




Enterprise Version 12R7 Changes

Improved Task Management


The **Tasks** area displays items that require user follow-up. In addition to being able to create **Tasks** from *Messages* and *Incoming Email* you can also drag and drop records or click on the  button in the **Tasks** area to create new **Task** records.



The **Tasks** box displayed to the left is located in the lower left of the Enterprise screen. Clicking on the  button allows the user to create a new **Task**. When an Enterprise record is open (**Employee, Customer, Order, Contact**, etc.) a **Task** can be created for that record by clicking on the avatar area and dragging and dropping the record in the **Tasks** box. Click on the  button to *Refresh* your **Task** list.

Tasks can also be created within the Follow-up area of any *Message* record or from an *Incoming Email*.

When the  button is clicked the full screen **Task Manager** will be displayed as shown in the next picture.

Tasks can be viewed for the entire branch from this screen and can be filtered by *Task Type, Assigned To, and Due Date*. To create a new **Task**, click on the  button in the upper right.



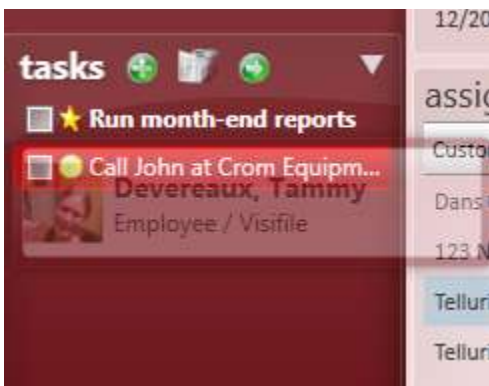
To edit the **Task** either double-click on the **Task** line or click on the button. To mark the **Task** as completed click on the button with the **Task** selected or right-click and choose *Mark as completed*. Some **Tasks** are created by actions taken in the system; these auto-generated **Tasks** will have a *Claim Task* button on the left of the **Task** line. Clicking on this button will add your *User Name* to the **Task** and the *Claim Task* button will disappear.



You can also display **Tasks** for a specific date by clicking on the buttons to the right of the *Due* and *Overdue* column headers.



Click in the box to the right of the *Due* date to display **Task** records with the selected date. In the *Overdue* column you can select the *True* box to display all **Tasks** that have passed their *Due* date and are not yet completed.



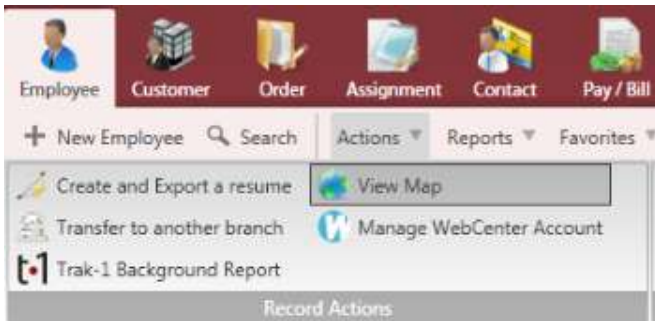
In the example to the left a new **Task** is being created for Tammy Devereux by selecting her picture in the avatar area and dragging the record down to the **Tasks** box and then dropping it.



This opens a **Task** record that will be linked to Tammy. Add any additional title information to the *Task* field, enter a *Due* date and further text can be entered in the large white box at the bottom. Then click on the *Save* button to save and close the new **Task** record and link it to Tammy's **Employee** record.

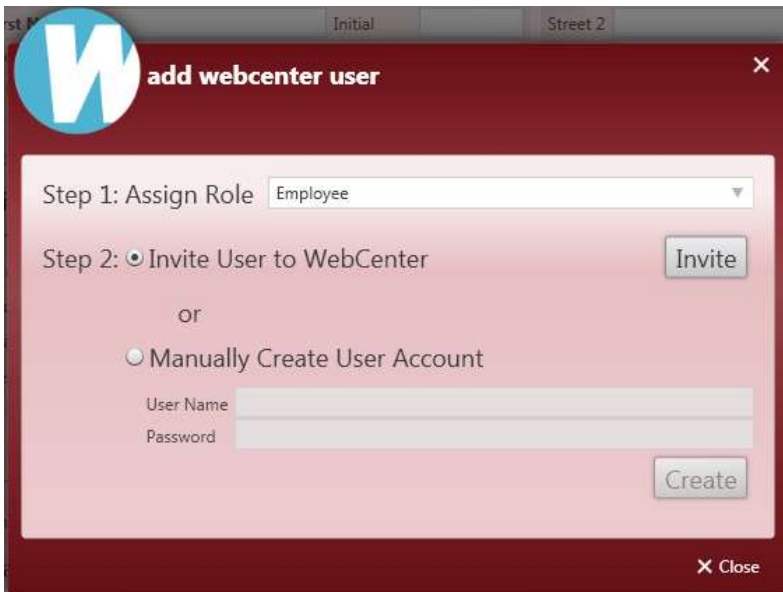
Employee Actions

When an **Employee** record is open the *Actions* button in the *Actions Bar* will display options for creating a resume, transferring the **Employee** to another *Branch*, submitting the **Employee** for a Trak-1 Background Check and locating “Unfilled” **Orders** that match *Interest Codes* from the **Employee’s** record.



*Note – Additional *Actions* may be available in each record, depending on what other record types you currently have open.

Employee WebCenter Management

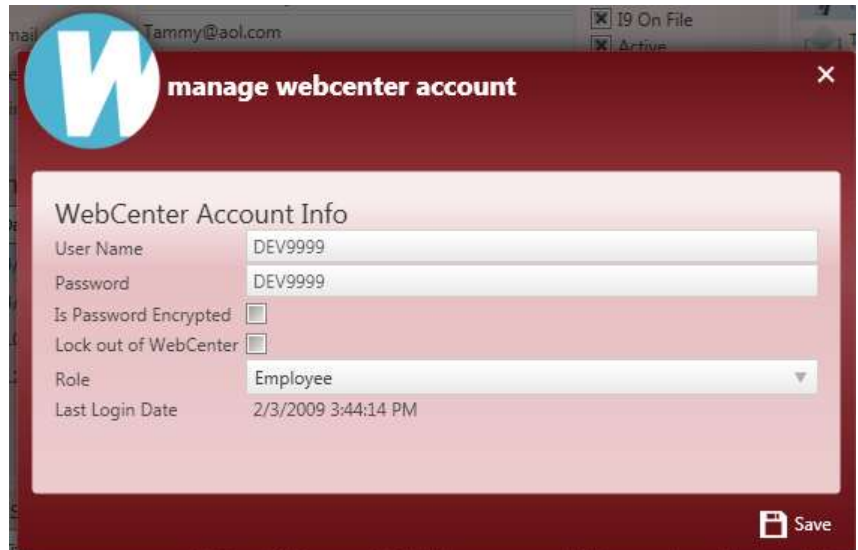


Option two is selected by clicking on the radio button in front of *Manually Create User Account* and then the *User Name* and *Password* are entered manually. Clicking the *Create* button adds the **Employee** as a WebCenter Employee Portal user. This information can then be communicated to the **Employee** via email, phone, etc.

Once the information has been added, click on the *Close* button in the lower right.



When *Invite to WebCenter* is selected from the *Actions* drop down menu and the **Employee** is already set up as a WebCenter user, the form to the right is displayed. You can update the *User Name* and *Password*, select if the password is encrypted, lock the **Employee** out of WebCenter and update the user *Role* (the role determines what features in the WebCenter that this **Employee** has access to). Once this information has been added or changed, click on the *Save* button in the lower right.

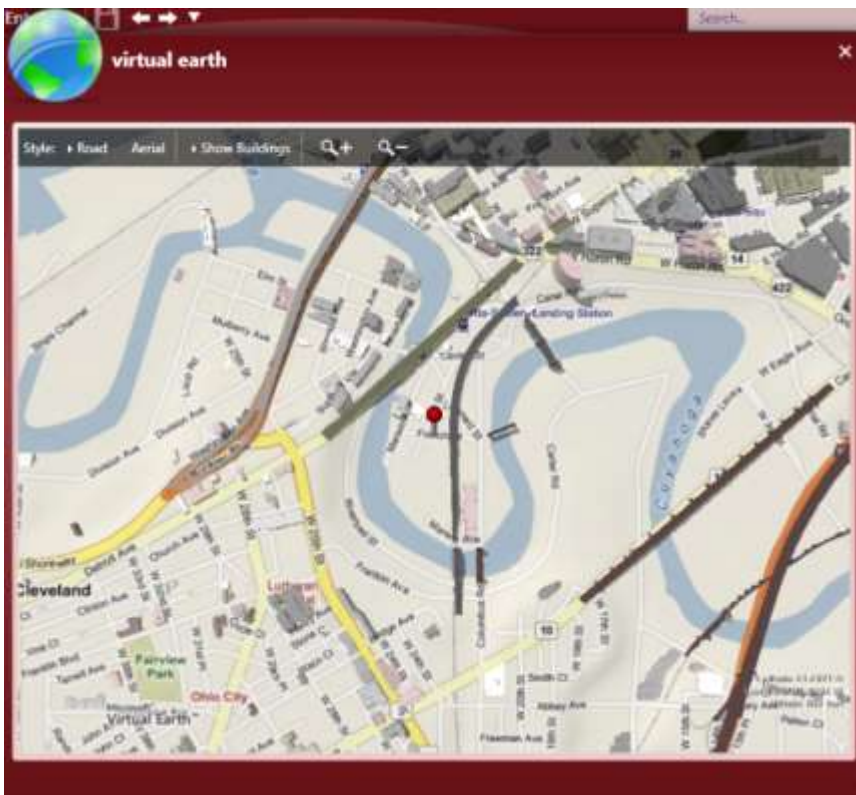
**Note – The WebCenter Employee Portal is an ancillary product, please contact a TempWorks' representative for more information about this web solution.*



User Name	DEV9999
Password	DEV9999
Is Password Encrypted	<input type="checkbox"/>
Lock out of WebCenter	<input type="checkbox"/>
Role	Employee
Last Login Date	2/3/2009 3:44:14 PM

Employee (and other record) Location Mapping

Location mapping is available from the *Actions* drop down menu in both the **Employee** and **Customer Worksites** or on any **Search** page where the  button is found. To use the location mapping in the **Search** form on any record, first select the line or lines and click on the  button in the upper right. When the mapping function is accessed it will pull in the address(es) of the selected record or line(s) and open to Microsoft's Virtual Earth (as shown).

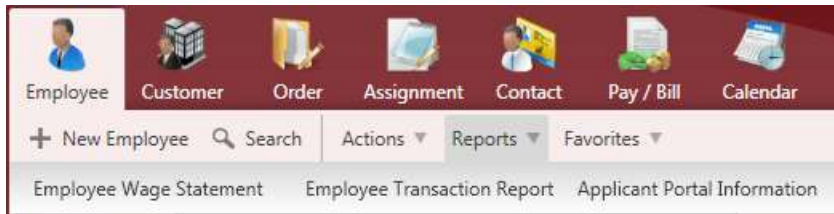


**Note – Although this functionality is available to all users on Enterprise version 12R7, the location mapping requires a special license agreement with Microsoft. Therefore the Microsoft licensing must be acquired before Virtual Earth mapping will be activated in your system.*

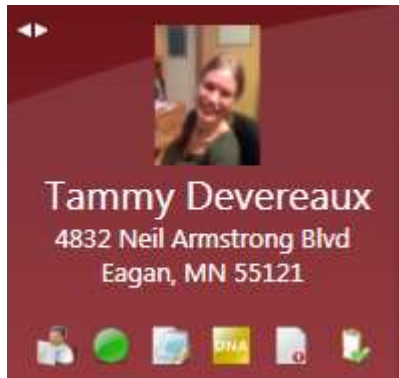
Please contact a TempWorks' representative for more information about location mapping and its licensing requirements.

