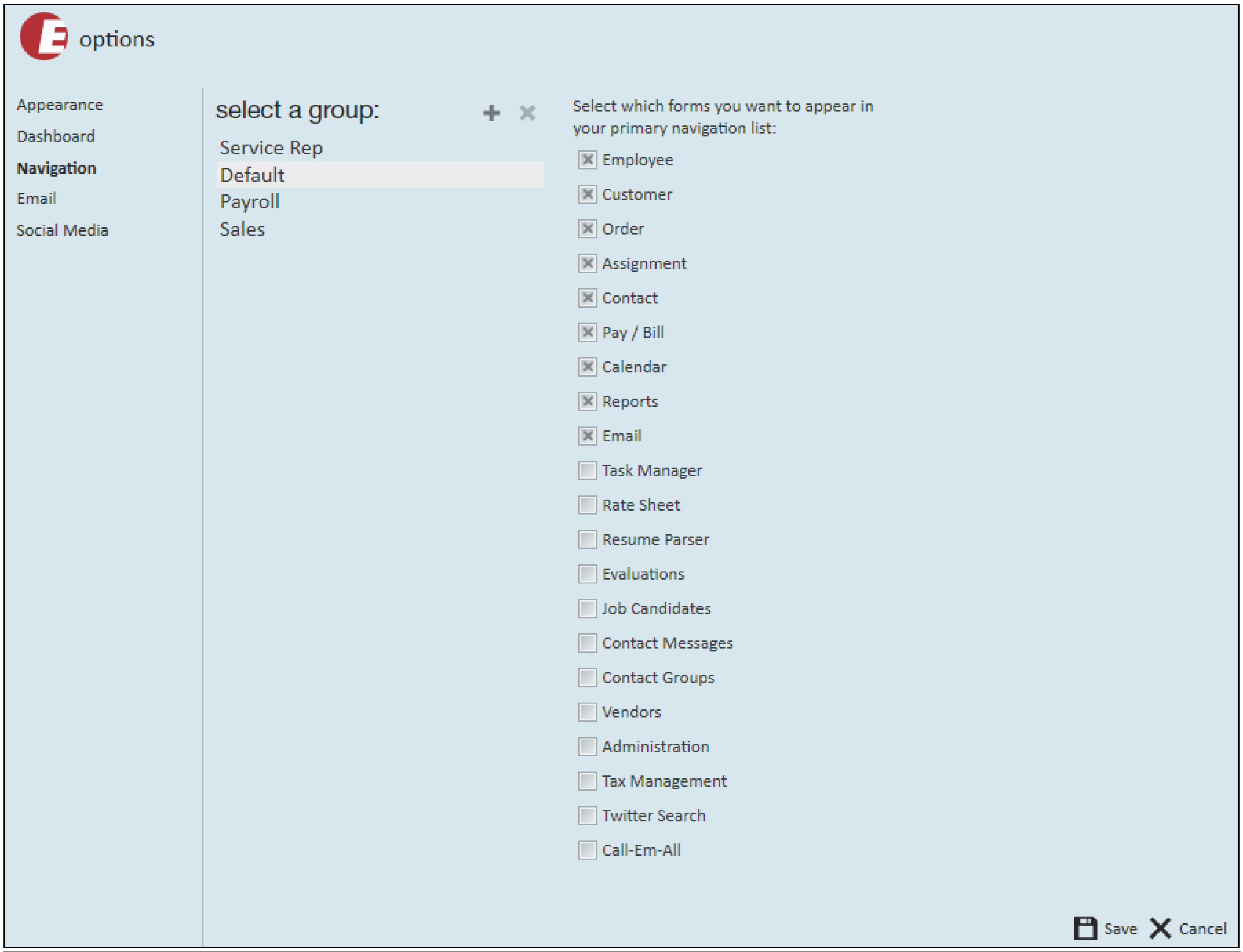
When the *Options* form is selected from the *E* menu the **Appearance** screen will display with new Color Schemes and Wallpaper selections. Select a Color Scheme (the default is Blue) and a Wallpaper (the default is none) and click *Save* in the lower right to update your background.



Some samples of various background selections are shown below:



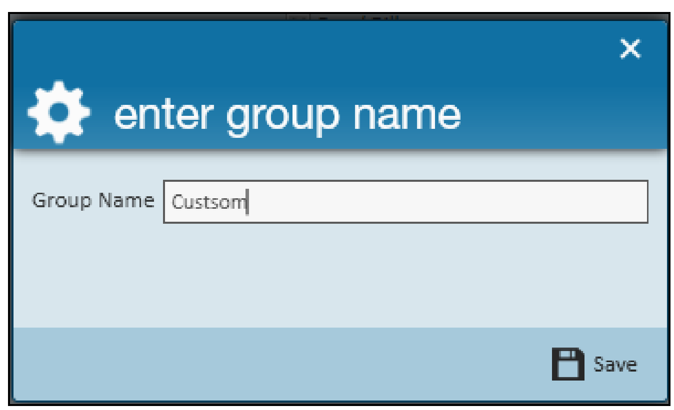
The *Options* **Navigation** form allows the user to select the record tabs that they want to display in their main navigation bar. However, the record options they can select will still be determined by their *Sec Role*(s).



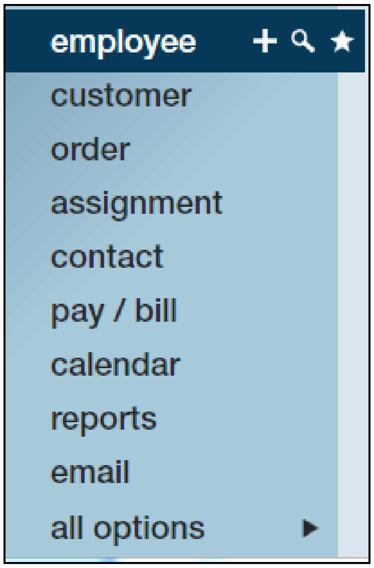
To use a current main navigation bar setting highlight a line in the Select a Group section. The available records will be displayed to the right. Click in the check box in front of an item to add it to your main navigation bar, then click *Save* at the bottom of the form to update your screen.

To add a new group, click on the button next to Select a Group. When the form to the right appears enter the new *Group Name* and click *Save* to add the group and close the form.

Then select the check boxes in front of the records that should display in the main navigation bar for that group.



Navigation Changes/Hover Menu



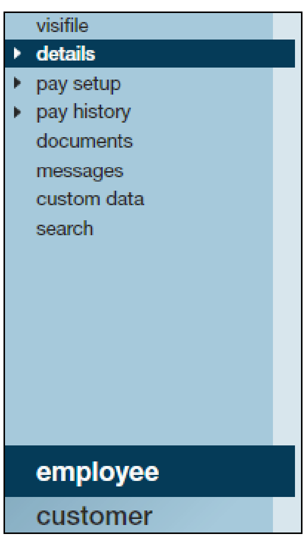
The left side of the screen now contains all of the main navigation options (customizing the navigation bar was covered in the previous section of this document).

Click on a record type to navigate to that record area (ie. **Employee** or **Assignment**). This record selection will stay **Bold** to indicate which record type you have open.

The main record areas (**Employee**, **Customer**, **Order**, **Assigment**, and **Contact**) will also have new hover menu options that you can select to increase efficiency. Options to add a new record (+), open the **Search** form (🔍) or select a record from your *Favorites* (★) will be available when your mouse moves over that navigation bar (as shown for the **Employee** option to the left).

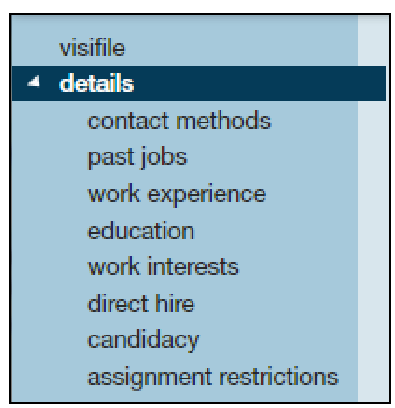
When clicked, the **All Options** navigation bar at the bottom will expand to display all of the records (in alphabetical order) that the user has access to.

Click on the record name to navigate to that record.



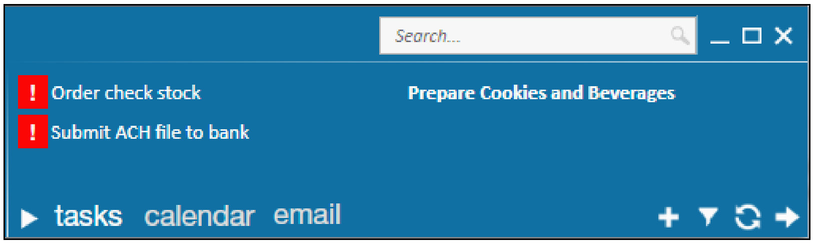
When the record area is open the forms that are available for that record will be displayed above the main navigation bar on the left (shown left).

Any form with an ▶ indicator in front of it has an expansion menu. Clicking on that menu item will open that form and expand the list to display additional forms in this section (as shown for the **Employee Details** form to the right).



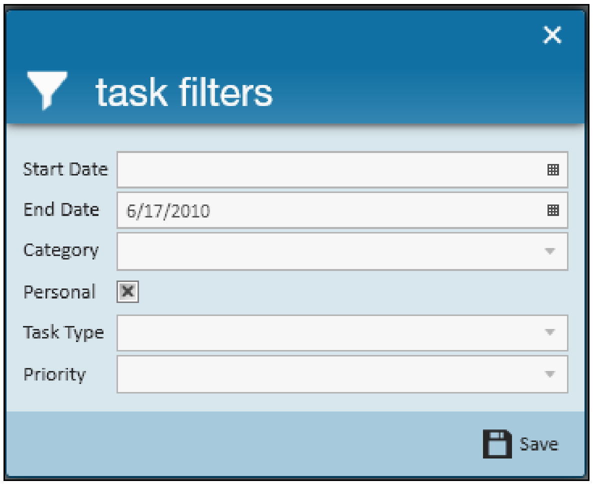
New Task Layout

The **Tasks** are now located in the upper right of the screen directly below the **Universal Search**.



Tasks are listed in order by their *Due* date and time, with the oldest "incomplete" **Tasks** displaying on the left.
Overdue **Tasks** (based on both the *Due* date and time) will have an icon in front of them.

Scroll over a **Task** to display the check box that you'll click in to mark it as "completed".



To add a new **Task** from the **Tasks** area click on the . To open the ***Task Filters*** form (displayed left) click on the button.

