

Enterprise - Recruiter Manual

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Welcome to Enterprise™ for Recruiters!

TempWorks® Enterprise system is the heart of our software. It includes a full front and back office functionality and integrates seamlessly with our other software as well as with 3rd party integrations. This guide is here to provide a road map for front office recruiters or staffing specialists to help them understand the full functionality of Enterprise.

When we talk about Recruiters or Staffing Specialists, we mean anyone who works with employees to help find them a job. This can include:

- [Managing Employees & Applicants](#)
- [Creating & Managing Customer Requests](#)
- [Assigning Employees to a Job](#)

New to Enterprise?

If you are brand new to our software, we recommend you start by checking out our TempWorks University Videos. These videos are designed to give you an overview of our system and walk you through some of the basic functionality. For recruiters, we recommend the following sections:

- [Enterprise 101](#) - provides an overview of important information including how to navigate and what is hierarchy
- [Recruiter 101](#) - provides an overview of basic recruiter related functionality

There are many videos under these topics that you can watch. We recommend watching just a few videos at a time and following along with the quizzes and workbooks provided.

Note If you are looking for more training, we offer weekly webinars that you (or

your admin) can find and sign up for via [Bridge](#).

The following sections of this guide provide links to articles to learn about different functionality. These sections are separated by record type and are organized to help you navigate from basic functionality to some of our more advanced options all with the recruiter responsibilities in mind.

Managing Employees & Applicants

What is an Employee Record?

The Employee snapshot section of Enterprise includes all applicants, current & past employees. These records contain information such as current employment status, compliance documents, past jobs, interview questions, skills, and more.

The screenshot displays the 'employee snapshot' for James 'Jay' West. The interface includes a navigation sidebar on the left with options like 'details', 'documents', 'integrations', 'evaluations', 'messages', 'pay history', 'pay setup', 'tasks', and 'search'. The main content area is divided into several sections:

- employee snapshot:** Fields for Name (West, James), Email Address (jameswest@xip.xom), Desired Location, Hire Status (Eligible for Hire), and Rate Desired.
- phone/email:** Contact information including an email address (jameswest@xip.xom) and a phone number ((201) 510-5010).
- messages:** A table of communication history with columns for Date, Action, Message, Rep, Contact, and Due.
- assignments:** A table of job assignments with columns for Title, Customer, Code, Start, End, Bill, Pay, Dept, and Assignment ID.
- 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.czapliewski		
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		
3/28/2019	LMTc	Called James about a job	alix.borkowski		
12/6/2018	LMVM	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	hosteval11		
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 Spect...	Buy N Large	CO	11/9/2018	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

Check out the following links to learn more about the employee record:

Employee Record Basics

Start with the following articles to gather more fundamental knowledge related to

employee records.

- [Video: Employee Part 1: The Basics](#)
- [Enterprise - How to Add a New Employee Record](#)
- [HRCenter Applicant Process](#)
- [Enterprise - Employee Record Navigation and Basics](#)
- [Enterprise - How to Deactivate and Reactivate Employee Records](#)
- [Enterprise - Utilizing the Washed Status](#)
- [Enterprise - Employee Searching](#)
- [Tips for Message Logging](#)

Tracking Employee Information

Every staffing company needs to track different sets of information about the employee to find them the right job. Check out the following options for tracking information on the employee record:

- [Enterprise - How to Track Employee Availability](#)
- [Enterprise - How to Document Employee Work History and Education](#)
- [Enterprise - Managing Resumes](#)
- [Enterprise - Managing Employee Documents](#)
- [Enterprise - Activity Tracker](#)
- [Enterprise - Managing Employee Interest Codes](#)
- [Enterprise - Documenting an Interview](#)
- [Enterprise - How to Create Assignment Restrictions](#)

Employee Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top) and take notes or discuss these questions with your team:

Question	Answer
How will most employee records be entered into your system?	

