Enterprise - Administration Manual

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Welcome to Enterprise™ for Administration!

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 Administrators to understand all the admin related options they have available.

Administration is divided into 3 topics:

- Front Office
- Back Office
- User & System Management

Note You may only be given access to some areas of administration depending on your role and company needs.

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 Admins, you may want to browse our full selection of videos in order to fully understand the system and how administration effects it:

- Enterprise 101 - provides an overview of important information including how to navigate and what is hierarchy (this is extremely important for administration)
- Recruiter 101 - provides an overview of basic front office related functionality
- Pay/Bill 101 - provides an overview of basic back office 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.

Front Office Administration

What Do We Mean by "Front Office"?

> When we talk about front office functionality, we are talking about managing employees, customers, orders, and assignments. The administration topics listed here will be related to what front office service reps can see and select in their drop downs and searches.

The Basics:

Every front office admin should at least consider and review the following common admin options:

- Enterprise - Creating Interest Codes
- Enterprise - How to Create Job Titles
- Enterprise - How to Create Message Action Codes
- Enterprise - How to Create Sales Teams
- Enterprise - How to Setup Sales Pipeline Statuses

Additional Topics to Consider:

Here are some additional optional admin settings to consider, you can always check out

Front Office Administration folder for more articles.

- Enterprise - How to Create Hotlist Tags
- Enterprise - How to Setup and Manage Business Codes
- Enterprise - How to Setup and Manage Custom Data
- Enterprise - Setting Up the Interview Questionnaire

Front Office 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
Who will be in charge of managing interest codes? Is there a standard naming convention or standard categories you will be using to help keep things organized?	
Who will create new job titles as you start staffing new positions with new customers?	
Who will create new message action codes? What message action codes will your service reps be asked to use? Are there processes behind when to use what code?	
Will you be utilizing Sales Teams? Will this	

be by sales rep, region, etc?

Question	Answer
How will you utilize the Sales Pipeline? What statuses are you setting up?	
Will you be utilizing Custom Data or Business Codes?	
Will you be utilizing the Interview Questionnaire? Who will be in charge of managing the groups and questions? How will service reps request updates to questions?	

Back Office Administration

What Do We Mean by "Back Office"?

> When we talk about back office functionality, we are talking about all the sections of our system that related to payroll, billing, and accounts receivable. The administration

> topics here might effect some front office options but will be related to payroll and billing.

The Basics:

Start with the following basic back office links:

- Enterprise - Creating Multiplier Codes
- Enterprise - How to Add Authorities
- Enterprise - How to Add Worker Comp Codes

Advanced Back Office Topics:

Check out the following articles for more advanced back office topics:

- Enterprise - How to Setup Adjustments in Administration
- Enterprise - How to Setup Electronic Authority Payments
- Enterprise - Jurisdiction Setup

Back Office 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 will be responsible for adding new authorities in the system and how will they be notified that there is a new authority needed?	
Who will be responsible for updating the worker comp percentages? Will you have someone auditing what worker comps are being selected on orders/assignments?	

Question	Answer
Will you be using multiplier codes in your system? Who will add in new rates as new agreements are signed?	
Will you be setting up some authorities with electronic payments?	

User & System Management

What do we mean by "User Management?"

> Users in your system have a variety of different security options that need to be set by your administration team. What can they edit or view? Do they only see records in one branch or a whole entity?

User Management

Use the following links to learn more about managing users:

- *To Create a New User:* Managing Users in Bridge
- *Managing Security in Enterprise:* Enterprise - Security Roles
- *Managing Security in Beyond:* Beyond - Managing Security Groups
- *Granting Service Reps Access to HRCenter or WebCenter Admin:* Enterprise - Managing Service Rep Web User Accounts

System Management

Use the following links to learn more about system settings:

- Enterprise - How to Create Branches
- Enterprise - Address Standardization

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 will have access to the administration section in Enterprise?	
What kind of access will your front or back office users have?	
Who will create new branches in your system?	
Which service reps will need web user accounts?	
Will your service reps be using Enterprise or Beyond?	

Question	Answer
Who will be adding users in Bridge?	

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