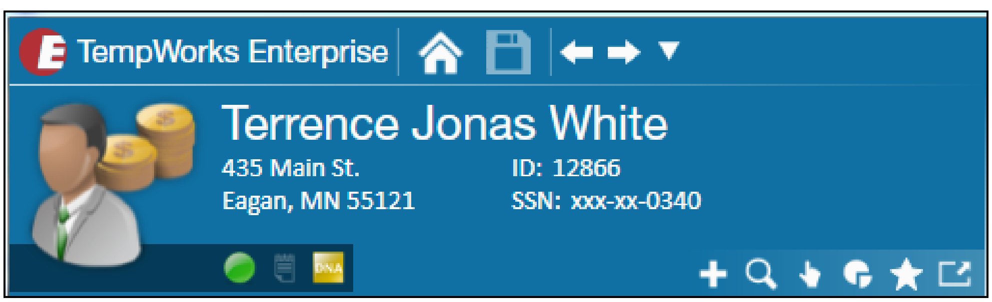
The ***Task Filters*** form will allow you to select which **Tasks** you want to display in the **Tasks** area. You can select filters for *Start Date*, *End Date*, *Category*, *Task Type*, and *Priority*. To display **Tasks** assigned to you specifically, click in the *Personal* check box. Then click *Save* to update the **Tasks** displayed.

Use the button to manually refresh your **Task** list. Clicking on the button in the **Tasks** area will open the **Task Manager**.

The **Task Manager** can also be opened by selecting it from the **All Options** expansion menu on the left side of the screen.

Integrated Header for Avatar and Actions Bar

The Avatar area is located in the upper left half of the screen, directly below the *E* menu and **Home** screen button.



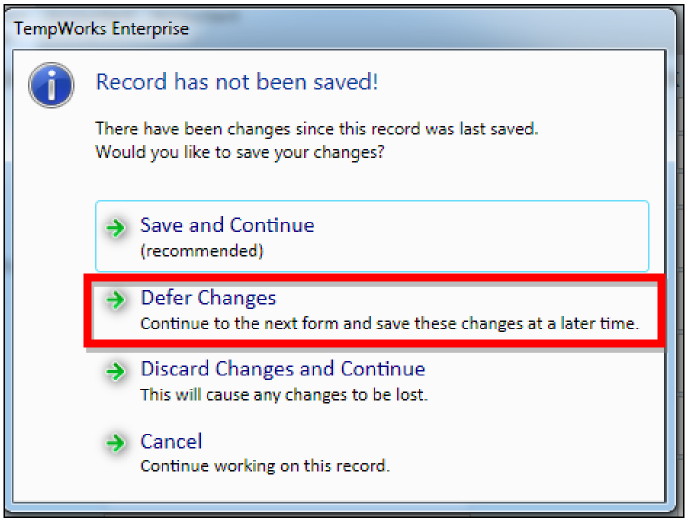
The Avatar no longer needs to be expanded in order to view the additional details (like *ID* number and last 4 digits of the *SSN* for the **Employee**).

The *Actions Bar* is also contained in the Avatar area. To open the ***Add New Employee*** form click on the button. The button opens the **Search** form for the selected record area. Select the button to view *Record* and *Form Actions* for this screen (ie: *Create and Export a Resume* (**Employee**), *View Assignments* (**Customer**), *Gross Profit Calculator* (**Order**), etc.).

The button will expand to display the *Reports* that can be run for this record. Click on a **Report** from the drop down menu to run and view it. The button displays records in your *Favorites*. When the *Favorites* list is expanded, click on the button to add the current record to the list. Clicking on will add this form to the **Compare View** (creates a separate "read only" window for this form).

Record Save Deferral (Form Shelving)

A new record save option has been added to the save prompt that appears when the user navigates away from the current form without saving changes made to the form first.



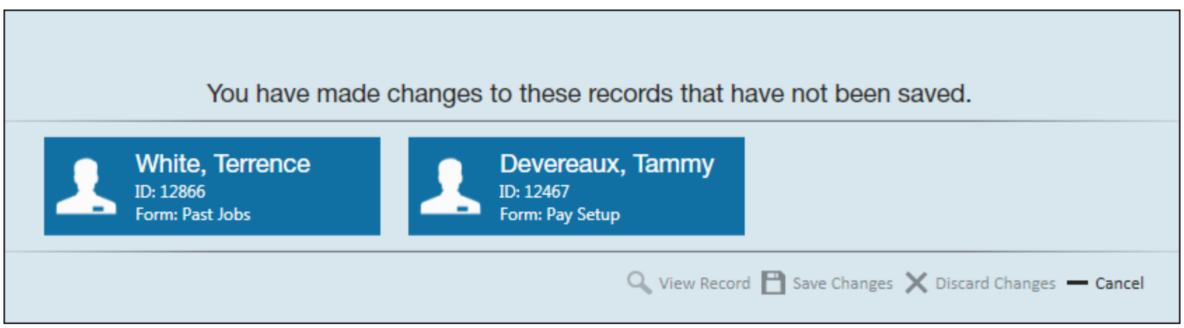
The *Defer Changes* option allows you to do a temporary save to this form without actually updating the database.

This way you can start adding or changing information while you're waiting on confirmation that the change should be made.

*Note – Not all record areas will allow for deferred changes. An example where deferred changes aren't allowed is in **Time Entry**. The **Time Entry** form must be saved before navigating away from it.

The navigation bar will display the number of records for that record area where changes have been deferred (pictured right).

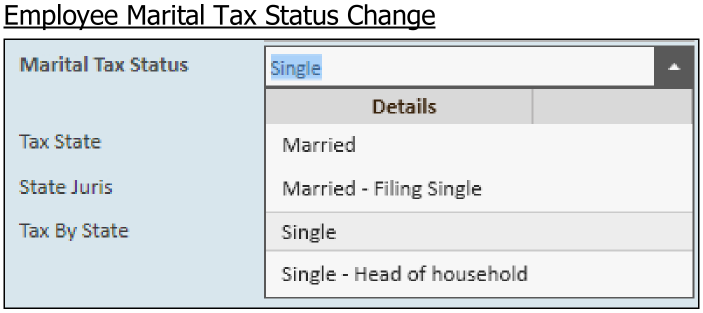
Click on the number box to the left of the record name in the navigation menu to display the form below:



Select a record from the list and then choose *View Record* to open, *Save Changes* to add the changes to the database or *Discard Changes* to leave the selected record unchanged. To leave this form click *Cancel*.

*Note - All records with deferred changes should be updated or the changes should be discarded before logging out of the system.

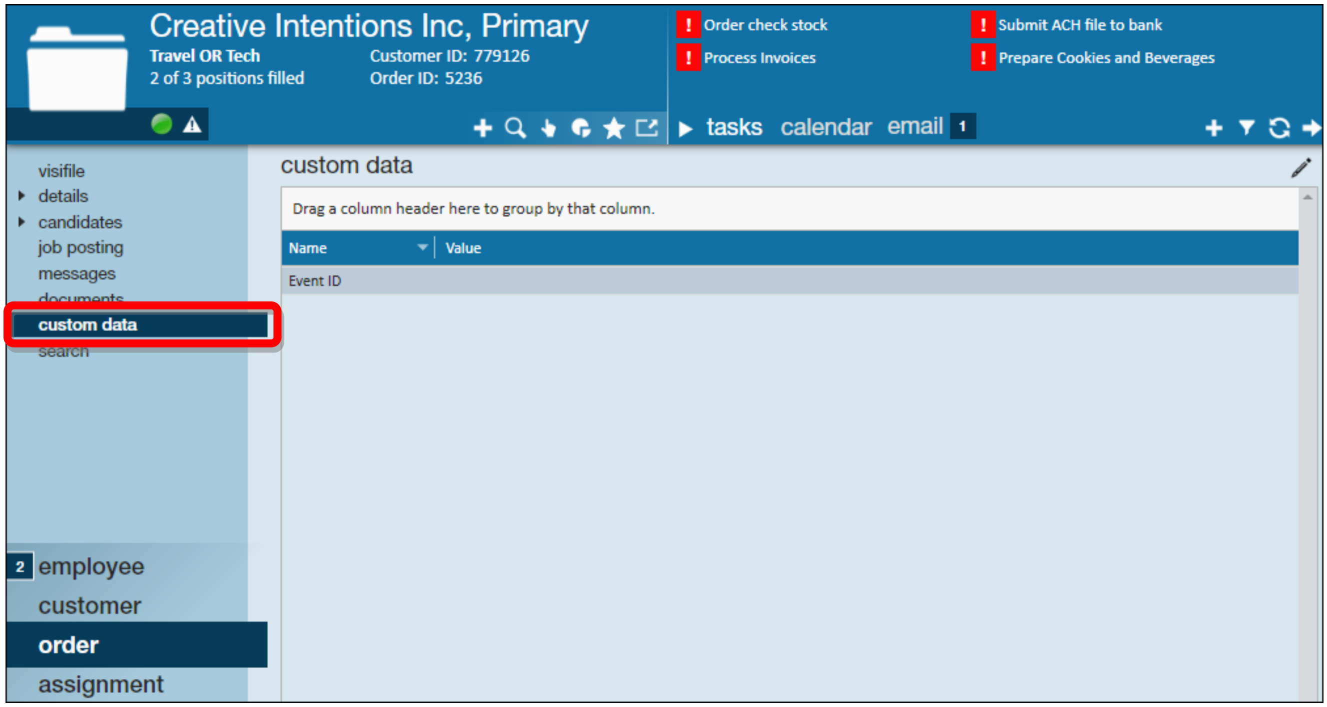
Employee Marital Tax Status Change



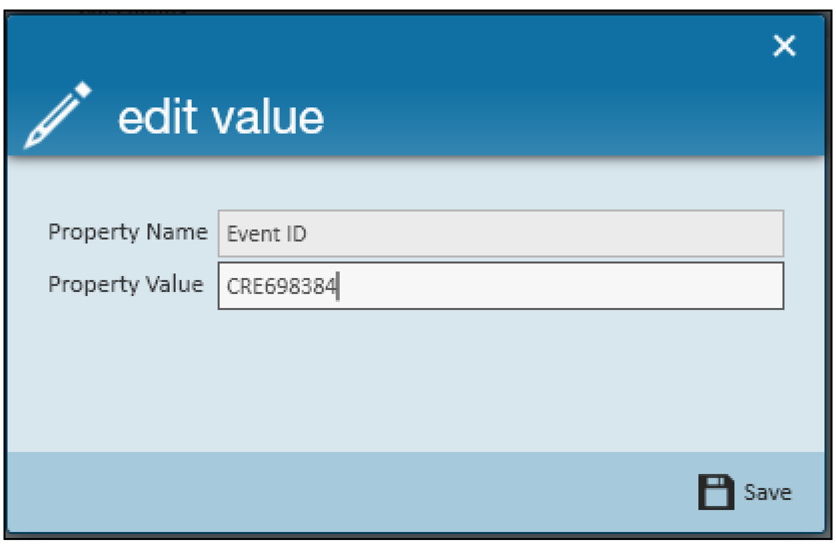
The **Employee's** *Marital Tax Status* field (**Pay Setup**) or *Marital Status* field (***Add New Employee*** form) has been updated to include "Married – Filing Single" and "Single – Head of Household".