Employee Reports


Display a wage statement or transaction history report for the **Employee** or view information entered from the TempWorks WebCenter online application portal.





Employee Avatar Updates



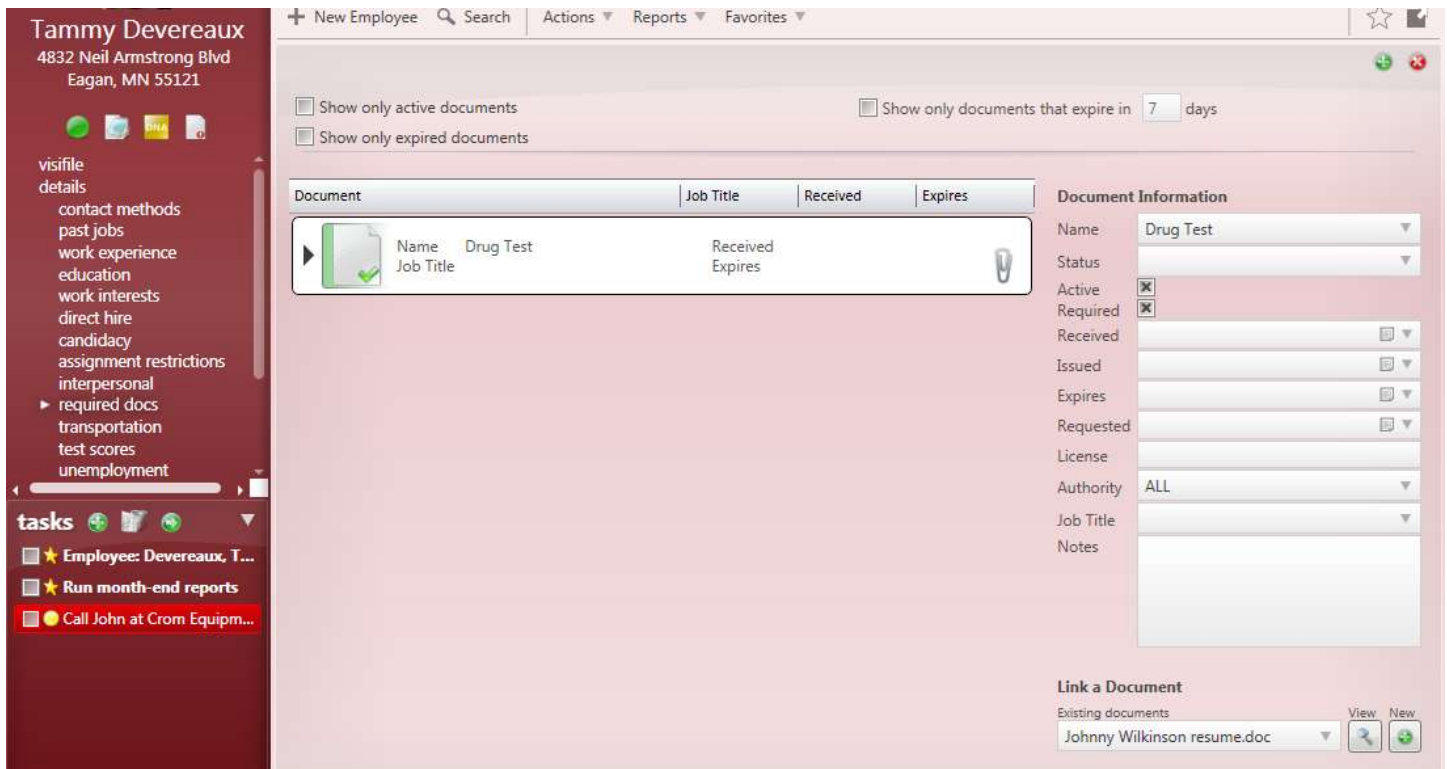
In the **Employee** avatar area three symbols have been added:



This  symbol will only display in the avatar area if the **Employee** should not receive a form W2 at the end of the year (ie. subcontractor or 1099 **Employee** record).

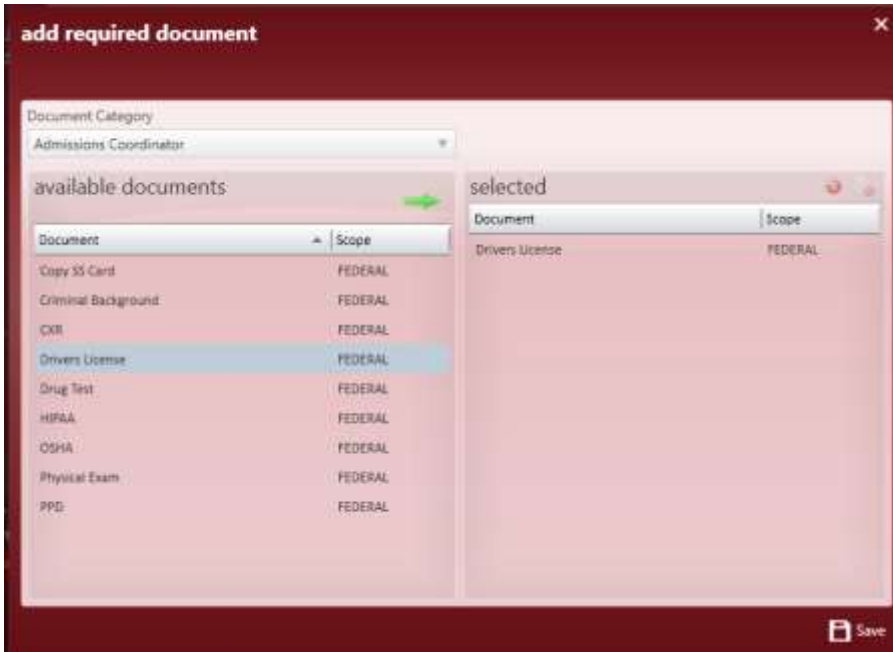
When a document attached in the *Required Docs* area is missing or expired, a symbol similar to this  will display on the record. When an **Employee** has an "Incomplete" **Task** linked to their record a  symbol will be displayed.

Employee Required Docs Form

In this form documents can be attached to the **Employee's** record and can be linked to specific *Job Titles*. Date information for *Received, Issued, Expires, and Requested* can be tracked. When the expiration date is exceeded an icon will be displayed in the **Employee's** avatar area.



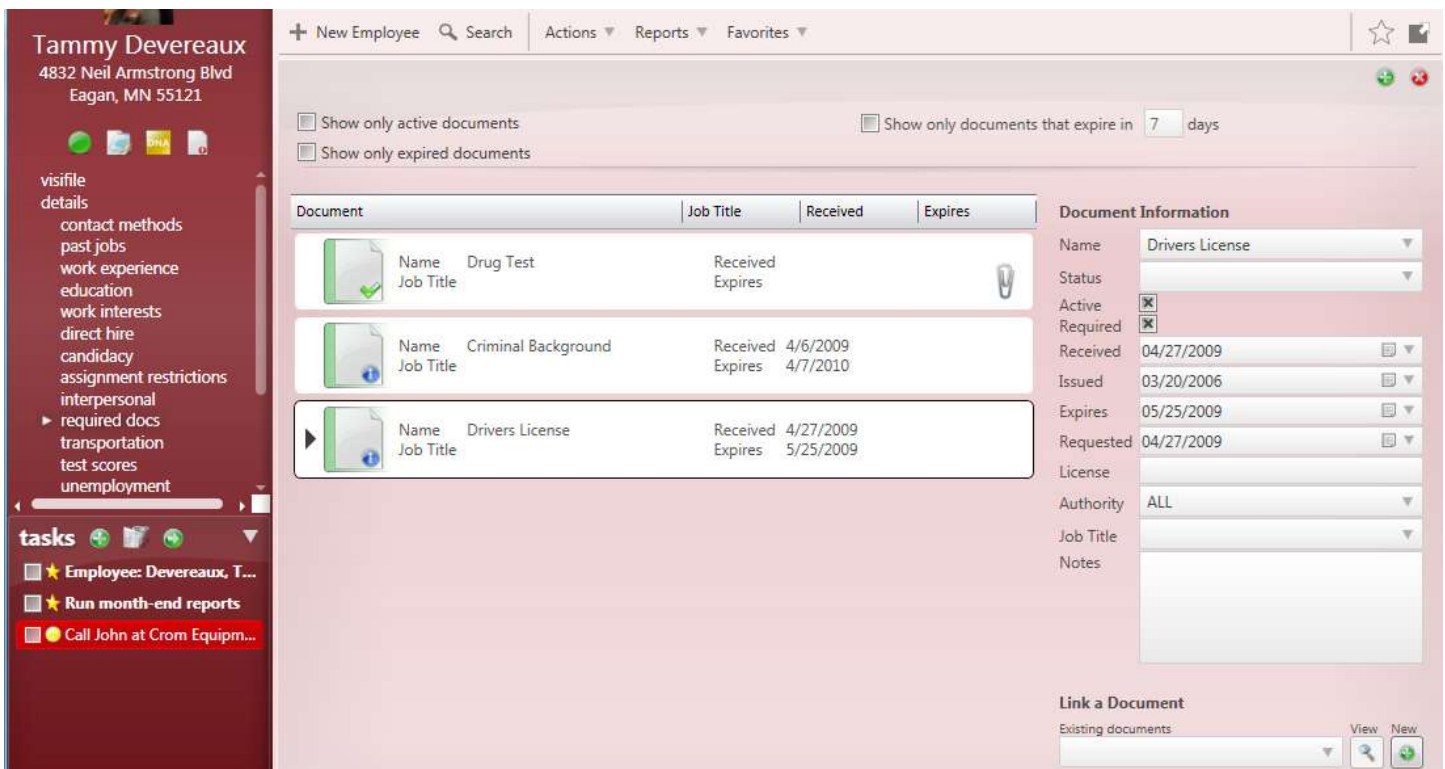
A required document can be attached to a document in the **Employee Documents** area. Select the required doc and then in the lower left click on the  button to attach a document from a local or network drive. If the document is already attached to the **Employee** record you'll be able to select it from the *Existing Documents* drop down menu. Choose one and click on it to select and link. If a required doc has a linked document in the *Documents* area, click on the  button to open the document.




The *Document Category* drop down menu allows the user to select which types of documents should be displayed in the available documents area.

