

Enterprise - Employee Record Navigation and Basics

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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.

This article walks you through how to navigate through the employee record. For a video guide, check out [Employee Part 1: The Basics](#).

This Article Covers:

1. [Employee Record Navigation](#)
2. [Employee Avatar](#)
3. [Action Menu & Additional Icons](#)

Looking to add a new employee record? Check out [Enterprise - How to Add a New Employee Record](#).

Check out this video overview:

Navigating Through the Employee Record

This section will provide you with some tips & tricks to help you navigate through the employee record.

The screenshot displays the Enterprise Employee Record interface for James "Jay" West. The interface is divided into several sections:

- Header:** Shows the employee's name, address (101 MAIN ST., NEW YORK, NY 10001), ID (4295080490), SSN (xxx-xx-4354), and Branch (Minneapolis). It also includes a search bar and navigation icons.
- Alerts:** Two red alert boxes: "Call Andrea Back" and "Don't forget about lunch", and "Call Ben" and "Luke Dane Background check".
- Navigation:** A menu with options: tasks, appointments, social, email.
- Left Sidebar:** A navigation menu with options: visifile, details, documents, integrations, evaluations, messages, pay history, pay setup, tasks, search.
- Employee Snapshot:** A form with fields for Name (West, James), Email Address (jameswest@xip.xom), Desired Location, Hire Status (Eligible for Hire), Rate Desired, and Notes.
- phone/email:** A section with contact information: jameswest@xip.xom and (201) 510-5010.
- messages:** A table listing messages with columns for Date, Action, Message, Rep, and Contact.
- Bottom:** A section for assignments and interest codes.

Date	Action	Message	Rep	Contact
11/27/2019	DNA	Does not like dolls	amelia.stout	
11/27/2019	Interview	Scheduled to come in for an interview today	amelia.stout	
7/18/2019	Message	allergic to materials	tamara.czapiewski	
4/2/2019	Interview in office	Scheduled 9 am interview Thursday, 4/4 - possible warehouse c...	hosteval1	
4/2/2019	1st Recruiting Call	called james west about a job in eagan	alix.borkowski	

Common Buttons & Icons

Here is a short list of some of the button icons you will see within the employee record:

Icon	Meaning
	+ signs are typically seen in the upper right corner of a section. This icon allows you to add something (for example, add a phone/email)
	This icon allows you to log a message.
	The pencil icon allows you to edit information and is typically located in the upper right of a section (for example, interest codes)
	The X icon allows you to remove something. While we don't allow removal of employee records (you can deactivate them but not remove), there is select information on the employee's record that can be removed (for example, assignment restrictions).

Navigation Tree

Located along the left side of the employee record is the Navigation Tree. This will show you where on the employee record you are. Each item on the tree will navigate you to a different section of the employee record with different sets of information. Below is a brief overview of some of the different pages:

- Visifile

visifile

employee snapshot

Name: Woodbury, Lorelai
 Email Address: l.woodbury@xip.xom
 Desired Location:
 Hire Status: Eligible and Active | Rate Desired: \$12.00
 Notes:
 Resume Received
 I9 On File
 Active
 Assigned
 Electronic W-2

phone/email

I.woodbury@xip.xom
 (987) 542-1230

messages

Date	Action	Message	Rep	Contact
12/2/2019	DNA	Employee DNA'ed Customer	amelia.stout	
11/27/2019	Available	Employee called to say they were available today	amelia.stout	
10/22/2019	PerformanceEval	Customer: Buy N Large	kayla.brehmer	
10/22/2019	Ended	Customer: Buy N Large	kayla.brehmer	
10/9/2019	Ended	Customer: Buy N Large	elena.toninato	

employee

customer

order

assignment

contact

pay / bill

calendar

all options

assignments

Title	Customer	Code	Start	End	Bill	Pay	Dept
General Laborer	Buy N Large	G	10/9/2019	10/25/2019	\$32.00	\$20.00	Primary
General Laborer	Buy N Large	CO	6/12/2018	9/27/2019	\$40.00	\$25.00	Primary
Warehouse Worker	Buy N Large	CO	12/3/2018	12/3/2018	\$23.97	\$17.00	Primary
Unknown	123 Main St.	CO	11/20/2018	11/20/2018	\$30.00	\$25.00	Primary
Warehouse Worker	Buy N Large	CO	11/14/2018	11/14/2018	\$24.00	\$15.00	Primary

interest codes

- Code
- 1st Shift
- Computer Operator
- Data Entry
- ENG-Industrial Engineer
- Industry Engineering
- Mechanic

- The visifile is a front page overview of the employee record. This section is often referred to as the "communication hub" of the employee record because it is home to contact information, messages, assignment information, and interest codes.