Custom Data Form

Each of the main record areas (**Employee**, **Customer**, **Order**, **Assigment**, and **Contact**) has a new form for **Custom Data**. This form can be easily configured by a system administrator to store additional data for the record. This additional data will be available for search and reporting purposes.



Once the record is open, select the **Custom Data** form from the menu on the left. The **Custom Data** form will display any additional data fields that can be tracked for this record. In the example above, the field of *Event ID* has been added to the **Order**.



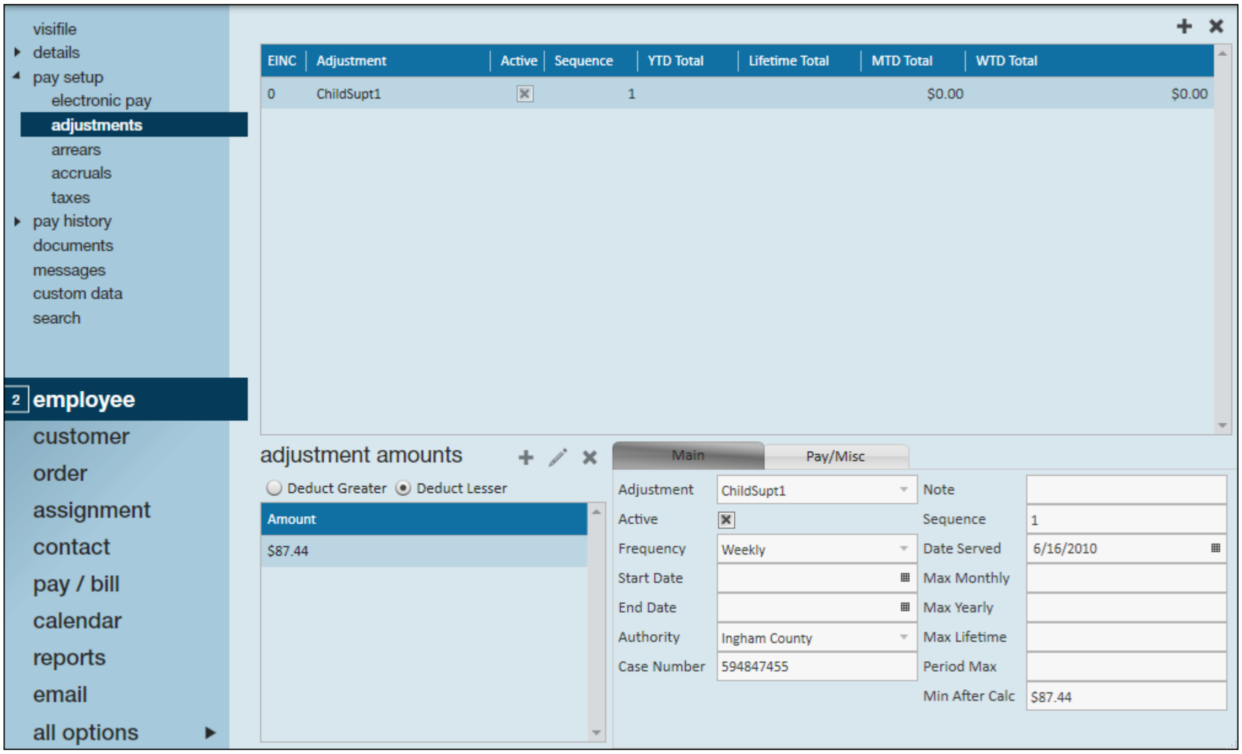
To open the ***Edit Value*** form (shown left), double-click on the line item or select the field and click on the button in the upper right.

Enter the *Property Value* (alphanumeric entry allowed) and click *Save* to update and close the form.

System Administrator (SA) users can add fields to the **Custom Data** form from the **Custom Data** option in the **Administration** form. Click the button in the upper right then choose the *Property Name* (required), *Origin Type* (record type), and click in the check box to make it *Required* if needed. Then click on the button at the top of the screen to add the new field to the selected record type.

<u>Expanded Rules for Employee Recurring Adjustments</u>

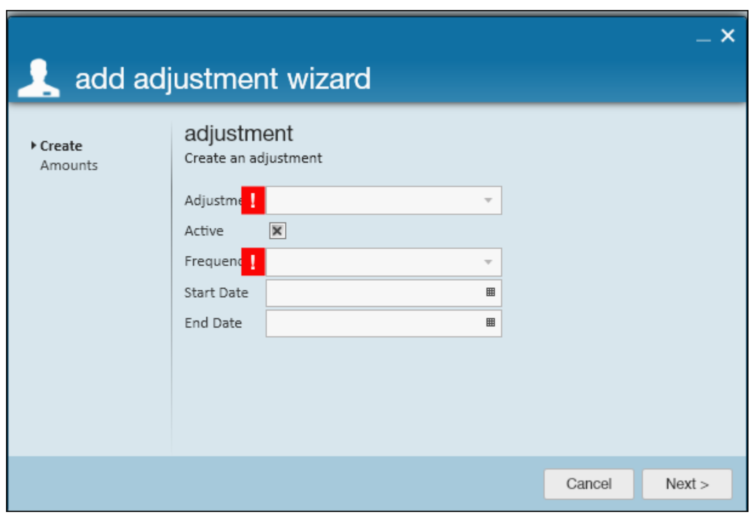
Let's face it; our government has some pretty complicated rules when it comes to garnishments and the amounts to withhold based on the **Employee's** gross and/or net pay. The changes that have been made to the **Employee** [Recurring] ***Adjustments*** set up will greatly reduce, if not eliminate, the need for manual changes to withholding amounts calculated during **Payroll** processing. The ***Adjustments*** form is found in the **Pay Setup** expansion menu of the **Employee** record.



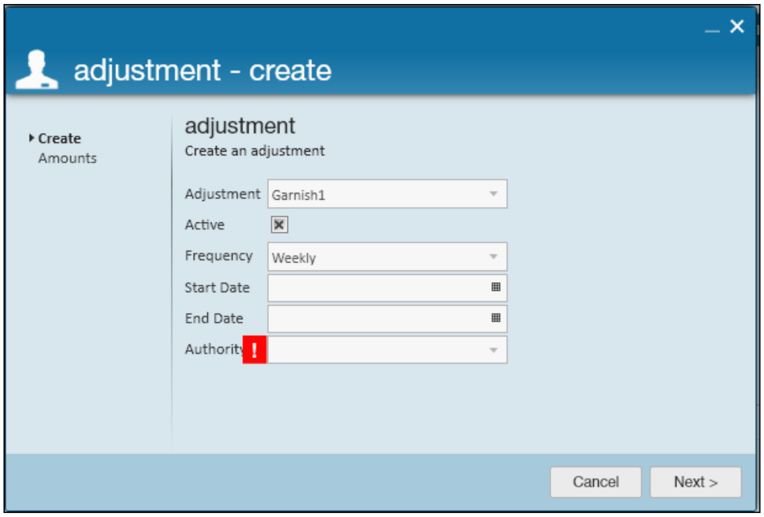
Any current *Adjustments* for the **Employee** will be displayed at the top of the form. To add a new *Adjustment*, click on the ⊞ button in the upper right.

The ***Add Adjustment Wizard*** will be opened. Select the type of *Adjustment* and the *Frequency* from the corresponding drop down menus.

If a *Start Date* and/or *End Date* applies for the *Adjustment* enter the dates into the appropriate fields.



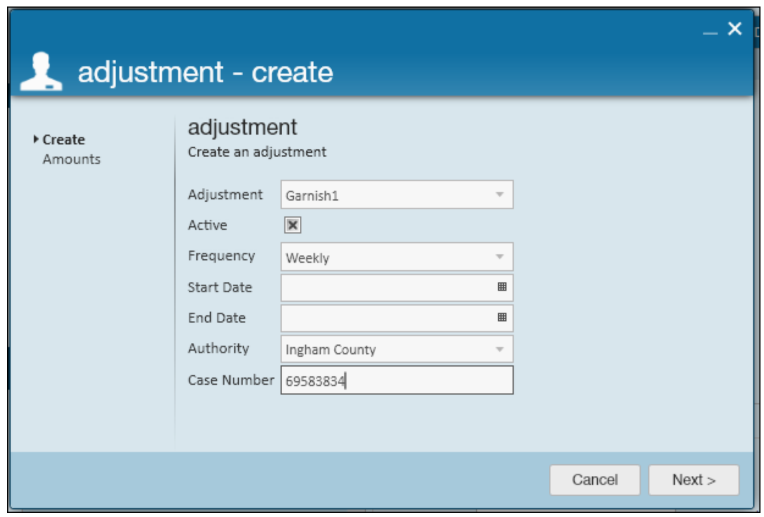
If all required (!) fields have been completed the *Next* button will be available. Click *Next* to continue completion of the ***Add Adjustment Wizard*** or click *Cancel* to exit the wizard.

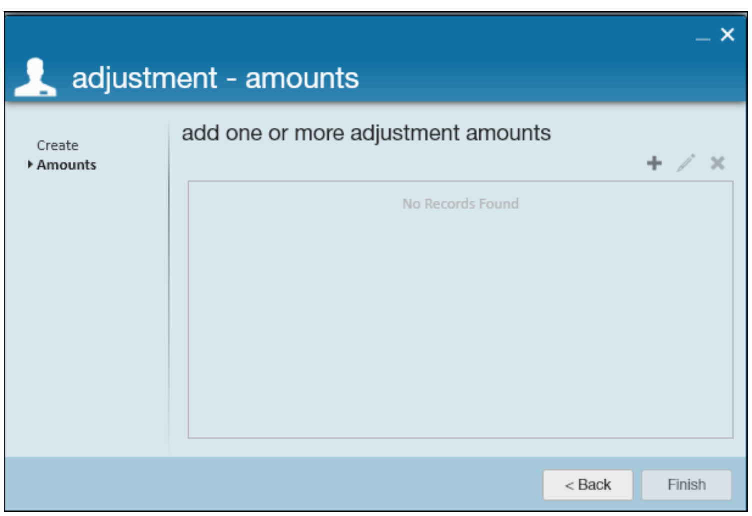


Adjustment types can be configured to require an *Authority*. If one of these *Adjustment* types is selected the *Authority* will be added to the form as a required field.

If the *Authority* selected requires a *Case Number*, it will be added as a required field as well.

Once all required fields have been completed, click *Next*.



