

# Setting Up PeopleNet Integration

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## Setting up the PeopleNet Integration

PeopleNet is a timeclock provider that creates timecards. Our PeopleNet integration allows you to export your assignment information from TempWorks to PeopleNet where you are able create employees timecards and then import those timecards back into TempWorks for payroll and invoice processing.

In order to be able to access PeopleNet, a service representative must have the PeopleNet security role. Depending on your role and permissions, this can be set up in [Bridge](#), within the administration area of Enterprise or, with the approval and backing of your Bridge Administrator, you may contact our support team and one of our analysts will be happy to assist you in granting a service rep the PeopleNet security role.

**\*Note\*** This integration does require additional setup and an existing relationship with PeopleNet. For more information about getting this setup, and pricing inquiries, please contact your TempWorks Account Manager.

## External Services

PeopleNet must be setup in the administration area of TempWorks Enterprise. Enterprise passes information to and from PeopleNet.

Navigate to all options> administration> external services> PeopleNet.

Once there, select the plus icon to open the PeopleNet area. A window will open for the required information. Notice, all fields are required:

external service

Service Type: PeopleNet

Account Level: [Red exclamation mark icon] [Dropdown menu]

Ownership: [Red exclamation mark icon] [Dropdown menu]

Username: [Red exclamation mark icon] [Text input field]

Password: [Red exclamation mark icon] [Text input field]

Upload Folder Path: [Red exclamation mark icon] [Text input field]

Upload File Name: [Red exclamation mark icon] [Text input field]

Import Folder Path: [Red exclamation mark icon] [Text input field]

Cancel Save

**Account Level:** This is used by Enterprise to determine where in the hierarchy this account is available. Options are: system, company (aka entity), branch, and service rep.

**Ownership:** This is selected based on the account level. It specifies which company, branch or service rep has access to the account.

**Username:** The username issued by PeopleNet.

**Password:** The password issued by PeopleNet.

**Upload Folder Path:** The location setup with PeopleNet for the upload file. This file will contain new and updated employee and assignment information.

**Upload File Name:** The name of the file containing new and updated employee and assignment information.

**Import Folder Path:** This is the path of the folder that will contain all of the time files for TempWorks to import. In some situations, time files may be placed in separate folders. The following is an example.

There are separate folders for each customer with a timeclock:

| ftp://ftp.peoplenet.com/clienttime |                      |             |
|------------------------------------|----------------------|-------------|
| Name                               | Date modified        | Type        |
| ABC Staffing                       | 11/21/2013 11:54 ... | File folder |
| ACME                               | 11/21/2013 11:54 ... | File folder |
| Crom Industrial                    | 11/21/2013 11:54 ... | File folder |

Once all three items have been completed, users will have the ability to import and export time by navigating to pay/bill and expanding the actions menu:

**TempWorks Enterprise** | Home | Save | Navigation icons

## Payroll / Invoicing

Current Weekend Bill: 7/28/2013

- 91 Unused Timesheets
- 13 Timesheets Not Paid

Close week

- Export
- Import
- Reprint Payroll Run
- Available Paycards
- Assign Paycard Numbers
- Export Assignment info to PeopleNet**
- Import PeopleNet Time File**

Record Actions | Form Actions

## PeopleNet Customer Setup

Before exporting assignment information into PeopleNet and/or importing PeopleNet time file(s), you have to connect the appropriate customers and orders to PeopleNet. If, for example, you want to set up your customer with PeopleNet, you would navigate to the customer > defaults > PeopleNet.

Once there, select to enable PeopleNet:

**American Choppers (Primary)**  
 123 Main St ID: 778468  
 Eagan, MN 55121  
 (651) 825-7825 x123

visifile  
 details  
 defaults  
**people net**  
 rate sheet  
 documents

**basic peoplenet settings**

☒ Enable PeopleNet  
☐ Mark new orders as PeopleNet orders by default  
☐ Apply all settings to departments  
☐ Enable advanced assignment export settings

You will then have the option to mark new orders as PeopleNet orders by default and/or to apply all settings to departments:

**American Choppers (Department Name)**  
 123 Main St ID: 4294969394  
 Eagan, MN 55121 Parent ID : 778468

visifile  
 details  
 defaults  
**people net**  
 rate sheet  
 documents

**basic peoplenet settings**

☒ Enable PeopleNet  
☒ Mark new orders as PeopleNet orders by default  
☒ Apply all settings to departments  
☒ Enable advanced assignment export settings

**\*Note\*** Any orders that were created prior to enabling PeopleNet on the customer record will not be automatically marked as PeopleNet orders, even if mark new orders as PeopleNet orders by default was selected. This is not retroactive.

## PeopleNet Order Setup

Once the customer has been enabled with PeopleNet, the next step is to verify that orders for the customer are enabled, as well. After creating a new order, navigate to the details page. There will be a PeopleNet box in the other information section.

other information

|                   |                          |               |   |
|-------------------|--------------------------|---------------|---|
| Status            | Filled                   | Taken By      | tweval5                                       |
| Sales Team        | Regional                 | Branch        | Memphis SE                                    |
| Do Not Auto-Close | <input type="checkbox"/> | TW Time Clock | <input type="checkbox"/>                      |
|                   |                          |               | PeopleNet <input checked="" type="checkbox"/> |
| Notes             |                          |               |   |

The PeopleNet box will automatically be selected if the customer record has been set to mark new orders as PeopleNet orders by default.

**\*Note\*** If the customer record is not set to mark new orders as PeopleNet orders by default, this option can be selected on the order, activating the integration for every assignment within this order.

Once the order has been setup to integrate with PeopleNet, any new assignments created will be integrated with PeopleNet.

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