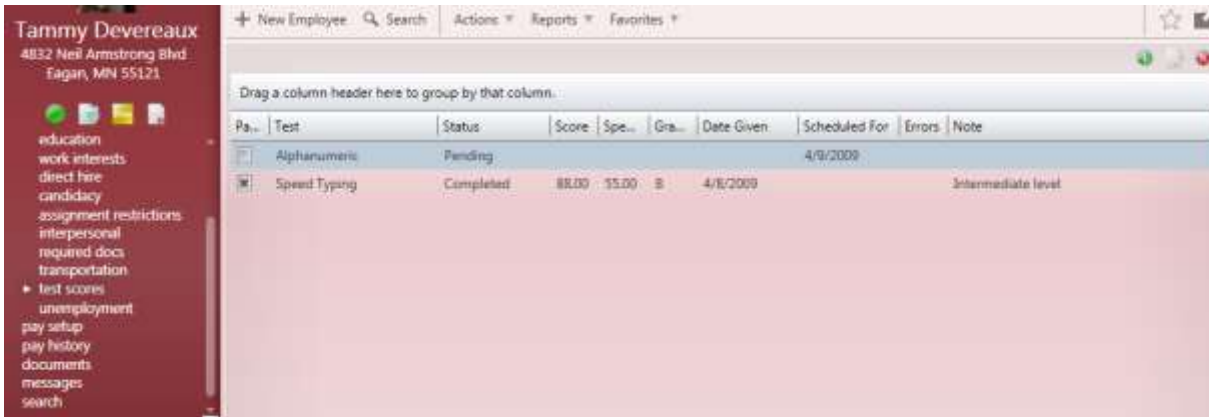
On the left side select the document(s) to be tracked on the **Employee's** record (hold down the keyboard's *Ctrl* button to select multiple records at once). Then click on the green arrow pointing to the right.

Once you've selected documents, click on the *Save* button at the bottom to attach the documents to the record.



Employee Test Scores

The *Test Scores* form allows the user to track internal testing that has been given to the **Employee**. Click on the  button in the upper right.



Tammy Devereaux
4832 Neil Armstrong Blvd
Eagan, MN 55121

education
work interests
direct hire
candidacy
assignment restrictions
interpersonal
required docs
transportation
test scores
unemployment
pay setup
pay history
documents
messages
search

+ New Employee Search Actions Reports Favorites

Drag a column header here to group by that column.

Pa...	Test	Status	Score	Spe...	Gra...	Date Given	Scheduled For	Errors	Note
<input type="checkbox"/>	Alphanumeric	Pending					4/9/2009		
<input checked="" type="checkbox"/>	Speed Typing	Completed	88.00	55.00	B	4/8/2009			Intermediate level



add test score

Category: <All Categories>

Test: [dropdown]

Status: [dropdown]

Score: [text field]

Speed: [text field]

Grade: [dropdown]

Date Given: [calendar icon]

Scheduled For: [calendar icon]


Pass:

Note: [text area]

Save

Choose the *Test* from the drop down menu and add any additional information that applies. Then click on the *Save* button at the bottom.

Employee Unemployment Tracking

The *Unemployment* form is used for tracking any unemployment claims that the **Employee** has submitted. Click on the  button in the middle of the screen and then choose the *Status* and last *Assignment* from the drop down menus.

Tammy Devereaux
4832 Neil Armstrong Blvd
Eagan, MN 55121

education
work interests
direct hire
candidacy
assignment restrictions
interpersonal
required docs
transportation
test scores
unemployment
pay setup
pay history
documents
messages
search

tasks
Employee: Devereaux, T...
Run month-end reports
Call John at Crom Equipm...

Unemployment Claim for Devereaux, Tammy
Claim Date 2/24/2009

Status: Pending Appeal Pending
Assignment: Warehouse Person
Filed By: Alisha Arnold Last Pay: \$9.00
Reason Left:
Claim Amt: Total Charged:
Weekly Amt: Remaining Amt:
Last Charged:

claims

- Devereaux, Tammy
2/24/2009
Status Pending Amount
Filed by alisha Last Charge
- Devereaux, Tammy
2/24/2009
Status Disallowed Amount
Filed by alisha Last Charge

claim charges
No Records Found

Customer Vendor Management

A staffing company vendor can be selected for the **Customer** from the *Vendor Management* form under **Details**.


Crom Equipment
Primary
123 8th St.
Minneapolis, MN 34950
(651) 555-1212

visifile
details
contact methods
departments
worksites
sales & service
interest codes
assignment restrictions
vendor management

+ New Customer Search Actions Reports Favorites

Drag a column header here to group by that column.

Vendor Company	Skill Code	Order Delay (Hrs)	Max Candidates Per Req
Colin Staffing		0	5
Select Staffing		2	2
Acme		0	2

To add a staffing company vendor to this **Customer** click on the  button in the upper right. The form below will be displayed:

Select the *Vendor Company* from the drop down menu. If this staffing company is used specifically for one *Job Title* select it from the *Skill Code Prefix* drop down menu.

Enter the *Order Delay (Hours)* and the *Max Candidates Per Req* that can be submitted by the vendor.

Then click *Save* to add the staffing company vendor to the **Customer**. This information will now automatically populate into **Order** records for this **Customer**.

Customer Invoicing/Invoice Detail

The **Invoicing** form displays all of the **Invoice** history for the **Customer**. To view the *Invoice Details*, double-click on the **Invoice**. This will navigate the user to the *Invoice Register* in the **Pay/Bill** section.

Inv N...	Date	Customer	Branch	Amount	Paid	Balance
5552747 Inv ID: 4435 OVERDUE	2/26/2009	Crom Equipment		\$1,622.60	\$0.00	\$1,622.60
5552739 Inv ID: 4419 OVERDUE	2/16/2009	Crom Equipment		\$2,903.60	\$0.00	\$2,903.60
5552722 Inv ID: 4400 OVERDUE	1/30/2009	Crom Equipment		\$394.98	\$0.00	\$394.98

The *Invoice Details* form has been completely reformatted. *Print* and *Print Preview*, *New Message* and *Edit* have been added to the *Actions Bar* in the *Form Actions*.

Invoice Items	quantity	rate	weekend date	total
Jennifera, gashelkjer Contract13 OR Tech	40.00	\$13.00	2/8/2009	\$520.00
Wendell, Paula Contract12 OR Tech	40.00	\$15.00	2/8/2009	\$600.00
Carlaal, Sharnette Contract12 OR Tech	36.75	\$15.00	2/8/2009	\$551.25
Carroll, Thelma Lee Contract15 Registered Nurse	36.50	\$18.00	2/8/2009	\$657.50
Prater, Kyle Contract12 Registered Nurse	32.00	\$14.00	2/8/2009	\$448.00
Hudgen, Tonisha Contract12 Registered Nurse	40.00	\$14.00	2/8/2009	\$560.00
Ramirez, Lindsay Contract12 Registered Nurse	40.00	\$14.40	2/8/2009	\$576.00
Brandt, Paula Contract12 OR Tech	-40.00	\$13.00	2/8/2009	(\$520.00)
Brandt, Paula Contract12 OR Tech	38.00	\$18.00	2/8/2009	\$684.00
				\$3,817.55
Adjustment Items				\$0.00
Tax Items				\$0.00
Total				\$3,917.55

*Note – The **Invoice Edit** functionality will be covered later in this document.

Select the  button at the bottom of the screen to display *Transactions*, *Email Recipients*, *Messages* and more.

Payroll / Invoicing
Current Weekend Bill
4/12/2009

- 15 Unpaid Timesheets
- 1 Timesheets Not Paid

payroll and invoicing
time entry
incomplete transactions
check register
invoice register
invoice detail
po setup

Actions

Publishers creative system - Memphis SE TN

Invoice Number 5552752 Weekend Bill 3/8/2009
Invoice Date 3/4/2009 Pay Date

Owed Balance **\$3,917.55** Amount Paid **\$30.00**

Extended Invoice Details


Extended Details

Transactions

Other

Invoice ID	4455	Void Date	
Customer ID	779640	Taxable Amount	\$0.00
Pay Amount	\$30.00	Sales Tax	\$0.00
Balance Amount	\$3,917.55	Reserve Amount	\$0.00
Credit Limit		Auto-factor Invoices	
Note		Date Email Sent	
Closed		Date Email Resent	
Supervisor		DSO	37
Replaces Invoice		Reserve Released	0.0000
Replaced By Invoice		Due Client	0.0000
Re-Invoice Reason		Due Factor	0.0000
Due Date	3/24/2009		
Voided		False	

Customer Defaults

The **Defaults** form allows the user to set up *Accruals*, *Shifts*, *Multiplier Codes*, and *Required Documents* that apply to the **Customer's Orders**. To add *Shifts*, *Multiplier Codes*, or *Required Documents* click on the  button in the appropriate area. Fill out or select the information from the *Add* forms and then click *Save* at the bottom of the form.

Crom Equipment Primary
123 8th St.
Minneapolis, MN 34950
(651) 555-1212

visifile
details
invoicing
defaults
messages
documents
search

tasks

- Employee: Devereaux, T...
- Run month-end reports
- Call John at Crom Equipm...

+ New Customer Search Actions Reports Favorites

accruals

Use Default Accrual Apply Accrual to Departments VacMel

shifts

Use Default Shifts Apply Shifts to Departments

Shift	Start	End	Break Time	Weekly Hours
Morning	8:00 AM	5:00 PM	60.00	40.00

multiplier codes

Use Default Multiplier Codes Apply Multiplier Codes to Departments

Code	Priority
1.21 Markup	1
1.43 Target	3
1.5325 Alpine	5
TrainingMel	4

required documents

Use Default Required Documents Apply Required Documents to Departments

Document	Scope	Job Title	Active	Required	Notes
OSHA	Accounts Payable				Notes
Drivers License	Admin. Assist.				Notes
Drivers License					Notes

Document Drivers License

Job Title

Active

Required

Notes

*Note – Only information set up on the **Defaults** form will be available in the **Order** records created for the **Customer**.

Order Gross Profit Calculator

The *Gross Profit Calculator* can be accessed when you are in the **Order** (or **Customer**) record area. The *Gross Profit Calculator* is opened from the *Actions* drop down menu.

gross profit calculator

calculator options

Worker Comp 8810 Initial Burden 9.55%

SUTA Juris MNSUTA Use SUTA Use FUTA

regular

Pay Rate \$10.20 GP % 53.92%

Bill Rate \$24.40 GP Amount \$0.00

Markup 2.39x

overtime

Overtime Pay \$15.30 GP Overtime % 54.01%

Overtime Bill \$36.60 Overtime GP Amount \$0.00

Overtime Markup 2.39x

doubletime

Doubletime Pay \$20.40 GP Doubletime % 54.06%

Doubletime Bill \$48.80 Doubletime GP Amount \$0.00

Doubletime Marku 2.39x

ot plan

Hours Per Week 0

Number of Weeks 1

Overtime Plan PlanSTD

expenses

No Records Found

The form to the left will be opened and you can populate the *Pay Rate* and *Bill Rate* fields to change the percentage in the *GP %* field on the left.

**Note - When the GP % field is calculating the field will turn green.*

Once the rates are determined, update the **Order Details** form by entering the rates in the *Pay Rate* and *Bill Rate* fields.

Order Web Options

The *Web Options* tab allows the user to change the *Job Description* that will be visible on the TempWorks' WebCenter Job Board. Just enter the information into the open text form at the bottom. If the **Order** should not be posted to the job board, click in the box for *Do Not Post to Web* check box.