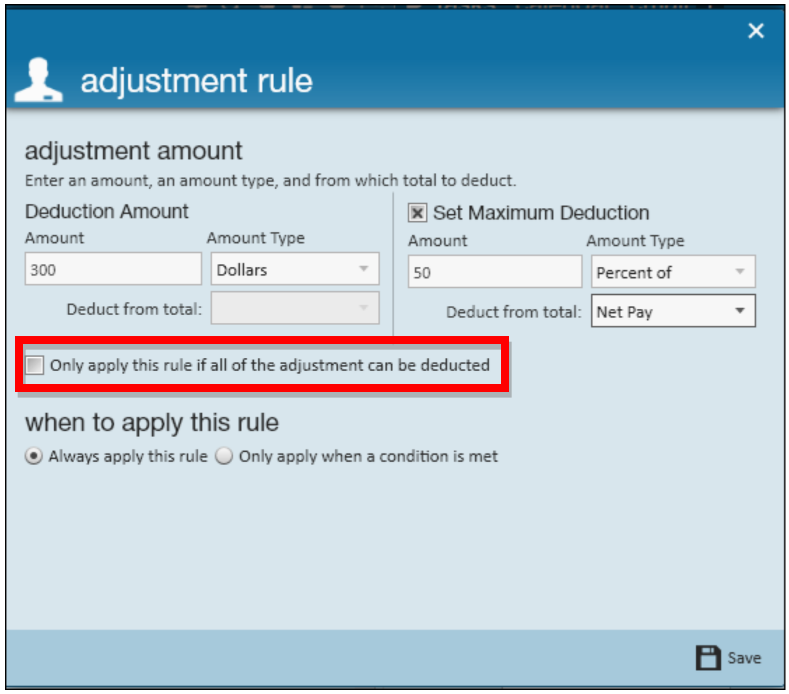


In the Add One or More Adjustment Amounts section click on the button to open the ***Adjustment Rule*** form.

In the Deduction Amount section enter the actual *Amount* ($ or %) then select the *Amount Type* to determine how the *Adjustment* amount will be calculated ("Dollars", "Dollars per Hr", or "Percent of".

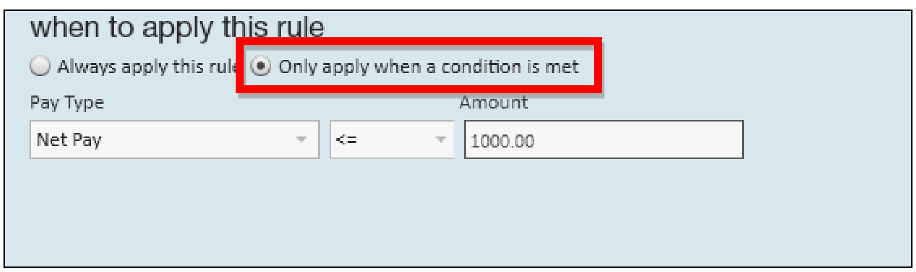
If there is a maximum amount that can be withheld for this *Adjustment* click in the check box for *Set Maximum Deduction*. Then enter the *Amount* and *Amount Type*.

Click in the check box (outlined in red to the right) if this *Adjustment* should not be withheld unless the full amount can be paid. If the box is unchecked a partial amount can be withheld.



*Note – If an *Amount Type* of "Percent of" is selected for either the Deduction Amount or Maximum Deduction sections, the *Deduct from Total* drop down will need to be populated with the **Paycheck** amount that will be referenced for the deduction ("Gross Pay", "Hourly Rate", or "Net Pay").

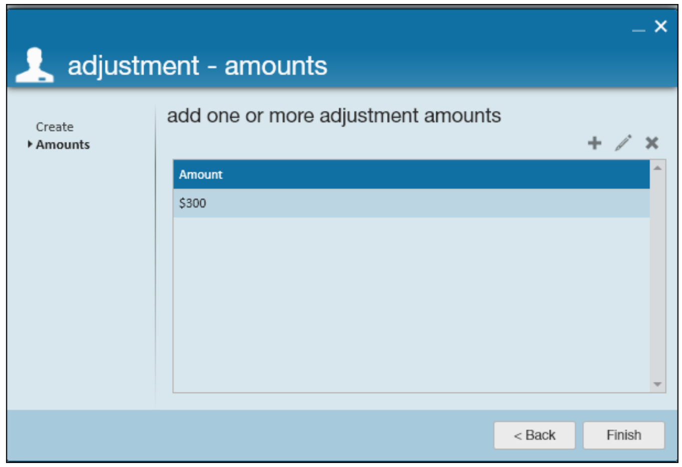
By default the *Adjustment* will be set to *Always Apply this Rule* and to deduct even if only a portion of the total *Adjustment Amount* can be withheld.

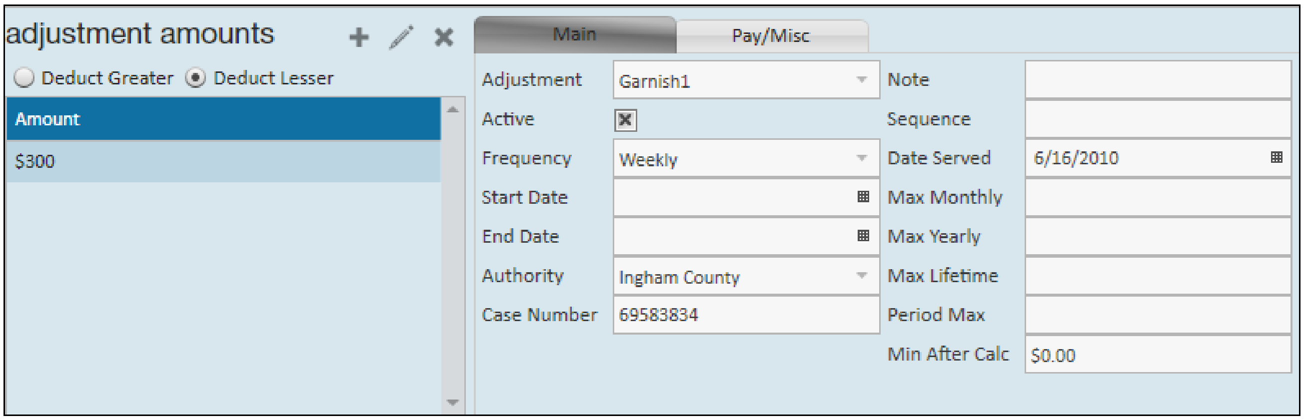


If this *Adjustment Amount* doesn't always apply, click on the radio button for *Only Apply When a Condition is Met* in the When to Apply this Rule section.

Select the *Pay Type* and comparison value from the drop down menus, and then enter the *Amount*. Once the ***Adjustment Rule*** form is completed click *Save* in the lower right corner.

If additional *Adjustment* calculation rules apply, click on the button to continue adding. Once the *Adjustment* set up is completed click *Finish* to close the ***Add Adjustment Wizard***.





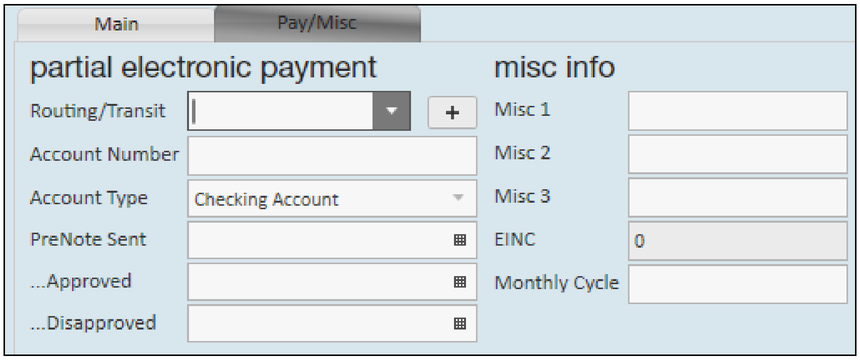
At the bottom of the ***Adjustments*** form the details for the selected *Adjustment* will be displayed. The Adjustment Amounts section will display the rules that have been applied for this *Adjustment*. If more than one rule may apply to this *Adjustment* select the radio button for *Deduct Greater* or *Deduct Lesser*.

For instance: a secondary direct deposit account is set up for "Savings". Two calculation rules have been added; one for 20% of the net and a second for $300 of the net. If the **Employee** wants the larger of the two amounts to be applied, then the *Deduct Greater* radio button will be selected. If the *Net Amount* of the **Paycheck** is less than or equal to $1500 then $300 will be deducted. If it's greater than $1500 then 20% of the net would be the larger amount so the first rule would apply.

To edit information in the Adjustment Amounts section click on the button; to remove a rule click on the button. Need to add another rule, click on the .

In the ***Main*** tab information can be added to the *Note*, *Sequence*, *Max Monthly*, *Max Yearly*, *Max Lifetime*, *Period Max*, and *Min After Calc* fields.

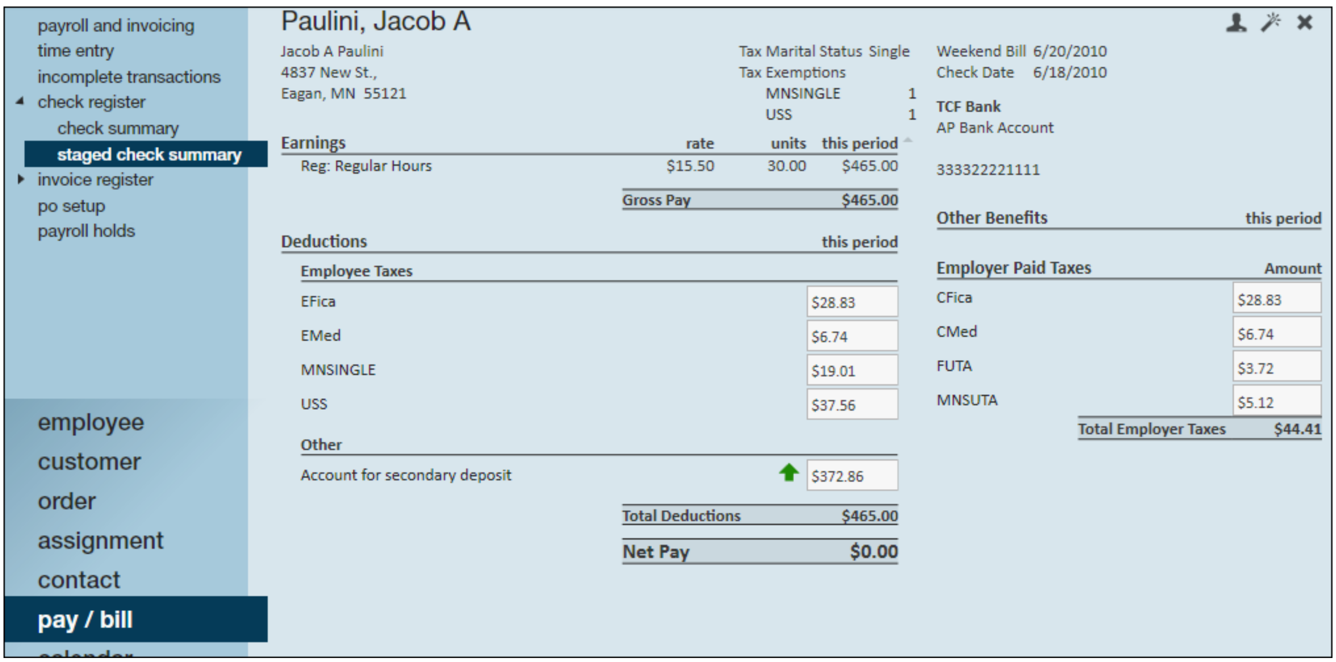
*Note – Always verify that the correct *Adjustment* is selected before making any changes to the amounts or rules.



