Enterprise - Managing Employee Interest Codes

Last Modified on 12/04/2019 3:59 pm CST

Managing Employee Interest Codes from TempWorks Software on Vimeo.

What is an Interest Code?

Within Enterprise you can track and search an employee's skills, languages, shifts that they're willing to work, etc. by managing the interest codes tied to their record. This will allow you to find employees with the correct skill sets and experience for a job.

Quick Steps

Assign an Interest Code

- 1. Navigate to Employee's Visifile
- 2. Select the pencil icon next to Interest Codes
- 3. Select an interest code under the available column
- 4. Click the right arrow in the center to assign the code
- 5. Click 'Save'

Unassign an Interest Code

- 1. Navigate to Employee's Visifile
- 2. Select the pencil icon next to Interest Codes
- 3. Select the interest code under the assigned column that you wish to remove
- 4. Click the left arrow in the center of the window
- 5. Click 'Save'

Search Using Interest Codes

- 1. Navigate to Employee Search
- 2. Select 'Enhanced Search'

- 3. Select 'Profile'
- 4. Select 'Interest Code'
- 5. Enter the code you want to search by typing or using the drop down menu
- Click 'Add' to add additional codes (if you add additional codes be sure to select Match All when you want employees to meet all criteria instead of any)
- 7. Click Search

Complete and Details Steps

Step 1: Navigate to the employee's visifile and select the pencil icon to manage/add/edit interest codes:

Jim "J Canoe Rive Albany, MN		ch ⁹⁵⁰⁰³⁹¹⁴ xx-xx-1212		F	Personal T	ask		Persor	nal Task	
o 🥏 🦉 🗒 🔤 🚺 🗹 🖴	EV	+ + 6 ★	🖆 🔍 🔶 🕈	► 1	tasks	appointme	nts soc	ial en	nail ·	+ 7 0 +
visifile	employee s	napshot						phone	e/email	+
 details 	Name	Peach, Mr. Jim				Resume R	eceived	(3)	29) 866-5656	
documents integrations 	Email Address				8	I9 On File		L (80	57) 254-3625	
 evaluations 	Desired Location	Downtown				X Assigned		✓ 48	4-484-4659	
messages	Hire Status	Eligible and Active	Rate Desired	\$26.00						
pay historypay setup	Notes	WEX PC								
tasks										
search	messages									
	Date	•	Action			Customer		Message		î
	9/18/2015	*****	WebToAllEmp	loyees		•••••	*****	This wee	k we are having a referral	program plea
	9/18/2015		WebMessage					Great job	Jim on being employee o	f the month!
	9/18/2015		Available					Available		
	9/17/2015		DNA			Yosemite Car	dy Corp.,	Never sh	owed up on time.	
employee	9/15/2015		Disqualified					Jim is mo	oving away for a month an	d will be back
customer	<			_			-			•
order	assignment	s					E	0 🗩	interest code	s 🧨
assignment	Title	Customer	Code			Start	End 4	· ^	Code	▲ [▲]
contact	Machine Operator	Stearns Trailers	Open			7/1/2015		\$1	3rd Shift	
pay / bill	Accountant	Stearns Trailers	DE			4/29/2015	5/21/2015	\$2	Bilingual-French	
calendar	Machine Operator	Stearns Trailers	DE			5/1/2014	6/1/2015	\$2	Welder	
	Forklift	Comet Trailers	Open			2/22/2015	6/3/2015	\$1		
reports	Supervisor III	Stearns Trailers	DE			7/9/2015	8/1/2015	\$_		
all options	•			_		_		Þ		•

Step 2: Users can select a category from the drop-down menu to display a list of related codes. Or, users can enter the first few letters of the code within the filter list field to narrow down the search results.

Note Interest codes can always be modified (or new ones can be added!) within the administration section of Enterprise.

egory	
available	assigned
Filter list 🗙	
. Testing	3rd Shift Created 5/11/2015 Note
ind Shift	Bilingual-French Created 6/22/2015 Note
Panel Drug Tested Panel Drug Tested	Welder Created 8/13/2015 Note
A Grade Property Account Analyst	
Account Analyst 2	

Step 3: Highlight a code(s) from the available list on the left and click the > icon to assign the code(s) to the employee. Then select to save.

