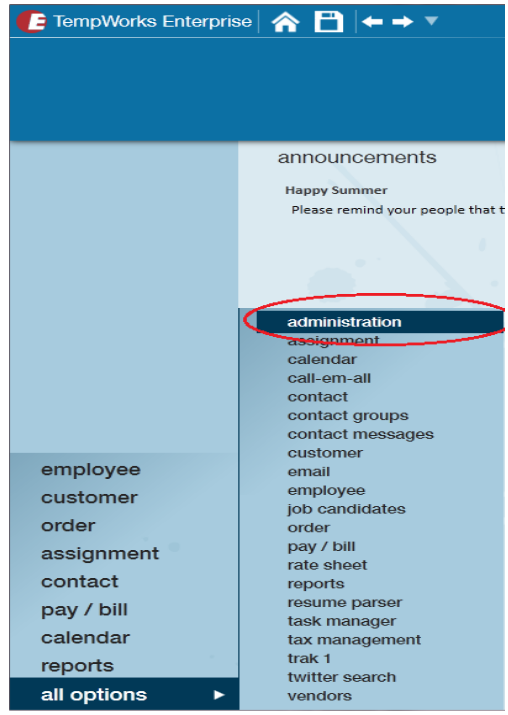
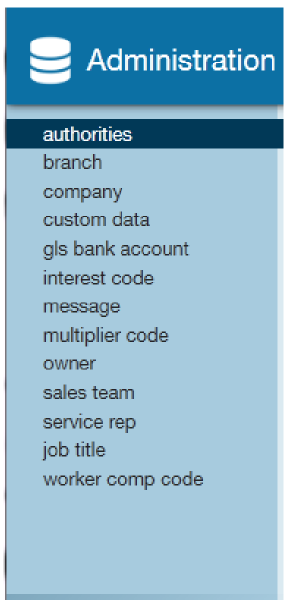
16R1 Enterprise Administrator Functions

The **Administration** form can be accessed by users with the "SA" (System Administrator) *Sec Role* in Enterprise. This form allows authorized users to set up and edit *Authorities*, ***Interest Codes***, ***Message*** *Action* codes, etc. To open the **Administration** form, click on All Options from the navigation bar, then select **Administration** from the menu.





The **Administration** form menu is displayed on the left side of the screen (shown left). Select an option from the menu to add/edit/deactivate information within that table of the TempWorks SQL database.

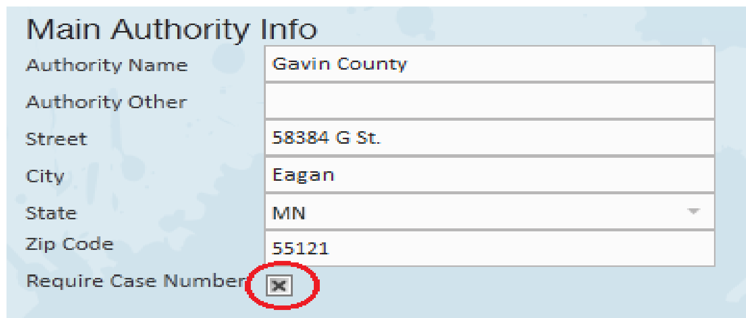
Authorities

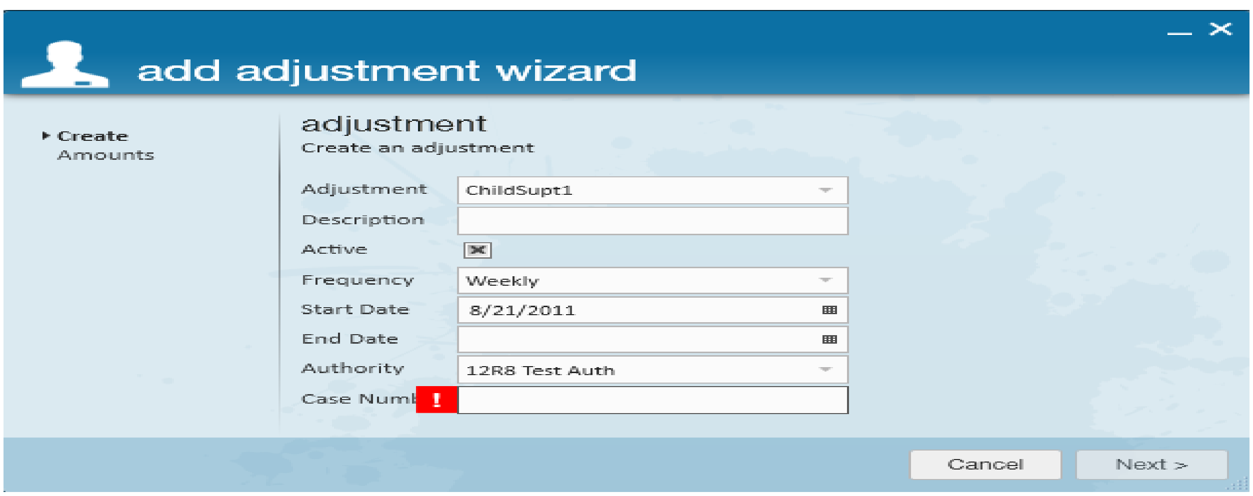
From the **Administration** form click on the option for **Authorities** on the left side of the screen. **Authorities** that are set up in this form are available in the **Employee**/**Pay Setup**/***Adjustments*** form within the *Authority* drop down. When an "AuthCheck" *Run Type* is selected in the ***Payroll Wizard*** the *Authority Name* and address that is set up in this form will be printed on the check. Or if checks are being issued from a separate accounts payable software the **Authority** info will pull into the report that is run for tracking recurring *Adjustments*.

On the left the list of current **Authorities** is displayed. Limit the list displayed by entering the name in the *Find an Authority* field. Click on an **Authority** from the left to display the details in the Main Authority Info section. Once displayed in the Main Authority Info section the **Authority** info can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.

Click on the button in the upper right to add a new **Authority**. Enter the *Authority Name*, *Street*, *City*, *State*, and *Zip Code*.

If a *Case Number* is required when this **Authority** is selected, click in the *Require Case Number* check box.

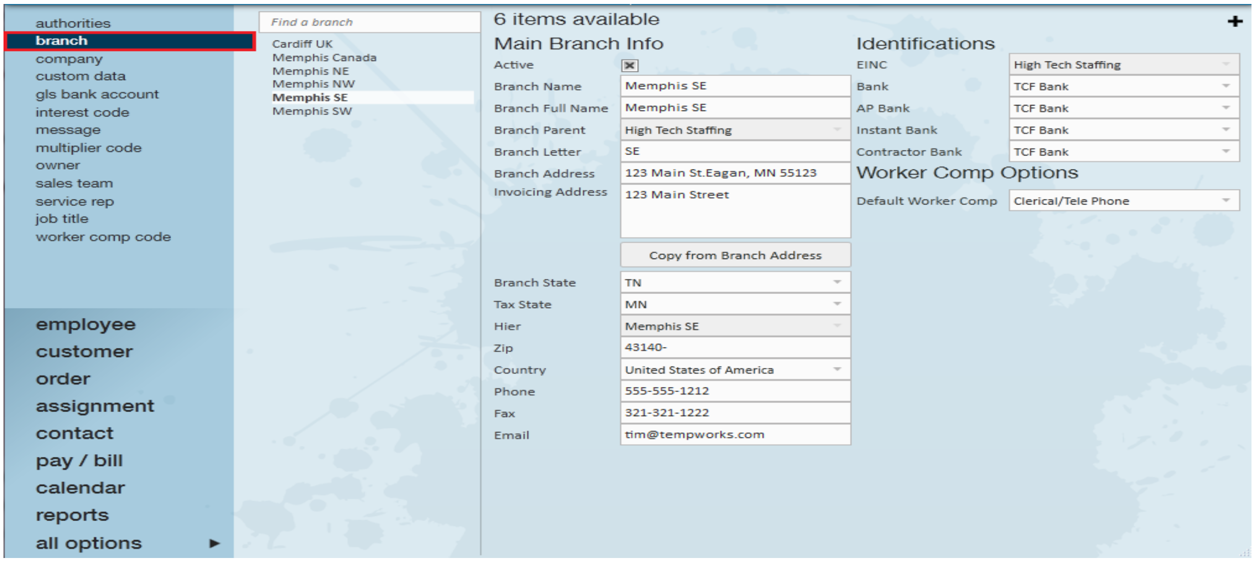




If the **Authority** selected from the *Authority* drop down menu has been set up with the *Require Case Number* checked the *Case Number* will be a required field as shown above. The *Case Number* will need to be entered before this *Adjustment* can be saved.