- **Details**

visifile

personal information

Last Name: Woodbury | Suffix:
 First Name: Lorelai | Prefix:
 Middle Name: | Nickname: Leah
 SSN:
 ID: | Contact:
 Act. Date: 6/6/2018 | Deact. Date:
 I9 On File | I9 Expire Date:
 Orientation Date: | Anniversery Date: 7/7/2018
 Resume On File | Numeric Rating: 0
 WOTC Eligibility: Eligible

addresses

Permanent Use Temporary

Street: 123 Maple Lane
 Street 2:
 City: Saint Paul
 State: MN | Zip Code: 55123-____
 County: Ramsey | School:
 Country: United States of America

hiring information

Order Type: TE | Branch: New Brighton
 Hire Status: Eligible and Active | Staffing Specialist: amelia.stout
 Profession: All | Interviewed By: amelia.stout | 4/29/2019
 Washed Status: Familiar | Entered By: amelia.stout | 6/6/2018 1:57:00 PM
 Vendor:
 Job Title:
 How Heard of:
 How Heard Details:
 Felony

background information

Past Residences: | Security Clearance:
 Convictions:
 Felony

equal opportunity

Birth Day: | I9 Date Verified: | Nationality: | Disabled: Everified:
 Date Entered: | Veteran Status: Citizen | Unknown
 Gender: | Birthplace:
 Disabled Everified