Note To delete an interest code before saving, highlight the code you wish to remove, this will be represented by a black bar (as shown in the screenshot below). Then, select the < icon to remove an unwanted code.

available			assigned
Filter list	X]	
12 hour Nurse 1st Shift 2nd Shift 3G 5 Panel Drug Tested 7 Panel Drug Tested 8 hour nurse A Grade Property	Î		3rd Shift Created 5/11/2015 Note Bilingual-French Created 6/22/2015 Note Welder Created 8/13/2015 Note
Account Analyst Account Analyst 2 Account Representative Accountant	Ŧ		Testing Created 9/28/2015 Note

If you wish to remove more than one code at a time utilize the ctrl key to select those you want to remove as shown:

available		assig	assigned		
Filter list	×				
12 hour Nurse	Ê	3rd Shift			
1st Shift		Created 5/11/2015			
2nd Shift		Note			
		Bilingual-French			
3G		Created 6/22/2015			
5 Panel Drug Tested					
7 Panel Drug Tested					
8 hour nurse		Welder			
		Created 8/13/2015			
A Grade Property	<	Note			
Account Analyst		1 Testing			
Account Analyst 2		Created 9/28/2015			
		Note			
Account Representative					
Accountant					

Interest Code Details:

Within the (1.) employee's record expand (2.) the details section and select (3.) the work interests section of the employee record. From here, users will see an (4.) interest codes table where added codes can be removed or edited:

Jim "Jir Canoe River Albany, MN 56	nmy" Peach ID: 42950 3307 SSN: xxx-	003914	Personal Tas	k I	ersonal Task	
💊 🥏 🛱 🔤 🕽 🗹 🖽 E	¥ +	♦ ♥ ★ Ľ Q ↑ ₹	▶ tasks a	ppointments socia	email 🕂 🕇 🕄	-
visinie details 2.	work interests	s / preferences		notes		
aca	Location Preferred	Downtown		Why Temp Work		2
assignment restrictions	Desired Pay	\$26.00		WEX PC		
contact methods	Pay Comment	Willing to negotiate				
candidacy direct hire	Other Temp Services					
education	Kind of Work		+			
interpersonal	Business		~			_
interview questionnaire	• • •					
past jobs	Size/Environment		*	Supplement Income	Between Jobs	
required docs	Pace Preferred		Ŧ	Gain Experience	Flexible Schedule	
schedule	Task Preferred		~	🗶 Laid Off	K Looking for FT	
test scores transportation	Supervision Level	Minimal	+	X Increase Skills	🕱 Student	
unemployment	When Available			Work Different Places		
work experience 3.				_		
work interests	Available Days	🗙 Sun 📃 Mon 🗶 Tue 📃 Wed	X Thu Fri			
		🗙 Sat			4.	
employee <u>1</u> .	interest codes	Detailed View 🔻				×
customer						-
order	Bilingual-Spa	nish	ectrician	We	der	
	Validated		Validated		alidated	
assignment	Years		Years	Y	ears	
contact	Note		Note	N	ote	

Searching Interest Codes

The benefit of adding interest codes to an (1.) employee(s) record is that they can be (2.) searched.

Step 1: Within the (3.) enhance search section, select the (4.)*profile* category.

Step 2: Select (5.) *Interest Code* from the list of options. This will allow users to search one or multiple (depending upon the results you wish to obtain) codes.

Step 3: Select Search.

Search Example:

In the following example, we are looking for employees who have forklift experience and/or who can speak Spanish.

• When selected, the Match Any check box will look for records that have been tagged with the code of Forklift OR Bilingual-Spanish.

- When selected, the *Match All* check box will look for records that have been tagged with the code of *Forklift AND Bilingual-Spanish*.
- When selected, the *Show in Results* check box will create an additional column within your search results specifying the interest codes that match the employee record

