

Enterprise - How to Assign an Employee to an Order

Last Modified on 01/23/2020 12:19 pm CST

Creating Assignments

Creating assignments for TempWorks orders provides many benefits. To list a few, the assignment creation enables timecards to be created, allows for tracking of staffing agencies' order fill rates and other related Key Performance Indicators, and provides helpful information to the employee regarding worksite location, pay rate and potential Supervisor contact information.

There are multiple ways to create the assignment in Enterprise™. The most efficient method will depend on where you are currently working in your system. The following will walk through a few of the different options available.

This article covers:

1. [Using the Assignment + Option](#)
2. [Using the Actions Menu](#)
3. [Assigning from the Candidate Worksheet](#)
4. [Email Assignment Confirmation](#)
5. [Email New Hire Packet](#)

Assignment + Option

This is the most common option for people based on their workflow. For most recruiters, it's typical to look for an order you need to fill and then find the best candidate for that order and assign them. That is exactly what you will be doing here. Check out [Assignments Part 1: The Basics](#) for a video overview.

1. Find the order you want to fill

Mew Transportation, Primary
 Driver Helper
 0 of 2 positions filled

Customer ID: 4295014971
 Order ID: 4295091990
 Branch: Eagan

No tasks to display for your current filter settings
 Currently viewing 0 of 24447 tasks. View more...

tasks appointments social email

visifile

details

- adjustments
- attendance
- interest codes
- invoice recipients
- education
- po setup
- required documents
- vendors
- candidates
- documents
- integrations
- messages
- tasks
- search

employee

customer

order

assignment

contact

pay / bill

Order Details Web Options ACA Surcharge

customer information

Customer ID: 4295014971 Work Site: Primary
 Worker Comp: MN2242
 Alt Order ID: Burden Burden 3%
 Directions: Park in the side lot and stop at the front desk on your first day

financial details

Multiplier	1.25	Pay Periods	52
Bill Rate	\$21.25	Pay Rate	\$17.00
Unit Bill Rate	\$0.00	Unit Pay Rate	\$0.00
OT Factor	1.5000	Other Agency Pay	\$0.00
Overtime Bill	\$31.88	Overtime Pay	\$25.50
Doubletime Bill	\$42.50	Doubletime Pay	\$34.00
Overtime Plan	PlanSTD	GP Percent	10.64%
Desired GM %		GP Estimate	\$361.76

job information

Required: 2 Assigned: 0
 Order Type: TF Temp To Full-Time
 Job Title: Driver Helper
 Description: Delivering food product in Minneapolis/St. Paul

Dress Code: Safety Notes: Start Date: 1/15/2020
 Duration: Indef Est. End Date: Shift: Start Time: 7:00 AM End Time: 4:00 PM

contacts

Name	Description	Office Phone
Mewhorter, Mike	Hiring Mgr	952-999-9999
Mewhorter, Mike	Report To	952-999-9999

other information

Status: Unfilled Taken By: mike.mewhorter
 Sales Team: Default Branch: Eagan
 Do Not Auto-Close: TW Time Clock: PeopleNet:

2. Run an **employee search** to find the best qualified candidate

Last Name: SSN: Unassigned RepName: All Reprs Document Text: Search Clear Criteria

First Name: ID: Active Branch: All Branch

Enhance Search Saved Searches

Your search returned 21 results.

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Ph...
429497...	Acosta	Quentin	Minneapolis		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55082	<input type="checkbox"/>	(248) 3...
429501...	Ball	Monte	Minneapolis	(561) 321-5132	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55113	<input type="checkbox"/>	
429501...	Brell	Iris	Minneapolis	(607) 881-8876	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Accepted	14850	<input checked="" type="checkbox"/>	
429503...	Chadborn	Christine	Minneapolis	(414) 403-4843	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	55123	<input checked="" type="checkbox"/>	
429508...	Day	Sunshine	New Brighton		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ended	71250	<input type="checkbox"/>	(318) 4...
429508...	Dettman	Harvey	New Brighton	(651) 651-6342	<input checked="" type="checkbox"/>	<input type="checkbox"/>		55106-...	<input type="checkbox"/>	
12467	Devereaux	Tammy	Minneapolis	(651) 555-1212	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ended	55121	<input checked="" type="checkbox"/>	(651) 1...
429508...	Go	Min	Minneapolis	(904) 362-7959	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DNA	34472	<input type="checkbox"/>	

3. View the employee's record

Christine Chadbourn
 123 Main Street Eagan, MN 55123 ID: 4295038917 SSN: xxx-xx-8888 Branch: Minneapolis