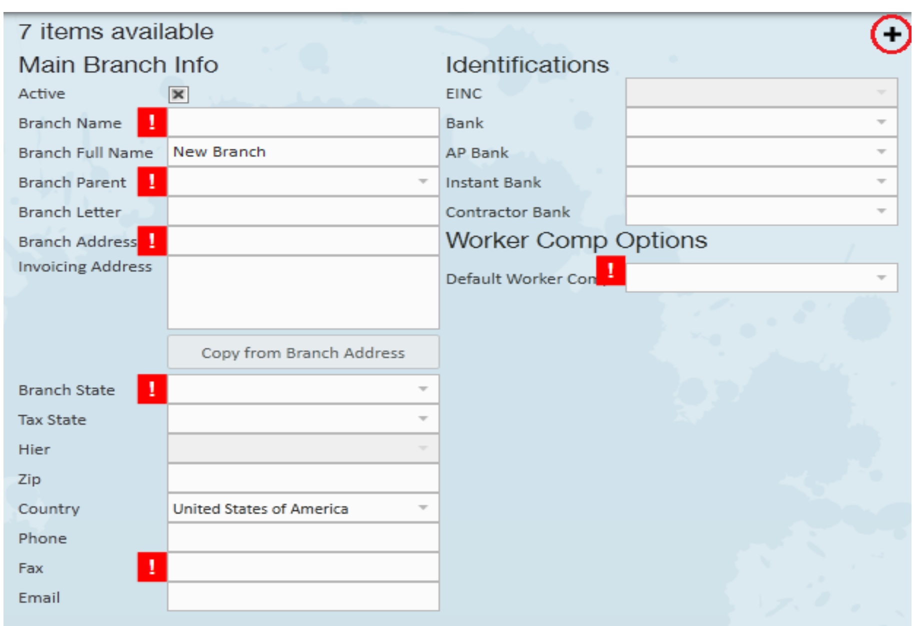
Branch

New *Branches* can be added to currently existing *Entities* by selecting the **Branch** form in the **Administration** menu.



On the left the list of current *Branches* is displayed. Limit the list displayed by entering the name in the *Find a Branch* field. Click on a *Branch* from the left to display the details in the Main Branch Info section. Once displayed in the Main Branch Info section the *Branch* info can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.

*Note - The *Branches* that are displayed in the list will be determined by the hierarchy level (*System*, *Entity*, *Class*, etc.) that the user is currently logged in at.

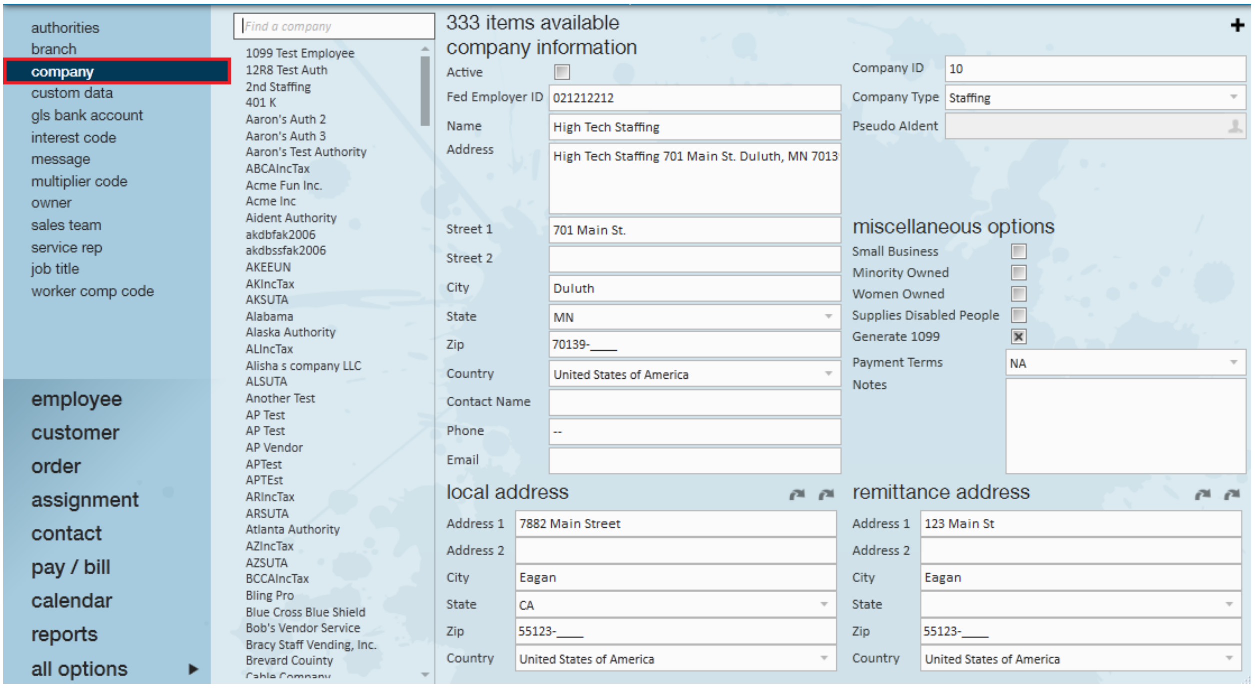


*Note – Hosted clients will need to contact TempWorks to have new *Branches* created.

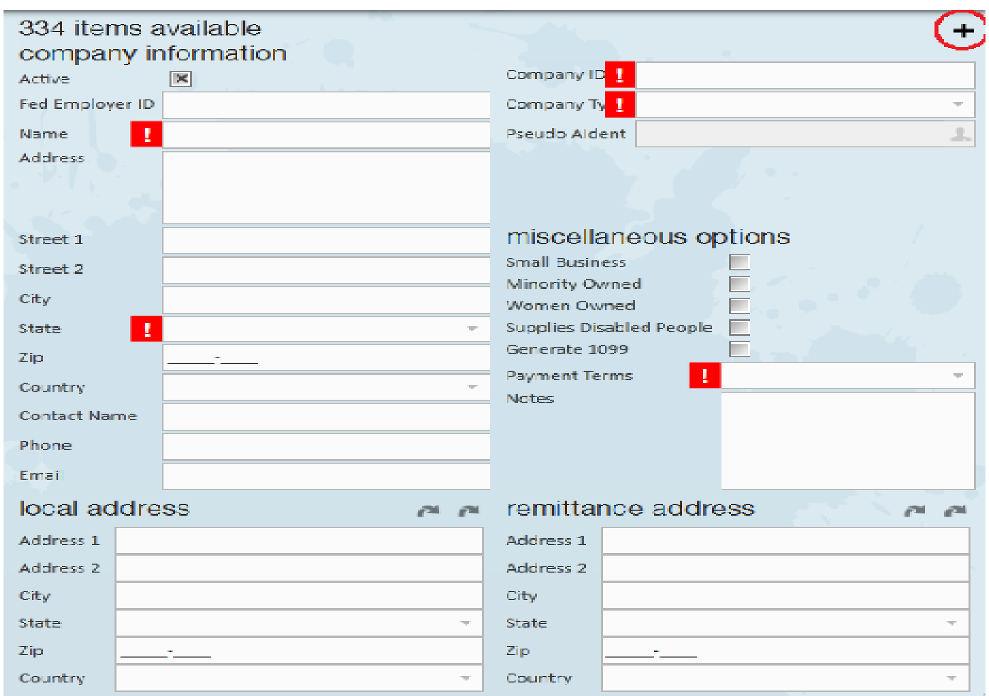
Click on the button in the upper right to add a new *Branch*. Enter the *Branch* info into the required fields and select the correct *Entity* from the *EINC* drop down menu. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the new *Branch*.

Company

The **Company** form is used for adding new **Vendors** for issuing 1099 consultant **Employee Paychecks** and subcontractor **Vendor** payments. If the TempWorks Accounts Payable module is being used the **Vendors** that AP checks will be issued to can be entered in this form as well.



On the left the list of current **Companies** is displayed. Limit the list displayed by entering the name in the *Find a Company* field. Click on a **Company** from the left to display the details in the Main Company Information section. Once displayed in the Main Company Information section the **Company** info can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.

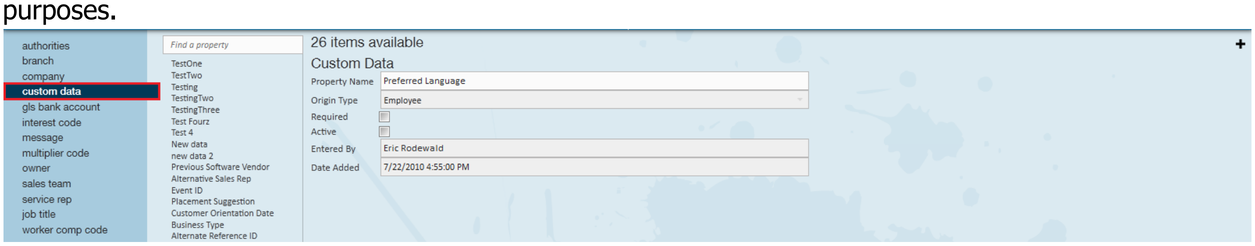


Click on the button in the upper right to add a new **Company**. Enter the Company info into the required fields and then click on the button at the top of the screen or *Ctrl – S* on your keyboard to add the new record.