Canoe Rive Albany, MN				
o 🥏 🛱 🔤 🔒 🗹 🛤	E 🛛 🕂 🔶 🕞	★ Ľ Q + + ト t	asks appointments social ema	il + ▼ ᢒ •
visifile details documents integrations	Last Name SSN First Name ID	All Records Active	RepName All Reps ▼ Document Text Branch All Branc ▼	Search Clear Criteria
evaluations	• • • • • • • • • • • • • •	Enhance Search	Saved Searches	
messages pay history pay setup tasks 2.	Universal Search	▼ 5.		
search	Profile 🔍	Interest Code	Show in Results 💌	
	Personal Status 9	Like 🔻 Forklift	~ 🗙	
	Assignments	Like 🔻 Bilingual-Spanish	~ ×	
	Order Candidate	Add	 Match All O Match Any 	
1.	Document Direct Hire Job History Testing Education Financial	Hours Since Days Since Desired Pay Job Title Entered By		
employee	Bank Information	Message Date Numeric Rating		
customer	Custom Data	Message Action		
order	ACA ACA Statistics	Message Text		
assignment	Interview Questionnaire	Interviewed By Activation Date		
contact		Anniversary Data		• • •
pay / bill				
calendar				
reports				
all options				

Once results are returned you may organize and work off of the information to match employees to the correct positions.

🥏 🗒 🚾 🔒 🗹 🖽 E	V	+	• • ★ 🖸	Q + +	> tas	ks ap	pointments	socia	al emai		+ 7
file	Last Name	SSN		All Record	İs	RepName	All Reps	⊤ D	ocument Te	ext	
ails :uments	First Name	ID		Active		Branch	All Branches	•			Search Clear Cri
grations							•				
luations			En	hance Search		s	aved Searches				
ssages history	Your search retu	rned 27 resul	ts.								⊕ ± ≤ 0 1 7 7
setup	Drag a column header l										
s				ni		1		1	1		
ch	ID Last Name	First Name	Branch	Phone	Is Acti	Is Assi	Last Message	Zip C	HasR	Cell Phone	Interest Code
	429501 Bradley	Alex	Memphis SE	(554) 000 7040	×		DNA	56352 55109		(563) 456-4533	Forklift
	429501 Brehn 429501 Culley	Mary Karen	Memphis SE	(651) 232-7913 356243566	×	×	Order Candidate	32908	×	356243566	
	429501 Erickson	Jenna	Memphis SE Memphis SE	(320) 215-6328	×		Order Candidate	56378		330243300	Forklift
	429501 Farmington	Rex	Memphis SE	(566) 653-1233	×	×	Refused	56352	×		Forklift
	429501 Halifax	Thomas	Memphis SE	(248) 549-4984	×	×	Order Candidate	55413	×	(248) 984-5854	
	429501 Harper	John	Memphis SW	(240) 345-4504	×	×	Message	55413		(984) 844-2555	
	429501 Holsted	Ronald	Memphis SE	(651) 444-9874	×		Email	55109			Forklift Operator
	429501 Jones	Fredrerick	Memphis SE	(234) 539-8457	×	×	Message	84088		(123) 414-3238	
	429501 Juniper - Lopez		Memphis SE		×		Email	55419		(343) 534-5454	
	12579 Kozelek	Jordan	Memphis SE	(651) 212-22	×		Order Candidate	43220		(651) 210-22	
	429501 Little	Wayne	Memphis SE	(234) 234-2344	×		Email	14850		(234) 234-2344	
	429501 Moser	Robert	Memphis SE	(321) 345-9858	×	×	Order Candidate	14850		(321) 345-9858	
ployee	12789 Myers	Christopher	Memphis SE	(651) 766-4766	×	×	Message		×	(651) 889-3889	Forklift
tomer	429501 Nunez	Angelica	Memphis SE	(801) 111-5555	×		Order Candidate	84088		(901) 525-5552	
er	429501 O'Keefe	Ryan	Memphis SE	(976) 431-2133	×		Email	56352			Forklift
	429501 Okoneski	Lauren	Memphis SE	(651) 545-1212	×	×	Order Candidate	55109			Forklift
ignment	429501 Potter	Kevin	Memphis SE	(321) 687-4756	×		Placed	30507		(321) 687-2437	Forklift
tact	429501 Righter	Daryl	Memphis SE	(321) 321-2314	×		Email	55419		(452) 131-4152	Forklift
/ bill	429501 Rockwell	Norman	Memphis SE	(646) 131-6543	×		React	76117			Forklift
endar	429501 Sams	Harold	Memphis SE	(321) 321-3213	×	×	Email	14850	×	(321) 321-3213	Forklift
orts	429501 Schultzenberg	Robert	Memphis SE	(565) 623-2656	×		Order Candidate	56352			Forklift
options ►	429501 Smith	Corey	Memphis SW	(321) 474-2868	×		Message	14850	×	(321) 474-2868	Forklift

Related Articles