

# Enterprise - How to Add a New Employee Record

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## Quick Steps:

### For Manual Entry

1. Hover mouse over 'employee' on the navigation tree and click the plus icon.
2. Fill out information (first and last name are required fields).
3. Click 'Save.'

## What is an Employee Record?

Employee records in Enterprise™ allow you to keep track of the relationship history your team has with an employee as well as keep track of documents and information that will be helpful for placing them on a job. Employee records include applicants, current employees, and past employees.

The screenshot displays the Enterprise HR system interface for an employee record. The top navigation bar includes a search bar, user information (AMELIA STOUT: High Tech Staffing), and notification icons. The main content area is divided into several sections:

- employee snapshot:** A form containing fields for Name (West, James), Email Address (jameswest@vip.xom), Desired Location, Hire Status (Eligible for Hire), Rate Desired, and Notes.
- messages:** A table listing communication history.
- assignments:** A table showing job assignments.
- interest codes:** A list of codes such as 12 Hr Shift, 1st Shift, 2nd Shift, Bartending, Forklift Operator, and TECH-Project Manager.

| Date      | Action              | Message  | Rep              | Contact | Due |
|-----------|---------------------|--|------------------|---------|-----|
| 7/18/2019 | Message             | allergic to materials  | tamara.czajewski |         |     |
| 4/2/2019  | Interview in office | Scheduled 9 am interview Thursday, 4/4 - possible warehouse c... | hostew11         |         |     |
| 4/2/2019  | 1st Recruiting Call | called james west about a job in eagan                           | alla.borkowski   |         |     |
| 3/28/2019 | LMTc                | Called James about a job   | alla.borkowski   |         |     |
| 12/6/2018 | LMA/M               | Looking to have James come in to sign a new copy of employee...  | amelia.stout     |         |     |
| 12/5/2018 | Ended               | Customer- Buy N Large  | amelia.stout     |         |     |
| 11/9/2018 | Available           | Ready to work - willing to work weekends or short term jobs.     | amelia.stout     |         |     |
| 8/8/2018  | Approved            | Customer- Lightning's Computer                                   | hostew11         |         |     |
| 6/15/2018 | Check in            | Called for a follow up after interview. Need availability        | amelia.stout     |         |     |
| 6/12/2018 | Interview           | Interview with James scheduled today at 12 in conference room    | amelia.stout     |         |     |

| Title                             | Customer            | Code | Start      | End        | Bill    | Pay     | Dept    | Assignment ID |
|-----------------------------------|---------------------|------|------------|------------|---------|---------|---------|---------------|
| Distribution Speed... Buy N Large | CO                  |      | 11/8/2018  | 5/14/2019  | \$28.80 | \$18.00 | Primary | 4301403926    |
| Warehouse Worker- Buy N Large     | CO                  |      | 11/14/2018 | 11/14/2018 | \$24.00 | \$15.00 | Primary | 4301404008    |
| Data Entry                        | Lightning's Comp... | CO   | 6/18/2018  | 8/10/2018  | \$25.00 | \$20.00 | Primary | 4301402710    |

There are 4 different ways you can add an employee record into Enterprise:

1. **Resume Parser** - creates an employee record based on their resume
2. **Manual Entry** - creates an employee record and allows the recruiter to enter all the information in manually
3. **HRCenter™** - utilizes our application and on-boarding software to have the applicant fill out required information that will create their employee record
4. **Outlook Add-In**- allows the recruiter to create an employee record and parse in a resume without ever leaving their email

**\*Note\*** On the go? Looking for other quick ways to add and look up employees? Check out our web-based platform, **Beyond™**. Remember than any records added in Beyond will be accessible in Enterprise(and visa-versa).

## Utilizing the Resume Parser

This option allows you to upload a resume from a new employee and have the system create an employee record based on the information provided. This works great for recruiters who receive a lot of resumes.