employee

customer

order

assignment

contact

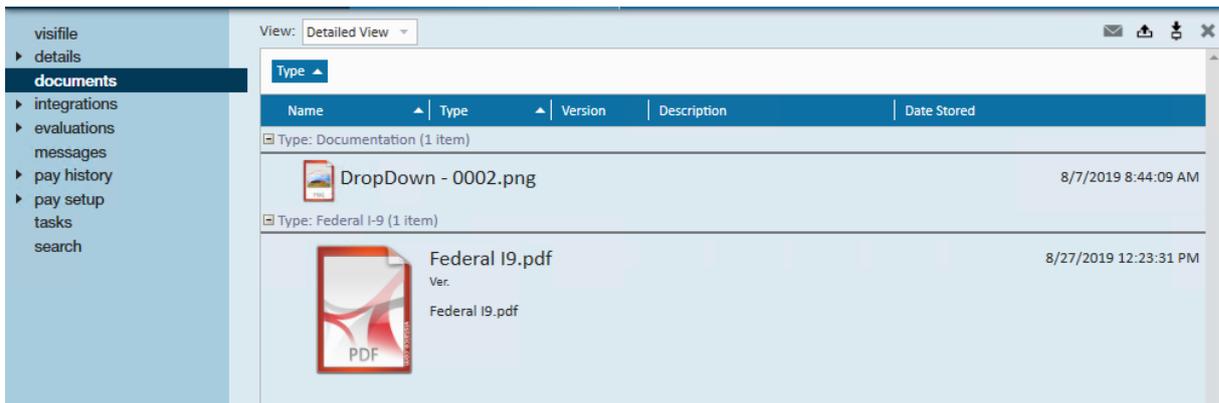
pay / bill

calendar

all options

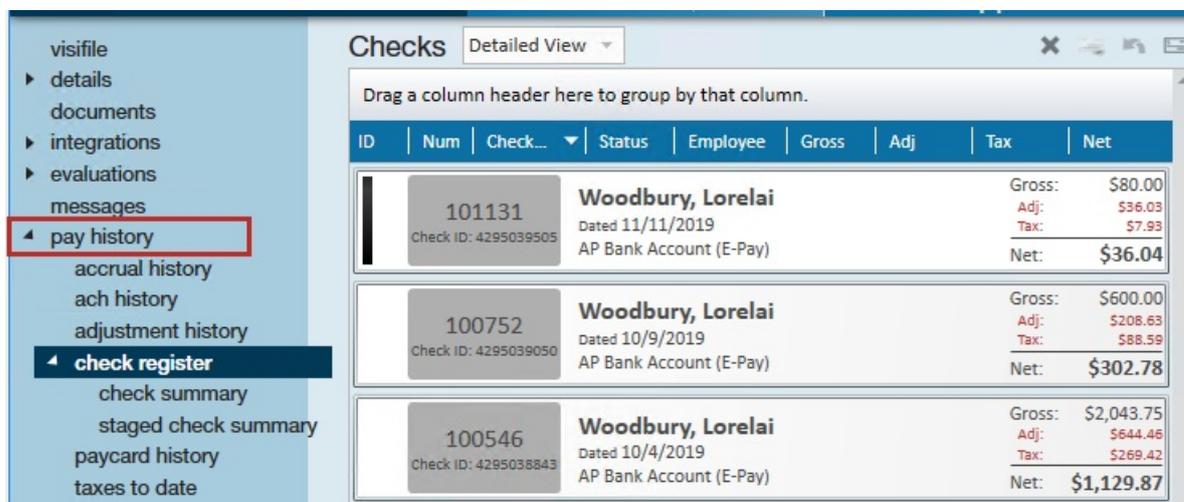
- The details page contains a lot of important information about the employee including address, SSN, and washed status. When you select this option, it opens up a drop down of additional sub detail pages that contain different sets of information such as education, job history, interview questionnaire, etc.

- **Documents**



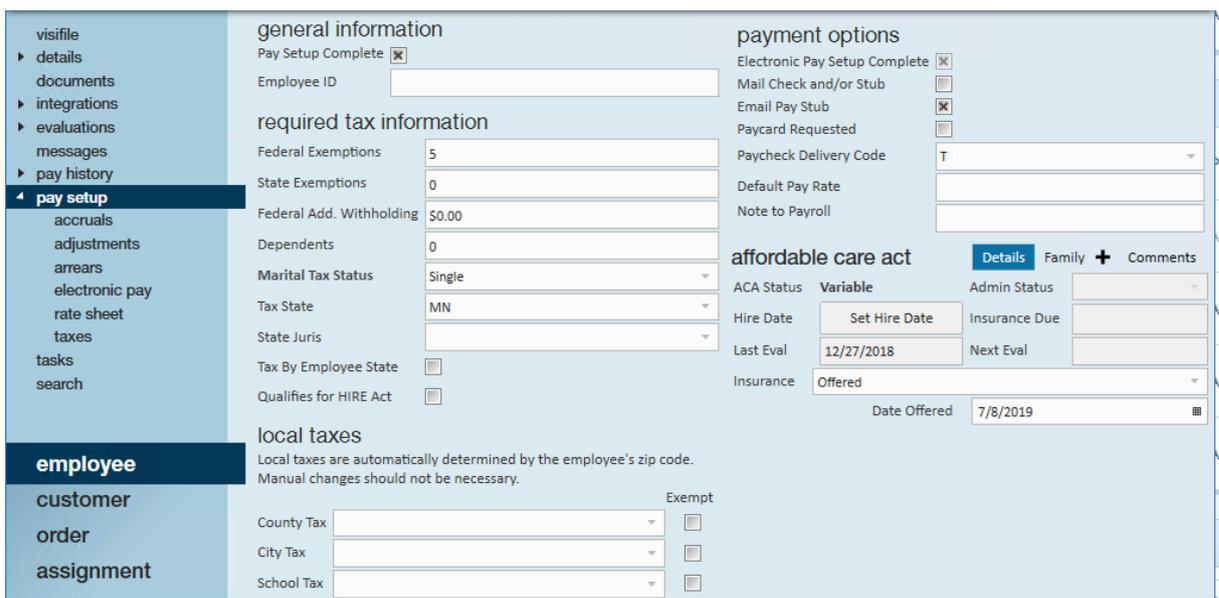
- o This area allows you to view, upload, and save any documents related to this employee. This is a great way to electronically file important paperwork including I-9s and W-4s.

- Pay History



- o This section shows past paychecks and pay information on the employee record. Not every user will be able to access this section

- Pay Setup



- o This section contains taxes, direct deposit, and garnishment information for the employee. This is typically accessible by HR Reps or Payroll Clerks.