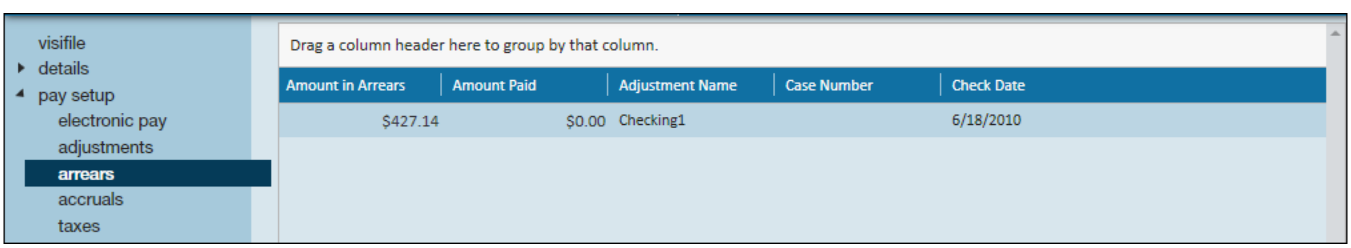
The ***Pay/Misc*** tab no longer has a *Flag Check for Approval* check box as the new *Adjustment* rule set up virtually eliminates the need for manual calculation of complicated **Employee** *Adjustments*.

Tracking Adjustments in Arrears

In the past all *Banked* **Employee** [Recurring] *Adjustments* had the owed amounts tracked in the "AdvanceBnk" *Adjustment* in the ***Adjustments*** form. Now the "AdvanceBnk" *Adjustment* will only contain owed amounts from **Paycheck** reversals. All other "banked" *Adjustments* will be tracked by the individual *Adjustment* type in the ***Arrears*** form. Amounts held in ***Arrears*** will be deducted from the next **Paycheck** for the **Employee**.



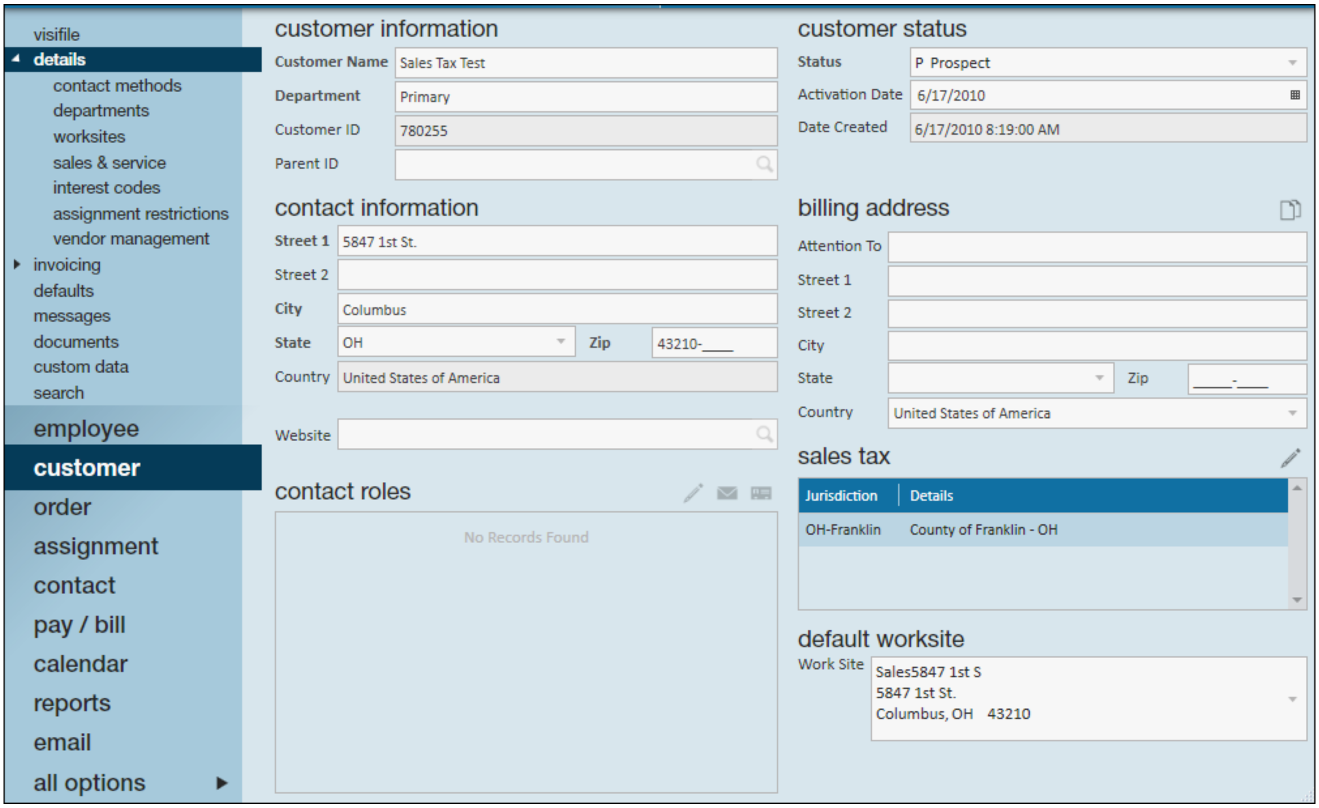
When the **Employee's Paycheck** is calculated (shown above) any "banked" *Adjustments* will automatically have their amounts updated so a negative *Net Pay* isn't created. Any amounts that weren't withheld from the **Paycheck** for "banked" *Adjustments* will automatically be added to ***Arrears***. Once the *Transaction* has been posted through **Payroll** the owed *Adjustment* amount(s) will display in the ***Arrears*** form (below).

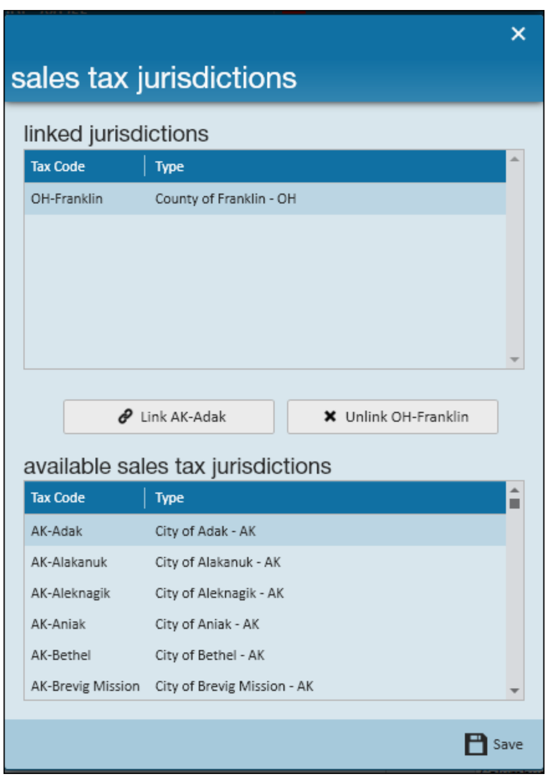


*Note - *Adjustment* types can now be configured by an administrator to "bank" unpaid amounts so that they are tracked in the ***Arrears*** form. When that *Adjustment* type is selected for the **Employee** the user won't have to indicate anywhere on the record that unpaid amounts should be "banked".

Changes for Customer Sales Tax

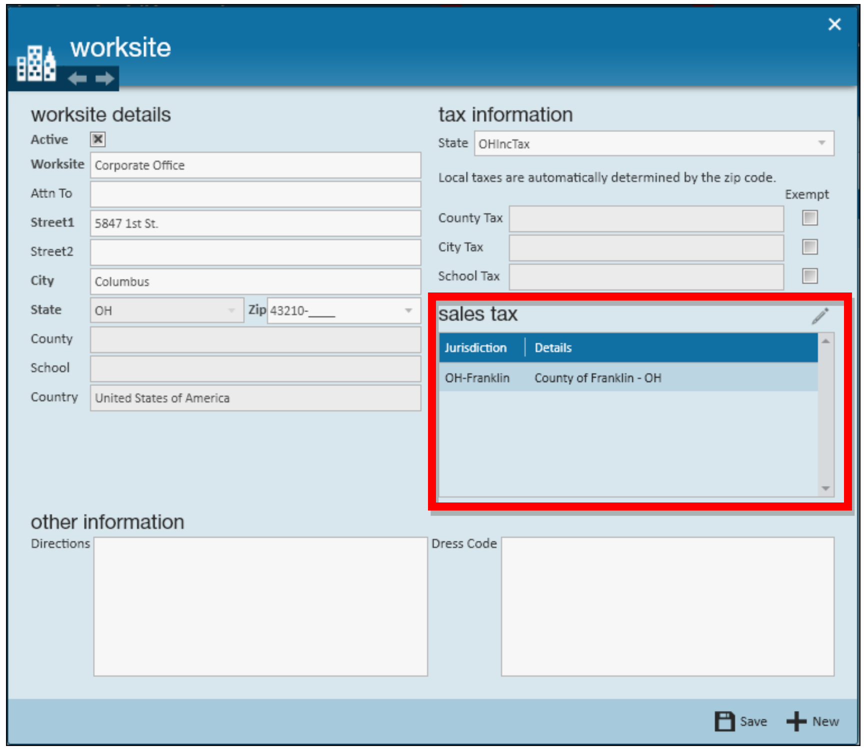
On the **Customer Details** form the Sales Tax section has been updated to apply any *Taxes* for goods and/or services based on the *Jurisdiction* selected.





Click on the button to open the form to the left. Any *Jurisdictions* that are currently linked will be displayed at the top of the form in the Linked Jurisdictions section. To remove this *Jurisdiction* from the **Customer** record select the line and click the *Unlink* [*Jurisdiction Name Here*] button in the middle.

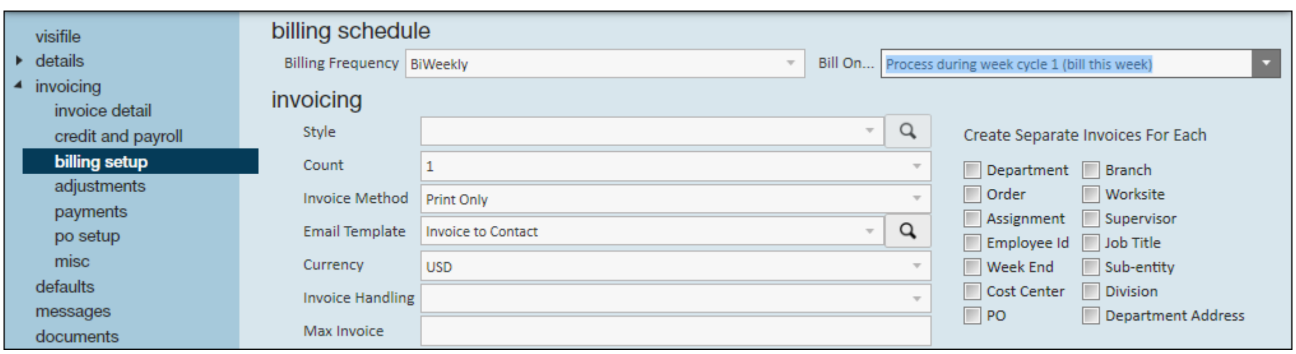
To add a *Jurisdiction*, select a line from the list of Available Sales Tax Jurisdictions at the bottom of the form. Then click on the *Link* [*Jurisdiction Name Here*] button. Once all appropriate *Jurisdictions* have been linked for this **Customer**, click on the *Save* button to update the database and close the form.