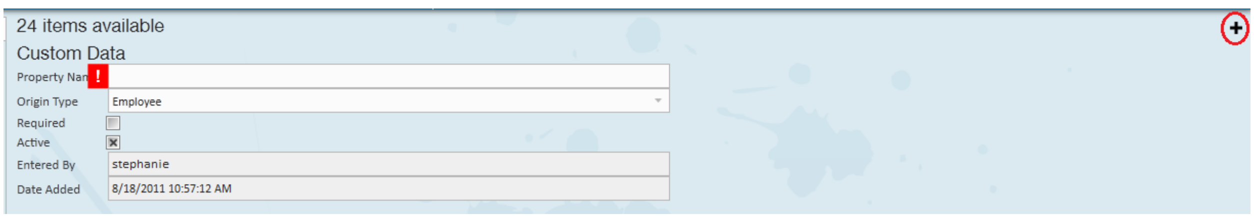
*Note – For more information on **Vendor** set up please refer to the 14R2 Enterprise Vendor Management help document: http://www.tempworks.com/documents/14R2EnterpriseVMS1099andWebCenterVendorPortal.pdf and for 1099 Consultant set up use the 15R1 Enterprise 1099 Consultants Set up: http://www.tempworks.com/documents/15R1Enterprise1099ConsultantsSetup.pdf

Custom Data

The **Custom Data** form is used for adding additional data in the **Employee**, **Customer**, **Order**, **Assignment**, or **Contact** records. This additional data will be available for searching and reporting purposes.



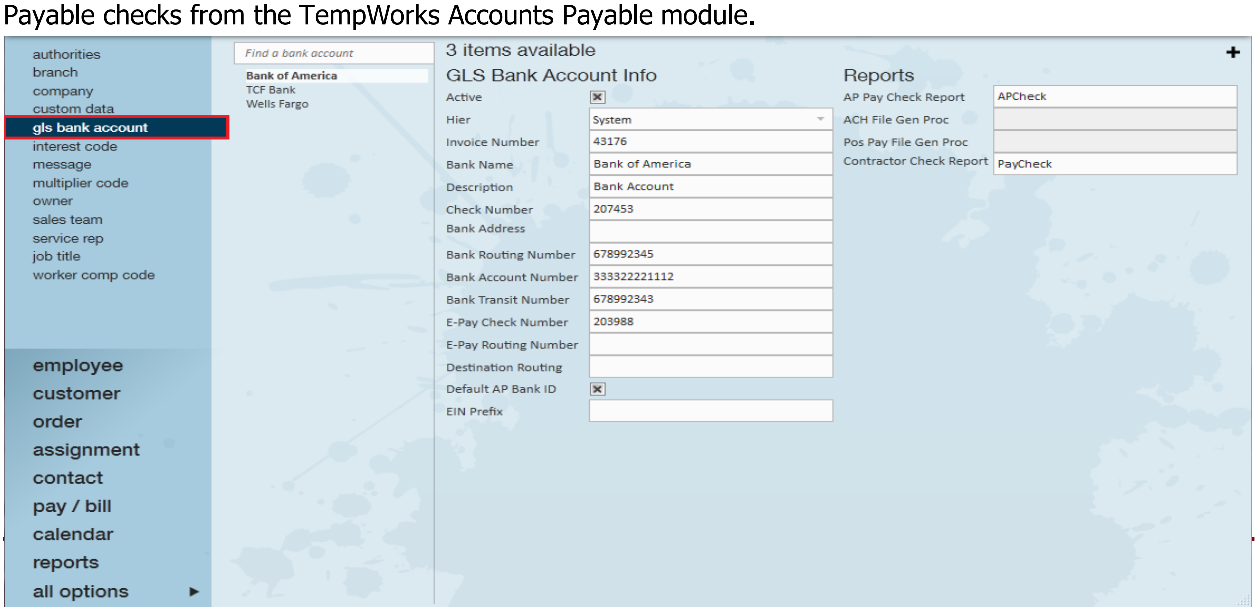
On the left the list of current *Custom Data* fields is displayed. Limit the list displayed by entering the name in the *Find a Property* field. Click on the *property* from the left to display the details in the Custom Data Info Section. Once displayed in the Custom Data Info Section, the *Property* info can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.



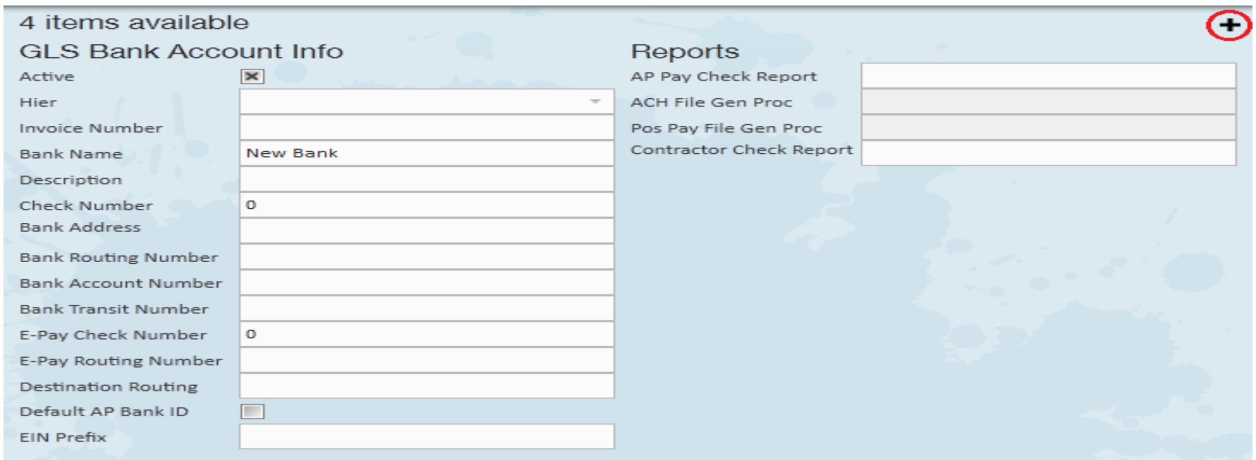
Click on the button in the upper right to add a new *Property*. Select the *Origin Type* or record where the *Property* will be available. Choose whether or not the *Property* should be required. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to add the new **Custom Data** field.

GLS Bank Account

The **GLS Bank Account** form is used for adding new *Bank Accounts* for issuing **Payroll** and Accounts Payable checks from the TempWorks Accounts Payable module.

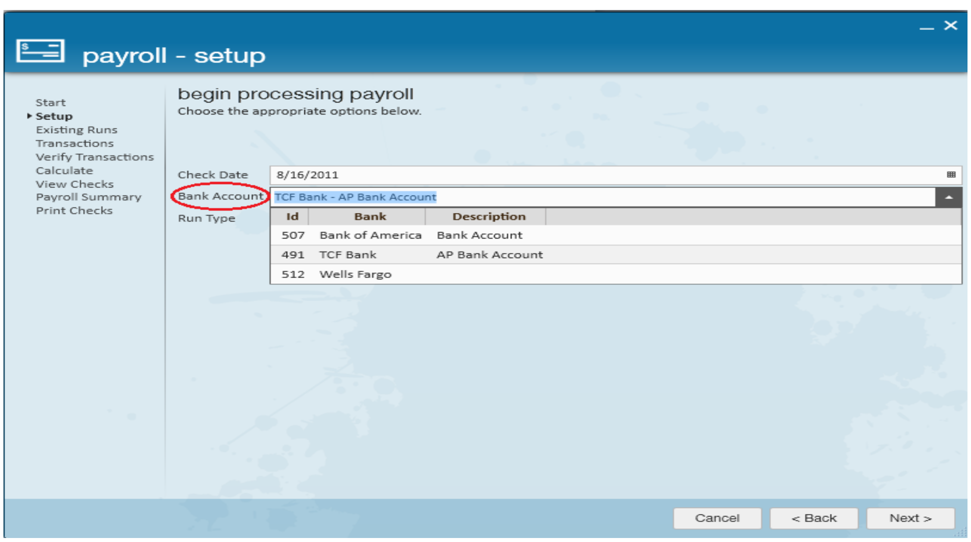


On the left the list of current *Bank Accounts* is displayed. Limit the list displayed by entering the name in the *Find a Bank Account* field. Click on a *Bank Account* from the left to display the details in the GLS Bank Account Info section. Once displayed in the GLS Bank Account Info section the *Bank Account* info can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.



