

# HRCenter Document Mapping

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When a form is completed in HRCenter™, it can be saved as a document on the employee's record. By default, included forms (I-9, W4, and state tax forms) all save as documents. When a document is saved to an employee's record, a document type is always associated. The HRCenter Document Mapping feature allows users to say when 'X' form (and related doc type) is completed in HRCenter, it is saved as 'Y' Document Type in Enterprise™. Furthermore, the HRCenter Document Mapping feature allows users to narrow the scope of a rule down to specific areas of their hierarchy.

To begin, navigate to All Options > Administration. Once there, select ( 1.) 'hrcenter doc mapping' from the list of options on the left.

HRCenter Document Type	TempWorks Document Type	Hierarchy
Background Check	Background Check	System
Care Now Report	Care Now Report	System
CIA Result	CIA Result	System
Customer Call	Customer call	System
Documentation	Documentation	System
Federal 8850	Federal 8850	System
Federal I-9	Federal I-9	System
Federal W-4	Federal W-4	System
Federal W-9	Federal W-9	System
Mag Media	Mag Media	System
Marketing	Marketing	System
Nelco Form	Nelco Form	System
Order Contract	Order Contract	System
Photograph	Photograph	System
Proposal	Proposal	System
Provelt Test Result	Provelt Test Result	System
Resume	Resume	System
State W-4	Documentation	System

The table to the right will display the (2.) HRCenter Document Type, the (3.) TempWorks Document Type, and the (4.) Enterprise Hierarchy.

**2. HRCenter Document Type:** When designing a form or survey page in HRCenter, users have the ability to map the document back to Enterprise. This setup involves associating a document type with the form/survey.

For example, when creating a page for a Health Insurance Form, users will be asked to specify the (6.) document type and (7.) form destination to be associated with the page within the (5.) configuration details step of the page creation.

**\*Note\*** If you do not want the form/survey page saved as a document within the employee record, select "NONE" from the (7.) form destination dropdown, otherwise select "PDF".

EDIT PAGE

5. **Configuration Details**

**Category**  
The category this block will belong to. Information blocks default to Info Blocks, Survey blocks default to Survey Blocks, Form blocks default to Form Blocks.  
Start Typing

6. **Document Type**  
Select a document type for this form.  
ACA Documentation

7. **Form Destination**  
PDF or NONE  
PDF

**Maximum Documents**  
Maximum number of files allowed to be attached when the Approver is signing the form.

**Minimum Required Documents**  
Number of files that are required to be attached when the Approver is signing the form.

**Postfill Procedure**

Page 3

**3. TempWorks Document Type:** The document type that will be stored on the employee record in Enterprise. This will be driven by the document type selected in HRCenter when creating a page (as described above), and the hierarchy established.

**\*Note\*** The TempWorks Document Type is a customizable list. While Enterprise includes a default list of document types, additional types can be added. Document types cannot be added by users, instead, please contact TempWorks Support to assist.

For example, there are two mappings that have been established for the HRCenter Document Type of "Photograph":

HRCenter Docume...	TempWorks Docume...	Hierarchy
Care Now Report	Care Now Report	System
CIA Result	CIA Result	System
8. Photograph	Photograph	System
9. Photograph	Documentation	High Tech Staffing

The (8.) first mapping dictates that as a general rule when an HRCenter page using the doc type of "Photograph" is completed, it should be mapped back to the doc type of "Photograph" in Enterprise. Since this first instance is set to a hierarchy level of system, "Photograph" in HRCenter will always equal "Photograph" in Enterprise unless a rule has been established for a more defined of the hierarchy.

Which brings us to our second mapping...

The (9.) second mapping dictates that when an HRCenter page using the doc type of "Photograph" is completed and the employee belongs to "High Tech Staffing", it should be mapped back to the doc type of "Documentation" in Enterprise.

**4. Enterprise Hierarchy:** The level in your database at which a mapping should occur.

Every Enterprise database will be stocked with a variety of system mappings for HRCenter → Enterprise document mappings. Users may override those system defaults by adding additional mapping rules.

For example, suppose we have the following hierarchy structure:

- **System :**
  - **Entity 1:** Secretariat Staffing
    - **Branch 2:** St. Paul
    - **Branch 1:** Minneapolis
  - **Entity 2:** Nerds Now Staffing
    - **Branch 1:** Duluth
    - **Branch 2:** Mankato

HRCenter Document Mapping	TempWorks Document Mapping	Hierarchy	Effects of Hierarchy
Transcripts	Transcripts	System	When an HRCenter page with the document type of "Transcripts" is completed it will mapped to "Transcripts" document type in Enterprise, regardless of the employee's entity or branch.
Transcripts	Documentation	Secretariat Staffing	If the employee belongs to the St. Paul or Minneapolis branch of Secretariat Staffing, an HRCenter page with the document type of "Transcripts" will be mapped to the "Documentation" document type in Enterprise. Employees that belong to Nerds Now Staffing respect the system setting and will continue to be mapped to "Transcripts".
Transcripts	Photograph	Duluth	If the employee belongs to the Duluth branch, an HRCenter page with the document type of "Transcripts" will be mapped to the "Photograph" document type in Enterprise. Employees that belong to the Mankato branch respect the system setting and will continue to be mapped to "Transcripts".

**To Add an HRCenter Doc Mapping Rule:**

**Step 1:** Select the + icon in the upper right hand corner. This will automatically open the "add/edit hrcenter document mapping" window:

The screenshot shows a dialog box titled "add/edit hrcenter document mapping". It features three dropdown menus for configuration:

- Hierarchy:** High Tech Staffing
- HRCenter Document Type:** Photograph
- TempWorks Document Type:** Documentation

At the bottom of the dialog, there are "Cancel" and "Save" buttons. A small warning icon is visible in the bottom left corner.

**Step 2:** Define the hierarchy for the document mapping - should this mapping rule reach across a SupEntity, Entity, ClassVsTemp, Region, District, Branch, etc ("levels" available will depend on your company's unique hierarchy structure).

**Step 3:** Define the HRCenter Document Type and TempWorks Document Type. Again, here you are stating when 'X' Form (and related doc type) is completed in HRCenter, it is saved as 'Y' Document Type in Enterprise.

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