**Before Parsing a Resume:**

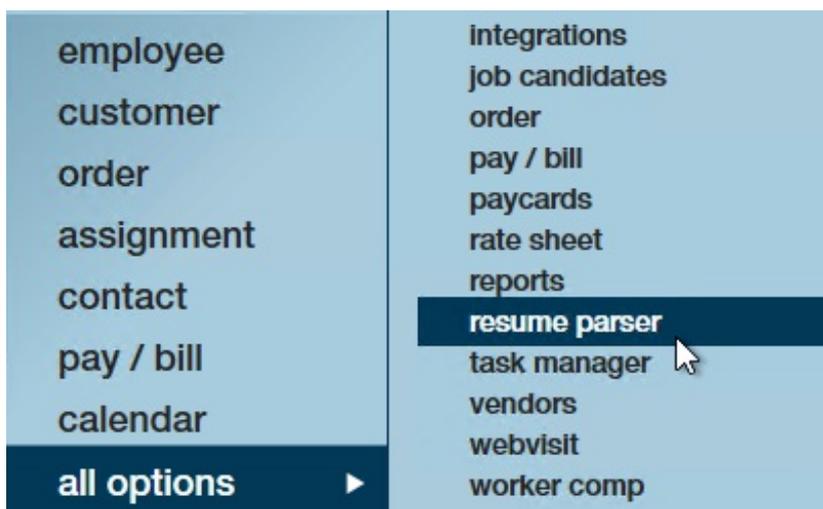
Before you can parse your resume(s), you must save them to your computer to be uploaded into Enterprise. Enterprise allows you to upload 1 or an entire folder of resumes at once.

Remember that all resume parsing information will need to be reviewed before the records are created and the more documents you upload at once, the longer it will most likely take for the upload to complete.

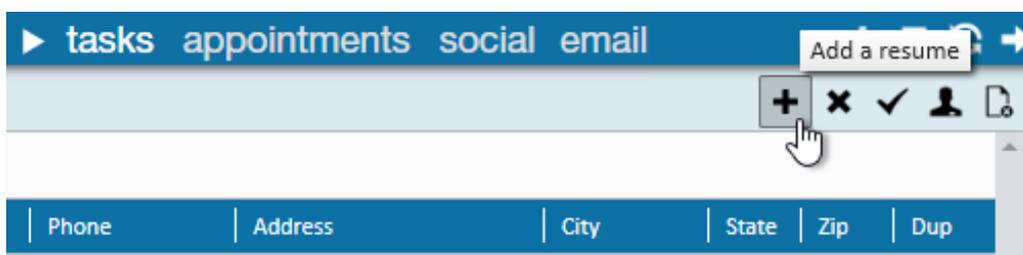
## To Parse a Resume in Enterprise:

**\*Note\*** Looking for a video walk-through? check out [\\*The Resume Parser](#).

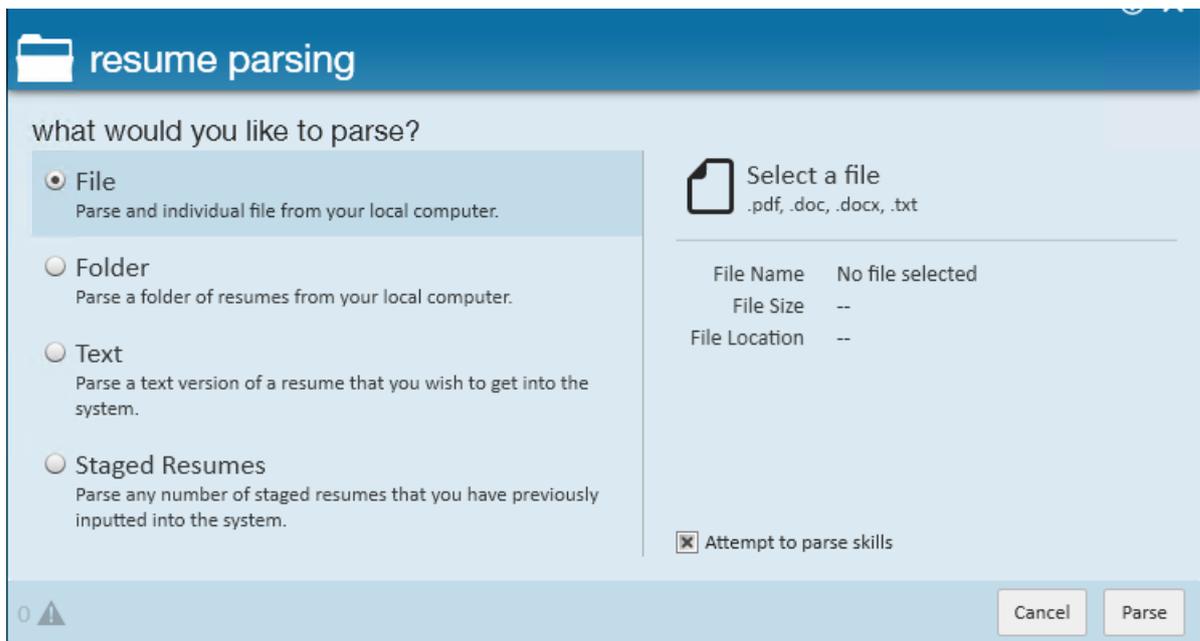
1. Navigate to all options > 'resume parser' in Enterprise