Click on the + button in the upper right to add a new *Bank Account*. Select the *Entity* or *Branch* from the *Hier* drop down menu. Enter the *Bank Name*, *Bank Routing Number*, *Bank Account Number*, and *Bank Transit Number*. For **Payroll** processing enter the starting *Check Number* and the starting *Invoice Number* that should be used for **Invoice** processing. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to add the new record.

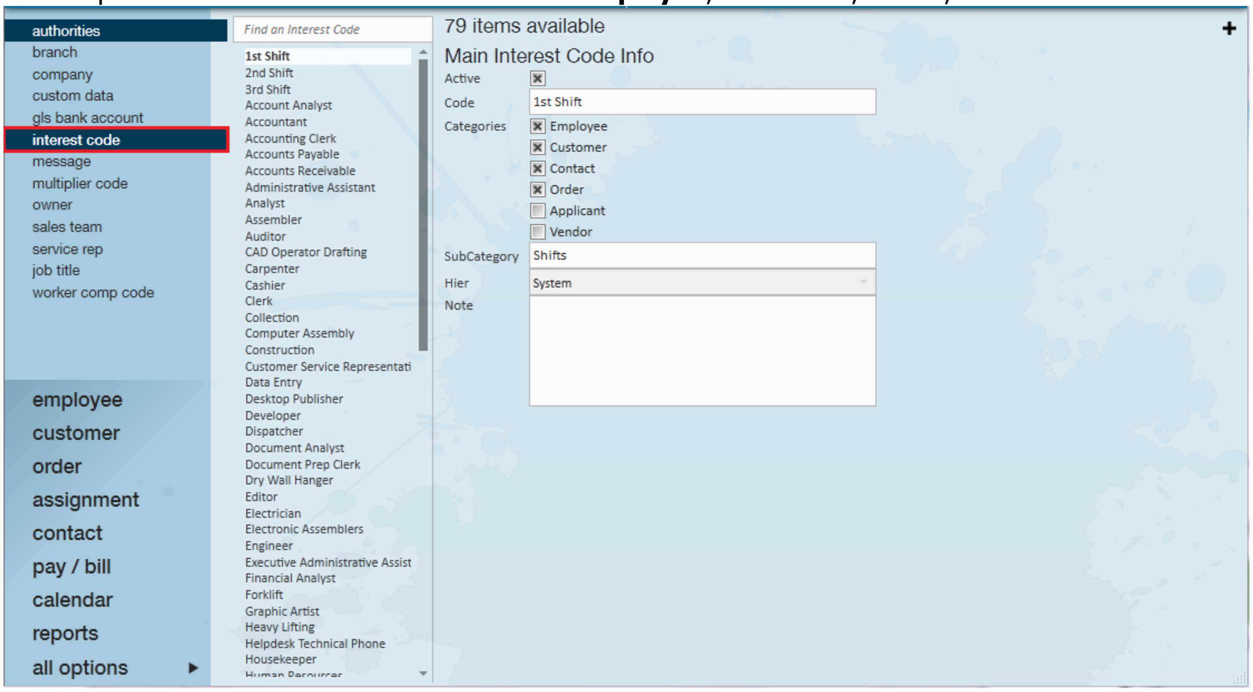
*Note – If pre-printed check stock is being used for **Payroll** processing and direct deposit check stubs should be printed on plain paper, enter in the starting *E-Pay Check Number* (use a high starting number to avoid overlap between e-pay and "live" check numbers).



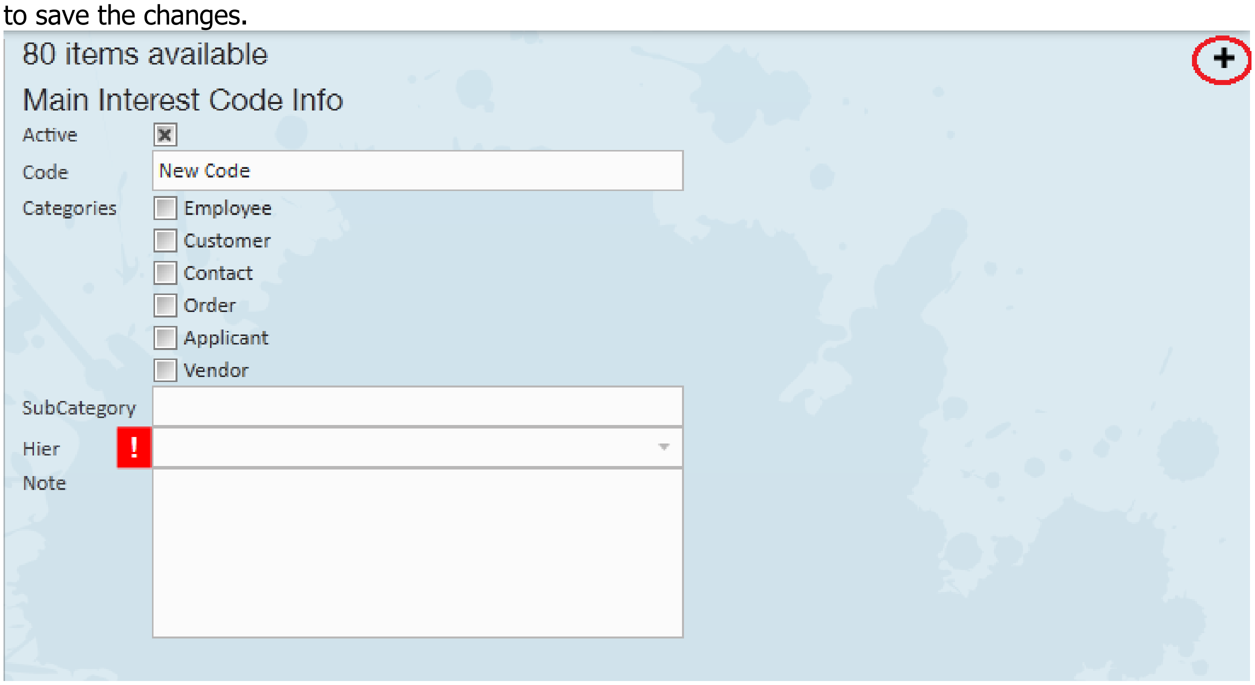
When the ***Payroll Wizard*** is on the ***Payroll – Setup*** form, the accounts that are set up in the **GLS Bank Account** form can be selected from the *Bank Account* drop down menu.

Interest Code

The **Interest Code** form is used for adding and editing ***Interest Codes*** for the different main record areas of Enterprise. ***Interest Codes*** are available on the **Employee**, **Customer**, **Order**, and **Contact** records.

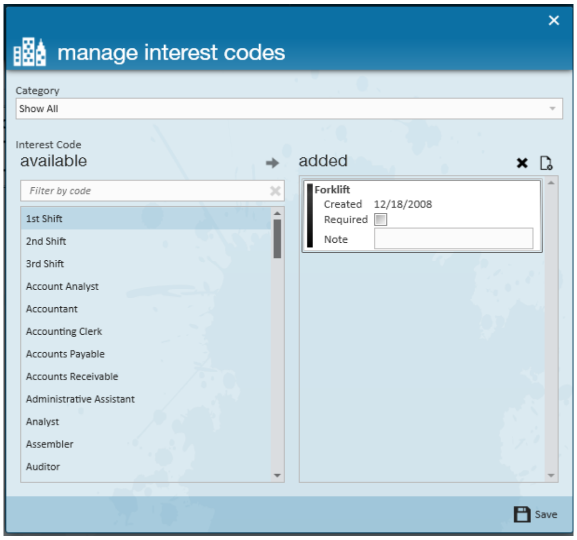


On the left the list of current ***Interest Codes*** is displayed. Limit the list displayed by entering the name in the *Find an Interest Code* field. Click on an ***Interest Code*** from the left to display the details in the Main Interest Code Info section. Once displayed in the Main Interest Code Info section the ***Interest Code*** info can be edited. Once complete click on the  button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.



Click on the button in the upper right to add a new ***Interest Code***. Enter the ***Interest Code*** name in the *Code* field. Put a check in the box next to the records that it should be available in and select the *Branch* or *Entity* that the code applies to from the *Hier* drop down menu (required field). If a *Category* applies to this code enter it into the *SubCategory* field. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to add the new *Interest Code*.