Employee Avatar

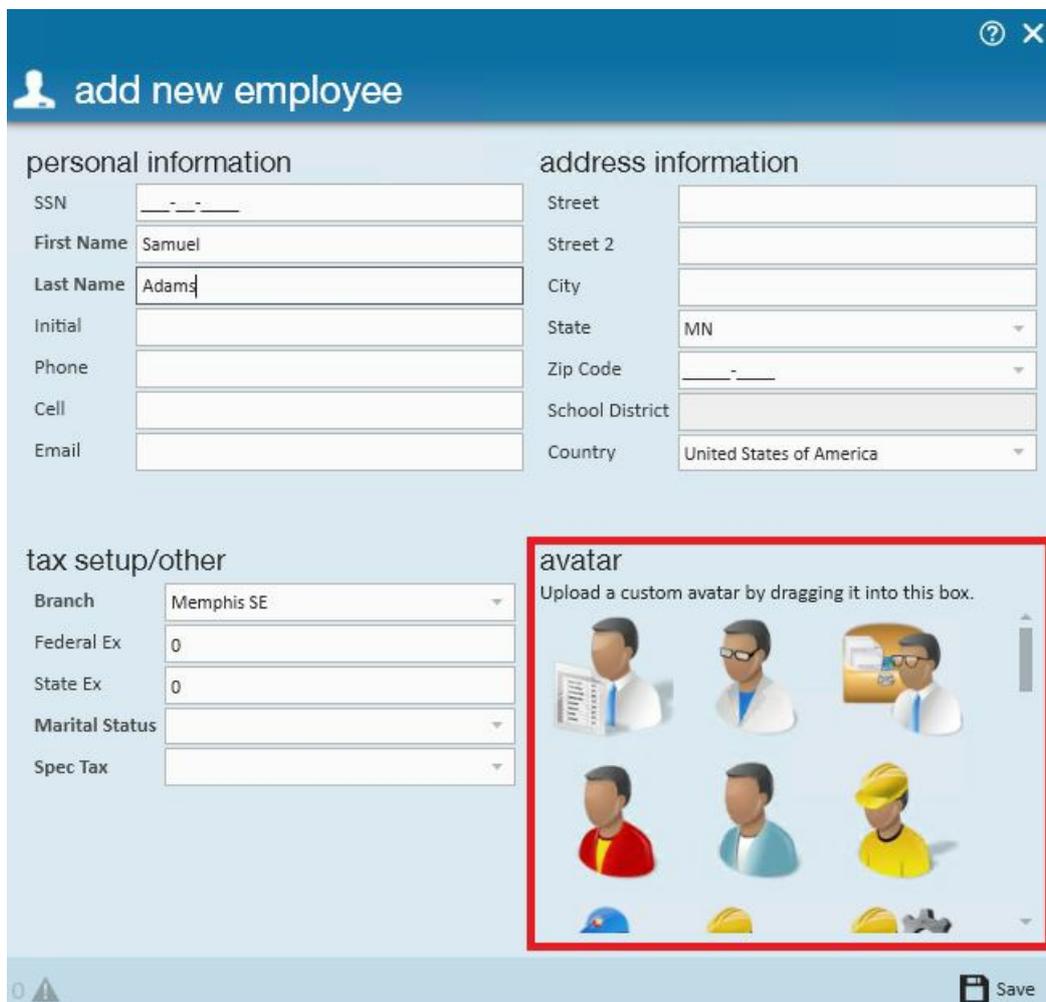
Located in the upper left corner of the database, the Avatar area displays a wealth of information about the employee record currently open in TempWorks Enterprise.



The name of the employee will be displayed along with their address, ID number, and SSN.

Note Depending on the preferences of your company, the SSN may display the full SSN or only the last four digits of their SSN.

The main (1.) Employee Avatar icon displayed can be selected at the time a new employee is entered into TempWorks Enterprise:



personal information

SSN: _____
First Name: Samuel
Last Name: Adams
Initial: _____
Phone: _____
Cell: _____
Email: _____

address information

Street: _____
Street 2: _____
City: _____
State: MN
Zip Code: _____
School District: _____
Country: United States of America

tax setup/other

Branch: Memphis SE
Federal Ex: 0
State Ex: 0
Marital Status: _____
Spec Tax: _____

avatar

Upload a custom avatar by dragging it into this box.