2. Click the plus icon in the upper right

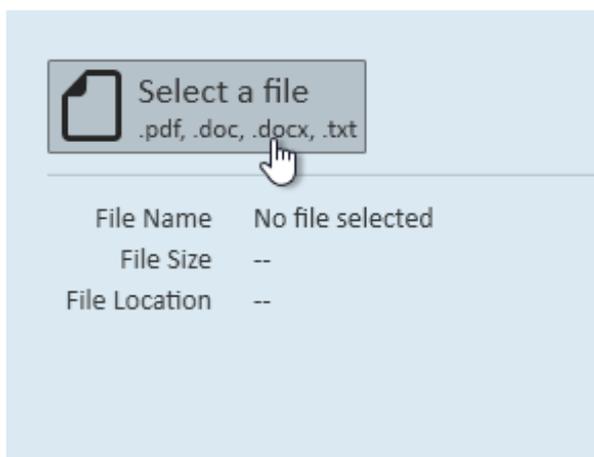


3. Select file, folder, text, or staged resume options



- Note that all resume files need to be a texted-based document (.pdf, .doc, .docx, .txt are all accepted formats)

4. Click on 'Select a File' & select the folder or file you want to upload



- If you are having trouble finding the file you are looking for, you may need to map your drives. [Click here](#) to learn more

5. Click 'Parse'



6. Review data parsed and make any necessary corrections

**C.J. Cron**  
 Apple Valley - MN • (123) 456-7891  
 C.J.Cron@Twins.zom  
**SUMMARY**

Diligent Assistant Manager with 3+ years of experience dedicated to inspiring employees, creating happy customers, and maintaining operational efficiencies. Enjoys discovering methods designed to improve workflow and generate additional revenue.

**EDUCATION**

GREEN VALLEY STATE

|                |                 |                |         |           |                          |  |
|----------------|-----------------|----------------|---------|-----------|--------------------------|--|
| <b>General</b> | First Name      | CJ             | Initial |           | Address                  |  |
| Jobs           | Last Name       | Cron           |         | Address 2 |                          |  |
| Education      | Phone Number    | (123) 456-7891 |         | City      |                          |  |
| Skills         | Secondary Phone |                |         | State     | MN                       |  |
|                | Cell Number     |                |         | Zip       | - - - - -                |  |
|                | Email           |                |         | Country   | United States of America |  |

- Use the tabs at the bottom to cycle through general, jobs, education, and skill information