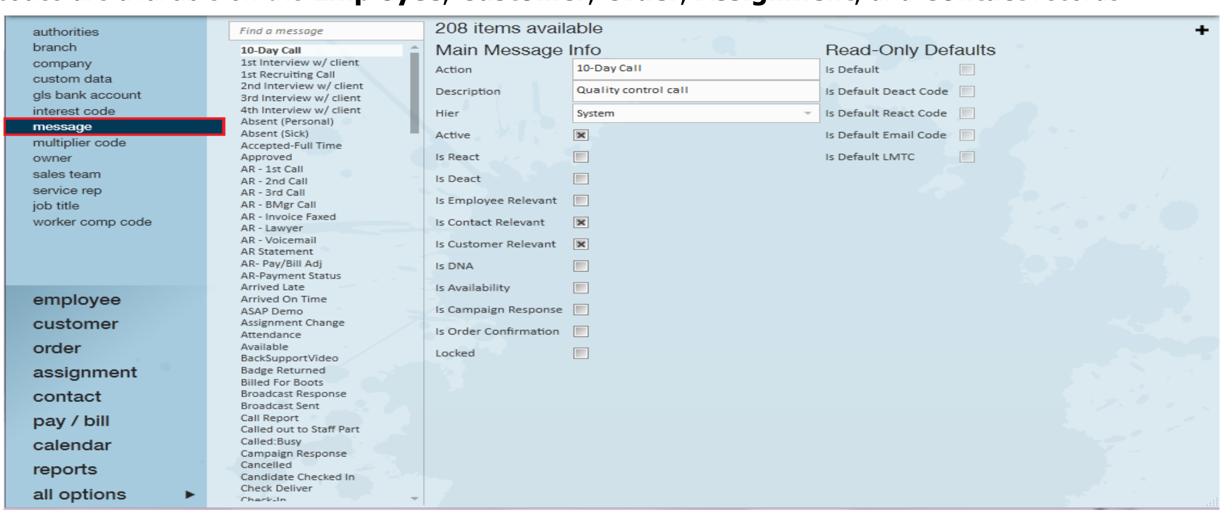
*Note – The check boxes for *Applicant* and *Vendor* are used in conjunction with the WebCenter Applicant Portal and Vendor Portal, respectively. Clicking in one of these boxes makes the ***Interest Code*** available to **Employees** applying online and **Vendor Contacts** when adding new sub-contracting **Employee** records.



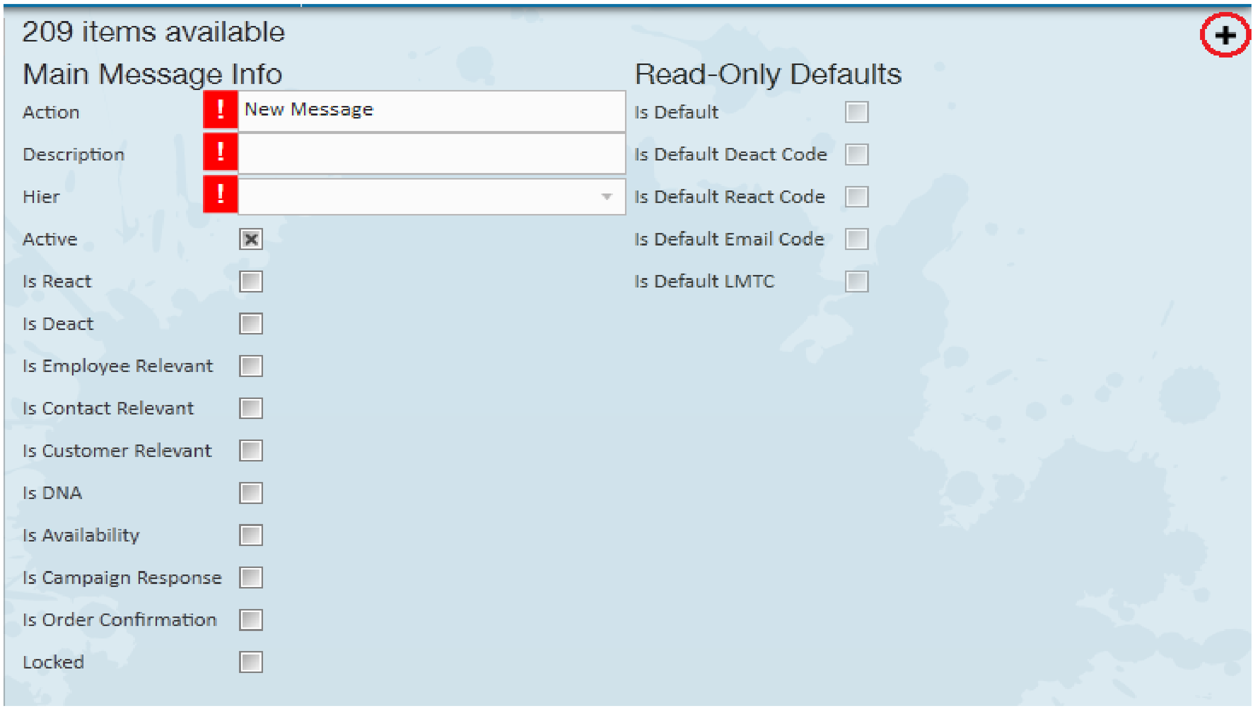
When the ***Manage Interest Codes*** form is open the new ***Interest Code*** will be listed for the current record type.

Message

The **Message** form is used for adding new ***Message** Action* codes or editing current codes. ***Message** Action* codes are available on the **Employee**, **Customer**, **Order**, **Assignment**, and **Contact** records.



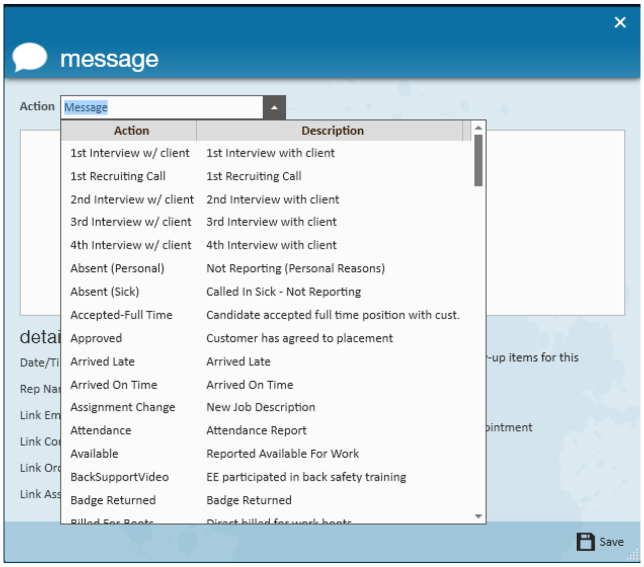
On the left the list of current ***Message*** *Action* codes is displayed. Limit the list displayed by entering the name in the *Find a Message* field. Click on a ***Message*** *Action* from the left to display the details in the Main Message Info section. Once displayed in the Main Message Info section the ***Message*** *Action* code can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.



Click on the button in the upper right to add a new ***Message*** *Action* code. Enter the ***Message*** *Action* code name in the *Action* field, add a *Description*, and select the *Branch* or *Entity* that the code applies to from the *Hier* drop down menu (required fields). Then click in the check boxes that apply for the *Action* code as listed below:

Active – Code is visible in the *Action* code drop down menu when adding a new ***Message***.
Is React – Will "reactivate" an inactive **Employee** or **Contact** record when this *Action* code is selected.
Is Deact – Will "deactivate" an active **Employee** or **Contact** record when this *Action* code is selected.
Is Employee Relevant – Should be available when adding a ***Message*** from the **Employee** record.
Is Contact Relevant – Should be available when adding a ***Message*** from the **Contact** record.
Is Customer Relevant – Should be available when adding a ***Message*** from the **Customer** record.
Is DNA – The *Action* code that is listed on ***Messages*** that are auto-created by adding an ***Assignment Restriction*** to the **Employee** or **Customer** record.
Is Availability – When this *Action* is selected in the **Employee** record it indicates that the **Employee** has indicated that they are "available" for placement.
Is Campaign Response – Will be selected on ***Messages*** that are automatically created when a recipient clicks on a url from an ***Email*** that is linked to the tracking website.
Is Order Confirmation – The *Action* code that is listed on ***Messages*** that are auto-created when an ***Email*** confirmation is sent from the **Order** to confirm that the **Order** has been filled.
Locked – Applies to ***Messages*** that cannot be edited once they have been added to the system.

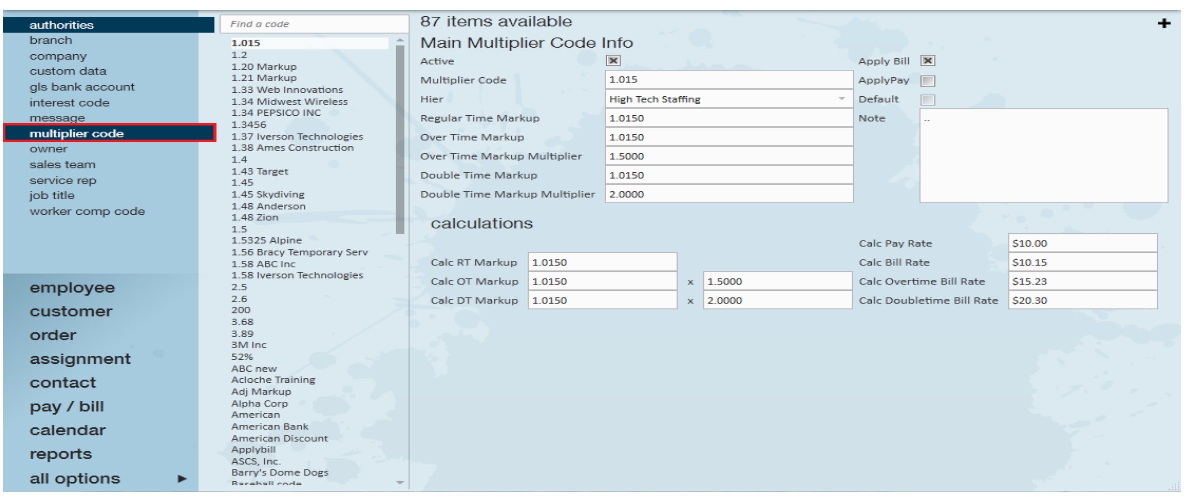
The Read Only Defaults section will indicate if the selected ***Message*** *Action* code is the system default for that type of ***Message***. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to add the new ***Message*** *Action* code.