The same Sales Tax set up option is available from the **Customer** ***Worksite*** form (outlined in red).

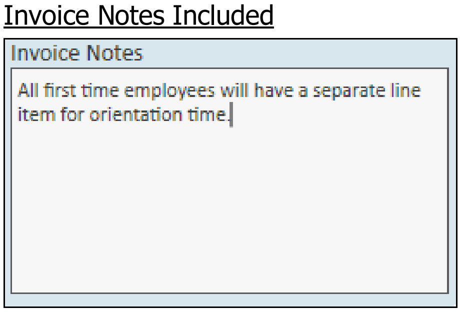
Bi-weekly Invoice Frequency Added

In the Billing Schedule section of the **Customer Invoicing**/***Billing Setup*** form an option for "BiWeekly" *Billing Frequency* has been added. Once "BiWeekly" has been selected as the *Billing Frequency*, the *Bill On* drop down menu becomes required. Select either "Process During Week Cycle 1" or "Process During Week Cycle 2" to complete the **Customer** set up for bi-weekly billing. The "Hold Off Monthly" and "Monthly" *Run Types* will still be used for bi-weekly **Invoice** processing.



*Note – The "BiWeekly" *Billing Frequency* will only be selected when the **Employee's** assigned to this **Customer** are not being paid bi-weekly. If the **Invoice** and **Payroll** frequencies are the same, then the *Billing Frequency* should be "Weekly".

Invoice Notes Included

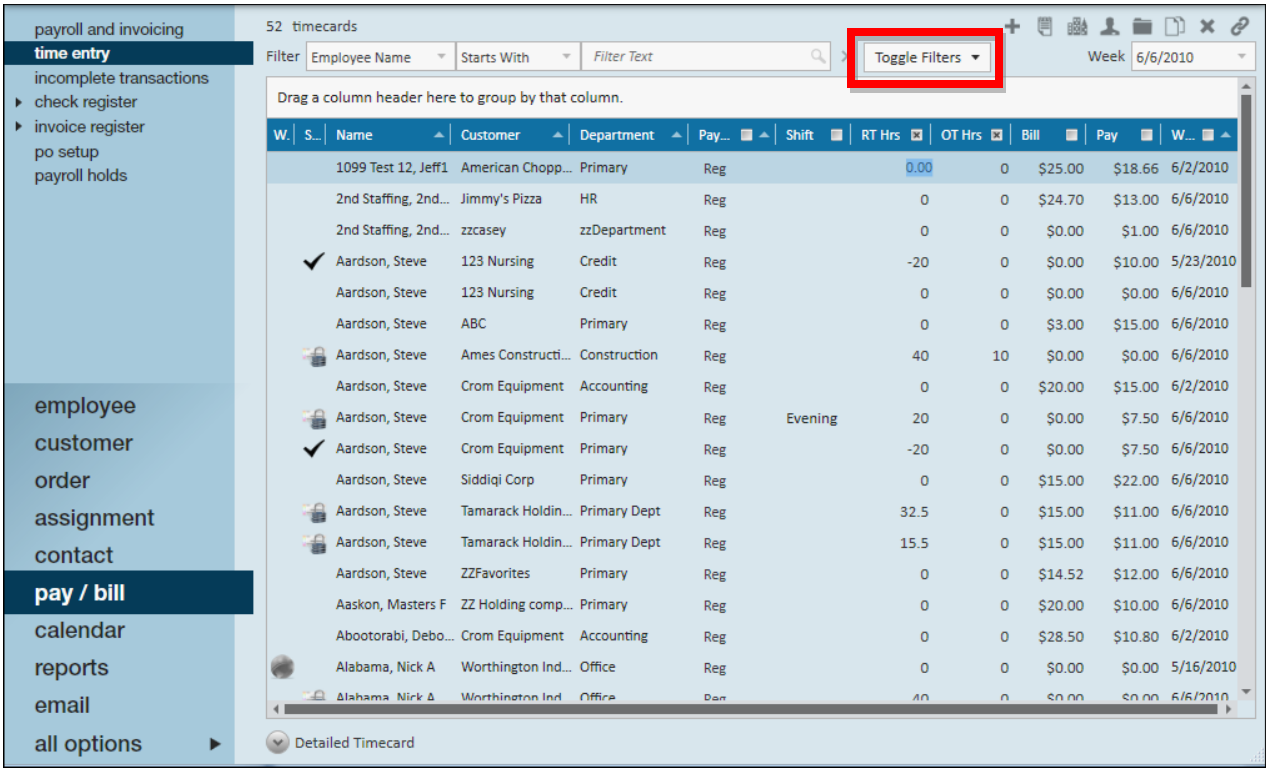


In the lower right corner of the **Customer Invoicing**/***Billing Setup*** form a field has been added for *Invoice Notes*. This is a free text field for adding notes that will be displayed on the **Invoice**.

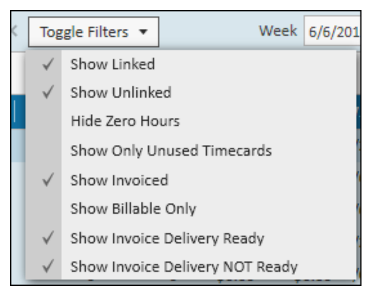
*Note – When adding an *Invoice Note*, be sure that the selected **Invoice** *Style* is designed (formatted) to display the information from *Invoice Notes*.

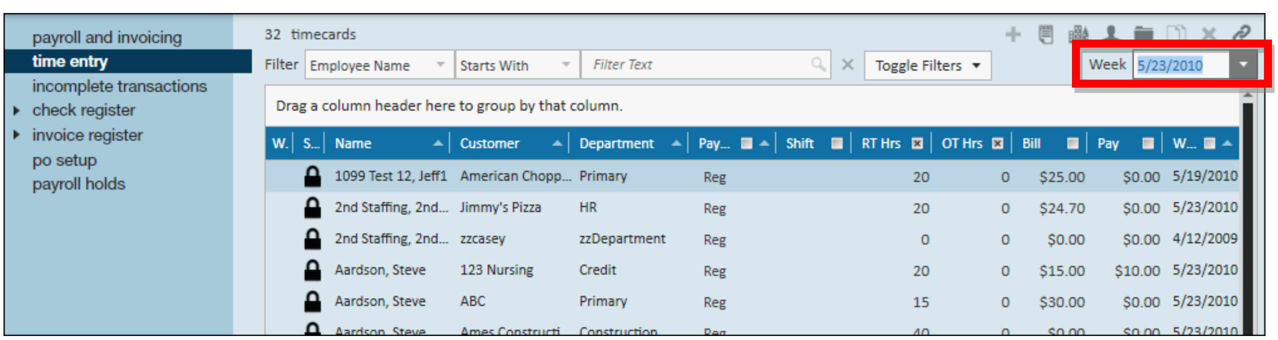
Time Entry Updated

In the **Pay/Bill Time Entry** form the filters for timecard image linking and *Show Only Unused Timecards* have been combined into the *Toggle Filters* drop down menu (outlined in red). A *Week* drop down menu has also been added so that *Transaction* data posted during previous *Weekend Bill* dates can be viewed.



When *Toggle Filters* is expanded you can select to include or exclude *Transactions* in **Time Entry** by clicking on a line item to add or remove a check mark. A check mark in front of the line item means that only *Transactions* that meet the selected criteria will be displayed in the **Time Entry** screen. Update the *Toggle Filters* to change the *Transactions* displayed.

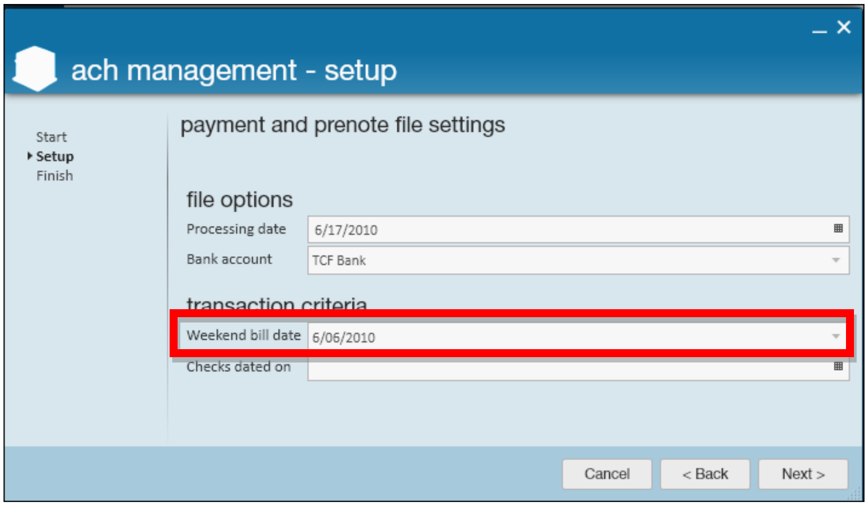




When the *Week* drop down menu is selected to display *Transactions* from a previous *Weekend Bill* date the **Time Entry** screen will update with posted *Transaction* data. Timecard images can be viewed and/or added for these *Transactions* by clicking on the button or by selecting *Link Timecard Images* from the *Form Actions* in the *Actions* drop down menu. The *Status* icon indicates that this is an archived record that is "read only".

*Note – Timecard image linking will only be available to companies that have opted to add this module.