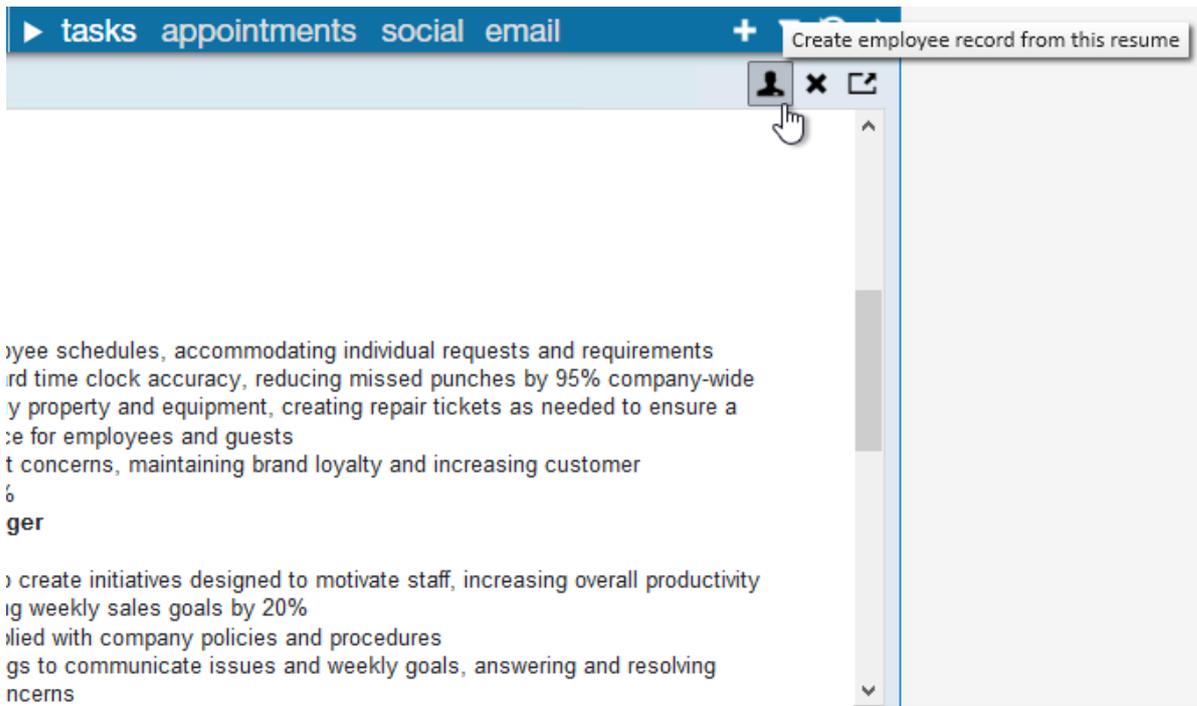


- Tabs such as jobs or education may have more than one entry that you can cycle through at the top

|             |   |            |          |             |   |  |
|-------------|---|------------|----------|-------------|---|--|
| General     | + |            |          |             |   |  |
| <b>Jobs</b> | x | Employer   | TRADELOT | Position    | Assistant Manager   |  |
| Education   |   | Supervisor |          | Duties      | Routinely inspect company property and equipment, creating repair tickets as needed to ensure a comfortable and safe space for employees and guests |  |
| Skills      |   | Address    |          |             | Address and resolve guest concerns, maintaining brand loyalty and increasing customer satisfaction ratings to 90%                                   |  |
|             |   | Phone      |          | Reason Left |   |  |
|             |   | Start Date |          | Comments    |   |  |
|             |   | End Date   |          |             |   |  |

- Highlight to copy or drag information that the computer did not find into the correct fields at the bottom
- Click on any field to add or remove any information parsed

7. Click on the 'Create an Employee Record' icon in the upper right when you are done reviewing the information



## Duplicate Checking

Since employees or applicants typically don't enter their SSN on their resume, the system instead checks for duplicate employee records based on email, address, and name information provided.



The system will warn you if it thinks the employee record you are about to create is a duplicate. You can also see this information from the main resume parser screen by looking at the 'Dup' column. Right click on any record with a checked box to see which related employee record the system thinks might be the same as the resume being parsed in.

| P... | Last Name | First Name | Email              | Phone          | Address            | City     | State | Zip   | Dup                                 |
|------|-----------|------------|--------------------|----------------|--------------------|----------|-------|-------|-------------------------------------|
| ✓    | Cron      | C.J        |                    | (123) 456-7891 |                    |          | MN    |       | <input type="checkbox"/>            |
| ✓    | Cron      | C.J        |                    | (123) 456-7891 |                    |          | MN    |       | <input type="checkbox"/>            |
| ✓    | Rogers    | Jason      | jrogers@email1.com |                | 356 W. Pioneer Ave | St. Paul | MN    | 55109 | <input checked="" type="checkbox"/> |
| ✓    | Smith     | Nicole     |                    |                |                    |          | MN    |       | <input type="checkbox"/>            |
| ✓    | Smith     | Nicole     |                    |                |                    |          | MN    |       | <input type="checkbox"/>            |

- ➔ Create Employee Record
- ✓ Proof Resume
- 👍 Mark as Proofed
- 👎 Mark as Unproofed
- 📎 Attach Duplicate to Employee
- ✕ Delete Resume
- 👤 View Duplicate Employee

Address Match: Rogers, Jason (4295016091)

Address Match: Rogers, Jason (4295016438)

If you've accidentally created a duplicate record that the system didn't find, check out [How to Merge Employee Records](#).