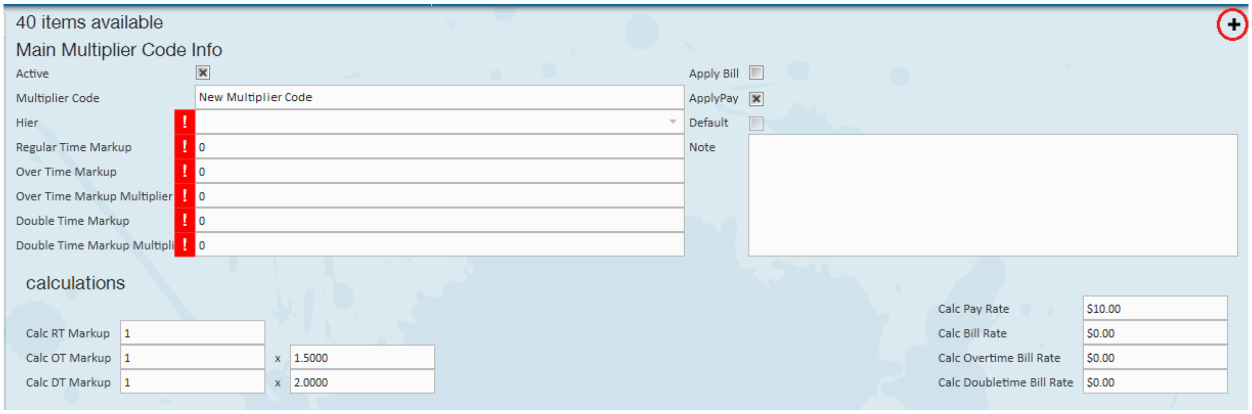
When the ***Message*** form is open the new *Action* code will be listed for the current record type.

Multiplier Code

The **Multiplier Code** form is used for adding new *Multiplier Codes* or editing current codes. *Multiplier Codes* are used on the **Customer**, **Order**, and **Assignment** records. *Multiplier Codes* are used to help in calculating *Pay* and *Bill Rates* on the **Order** and **Assignment** records.



On the left the list of current *Multiplier Codes* is displayed. Limit the list displayed by entering the name in the *Find a Code* field. Click on a *Multiplier Code* from the left to display the details in the Main Multiplier Code Info section. Once displayed in the Main Multiplier Code Info section the *Multiplier Code* can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.

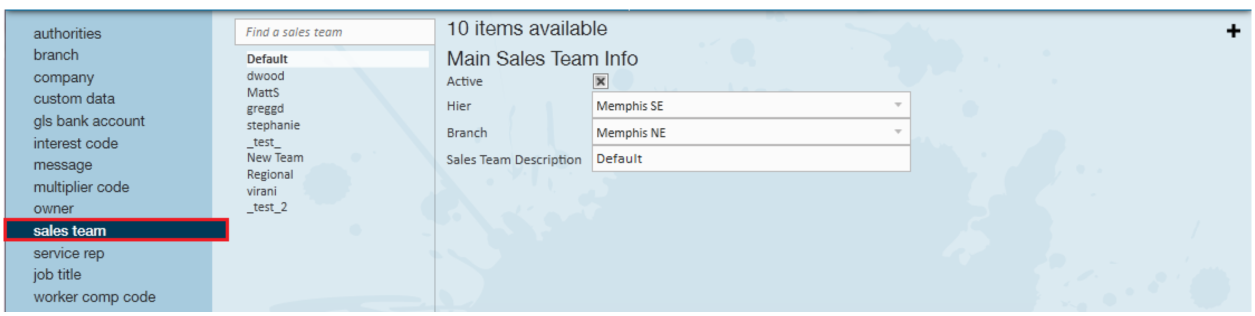


Click on the + button in the upper right to add a new *Multiplier Code.* Choose the name of the *Multiplier Code.* Select the *Hier* as well as the various markups. Based on your selections, the calculations will automatically populate. By selecting either *Apply Bill* or *Apply Pay*, the *Multiplier Code* will automatically be calculated to populate the pay rate and bill rate in the respective field. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the new *Multiplier Code*.

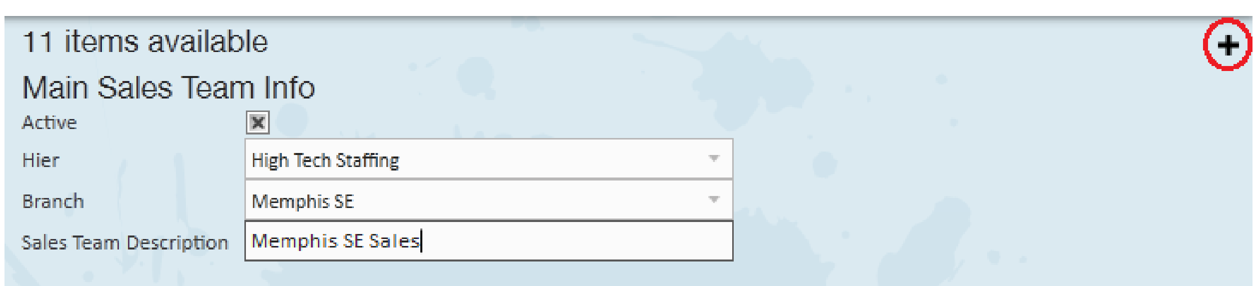
*Note – For more information on *Multiplier Code* set up please refer to the 15R1 Enterprise Multiplier Code Setup help document:
http://www.tempworks.com/documents/15R1EnterpriseMultiplierCodeSetup.pdf

Sales Team

The **Sales Team** form is used for adding new *Sales Teams* or editing current teams. The *Sales Team* is listed in the **Customer**, **Order**, and **Assignment** records. The *Sales Team* field allows for diverse tracking for sales and commission reporting.



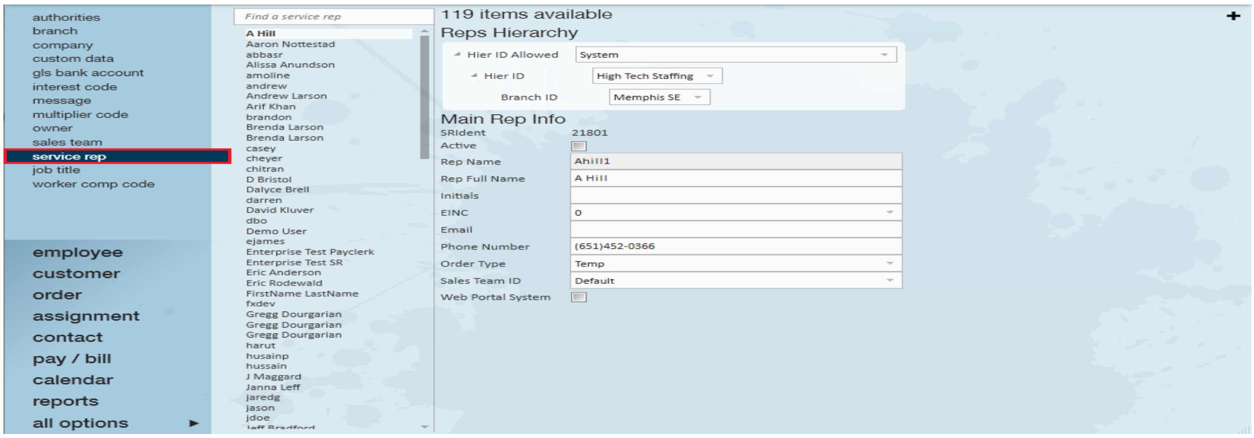
On the left the list of current *Sales Teams* is displayed. Limit the list displayed by entering the name in the *Find a Sales Team* field. Click on a *Sales Team* from the left to display the details in the Main Sales Team Info section. Once displayed in the Main Sales Team Info section the *Sales Team* can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.