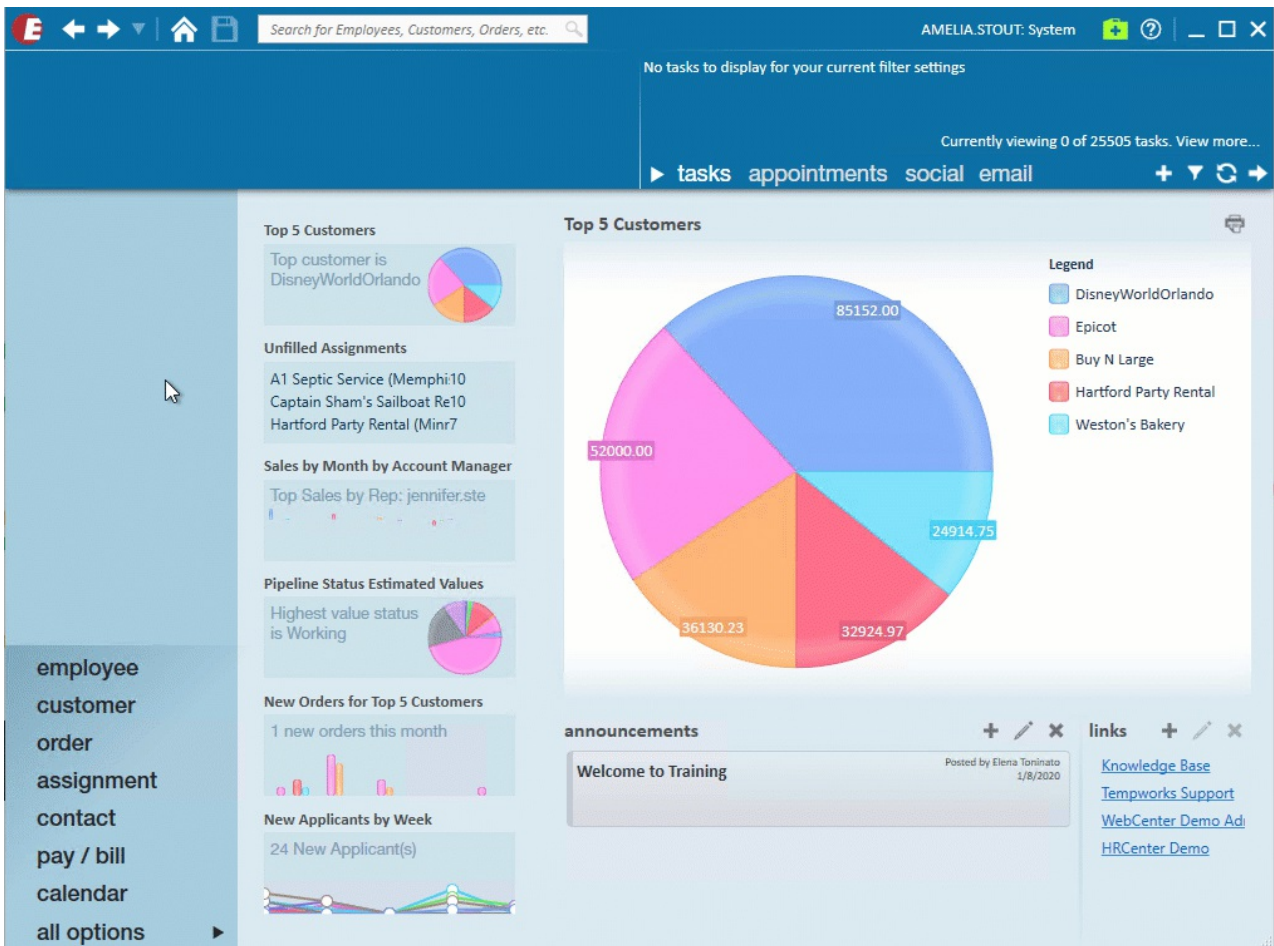
Question	Answer
<p>Will applicants be filling out an online application? If yes, what will it include?</p>	
<p>Will you be using HRCenter for onboarding documents? If yes, what kinds of additional forms need to be added?</p>	
<p>What are all the requirements before an employee's washed status can be changed to 'Familiar'?</p>	
<p>What types of interactions or job responsibilities do you want to track by logging messages(ex. left voicemail, scheduled interview, etc.)? What Message Action Codes will you need to use?</p>	
<p>What interest codes do you want to have in the system to quickly tag employees with?</p>	
<p>What fields on the employee record are going to be required for you to fill out? What kinds of information do you need to enter or track to create better searches?</p>	