Order Details | **Web Options**


Do Not Post to Web

Public Job Description:

DEFINITION: Under general supervision, learns to perform professional accounting duties including the examination, analysis, maintenance, reconciliation and verification of financial records; and performs related work as required.

DISTINGUISHING CHARACTERISTICS: This is the entry level in the professional accounting series. Incumbents work under well-established guidelines to develop sufficient knowledge to independently perform and assume journey-level responsibilities under supervision of higher level accountants.


Order Required Documents

Similar to the *Required Documents* form in the **Employee** record, required certifications, documents, etc. can be attached to indicate **Order**-specific requirements in this form. Click on the  button in the upper right to add a document to the form.

Creative Solutions, Primary C#

Show only active documents

Show only required documents

Document	Job Title	Received	Expires
 Name Drivers License Date Specific <input type="checkbox"/>	Admissions Coordinator		State Specific <input type="checkbox"/>

Document Information

Name: Drivers License

Active:

Required:

Date Specific:

State Specific:

Authority: ALL

Scope: FEDERAL

Job Title: Admissions Coordinator

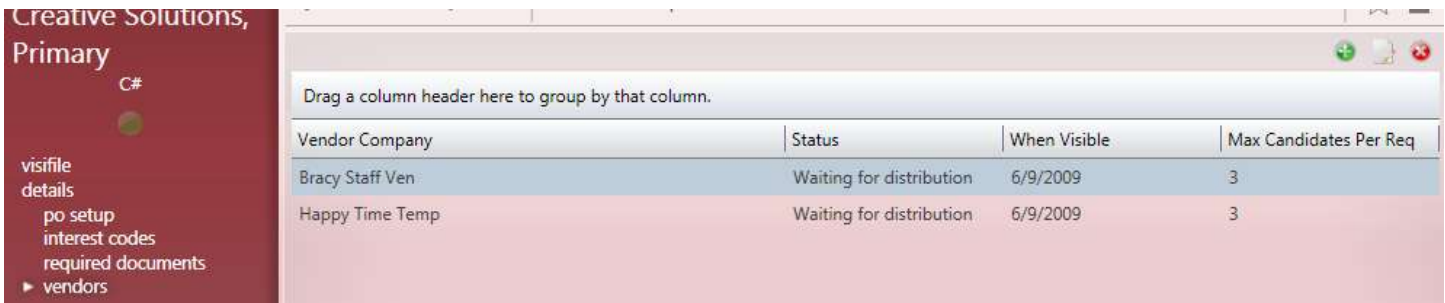
Notes:

tasks Sales call to Cory

Order Vendors


The **Vendors** form is used when a vendor management agreement exists between your staffing company and the **Customer**. This form is used to select the other staffing company vendors that the **Order** should be distributed to. **Orders** are then distributed to the vendors, notification is sent via email, and **Order Details** can be view by vendor **Contacts** from the TempWorks' WebCenter Vendor Portal.


***Note – The WebCenter Vendor Portal is an ancillary product, please contact a TempWorks' representative for more information about this web solution.**



The screenshot shows a web application interface. On the left is a dark red sidebar with a navigation menu. The main content area displays a table of vendors. Above the table is a header with the text "Drag a column header here to group by that column." The table has four columns: Vendor Company, Status, When Visible, and Max Candidates Per Req. Two rows of vendor data are visible.

Vendor Company	Status	When Visible	Max Candidates Per Req
Bracy Staff Ven	Waiting for distribution	6/9/2009	3
Happy Time Temp	Waiting for distribution	6/9/2009	3

***Note – Vendor records can be edited from the **Vendors** form in the  menu in the upper right. Vendor records can be added to the system from the **Administration** form in that same menu.**

To select a vendor, click on the  button in the upper right. This will open the form below:



The screenshot shows a form titled "add vendor to order" with a close button (X) in the top right corner. The form contains four input fields: "Vendor Company" (a dropdown menu), "Status" (a dropdown menu), "When Visible" (a date picker), and "Max Candidates Per Req" (a text input field with the value "0"). A "Save" button is located at the bottom right of the form.


Select the *Vendor Company* and the *Status* from the drop down menus.

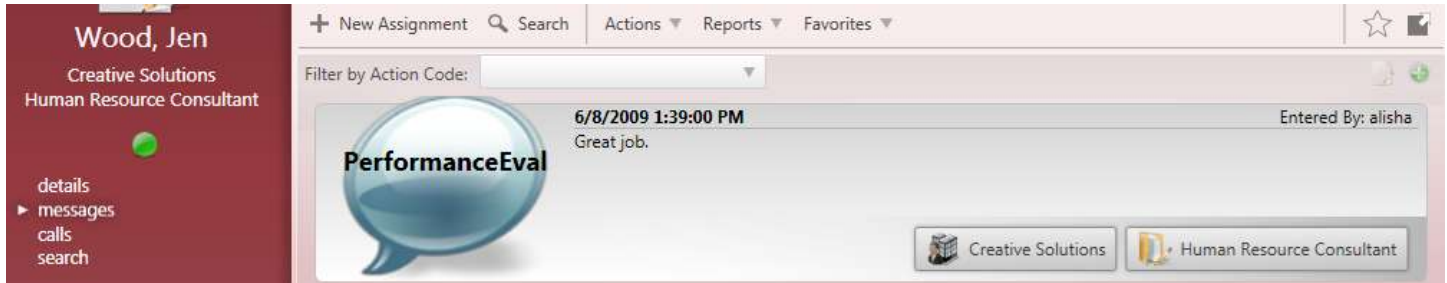
Select the *When Visible* date from the calendar and enter the *Max Candidates Per Req* that the vendor can submit to the **Order**.

Then click on *Save* to add the vendor information.

***Note – if the WebCenter Vendor Portal is being utilized the *Status* will automatically update when the vendor takes action on the **Order**.**

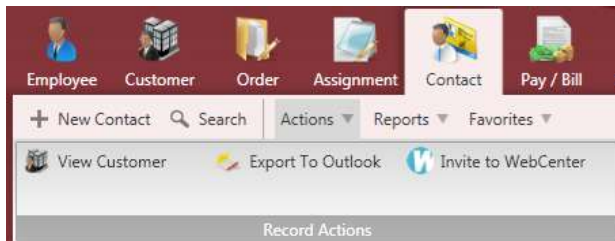
Assignment Messages

Messages can now be logged at the **Assignment** level from the **Messages** form and will automatically link to the **Employee's** record, and the associated **Customer** and **Order** records. Click on the  button in the upper right to add a new *Message*.

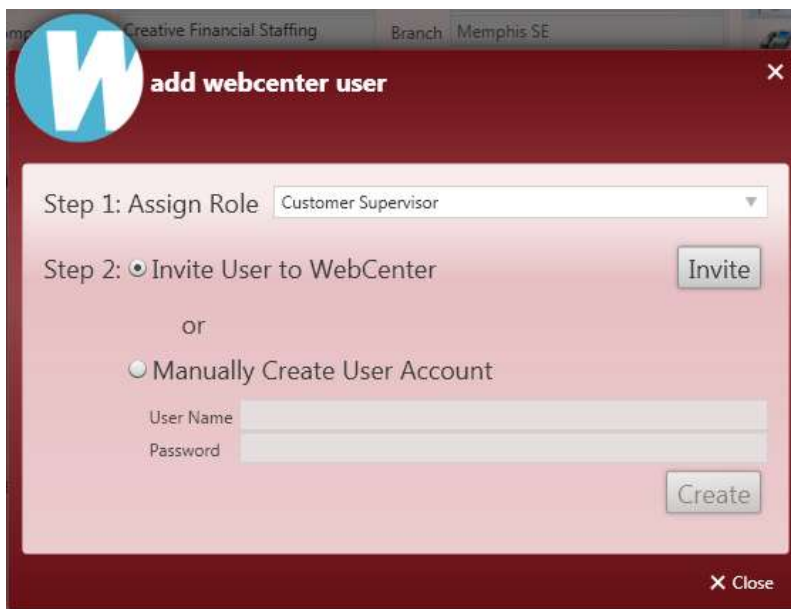


Contact Actions

When a **Contact** record is open the *Actions* button in the *Actions Bar* will allow you to open the corresponding **Customer** record, export the **Contact** record to Microsoft Outlook or invite the **Contact** to the **Customer** portal of WebCenter.



Contact WebCenter Management



When *Invite to WebCenter* is selected from the *Actions* drop down menu and the **Contact** has not been previously added as a WebCenter user, the form to the left is displayed.

The first step to set up a new **Contact** WebCenter log in requires that the user completes the *Assign Role* field by selecting from the drop down menu for available roles (the role determines what features in the WebCenter that this **Contact** has access to). Step 2 determines how the **Contact** gets notified of the log in information.

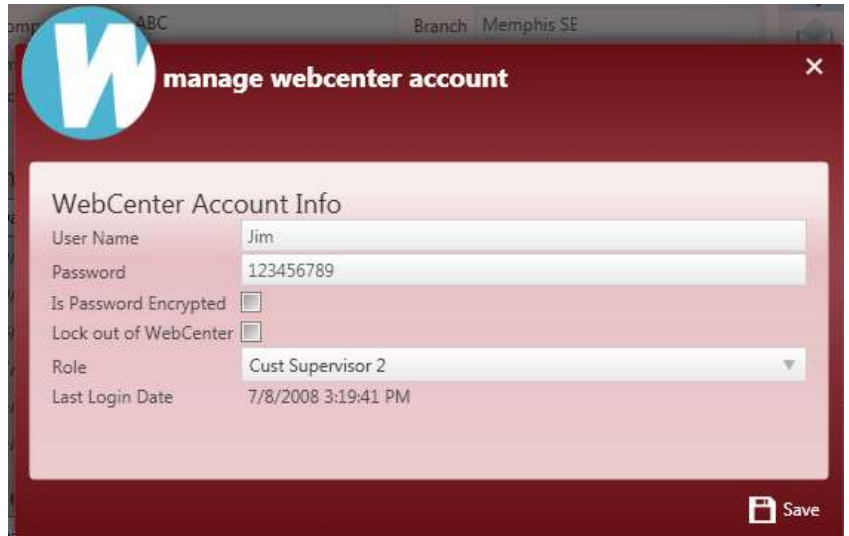
For option one the **Contact** has an "Email" address on their record and will be sent a system-generated email that directs them to the WebCenter log in page where they can select their own *User Name* and *Password*.

Option two is selected by clicking on the radio button in front of *Manually Create User Account* and then the *User Name* and *Password* are entered manually. Clicking the *Create* button adds the **Contact** as a WebCenter Customer Portal user. This information can then be communicated to the **Contact** via email, phone, etc.

Once the information has been added, click on the *Close* button in the lower right.

When *Invite to WebCenter* is selected from the *Actions* drop down menu and the **Contact** is already set up as a WebCenter user, the form to the right is displayed. You can update the *User Name* and *Password*, select if the password is encrypted, lock the **Contact** out of WebCenter and update the user *Role* (the role determines what features in the WebCenter that this **Contact** has access to). Once this information has been added or changed, click on the *Save* button in the lower right.

*Note – The WebCenter Customer Portal is an ancillary product, please contact a TempWorks' representative for more information about this web solution.