## Creating Employee Records En Masse

If you have multiple resumes in the resume parser, employee records can be created en masse:

1. From the resume parser/unproofed resumes dashboard, utilize the *Ctrl* or *Shift* key to highlight multiple resumes, then select the employee avatar icon in the upper right hand corner:

unproofed resumes

Drag a column header here to group by that column.

| P... | Last Name | First Name | Email                   | Phone          | Address                      | City            | State | Zip   | Dup                                 |
|------|-----------|------------|-------------------------|----------------|------------------------------|-----------------|-------|-------|-------------------------------------|
|      | DEMPSEY   | TIMOTHY    | timothyjamesdemp...     |                | 5144 Cedar Ave. South        | Minneapolis     | MN    | 55417 | <input checked="" type="checkbox"/> |
|      | Zubairi   | Sana       | sana.jawaid@gmail...    |                | 18103 Kindred Ct             | Lakeville       | MN    | 55044 | <input type="checkbox"/>            |
| ✓    | SAUSER    | RICHARD    | rich.sausser@gmail.c... | (847) 609-2256 | 2212 Briar Hill Drive        | Schaumburg      | IL    | 60194 | <input checked="" type="checkbox"/> |
|      | NEWELL    | SIBYL      | newellr_s@verizon...    | (301) 899-2077 | 6804 Middlefield Terrace     | Fort Washing... | MD    | 20744 | <input type="checkbox"/>            |
|      | Sewalt    | Jennifer   | mltpcom@yahoo.c...      | (610) 857-3848 | 86 E Highland Rd             | Parkesburg      | PA    | 19365 | <input checked="" type="checkbox"/> |
|      | Sewalt    | Jennifer   | mltpcom@yahoo.c...      | (610) 857-3848 | 86 E Highland Rd             | Parkesburg      | PA    | 19365 | <input checked="" type="checkbox"/> |
| ✓    | Marshall  | Mathew     | Mat@aol.com             | (215) 878-7877 | 2217 N. 51st Street Apt. A-7 | Philadelphia    | PA    | 19131 | <input checked="" type="checkbox"/> |
| ✓    | Jones     | Kelly      | kellyjones@gmail.com    |                | 123 Main Street, Apt. 101    | New York        | NY    | 10001 | <input checked="" type="checkbox"/> |
| ✓    | Smith     | John       | JSmith@gmail.com        | (832) 763-9987 | 1188 Kirby Drive             | Houston         | TX    |       | <input type="checkbox"/>            |
| ✓    | Podrazik  | Mary       | joseph.podrazik@ve...   | (610) 666-7535 | 23 Lawrence Road             | Audubon         | PA    | 19403 | <input checked="" type="checkbox"/> |
|      | Tatum     | Iman       | imantatum@hotmail...    | (770) 593-3616 | 3224 Hunters Crossings Point | Lithonia        | GA    | 30038 | <input checked="" type="checkbox"/> |

2. This will open a popup where defaults can be set for all employee records being created:

post resumes - set defaults

Set Defaults  
Post Resumes  
Finish

set defaults

Parsed By: taylor.mccormick

Order Type: Temp

Hire Status: Eligible for Hire

How Heard Of:

How Heard Of Details:

Profession: Industrial

Branch: Memphis SE

Employee Active:

Washed Status: Unfamiliar

Message Action: Message

Log Message: Candidates for the Industrial industry to call

Cancel Next >

3. Click *Next* and *Finish* to create an employee record for each record that was highlighted.

## Manually Adding an Employee Record

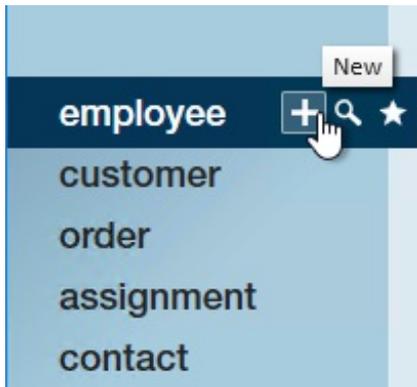
When you don't have a resume handy or have time to have your applicant fill out an online application, you can always manually enter an employee (or potential employee) into the system. This option may take the most time but gives the recruiter the freedom to add any and all important information.