No tasks to display for your current filter settings
 Currently viewing 0 of 24447 tasks. View more...

tasks appointments social email

visifile

- details
- documents
- integrations
- evaluations
- messages
- pay history
- pay setup
- tasks
- search

employee snapshot

Name: Chadbourn, Christine
 Email Address: CHADBOURN10@YAHOO.COM
 Desired Location:
 Hire Status: File Pending Rate Desired:
 Notes:

Resume Received
 I9 On File
 Active
 Assigned
 Electronic W-2

phone/email

CHADBOURN10@YAHOO.COM
 (414) 403-4843

messages

Date	Action	Message	Rep	Contact
7/17/2017	Message	Left message.	claudette	
6/28/2017	Scheduled Interview	7/1 in-person interview	sarah.rodgy	
6/28/2017	1st Recruiting Call	LVM and sent e-mail regarding Knapp.	sarah.rodgy	

employee

- customer
- order
- assignment
- contact
- pay / bill
- calendar
- all options

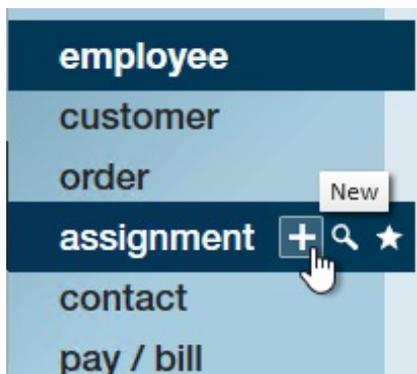
assignments

No Records Found

interest codes

Code
Drivers
Management

4. Hover over assignment in the navigation tree and select the + button



5. Review that it is the correct order/employee

6. Select Save

The screenshot displays a user interface for managing employee profiles. At the top, the user's name 'Christine Chadbourn' is prominently displayed along with their address and identification numbers. Below this, there are navigation tabs for 'tasks', 'appointments', 'social', and 'email'. The main workspace is divided into several functional areas:

- employee snapshot:** A form containing personal and professional details such as Name (Chadbourn, Christine), Email Address (CHADBOURN10@YAHOO.COM), and Hire Status (File Pending).
- messages:** A table listing recent communications.

Date	Action	Message	Rep	Contact
7/17/2017	Message	Left message.	claudette	
6/28/2017	Scheduled Interview	7/1 in-person interview	sarah.rodgy	
6/28/2017	1st Recruiting Call	LVM and sent e-mail regarding Knapp.	sarah.rodgy	
- assignments:** A section currently showing 'No Records Found'.
- phone/email:** A section listing contact information, including an email address (CHADBOURN10@YAHOO.COM) and a phone number ((414) 403-4843).

A left-hand sidebar provides navigation options under 'visifile' (details, documents, integrations, etc.) and 'employee' (customer, order, assignment, contact, pay/bill, calendar, all options).