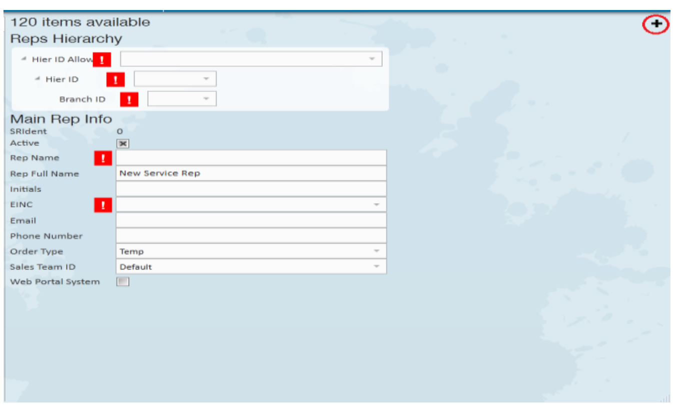
Click on the button in the upper right to add a new *Sales Team* code. Enter the *Sales Team* name in the *Sales Team Description* field; select the *Hier* and the *Branch* from the drop down menus. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the new *Sales Team*.

Service Rep

The **Service Rep** form is used for adding new Enterprise users or editing information for current users. This user set up will determine who has access to your Enterprise database and their level of access as well as setting up their ***Email*** address and default information.



On the left the list of current users is displayed. Limit the list displayed by entering the name in the *Find a Service Rep* field. Click on a user from the left to display the details in the Reps Hierarchy and Main Rep Info sections. Once displayed the user's information can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.

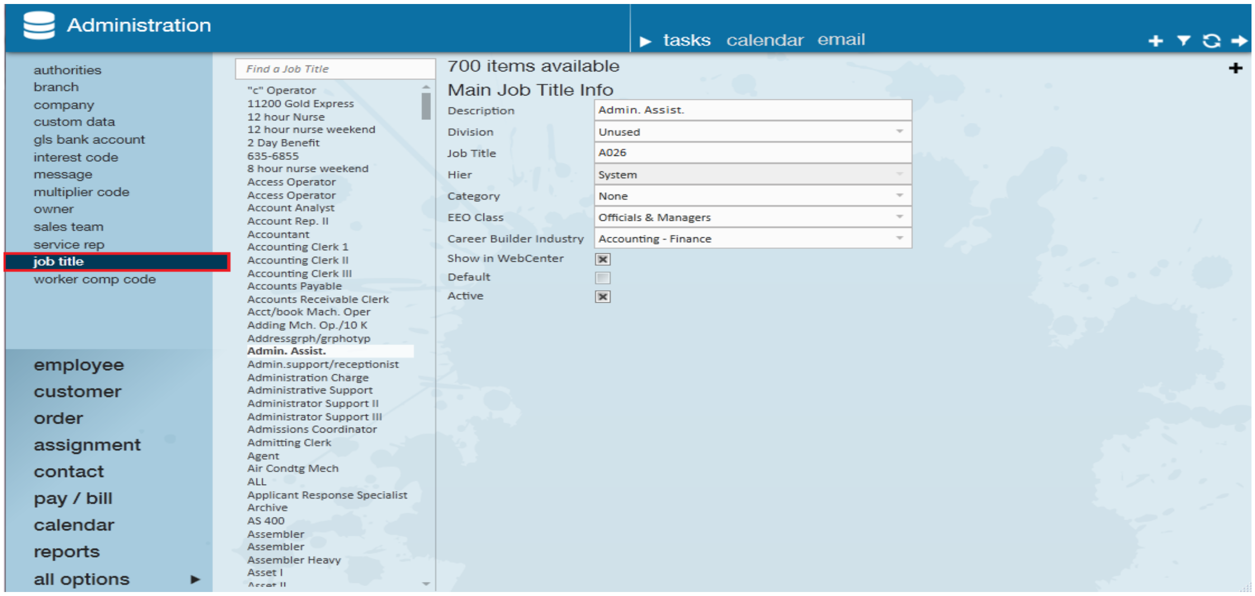


*Note – Only self-hosted companies will be able to use this functionality to add a new user. If your company is hosted by Tempworks, you will need to contact our customer support group to set up a new user for your database.

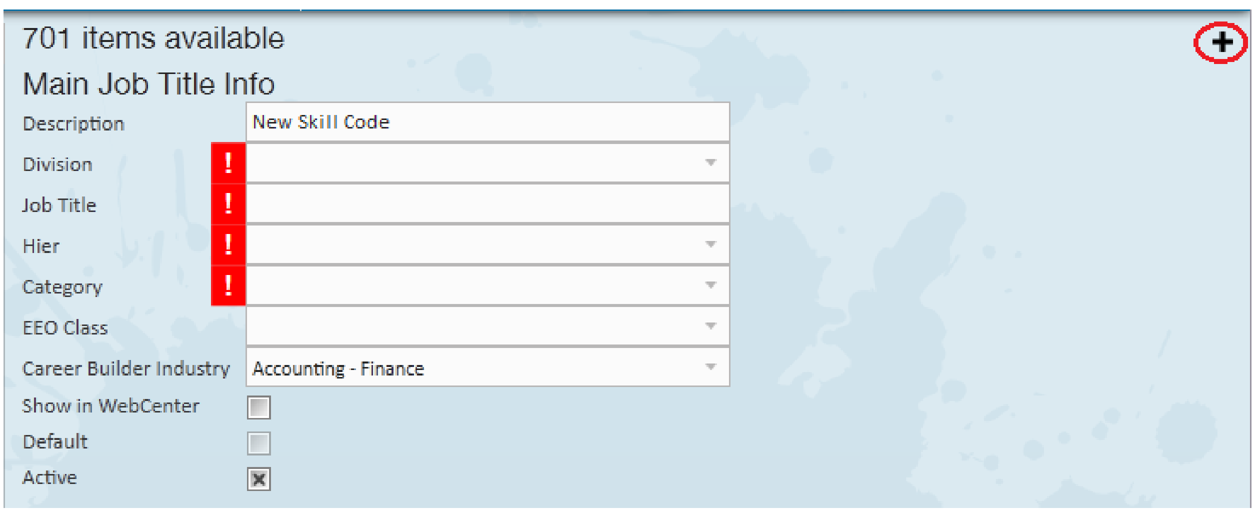
Click on the button in the upper right to add a new user. Enter the name of the user in the *Rep Name* field (required). Add in the *Rep Full Name*, select the *EINC*, *Email*, *Phone Number*, default *Order Type*, and *Sales Team ID*. In the Reps Hierarchy section select the correct option from the drop down menus for *Hier ID Allowed*, *Hier ID Root*, *Hier ID*, and *Branch ID*. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the new user.

Job Title

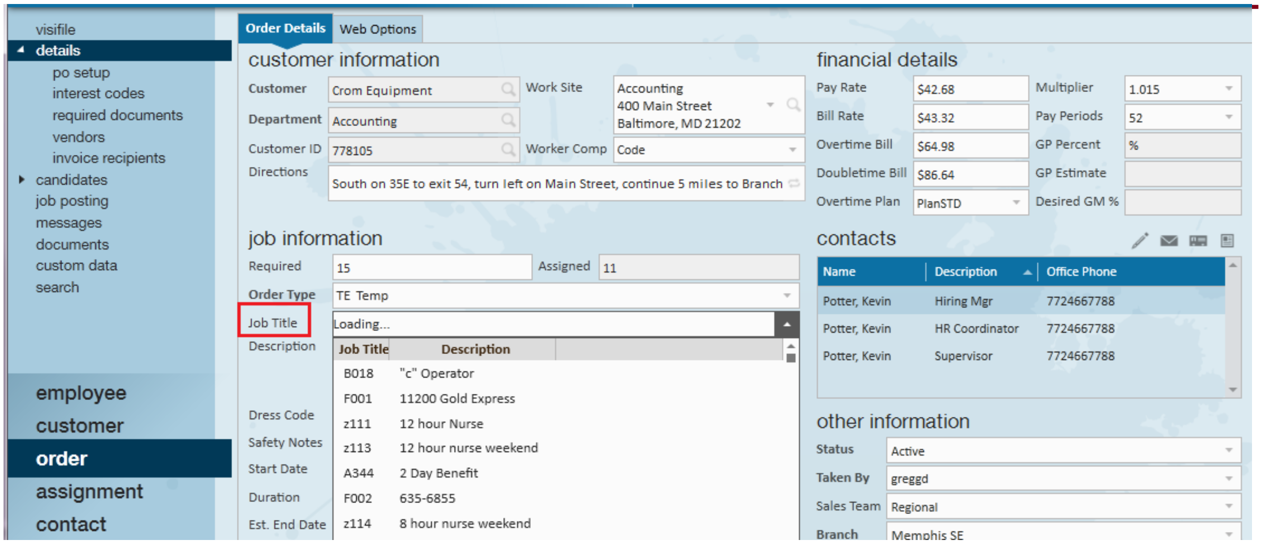
The **Job Title** form is used for adding new *Job Titles* or editing current titles. The *Job Title* is listed in the **Employee**, **Order**, and **Assignment** records. The *Job Title* is also printed on the **Customer's Invoice**.