Question	Answer
How will you be documenting interviews? Will you be using the interview questionnaire? What questions need to be asked by every recruiter?	
Will you be tracking WOTC status?	
Will you be saving documents on the employee file or keeping them in filing cabinets? Which documents do all employees need?	

Create & Manage Customer Requests

What is an Order Record?

The Order record contains information regarding all job openings (requisitions, openings, requests) placed by customers. Order records hold valuable information including shift times, start dates, financial details, worksite details etc.



Check out the following links to learn more about the order record:

Order Basics

Start with the following basic order options for making your order creation and management easy:

- [Video: Orders Part 1: The Basics](#)
- [Enterprise - How to Create and Manage Temporary Orders](#)
- [Enterprise - How to Create and Manage Direct Hire Orders](#)
- [Enterprise - How to Set up Customer Defaults](#)
- [Enterprise - Order Searching](#)
- [Enterprise - Default Order Statuses](#)

Advanced Order Topics

Check out the following articles for more advanced order options:

- [Enterprise - Utilizing Master Orders](#)

- [Enterprise - How to Copy an Order](#)
- [Enterprise - Using Contact Roles with Orders](#)
- [Enterprise - Departments](#)
- [Enterprise - Worksites](#)

Order Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top of this article) and take notes or discuss these questions with your team:

Question	Answer
Who on your team will be taking order requests from customers and entering them in the system?	
Who will be adding customer defaults to make order creation easier? What defaults will you be using for most customers?	
Will you be using Master Orders?	
Will you be posting to the TempWorks Job Board or using any other Job Board Integrations?	
Will you be using Multiplier Codes or Rate sheets to make sure billing rates and pay	

Question	Answer
rates are accurate?	
How will you track candidates you are considering for an order?	

Assign Employees to a Job

What is an assignment record?

Contains data regarding all placements made by your organization(s). Assignments are created off order records and are what tie the employee to a position. The information gathered from assignment records directly communicates to the back office (payroll and invoicing) portion of Enterprise.

Check out the following links to learn more about the assignment record options:

Assignment Basics

Use the following links to learn more about creating assignments and managing candidates

- [Video: Assignments Part 1: The Basics](#)
- [Enterprise - How to Assign an Employee to an Order](#)
- [Enterprise - How to Create and Manage the Candidate Worksheet](#)
- [Enterprise - How to End an Assignment](#)

Advanced:

- [Enterprise - The Assignment Status](#)
- [Enterprise - How to Document Employee Pay Raises](#)
- [Enterprise - How to Mass Assign and End Assignments](#)
- [Enterprise - How to Utilize the Assignment Replacement Option](#)

Assignment Process Questions to Consider

Download this file as a PDF (click the PDF icon at the top of this article) and take notes or discuss these questions with your team:

Question	Answer
Will you be using the Candidate Worksheet to track employees that you are considering for work? If yes, what statuses will you be using?	
How will you document check in calls with the supervisor or employee?	
Will you be using required documents, DNA, or Interest Codes to create additional assignment restrictions?	
Who will be responsible for ending the assignment when the employee is done working?	

Question	Answer
What must be completed on the customer and/or order record before your team can make any assignments?	

Related Articles