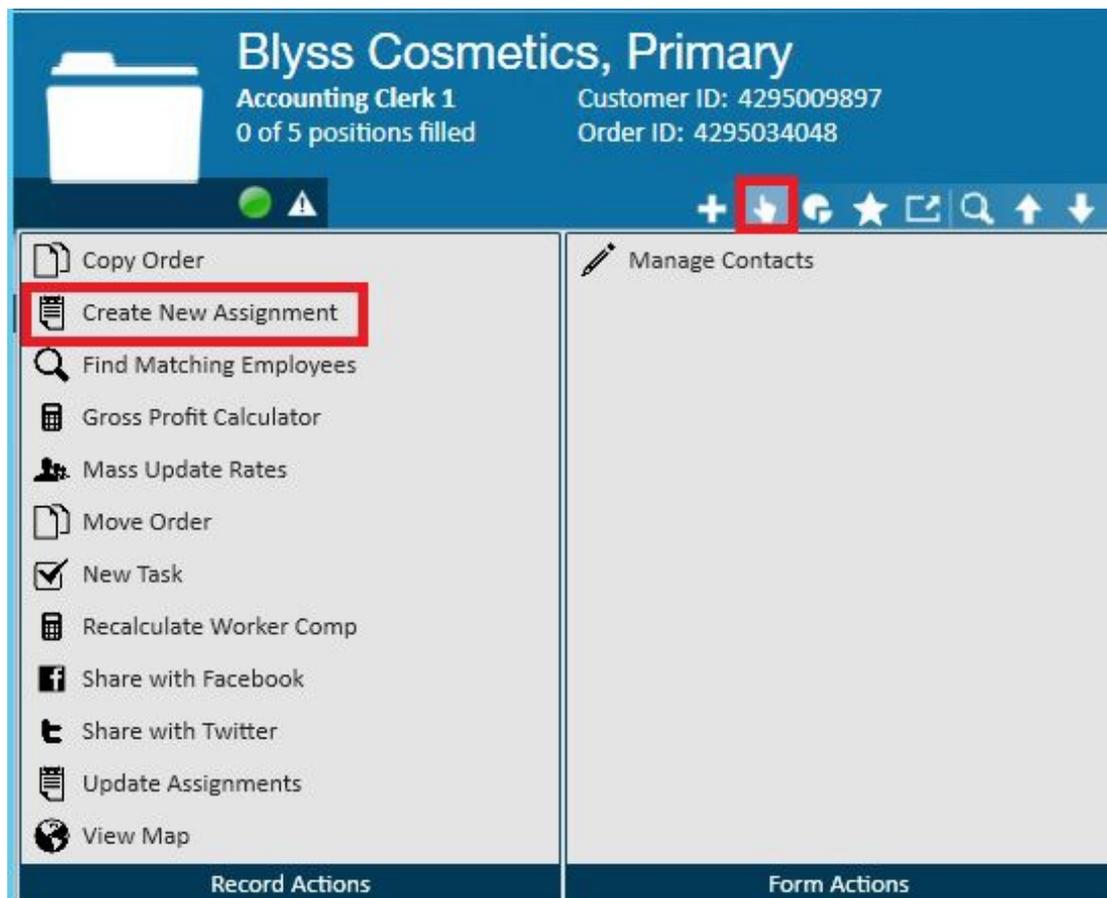
7. Review any potential Assignment Restrictions
8. If no hard stops appear you will be able to complete the assignment

From the Actions Menu

From the Order Record

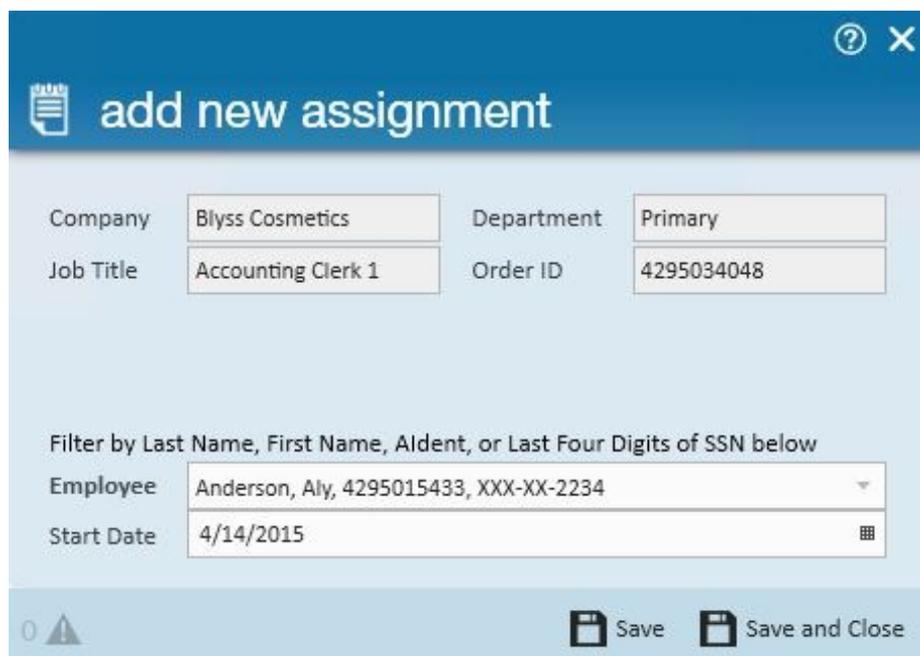
This is a great option when you are on the order and know exactly who you are going to assign.

1. From anywhere on the order record, Select the Actions Menu
2. Choose Create New Assignment



3. Look up the employee to be assigned

- You can search by last name, first name, Aident(ID number) or last 4 of their SSN