Weekend Bill Selection for ACH



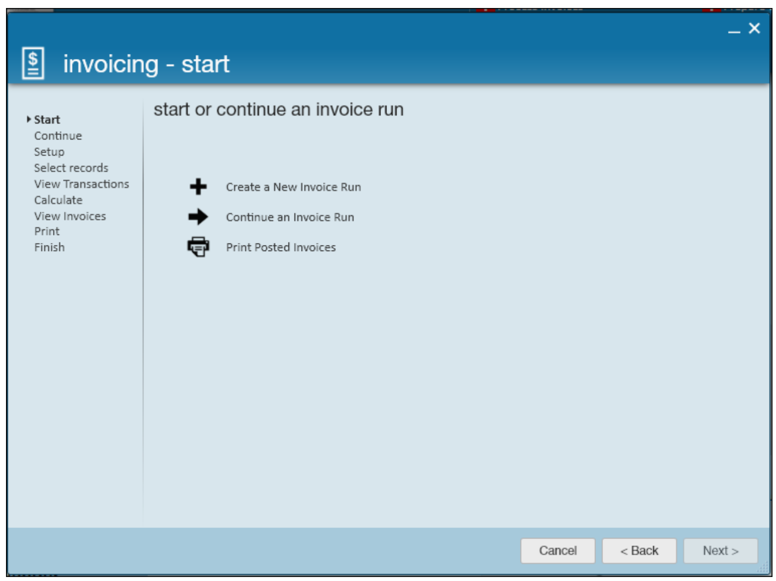
On the ***Ach Management – Setup*** page of the ***ACH Management Wizard***, a field has been added for *Weekend Bill Date* so that ACH files for previous weeks can be recreated.

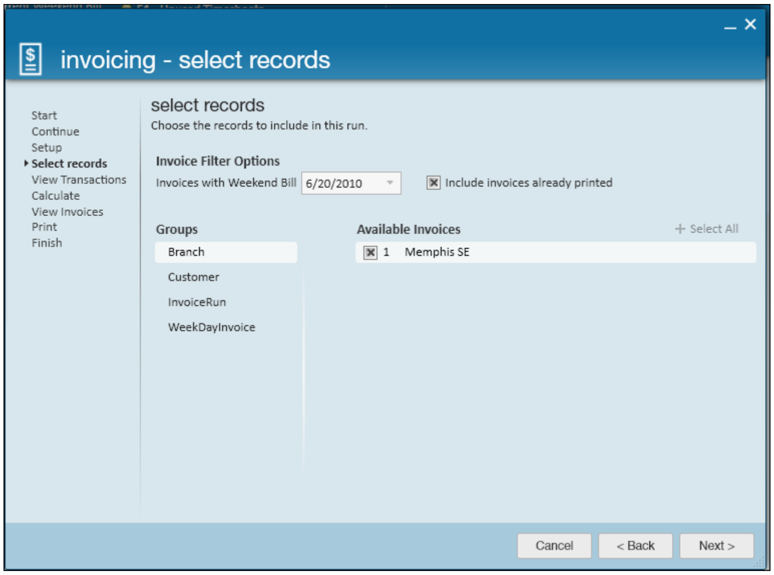
Printing Posted Invoices

Enterprise now offers the ability to print an **Invoice** run that has already been posted to accounts receivable.

In the **Payroll and Invoicing** form of the **Pay/Bill** tab select the ***Invoicing*** option.

Then choose *Start or Continue an Invoice Run*. With the ***Invoicing Wizard*** open select *Print Posted Invoices* from the ***Invoicing - Start*** page.





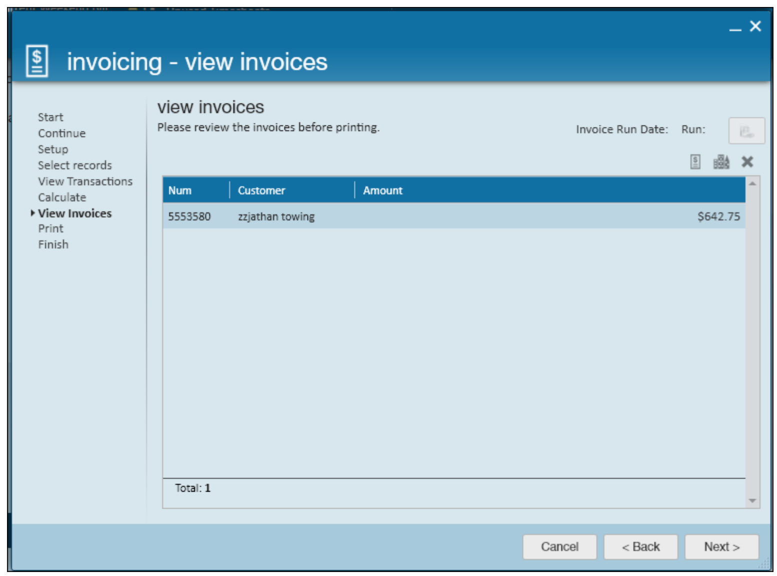
In the ***Invoicing – Select Records*** page choose the correct week from the *Invoices with Weekend Bill* drop down menu.

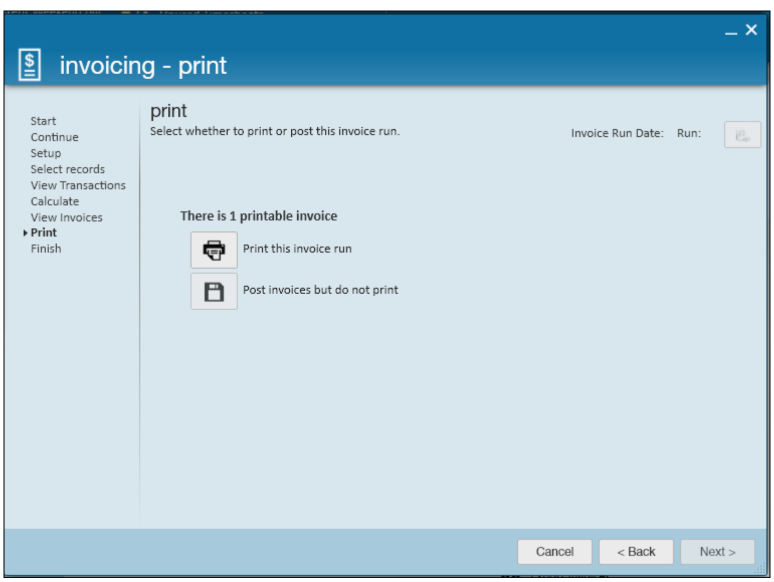
Put a check in the box to *Include Invoices Already Printed* and select an option from the list under Groups.

Put a check in the box in front of the **Invoices** that should be included and click *Next*.

The ***Invoicing – View Invoices*** page will display the **Invoices** that are included in this run.

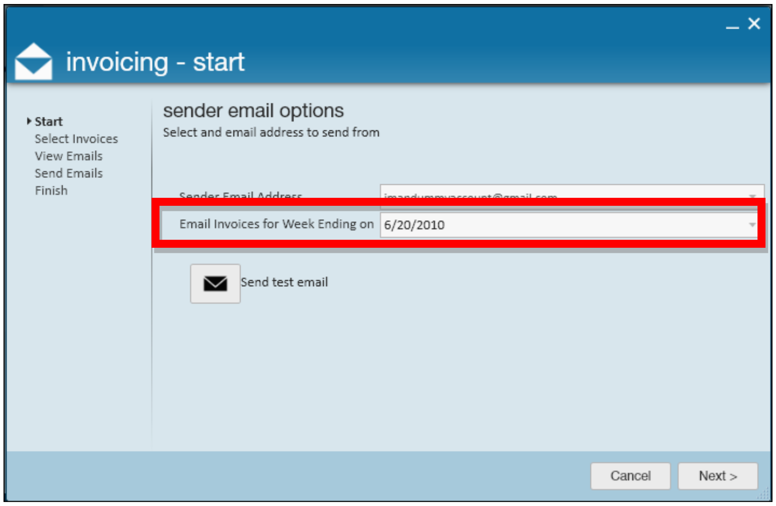
Verify that the correct **Invoices** are included and click *Next*.





In the ***Invoicing – Print*** screen click on the button to open your printer selector. Print out the **Invoices** and post in the ***Invoicing – Finish*** screen.

<u>Weekend Bill Filter for Invoice Email</u>

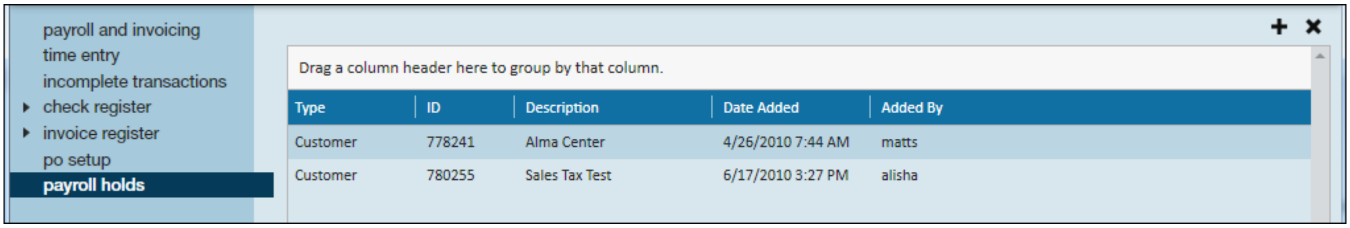


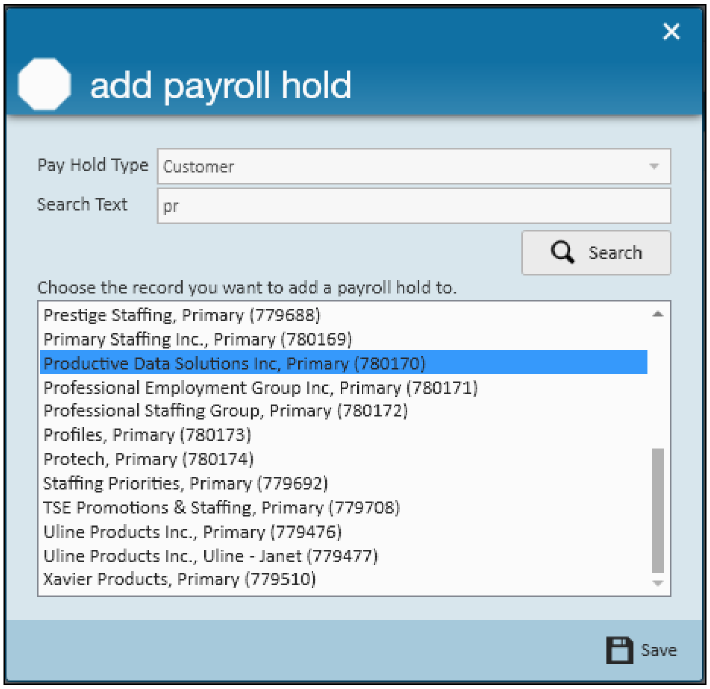
On the ***Invoicing - Start*** page of the ***Invoice Email Wizard***, a drop down menu has been added for *Email Invoices for Week Ending On* so that you will only see **Invoices** that need to be ***Emailed*** for the *Weekend Bill* date selected.

*Note – The **Invoice** ***Email*** functionality is only available to those clients that have added the EDDS module (Email Document Distribution System) to their core Enterprise software solution. For more information on **Invoice** ***Emailing*****,** contact a TempWorks' representatative.

Payroll Hold Functionality

The **Payroll Holds** form in **Pay/Bill** allows users to put the **Payroll** process for a *Branch* or **Customer** on hold.





To add a new **Payroll Hold** click on the button in the upper right to open the ***Add Payroll Hold*** form (left).