Employee's who are manually added into the system can still fill out an online application or on-boarding documents sent to them via [Assigning HRCenter Workflows/pages from Enterprise](#).

**\*Note\*** It is recommended that you run a basic employee search before creating a new record as a way to prevent duplicate employees from being added. If you are looking for a video walk-through, check out [Employee Part 1: The Basics](#).

## To Add an Employee Record Manually:

1. Hover mouse over 'employee' on the navigation tree and click the plus icon.



2. Fill out information: (the ! icons indicate required fields, meaning you must enter data into those fields)

A screenshot of a web form titled 'add new employee'. The form is divided into several sections: 'personal information', 'address information', 'tax setup/other', and 'avatar'.  
- 'personal information' section includes fields for SSN, First Name, Last Name, Initial, Phone, Cell, and Email. Red exclamation mark icons (!) are placed to the left of the First Name and Last Name fields, indicating they are required.  
- 'address information' section includes fields for Street, Street 2, City, State (dropdown menu with 'MN' selected), Zip Code, School District, and Country (dropdown menu with 'United States of America' selected).  
- 'tax setup/other' section includes dropdown menus for Branch (selected 'New Brighton'), Federal Ex, State Ex, Marital Status (selected 'Single'), and Spec Tax.  
- 'avatar' section has a text prompt 'Upload a custom avatar by dragging it into this box.' and a grid of various 3D-style avatars for selection.

- o SSN
  - SSN is not required on an employee record because, if you have contractor or direct hire candidates, you will not be paying the individual.

- If an invalid or duplicate SSN is entered, you will receive a ! in front of the SSN field. If you hover your mouse over the !, a pop up will indicate what is "wrong" with the number you have entered:
- **First & Last Name**
  - It is recommended that the first name and last name be entered using proper capitalization because these will show on the employee's paychecks, w2s, and correspondence where their name has been merged into an email.
- **Phone Number**
  - For the phone field, it is recommended that you enter the primary phone number this employee uses. Many people no longer have home phones therefore this may be their cell phone number. Using the "main" phone number in this field will ensure you will see that phone number in ALL searches where this employee is returned in the results.
- **Address:**
  - Instead on keying in the employee's resident city and state, tab through those fields and go right to the Zip Code. By keying in the employee's zip codes, their city will be on the drop-down list. Select their city from the drop-down list and it will auto-populate the corresponding city and state fields.
- **Tax Setup:**
  - If you do not have the federal & state exemptions or marital status for this employee at the time you are initially entering their information, the exemptions will default to zero and the marital status will default to single (this will put the employee into the highest tax bracket). When you do receive their w-4 information, this data can be updated on the employee's pay setup form.

3. Click 'Save.'

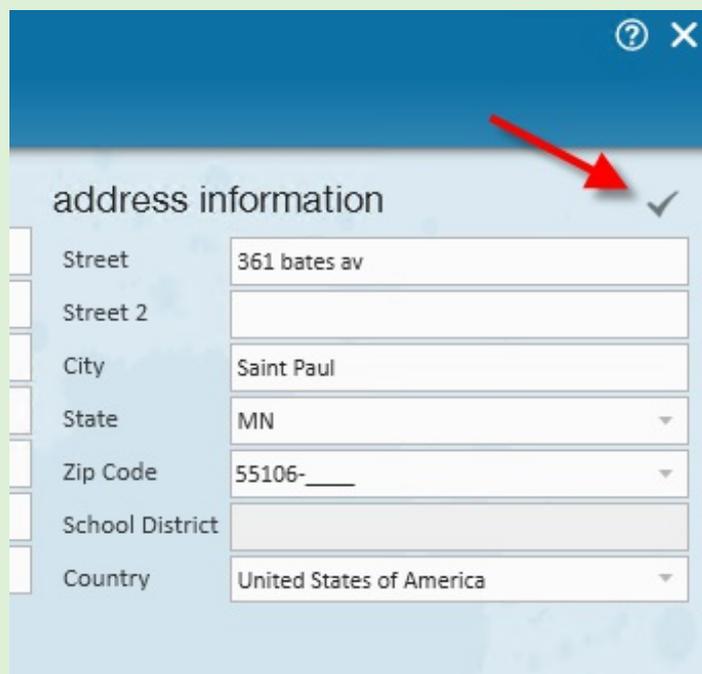
**\*Note\*** TempWorks will not allow:

- Duplicate SSN's
- SSN's with 00 as the 4th and 5th digits
- SSN's which start with 9

Some systems may require different fields or have different fields available. Always check with your staffing company's processes to ensure you enter all the information that your company requires.

### Configuration Alert: Address Standardization

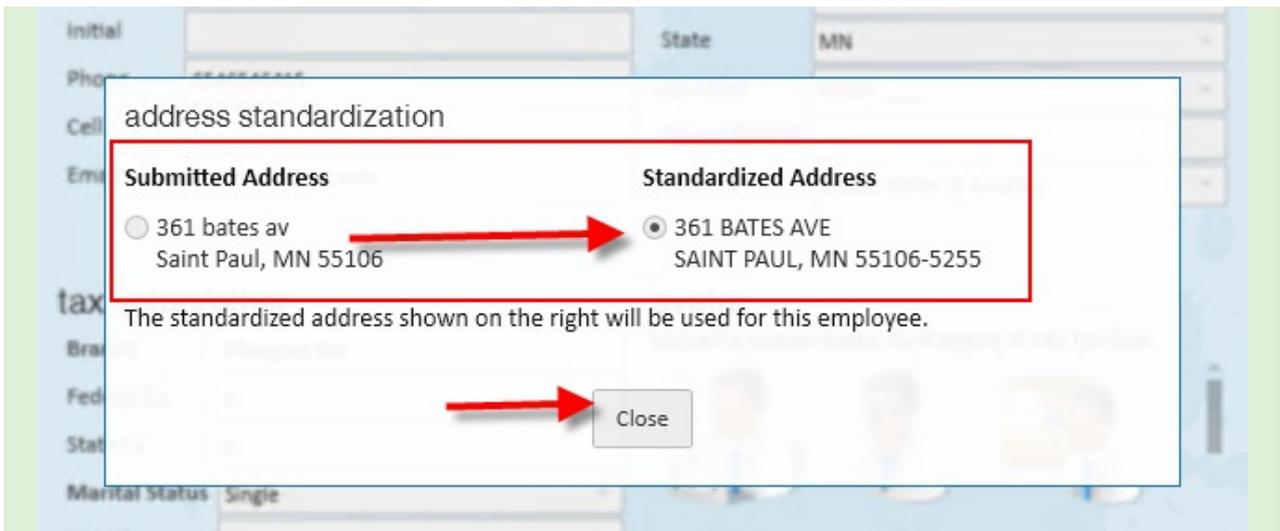
- Address standardization is an option that can be set up in Enterprise. This is used to ensure an address that is entered or changed on an employee matches the US Postal Service (USPS) records.
- With this configuration set to 'required,' users will have to select a check mark icon above the address *before saving the record*:



The screenshot shows a form titled "address information" with several input fields. A red arrow points to a checkmark icon located above the "Street" field. The form fields are as follows:

| Field           | Value                    |
|-----------------|--------------------------|
| Street          | 361 bates av             |
| Street 2        |                          |
| City            | Saint Paul               |
| State           | MN                       |
| Zip Code        | 55106-____               |
| School District |                          |
| Country         | United States of America |

- From here the user will be able to differentiate the submitted address from the standardized address by the USPS. If the configuration is set to 'enabled,' the user may keep the entered the submitted address before continuing:



For more information, check out [Enterprise - Address Standardization](#)

## Related Articles