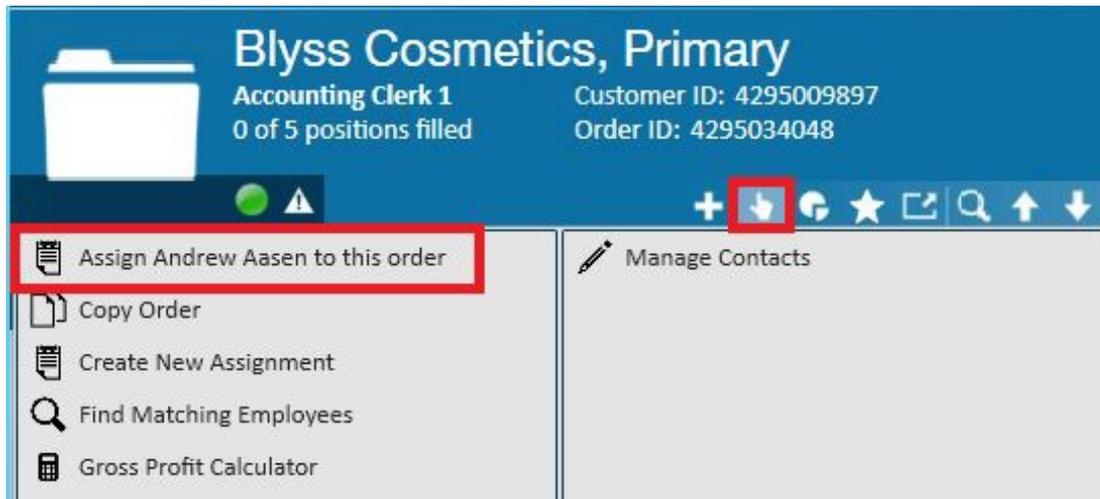
- Click the Advanced option (or Alt + 4 on your keyboard) when you open up the drop down for additional search options

From the Employee or Order Record

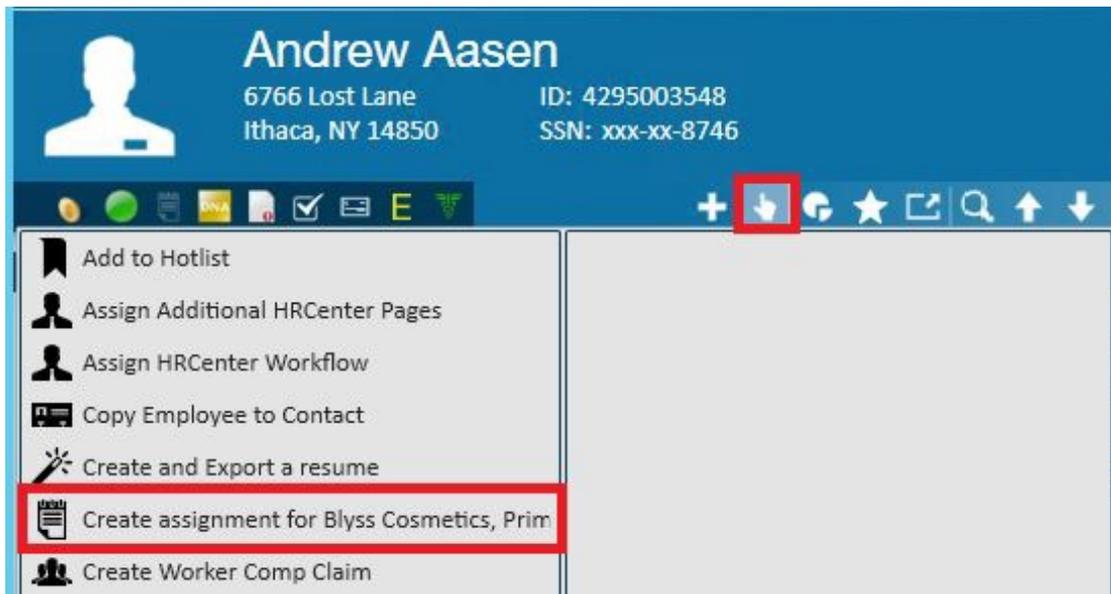
Use this option if you know who you want to assign and you just looked at their employee record in TempWorks Enterprise. An example would be: during your efforts to find someone to place on the order, your perfect candidate calls in. You navigate to that employee's record. Now, TempWorks knows the last person you viewed and the last order you viewed.