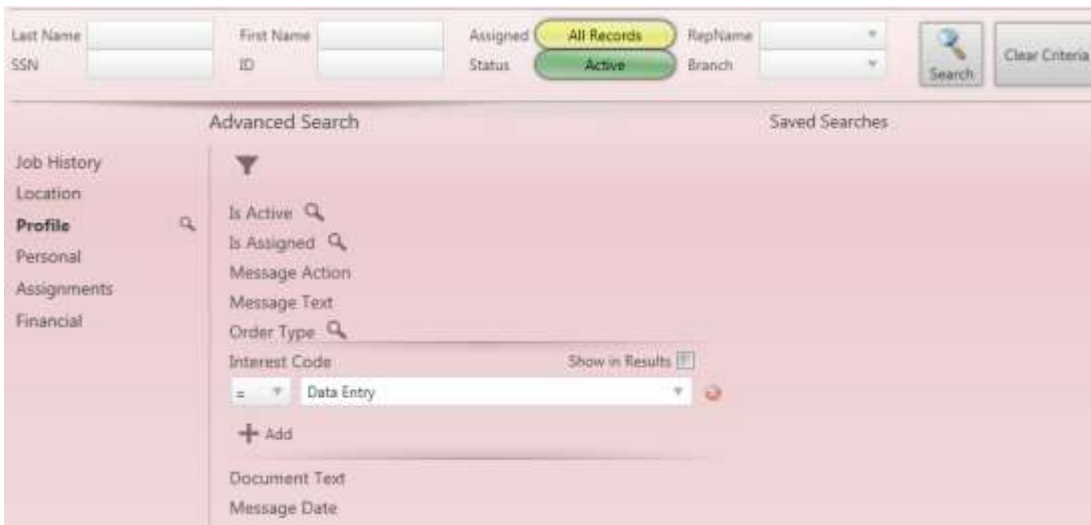



Enhanced Search Functionality

We have added additional search functionality to some of the major records that can be selected from that record's **Search** form. From the *Advanced Search* button new searches can be created and run. These searches can then be saved and accessed from the *Saved Searches* button.



To create a new search, click on the *Advanced Search* button. Then select the category from the information on the left and enter in the details in the appropriate fields.




The  icon will be displayed next to any search option that has information entered.

Once all of the details have been added, click on the *Search* button at the top of the form.

To add this search to the *Saved Searches* area click on the  button at the top of the screen.



Once the  button has been clicked the form to the left will be displayed. Enter in the *Name* and *Description*. If you would like to share your search with other users in your branch, click in the *Share Search* box.


At the bottom of the form you can select if the search should prompt for any of the inputs.

In the example to the left the **Employees** returned will be "Active", "Unassigned", have an *Order Type* of "TE" and then it will prompt for the *Interest Code* to be added.

Once all of the information has been entered click on the *Save* button to add it to the *Saved Searches* form.


From the *Saved Searches* form select the search from the list on the left, enter any information that the search prompts for and then click *Run Search*.

Vendor Records

In the upper right section of the Enterprise **Main Screen** the  button contains additional functionality that can be used. The **Vendors** form can be accessed by selecting it from the drop down menu.

Note - Vendor records can be added to the system from the **Administration form in that same menu under the **Company** form. Only those with the required user permissions will be able to add new vendor records.*


Company	Type	Dept	Generate 1099
City of Roseville	Staffing	Primary	<input type="checkbox"/>
Cable Company	Staffing	Primary	<input type="checkbox"/>
City of Eagan	Staffing	Primary	<input type="checkbox"/>
2nd Staffing	Staffing	Primary	<input type="checkbox"/>
Rite-Aid	Staffing	Primary	<input checked="" type="checkbox"/>
Alisha s company LLC	Vendor	Primary	<input type="checkbox"/>
Select Staffing Services, LLC	Staffing	Primary	<input checked="" type="checkbox"/>

The **Vendor List** above will be displayed when the **Vendors** form is selected from the drop down menu. Double-click on the line or click on the  button in the upper right to view the vendor **Details** form.

The **Details** form will list out all of the vendor company address and payment remittance information. The **Contacts** form will list all **Contact** records that are associated with this vendor company. To add a new vendor **Contact**, click on the *New Contact* button in the *Actions* menu from the **Contact** record and select the vendor name from the *Company* drop down menu. Distribution of **Orders** to vendor companies is covered earlier in this document.

*Note – A vendor management help document will soon be available that will cover this functionality and the vendor payroll process in more detail.


Rate Sheet Entry

In the upper right section of the Enterprise **Main Screen** the  button contains additional functionality that can be used. The **Rate Sheet** can be accessed by selecting it from the drop down menu.

Current *Rates* will be displayed in the form below:

Drag a column header here to group by that column.

Work Site	Customer	Job Title	Bill	Pay	Department	Branch	Shift	GP Pct
	123 Nursing	Unbillable Overtime	\$13.00	\$10.00	assembly	Memphis SE		23.08%
	Crom Equipment	Accounting Clerk 1	\$13.50	\$10.00	Primary	Memphis NE		25.93%
	123 Nursing	Payroll Clerk II	\$48.00	\$15.00	HR	Memphis CA		68.75%
	123 Nursing		\$20.00	\$10.00	assembly		Evening	50.00%
	123 Nursing		\$26.00	\$12.00	assembly	Memphis NE		53.85%
Crom	Crom Equipment	Forklift	\$30.00	\$20.00	Primary			33.33%

To add a new *Rate* to the form click on the  button in the upper right. This will open the *Rate Details* form as shown below:

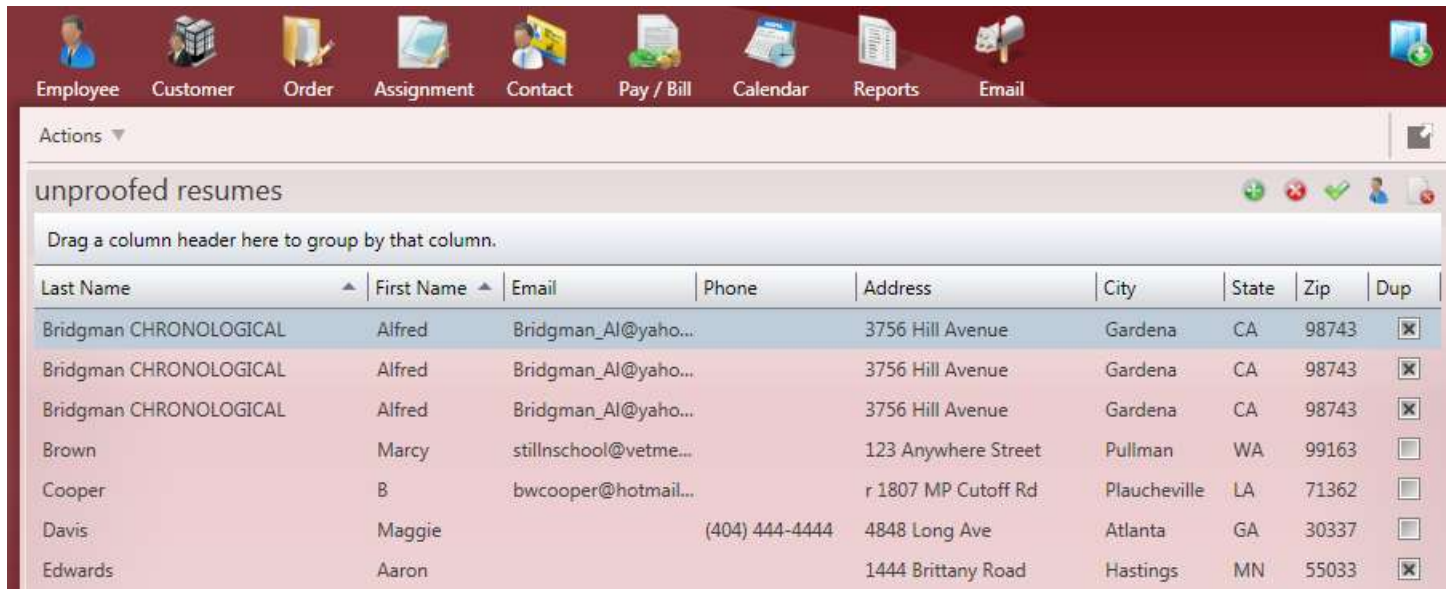
Enter information into the *Customer*, *Work Site*, *Vendor*, *Job Title*, *Shift*, *Branch*, *Worker Comp Code*, *Pay Rate*, *Overtime Pay Rate*, *Multiplier Code* (required), *Bill Rate*, *Overtime Bill Rate*, and *Double Time Bill Rate*.

***Note – the more information that is added into these fields the more specific the *Rate* will be.**


Once all of the information for the *Rate* has been added click on the *Save* button at the bottom of the form. Whenever the information contained in the criteria area for this *Rate* is selected in the **Order**, the information in the rates part of the form will automatically populate into the **Order Details** form.

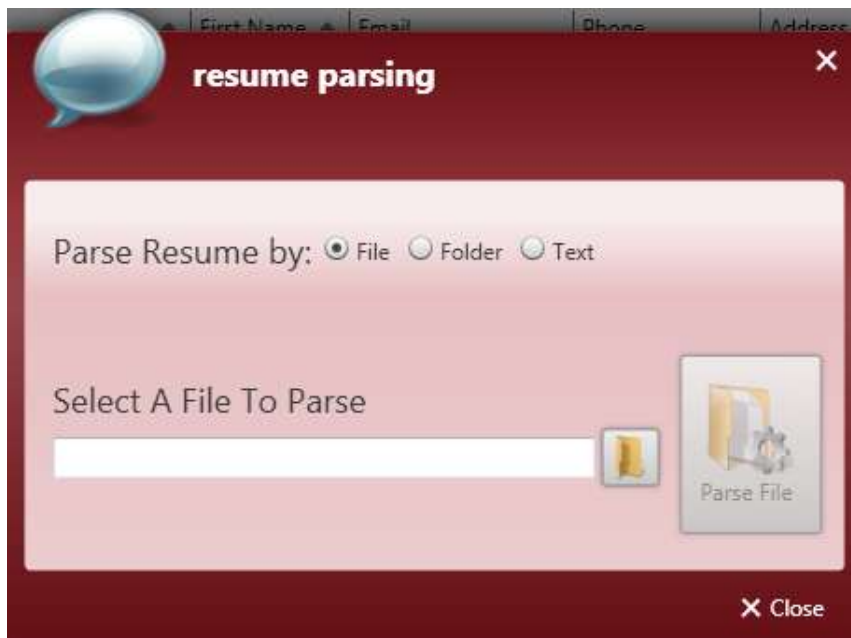
Updated Resume Parser

When the **Resume Parser** is selected from the drop down menu the following form will appear:



Last Name	First Name	Email	Phone	Address	City	State	Zip	Dup
Bridgman CHRONOLOGICAL	Alfred	Bridgman_Al@yaho...		3756 Hill Avenue	Gardena	CA	98743	<input checked="" type="checkbox"/>
Bridgman CHRONOLOGICAL	Alfred	Bridgman_Al@yaho...		3756 Hill Avenue	Gardena	CA	98743	<input checked="" type="checkbox"/>
Bridgman CHRONOLOGICAL	Alfred	Bridgman_Al@yaho...		3756 Hill Avenue	Gardena	CA	98743	<input checked="" type="checkbox"/>
Brown	Marcy	stillnschool@vetme...		123 Anywhere Street	Pullman	WA	99163	<input type="checkbox"/>
Cooper	B	bwcooper@hotmail...		r 1807 MP Cutoff Rd	Plaucheville	LA	71362	<input type="checkbox"/>
Davis	Maggie		(404) 444-4444	4848 Long Ave	Atlanta	GA	30337	<input type="checkbox"/>
Edwards	Aaron			1444 Brittany Road	Hastings	MN	55033	<input checked="" type="checkbox"/>


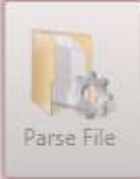
To parse a new resume, click on the  button in the upper right. The following form will be displayed:



resume parsing


Parse Resume by: File Folder Text

Select A File To Parse

Close

Select how the resumes should be parsed by selecting *File* (Word doc or PDF), *Folder*, or *Text*. Then select the location of the document or folder by

clicking on the  button and once selected, click on *Parse File*.