Select "Branch" or "Customer" from the *Pay Hold Type* drop down menu. Then enter in the first few letters of the *Branch* or **Customer** name in the *Search Text* field.

Click *Search* to display records in the box at the bottom. Click on the line for the record to select. Click *Save* at the bottom to add the **Payroll Hold** to the selected record and close the form.

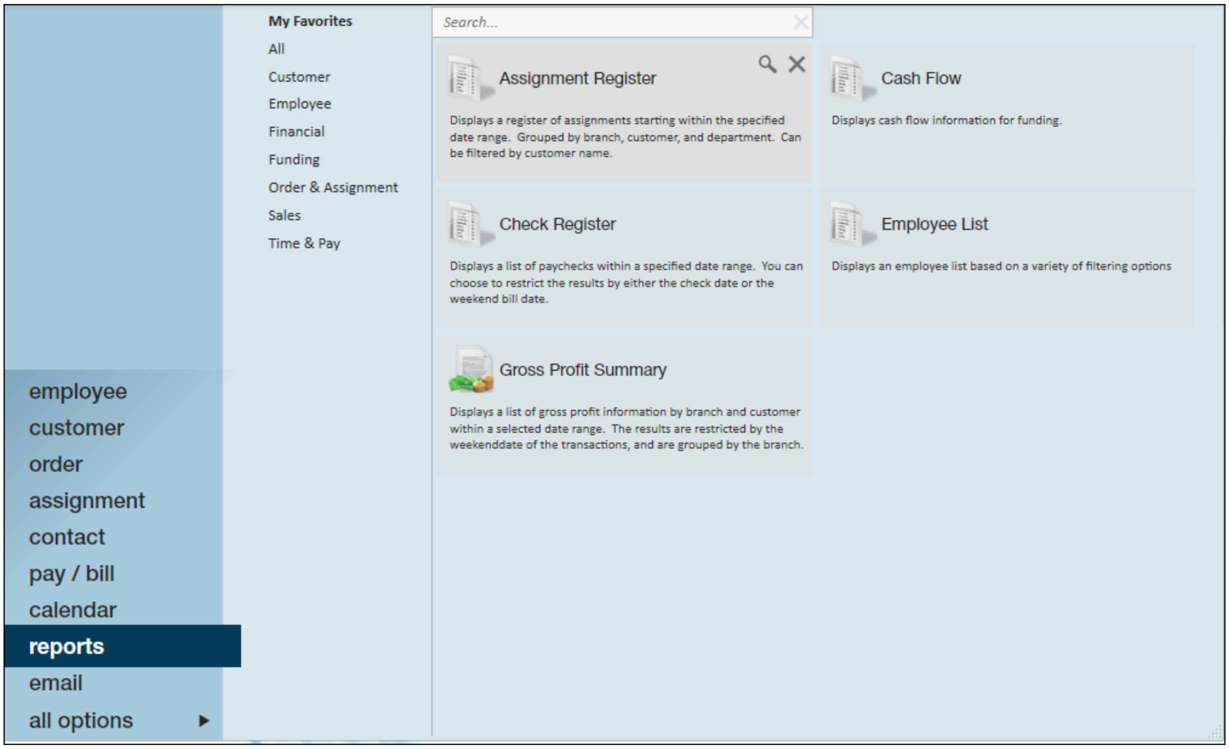
*Note – If an individual **Employee's Paycheck** should be on hold, the code will still be added in the *Pay Hold* drop down menu of the ***Overrides*** tab in **Time Entry**. The *Pay Hold* must be added for each *Transaction* the **Employee** has.

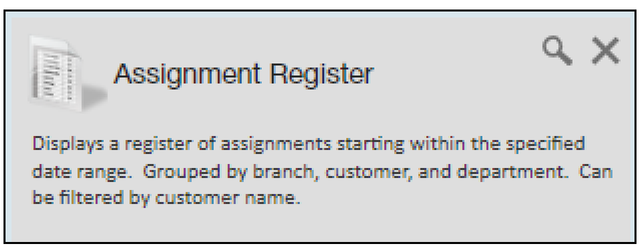
Once a **Payroll Hold** has been established for a **Customer** or *Branch* any **Payroll** *Transactions* that are pulled into a **Payroll** run will automatically be removed from the original run and stored in a separate "pay hold" **Payroll** run until the **Payroll Hold** has been removed. To remove a **Payroll Hold** select the line of the record and click on the button. Once the hold is removed open the "pay hold" **Payroll** run where the *Transactions* have been stored and continue processing (any *Transactions* in the run that are still "on hold" will automatically be moved into a different run).

*Note – All **Payroll Holds** will need to be removed and their **Payroll** *Transactions* must be posted before the week can be closed. If this hasn't been completed prior to closing the week there will be an open **Payroll** run containing the "on hold" *Transactions* that will impede the close week process.

New Reports Layout

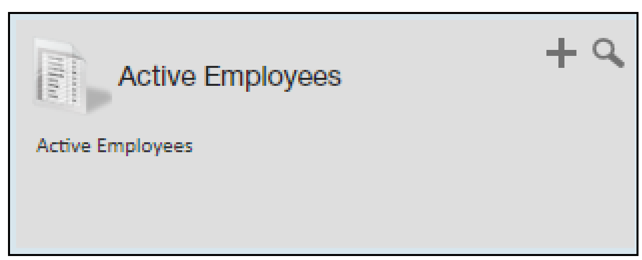
When **Reports** is selected from the navigation menu the form below will be displayed. The ***My Favorites*** category displays first by default and shows all of the **Reports** that you've listed as *Favorites*. Click on the ***All*** category to view all **Reports** in Enterprise. Or use the other category selectors to view **Reports** specific to the category.



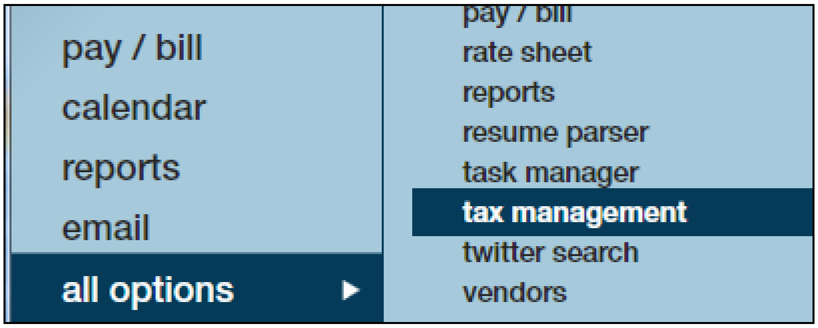


When you hover your mouse over a **Report** in the list, additional buttons will be displayed. Click on the button to run the **Report**. If the **Report** is in your ***My Favorites*** list click the button to remove this **Report** from your *Favorites*.

If a **Report** is not listed as one of your *Favorites*, clicking on the button will add it to the list.

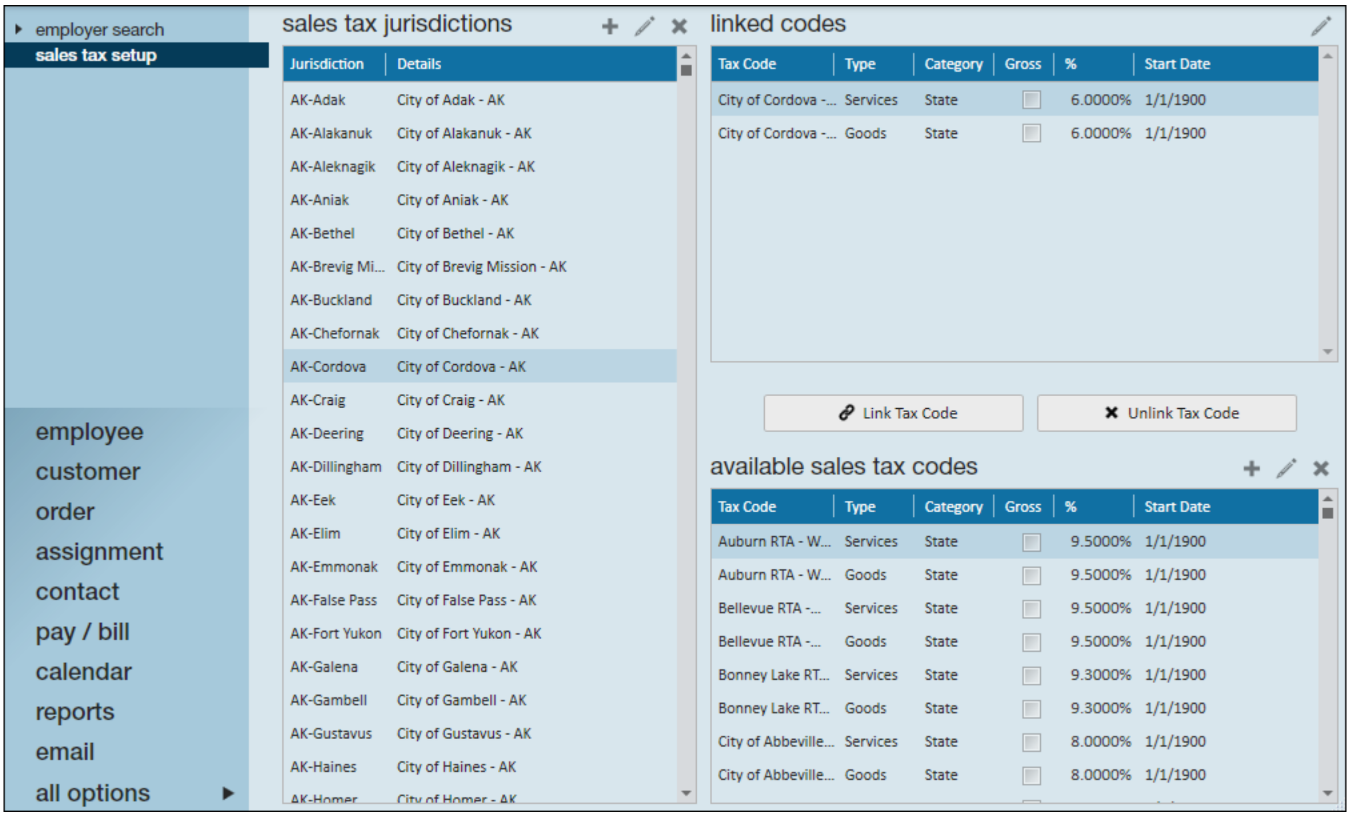


Tax Management Functionality Added



The **Tax Management** form is available for System Administrators for updating Sales Taxes to be charged for goods and services.

To open this form, select **Tax Management** from the navigation menu expansion list.



The **Sales Tax Setup** form allows administrators to make changes to current sales tax rates, add new sales tax *Jurisdictions* and view which **Customers** each *Jurisdiction* is linked to.

Want to Learn More?

To learn more about TempWorks Enterprise version 15R1 contact us at 651-452-0366 to schedule a demo.