For this scenario, you have 2 options:

1. **Assign from the order:** From the order, select the actions button and select assign *employee* to this order. This will display the name of the last employee viewed in TempWorks:



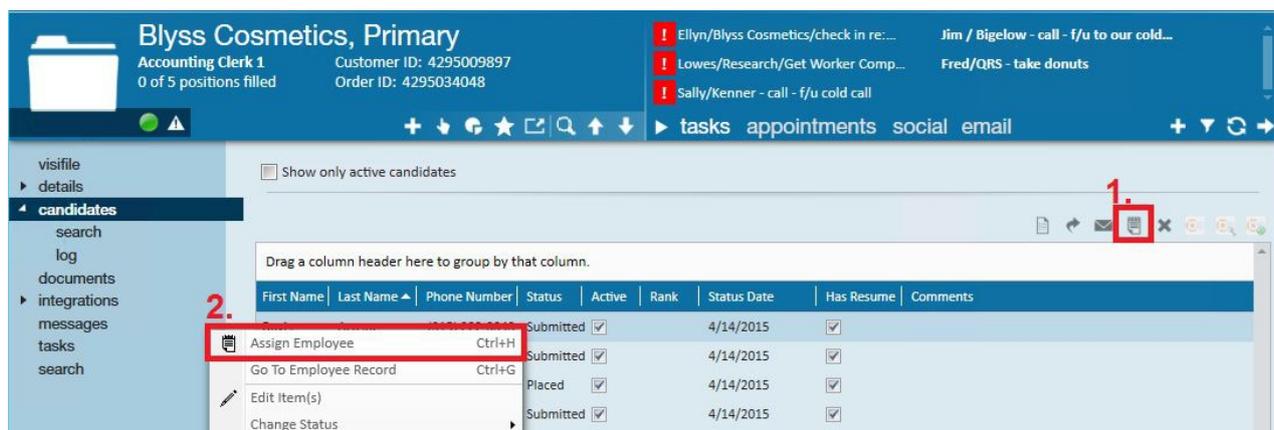
2. **Assign from the employee:** From the employee, select the actions button and select create assignment for *customer name, department* of the last order viewed in TempWorks:



Assign from the Candidate Worksheet

The candidate worksheet allows you to put together a call list for the order you are working on. If you are using the candidate worksheet to manage your recruiting efforts, you can assign your employee from that worksheet. To learn more about the candidate worksheet, check out [Enterprise - How to Create and Manage the Candidate Worksheet](#).

Navigate to the order/candidate worksheet. There are 3 options from the candidate worksheet.



1. Click to highlight the candidate and assign by clicking the assign button (1.) in the upper right.

2. Right click on the candidate and select assign employee (2.).

3. Use the keyboard shortcut of ctrl+H

Note Using any of the methods from the candidate worksheet you can assign multiple Employees at the same time by using your shift or control key and clicking to highlight each employee you'd like to assign.

Note When assigning you may see assignment restrictions pop up if there is anything you should be aware of about the employee(s) you are assigning.

All assignments made for this order will be displayed on the visifile:

The screenshot shows the 'Blyss Cosmetics, Primary' order snapshot. The 'assignments' table is highlighted with a red box and contains the following data:

Employee	Perf Code	Description	Orig. Start	Start	End	Pay	Bill
Adams, Dianna	Open		4/14/2015	4/14/2015		\$10.00	\$14.50
Atkins, Henry L.	Open		4/14/2015	4/14/2015		\$10.00	\$14.50

See [*Assignments Part 2: The Candidate Worksheet](#) for a video overview of this option and a quiz!

Email Assignment Confirmation:

Using the Email Assignment Confirmation gives you the ability to quickly send important

assignment details to the Supervisor listed on the order.

- 1) Navigate to the Order > Visifile
- 2) Select the assignment that you are sending the details of
- 3) Choose the highlighted icon below "Email Assignment Confirmation"



Title	Employee	Perf Code Description	Orig. Start	Start	End	Bill	Pay
Accounting Clerk 1	Bailey, Bobbbbyy	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Anderson, Robert	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Adam , Froehlich A	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Acosta, Davis	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Atkins, Henry L	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Adams, Dianna	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00

4) Now you have the option to choose which template you want to send. Common examples are: Job Details, Assignment Information or Confirmation, and Start Day Details.

Note To create a new template navigate to Template Manager: All Options > Email > Template Manager. If you do not see this option, talk with your administrator.

Email New Hire Package

If you want to send a template New Hire Package to an employee on assignment you can quickly do that as well.

- 1) Navigate to Order > Visifile
- 2) Select the assignments
- 3) Choose the highlighted icon below "Email New Hire Package"

4/14/2015 Submitted Submitted -- Rlvss Cosmetics Comments: dtwood Becker, Rob (Rlvss) Email New Hire Package

assignments

Title	Employee	Perf Code Description	Orig. Start	Start	End	Bill	Pay
Accounting Clerk 1	Bailey, Bobbbbyy	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Anderson, Robert	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Adam , Froehlich A	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Acosta, Davis	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Atkins, Henry L	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00
Accounting Clerk 1	Adams, Dianna	Complete	4/14/2015	4/14/2015	10/14/2015	\$14.50	\$10.00

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