If the *Text* option is selected, copy and paste the information into the form provided and then click on *Parse File*.


Jose V. Rodriguez
48858 Toronado Path
Bloomington, MN 55118
858-455-3454 (cell) or 488-594-5949 (home)

Objective: To find a rewarding career in Human Resources with a strong company that will allow me to expand my knowledge and experience within my chosen field while adding increased value to the business.

Work Staff Manager – Compact Solutions – Bloomington,
Experience: MN Feb. '05
to Sept. '05
Job Duties: Leading the staffing team of 3 employees, regulating Visa status, writing offer and declination letters, writing and posting new positions, mentoring and training my team, working with GE employees to verify application status, phone screens, in-person interviewing annual reviews reviewing compensation and benefits programs communicating with hiring managers

General
Employment (0)
Education (0)
Skills (3)

First Name	Jose	Initial	V	Address	48858 Toronado Path
Last Name	Rodriguez			Address 2	
Phone Number	(488) 594-5949			City	Bloomington
Secondary Phone	(858) 455-3454			State	MN
Fax Number				Zip	55118-
Email					

Once the parsing is complete the information will be displayed in the form as shown. Verify that the information is correct in each of the tabs: *General*, *Employment (Past Jobs)*, *Education*, and *Skills (Interest Codes)*. To create the new **Employee** record from the parsed information, click on the  button in the upper right of the form.

Time Entry Weekly Adjustment Overrides

When a one-time change needs to be made to a weekly *Adjustment* that has been set up on the **Employee's** record you can access this from the **Time Entry** form. Expand on the *Detailed Timesheet* and then go to the *Adjustments* tab.

The screenshot displays the TempWorks software interface. On the left, a sidebar identifies the user as Tammy L, 123 Nursing, assembly Forklift. Below this are navigation links for payroll and invoicing, time entry, incomplete transactions, check register, invoice register, and po setup. A tasks section shows a red notification for 'Sales call to Cory'. The main window is titled '2 timecards' and features a filter for 'Employee Name' set to 'dev'. A table lists timecard entries for Tammy L. Below the table, the 'Detailed Timecard' section is active, with the 'Adjustments' tab selected. The adjustments area is currently empty, displaying 'No Records Found'. To the right, a 'payroll info' panel shows details for the current week ending 05/31/2009, including work date, pay code (Reg), skill code (Forklift), and PO number (4).


Name	Customer	Department	Pay C...	Shift	RT Hrs	OT Hrs	Bill	Pay	WE D...
Devereaux, Tam...	123 Nursing	assembly	Reg	1	0.00	0.00	\$12.34	\$10.00	5/31/2009
Devereaux, Tam...	Dans Cleaning Se...	Primary	Reg	Day	0.00	0.00	\$11.11	\$9.00	5/30/2009

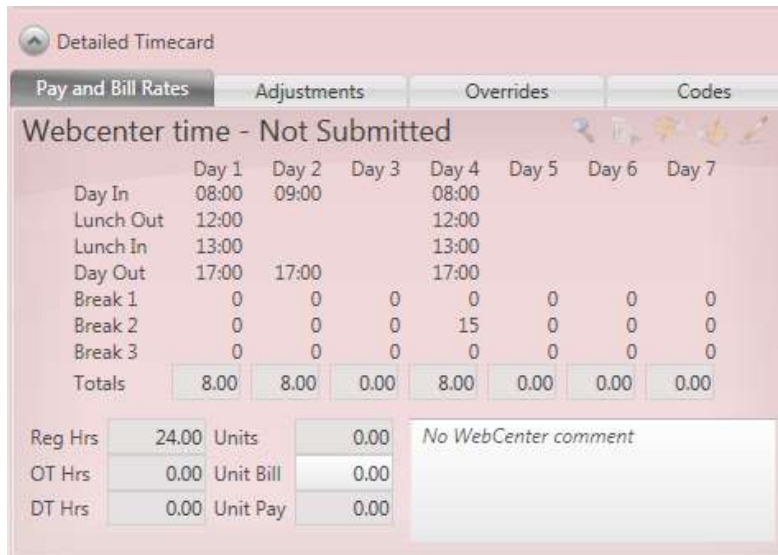
Click on the  button in the upper right corner of this section to open the following form:

The 'employee adjustment override' form is displayed in a dark red window. It contains two input fields: 'Adjustment' with a dropdown menu set to 'ChildSupt1', and 'Adjustment Amount' with a text box containing '\$19.50'. A 'Save' button with a floppy disk icon is located at the bottom right of the form.

Select the *Adjustment* from the drop down menu and then enter the *Adjustment Amount* that should be calculated for this override. Next, click *Save* to update the *Transaction* record.

WebCenter Time Entry functionality

When a timecard is completed online either through the WebCenter online time entry available from the Employee and Customer Portals or via the TempWorks' Time Clock solution, these *Transactions* will display with a  to the left of the record. There are several different *Statuses* for WebCenter time entry as shown below:



Detailed Timecard

Pay and Bill Rates Adjustments Overrides Codes


Webcenter time - Not Submitted


	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Day In	08:00	09:00		08:00			
Lunch Out	12:00			12:00			
Lunch In	13:00			13:00			
Day Out	17:00	17:00		17:00			
Break 1	0	0	0	0	0	0	0
Break 2	0	0	0	15	0	0	0
Break 3	0	0	0	0	0	0	0
Totals	8.00	8.00	0.00	8.00	0.00	0.00	0.00


Reg Hrs 24.00 Units 0.00 No WebCenter comment



OT Hrs 0.00 Unit Bill 0.00

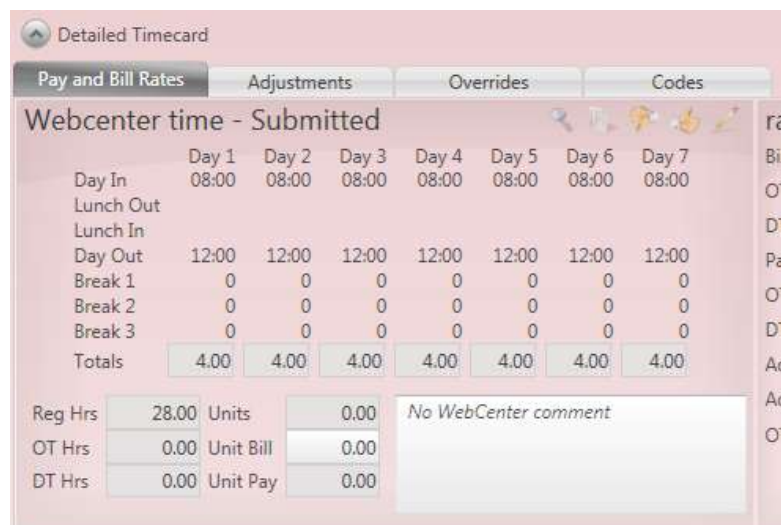
DT Hrs 0.00 Unit Pay 0.00

After an **Employee** creates a timecard in the WebCenter Employee Portal the time entry *Transaction* will be visible in Enterprise. The first *Status* of a timecard that is **Employee**-entered is "Not Submitted". A user can open the *Detailed Timecard* view and click on the  button to view the *Log* of the *Statuses* that the

Transaction has been in. Click on the  button to view the *Consultant Timecard Verification Report* about the *Transaction* or

click on the  button to *Override* the WebCenter time entry that the **Employee** has done so far.

Once an **Employee** finalizes a timecard in the WebCenter Employee Portal and submits it (online) to their *Supervisor* the *Status* of the *Transaction* is "Submitted". A "Submitted" timecard will not pull into a **Proofing** session until it has been "Approved". If a *Supervisor* or other **Customer Contact** is not able to approve the time from the WebCenter Customer Portal, the Enterprise user can click on the  button to *Force Approval*. The database will track the user who clicked the  button and will display this information in the *Log* and the *Consultant Timecard Verification Report*.



Detailed Timecard

Pay and Bill Rates Adjustments Overrides Codes

Webcenter time - Submitted

	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Day In	08:00	08:00	08:00	08:00	08:00	08:00	08:00
Lunch Out							
Lunch In							
Day Out	12:00	12:00	12:00	12:00	12:00	12:00	12:00
Break 1	0	0	0	0	0	0	0
Break 2	0	0	0	0	0	0	0
Break 3	0	0	0	0	0	0	0
Totals	4.00	4.00	4.00	4.00	4.00	4.00	4.00

Reg Hrs 28.00 Units 0.00 No WebCenter comment

OT Hrs 0.00 Unit Bill 0.00


DT Hrs 0.00 Unit Pay 0.00

*Note – Use of the *Force Approval* function is outside of the normal constraints for WebCenter time entry and will generate an error during the **Proofing** process.

Once the *Supervisor* (or *Timecard Alternate*) approves a timecard from the WebCenter Customer Portal or enters the **Employee's** time (online) and submits it, the *Transaction Status* in Enterprise will be updated to "Approved".

Once a WebCenter timecard has a *Status* of "Approved", it can be pulled into a **Proofing** session.

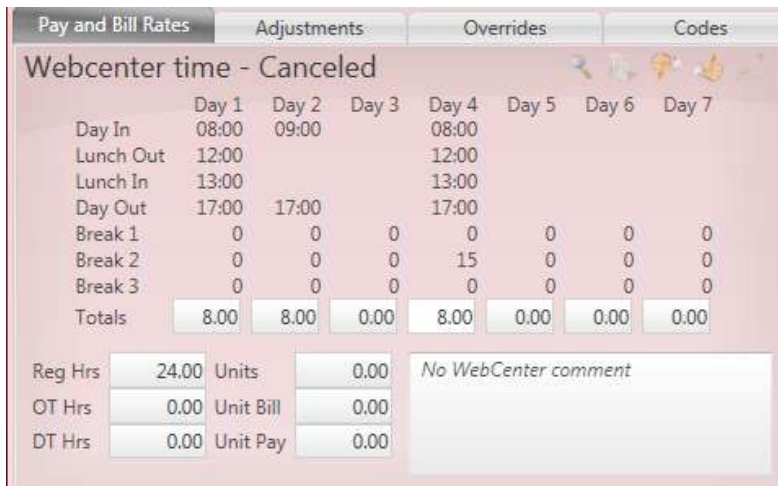
***Note – If the Employee or Supervisor submits or approves the WebCenter timecard in error,**

clicking on the  button will *Reset* the timecard and it will show the *Status* of "Not Submitted". After this has been done the **Employee** (or *Supervisor*, if time is entered in the WebCenter Customer Portal) can resubmit their timecard to their *Supervisor* for approval.