The avatar section displays a grid of 12 avatar icons, including various professional and construction-themed avatars. The first icon in the top row is highlighted with a red box and a '1.' next to it.

Save

To change the Avatar after initial creation of the employee record, right click the icon



Resetting the Avatar icon will change it to the universal symbol for Employee:



Note because each company has different policies about using Avatar icons, please consult your company before using Avatar icons.

Within the Avatar area there is a row of symbols which depict various aspects of the employee currently viewed:



Hovering your mouse over each Avatar will display what that Avatar represents.

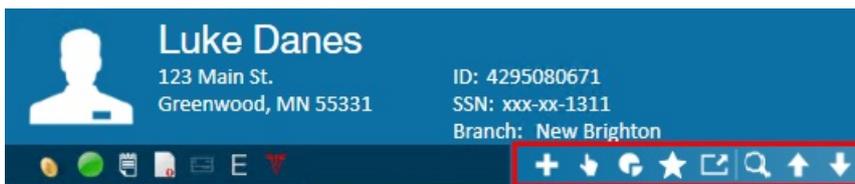
Clicking on an Avatar may give options to navigate to the record prompting the Avatar:

Avatar Icon	Name	Meaning
	Subcontracted	This employee is setup as a subcontractor. See Vendor- Subcontractors in Enterprise for more information.
	Direct Deposit	Employee is setup to use direct deposit/paycard under Electronic Pay . Use the jump buttons to go to the pay setup/electronic pay sections of the employee record
	Active	If lit up, this is an active employee record. If this is grayed out, then this is an inactive record.

Avatar Icon	Name	Meaning
	Assigned	If lit up, this employee is currently on an assignment. A list of current & recent assignments will appear when you hover over this icon.
	DNA Records	This Avatar icon represents the fact that this employee has been asked to not return, or has asked to not be sent back, to a customer and/or department of a customer. Hovering over the icon will display a list of customer/department, clicking on any customer/department that is listed will navigate to the DNA (Assignment Restriction) area of the employee record.
	Missing or Expired Documents	This Avatar icon represents all required documents added to the employee record which are either missing or expired based on the data collected for each Required Document . Clicking on any of the required documents listed will navigate TempWorks Enterprise to the required documents area of the employee record.
	Tasks	If this icon is visible, then there is at least one task tied to this record. Hover over this icon to see the task regardless of who created it.
	Payroll Setup Incomplete	If this icon is visible, it means that the employee's pay setup complete checkbox is unchecked. Hover over it and select 'View Employee Payroll Information' to navigate to pay setup.
	Worker Comp Claims	If the employee being viewed has a worker compensation claim being tracked in TempWorks Enterprise this Avatar icon will be displayed. Hovering the mouse over the icon will display all worker compensation claims; click a claim to navigate directly to that Worker Compensation claim area if you have access.

Avatar Icon	Name	Meaning
	E-Verify	If you are utilizing out E-Verify integration, then you will see the employee's current E-Verify status here. For more information including color coding meanings see How to Process E-Verify Cases .
	ACA Status	This icon will display the employee's current ACA status .
	WOTC Eligibility	If displayed, the employee is WOTC Eligible. This information is coming from the employee details page under hiring Information.

Actions Menu & Additional Icons



Employee record header for Luke Danes. The header includes a profile picture, name, address (123 Main St., Greenwood, MN 55331), ID (4295080671), SSN (xxx-xx-1311), and Branch (New Brighton). A red box highlights the actions menu icons: a plus sign, a downward arrow, a refresh icon, a star, a share icon, a magnifying glass, and up/down arrows.

These options are located along the top of the employee record next to the avatar section.

Icon	Name	Meaning
	Add a New Record	Opens the Add New Employee Form
	Actions Menu	Will display a multitude of options.
	Reports	Displays a list of specific reports for the record you are on. This is dependent on your security roles.
	Favorites	Displays list of favorite records and allows you to add a new favorite.
	Tearaway Page	Allows users to open current page in a separate window. See The Tearaway Page for more information.
	Search	Navigate to Employee Search
	Previous/Next Search Results	Will navigate you to the previous or next result in your search.

Note Avatar icons will vary depending on the Security Role of each user and the options contracted with TempWorks. Please see your system administrator for the specifics of your Security Role and contacted options.

Related Articles