On the left the list of current *Job Titles* is displayed. Limit the list displayed by entering the name in the *Find a Job Title* field. Click on a *Job Title* from the left to display the details in the *Main Job Title Info* section. Once displayed in the *Main Job Title Info* section the *Job Title* can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.



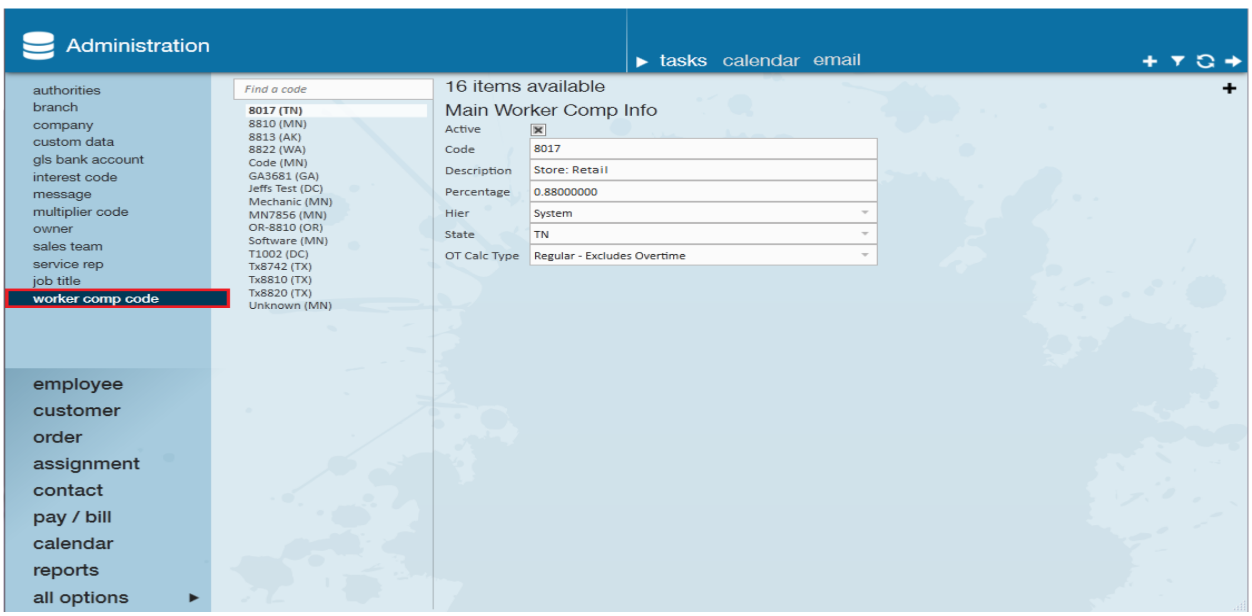
Click on the + button in the upper right to add a new *Job Title*. Enter the *Job Title* description in the *Description* field and the name in the *Job Title* field, select the *Division*, *Hier* and *Category* from the drop down menu (required fields). Click in the *Show in WebCenter* check box if this is a *Job Title* that should be displayed online. If this *Job Title* is the default that should be applied to **Orders** and **Assignments** click in the *Default* box. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the new *Job Title*.



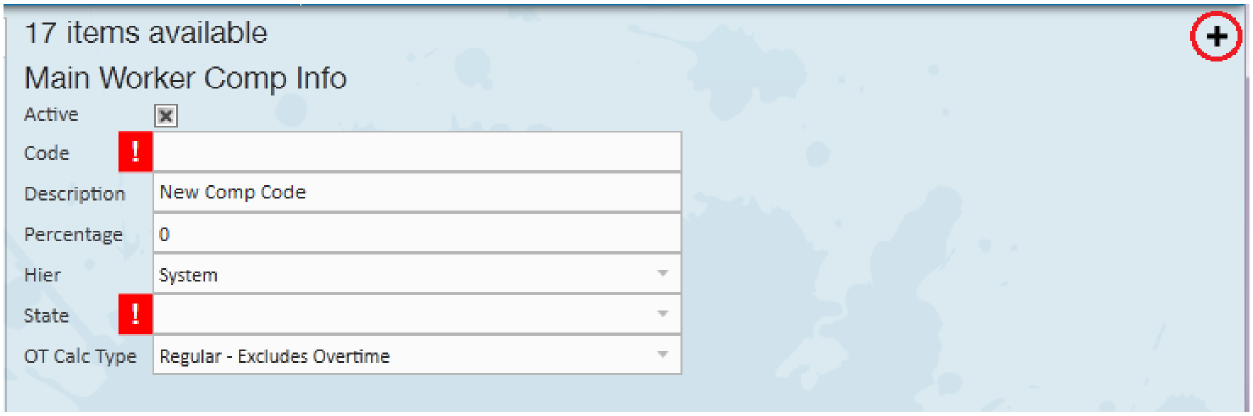
Once the *Job Title* has been added it will be available from the *Job Title* drop down menu on the **Employee**, **Order** and **Assignment Details** forms.

Worker Comp Code

The **Worker Comp Code** form is used for adding new *Worker Comp* codes or editing current codes. The *Worker Comp* is listed in the **Customer**, **Order**, and **Assignment** records. It is used to determine payments owed to your worker compensation insurance provider and is used in calculating gross profit.

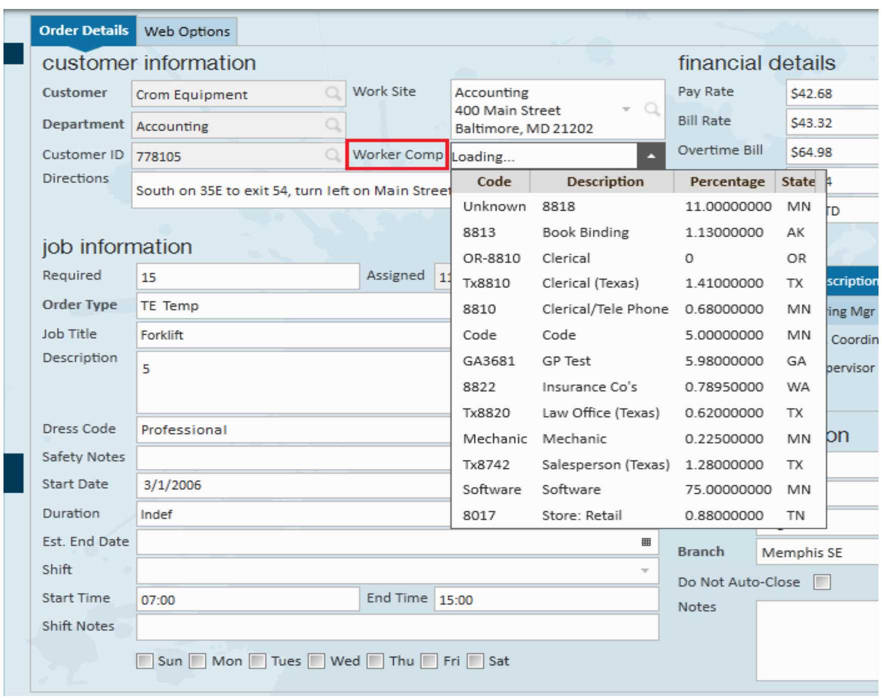


On the left the list of current *Worker Comp* codes is displayed. Limit the list displayed by entering the name in the *Find a Code* field. Click on a *Worker Comp* code from the left to display the details in the Main Worker Comp Info section. Once displayed in the Main Worker Comp Info section the *Worker Comp* code can be edited. Once complete click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the changes.



Click on the button in the upper right to add a new *Worker Comp* code. Enter the name of the code in the *Code* field. Then enter in the *Worker Comp* description in the *Description* field and add the *Percentage*. The *Percentage* should be entered as a decimal. (Ex: 2% should be entered as .02) Select the *Hier*, *State* and *OT Calc Type* from the drop down menus. Click on the button at the top of the screen or *Ctrl – S* on your keyboard to save the new *Worker Comp* code.

*Note – If your company is doing business in more than one state, make sure to enter the state abbreviation as the first two digits of the *Code* field (ie. "MN8810").



The *Worker Comp* can now be selected on the **Customer**/**Invoicing**/***Credit and Payroll*** form (defaults into the **Order** record) or on the **Order Details** form. (It is displayed on the **Assignment Details** form, but cannot be edited at the **Assignment**-level).

Still Have Questions?

For more information about administrator functionality contact our customer support group at 877-452-0327 or by sending an email to support@tempworks.com.

To schedule training on utilizing the administrator functions, submit suggestions on how to improve this document, or to request documentation on other Enterprise functionality please contact our training department at trainers@tempworks.com.