	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Day In	08:00	08:00	08:00	08:00	08:00		
Lunch Out							
Lunch In							
Day Out	16:00	16:00	16:00	16:00	16:00		
Break 1	0	0	0	0	0	0	0
Break 2	0	0	0	0	0	0	0
Break 3	0	0	0	0	0	0	0
Totals	8.00	8.00	8.00	8.00	8.00	0.00	0.00

Reg Hrs: 40.00 Units: 0.00
 OT Hrs: 0.00 Unit Bill: 0.00
 DT Hrs: 0.00 Unit Pay: 0.00




	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Day In	08:00	09:00		08:00			
Lunch Out	12:00			12:00			
Lunch In	13:00			13:00			
Day Out	17:00	17:00		17:00			
Break 1	0	0	0	0	0	0	0
Break 2	0	0	0	15	0	0	0
Break 3	0	0	0	0	0	0	0
Totals	8.00	8.00	0.00	8.00	0.00	0.00	0.00


Reg Hrs: 24.00 Units: 0.00
 OT Hrs: 0.00 Unit Bill: 0.00
 DT Hrs: 0.00 Unit Pay: 0.00

The user can override the WebCenter timecard *Transaction* by clicking on the  button. Once the *Override* button has been clicked, enter in the number of *Reg Hrs*, *OT Hrs*, and *DT Hrs*, or enter the *Totals* by day. Then use the  button to *Force Approval*.

***Note – Use of the Override and Force Approval buttons is outside of the normal constraints for WebCenter time entry. It will create an error during the Proofing process and should ONLY be used as a last resort.**

If the WebCenter timecard that the **Employee** submitted is not correct the *Supervisor* will choose to "Reject" the *Transaction*. The *Status* of the timecard will automatically be updated to "Rejected" in Enterprise. The timecard is sent back to the **Employee** to be revised and then resubmitted to their *Supervisor*.

This entire process can be tracked by clicking on the  button to view the *Log* of the *Statuses* that the *Transaction* has been in.

Or choose the  button to view the *Consultant Timecard Verification Report* for this WebCenter timecard *Transaction*.

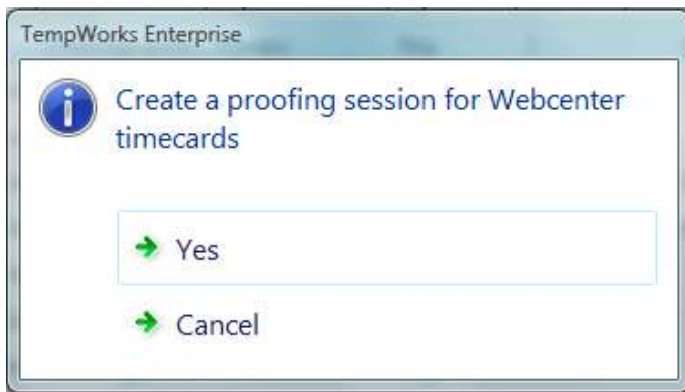
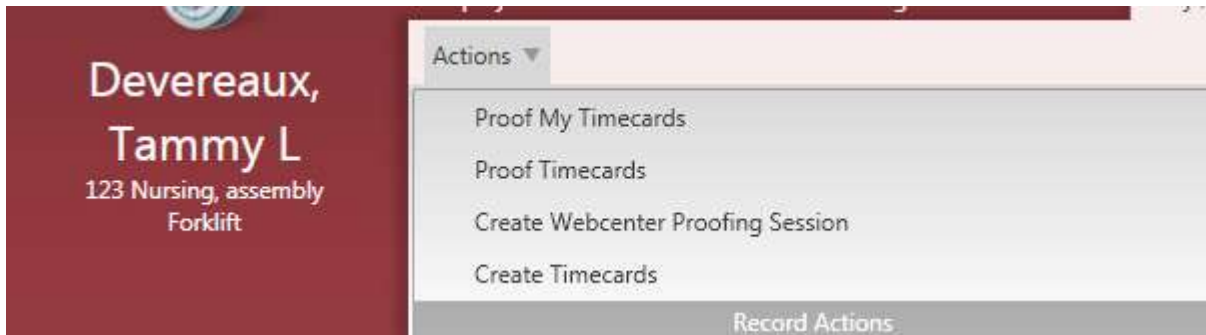


	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
Day In	08:00	08:00	08:00	08:00	08:00		
Lunch Out		12:00	12:00	12:00	12:00		
Lunch In		13:00	13:00	13:00	13:00		
Day Out	17:00	17:00	17:00	17:00	17:00		
Break 1	0	0	0	0	0	0	0
Break 2	0	0	0	0	0	0	0
Break 3	0	0	0	0	0	0	0
Totals	9.00	8.00	8.00	8.00	8.00	0.00	0.00

Reg Hrs: 40.00 Units: 0.00
 OT Hrs: 1.00 Unit Bill: 0.00
 DT Hrs: 0.00 Unit Pay: 0.00

***Note – If the WebCenter timecard is Reset, the Enterprise user will need to notify the Employee or Supervisor as there aren't any automatic WebCenter email notifications associated with this process.**

Once WebCenter timecards have been approved (or submitted if *Supervisor*-entered) these *Transactions* are assigned to a user and pulled into a session from the **Time Entry Actions** drop down menu. Select *Create WebCenter Proofing Session* to continue processing WebCenter *Transactions*.



Click *Yes* to pull "Approved" WebCenter timecards into a **Proofing** session. Click *Cancel* to exit this process.

Note - The WebCenter timecard **Proofing session will only pull in *Transactions* with a *Status* of "Approved" where the current *WE Bill* (Weekend Bill) date is greater than or equal to the *WE Date* (Weekending Worked). For example, if the current *WE Bill* date is 06/07/2009 and there is an approved WebCenter timecard for *WE Date* 06/14/2009, this *Transaction* will not be pulled into a **Proofing** session until the following week.*

The number of timecards that have been pulled into the **Proofing** session will be listed at the bottom of the screen. Next navigate to **Payroll and Invoicing** and select the **Proofing** box. Then click on *Proof Transactions*. The WebCenter timecard *Transactions* will be listed as belonging to the user that created the **Proofing** session. Continue to process through **Proofing** as explained in the [12R6 Enterprise Back Office Training Manual](#).

**Note – The WebCenter Employee and Customer Portals are ancillary products, please contact a TempWorks' representative for more information about WebCenter timekeeping.*


Steps for Fixing Invoices

1) Select the Invoice.

In the *Invoice Register* form click on the **Invoice** that needs to be fixed and then choose *Edit Invoice* from the *Actions* drop down menu.

The screenshot shows the 'Payroll / Invoicing' interface. On the left, there's a sidebar with 'Current Weekend Bill 4/12/2009' and statistics: 93 Unused Timesheets and 8 Timesheets Not Paid. The main area has a top navigation bar with icons for Employee, Customer, Order, Assignment, Contact, Pay / Bill, Calendar, Reports, and Email. Below this is an 'Actions' dropdown menu with options: New Message, Print, **Edit Invoice** (circled in red), and Print Preview. The main content area shows 'Record Actions' and 'Form Actions' with a summary: \$600.00 and \$0.00. Below that is a table of 'Invoice Items' with columns: item, quantity, rate, weekend date, total. One item is listed: Greine, Jessica Bank Teller, Reg Hours, 40.00, \$15.00, 2/8/2009, \$600.00. There are also sections for 'Adjustment Items' and 'Tax Items', both showing \$0.00. A 'Total' row at the bottom shows \$600.00.

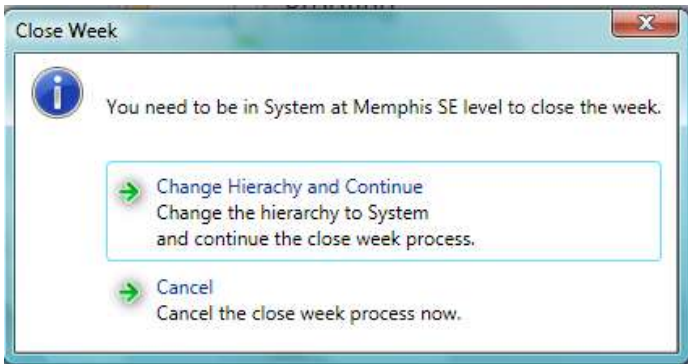
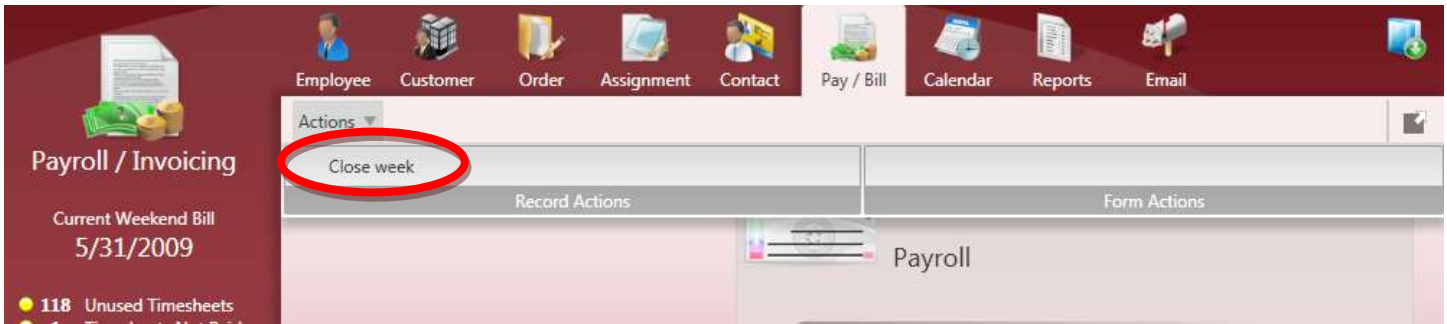
2) Fix Job Title or select Edit button.

If the *Job Title* is incorrect, it can be updated by highlighting the current information and then typing the correction. If the rates or hours need to be updated, click on the  button (as circled).

The screenshot shows the 'Payroll / Invoicing' interface for a different invoice. The sidebar shows 'Current Weekend Bill 4/12/2009' and statistics: 93 Unused Timesheets and 8 Timesheets Not Paid. The main area has the same top navigation bar. Below it is an 'Actions' dropdown menu. The main content area shows 'Record Actions' and 'Form Actions' with a summary: Owed Balance \$600.00 and Amount Paid \$0.00. Below that is a table of 'Invoice Items' with columns: item, quantity, rate, weekend date, total. One item is listed: Greine, Jessica Bank Teller, Reg Hours, 40.00, \$15.00, 2/8/2009, \$600.00. The 'Edit' icon (a pencil) next to the item name is circled in red. There are also sections for 'Adjustment Items' and 'Tax Items', both showing \$0.00. A 'Total' row at the bottom shows \$600.00.

Close Week Procedure Dialogue

The first step to take in order to close the week is to open the *E* menu, select *Switch Branch* and change your user hierarchy level to "System". Then open the **Pay/Bill** tab and click on the *Actions* drop down menu and select *Close Week*.



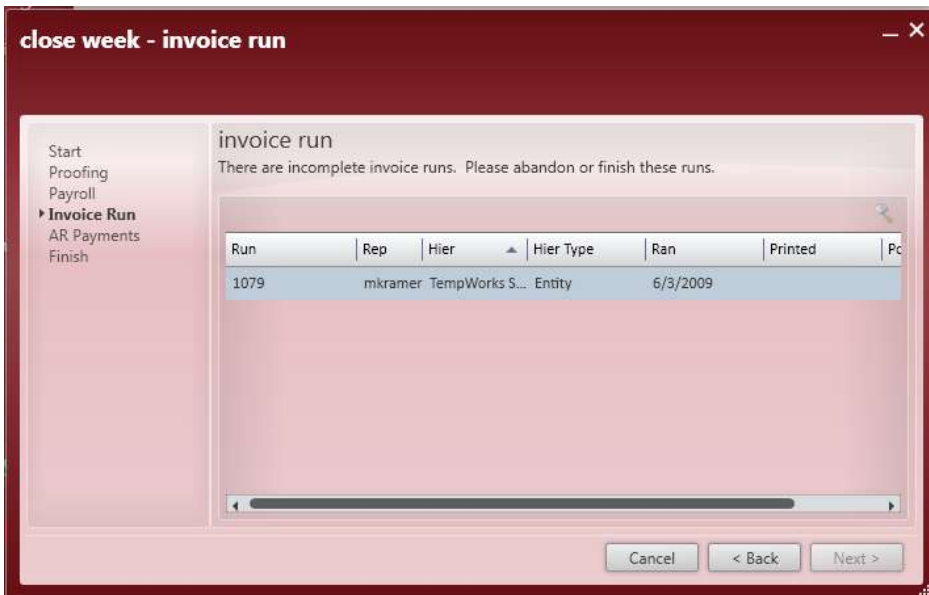
If you don't change your hierarchy level prior to selecting *Close Week* the prompt to the left will be displayed. Select *Change Hierarchy and Continue* to update your hierarchy level to "System" and continue with the close week process.

Click *Cancel* to end the close week process at this point.

The close week wizard will now list out any time entry **Proofing** sessions, **Payroll** runs, **Invoice** runs, or **AR** posting batches that remain incomplete.



***Note - If any of these remain open you will not be able to close the week. Any open **Proofing** sessions, **Payroll** runs, **Invoice** runs or **AR** posting batches must be finalized before the week can be closed successfully.**

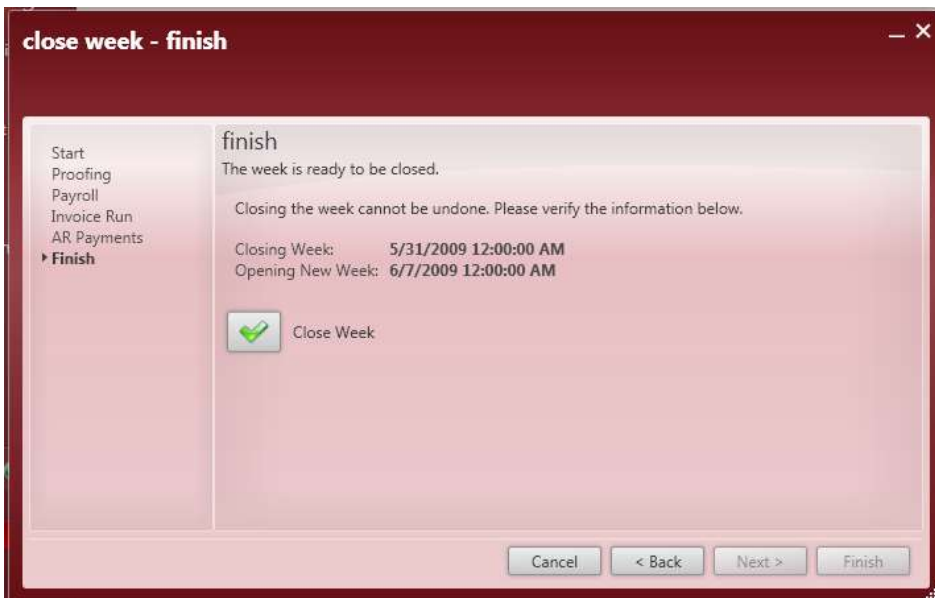


By clicking on the line of any sessions, runs or batches that remain open it will display a form similar to the one pictured on the left.

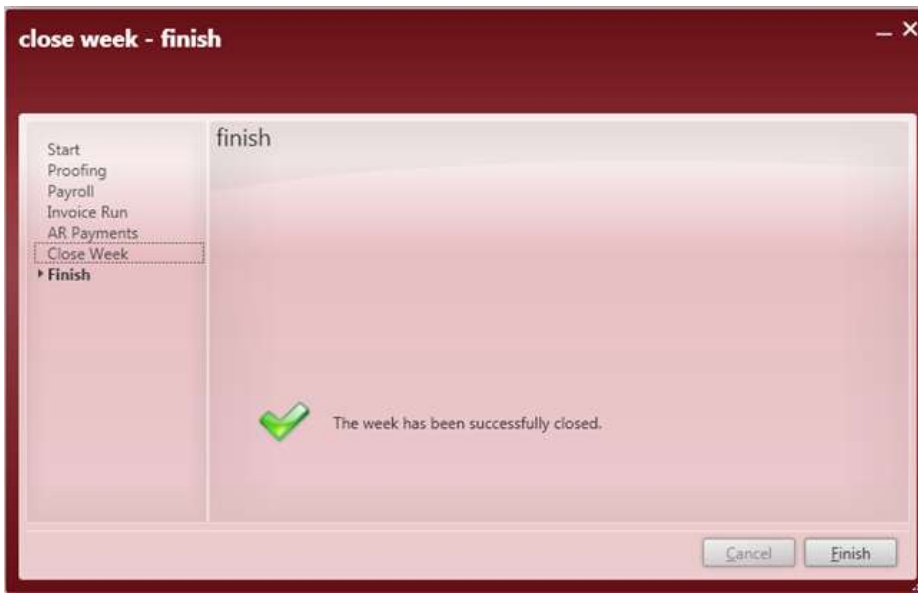
Take note of the unique ID number and open that section of **Pay/Bill** to complete the associated process.

**Note – You will have to change your hierarchy out of “System” level to be able to complete these functions.*

Once all of the **Proofing** sessions, **Payroll** runs, **Invoice** runs, and **AR** batches have “0” items listed click *Next*.



Click on the  button to close the week.



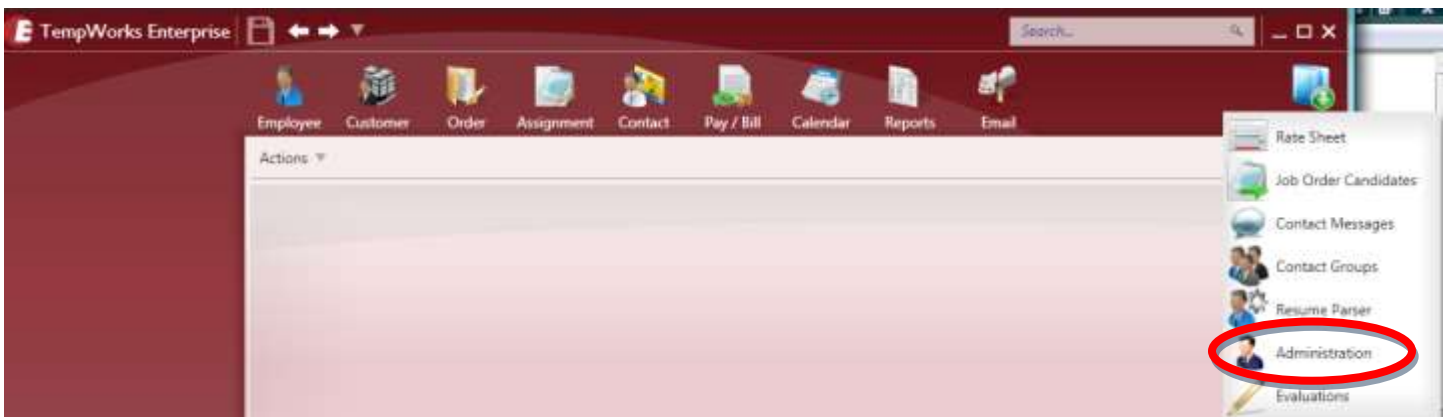
Once the close week procedure has completed successfully the wizard will display the screen to the left. Click on *Finish* to close out the wizard.

Timecards can now be pulled in for the next week.

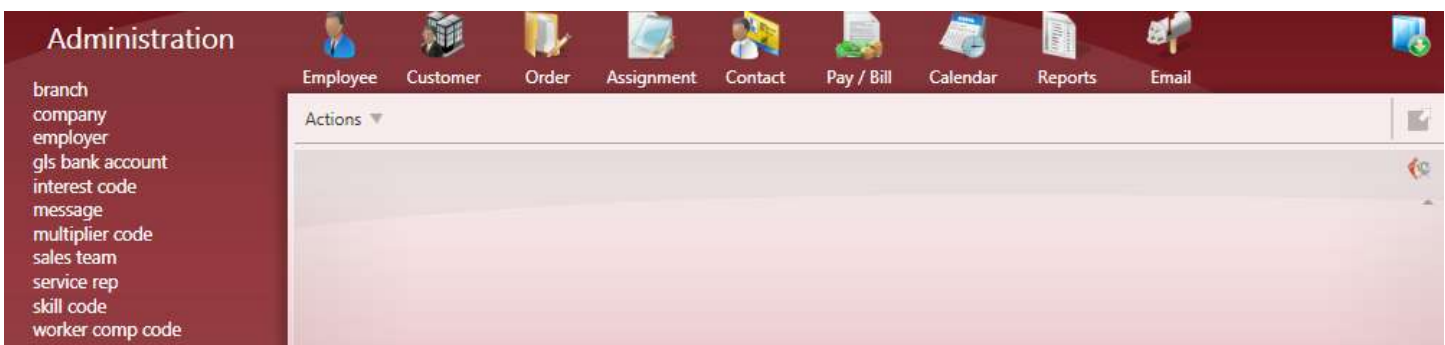
Accessibility to basic Administrative Functionality

In the upper right section of the Enterprise **Main Screen** the  button contains additional functionality that can be used. The **Administration** form can be accessed by selecting it from the drop down menu.

**Note – Only users with appropriate permissions will be able to access this feature.*




On the left side of the screen an **Administration** menu will be displayed.



Select the database table that needs to be updated.

*Note – The **Message** table is where the *Message Action Codes* are stored. **Skill Code** table stores *Job Titles* that are available in the **Employee** and **Order** records. The **Company** table is where staffing company vendor and **Accounts Payable** vendor records are stored.

Once a selection is made the matching **Administration** form will be displayed. To add a new record, click on the  button in the upper right. Fill out the information on the form and then *Save* the record. This will add the information to the database.

