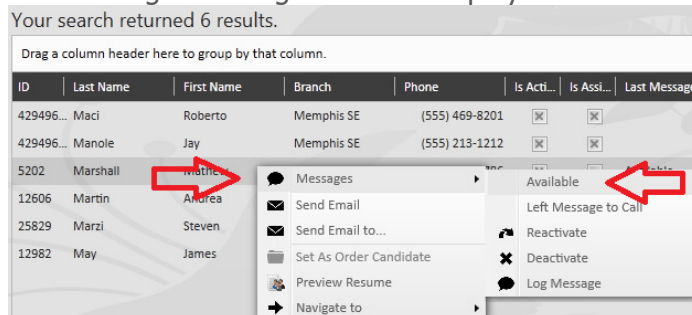


Tips and Tricks to save Clicks

As creatures of habit, we sometimes continue to do the same thing in the same way because we are “used to it”. There may be an easier way to accomplish a goal but we are familiar with our “old ways” and are often too busy to take the time to learn something new. Work gets busy and we don’t have time to “play around” with TempWorks Enterprise to learn little features that would make work so much easier.

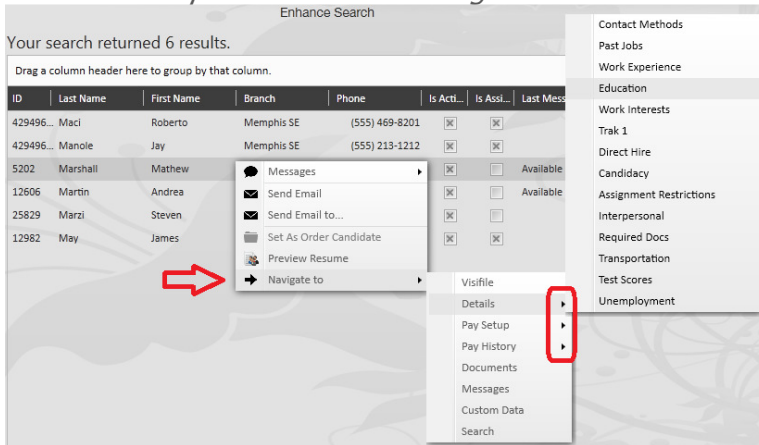
Tips and Tricks to Save Clicks will cover some of the ways in which you may be able to shave precious seconds off different tasks that need to be performed each day.

- Right click to log someone has called in available:
 - After conducting a search to find the Employee who has called in available...
 - Right click on the row which includes the Employee calling in available
 - Hover your mouse over *Messages* and select *Available*
 - This will log a Message that the Employee has called in Available



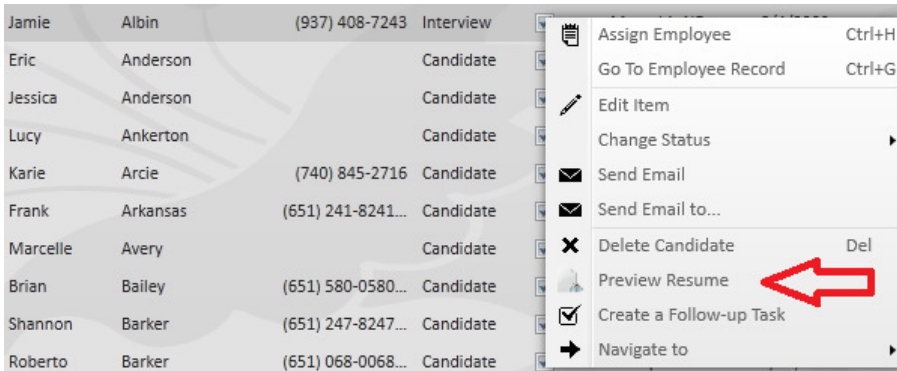
- This can also be used to log a message of *Left Message to call*, *Reactivate*, *Deactivate* or selecting *Log Message* will open the **Message Dialog** window

- **Right click navigation:**
After conducting a search from any of the main areas of TempWorks Enterprise (**Employee/Customer/Order/Contact**)...
 - Right click on the row which includes the Employee you want to be working with
 - Hover your mouse over *Navigate to*



- Select the form within the **Employee** record that you want to navigate to
- An arrow to the right of the Form Name indicates there are sub-forms available
- This will navigate you directly to the form within the **Employee** record

- **Right click to view resume:**
After conducting a search for an Employee from the **Employee** or **Order Candidate Search** areas...
 - Right click on the line which includes the Employee whose resume you would like to see
 - Select *Preview Resume*

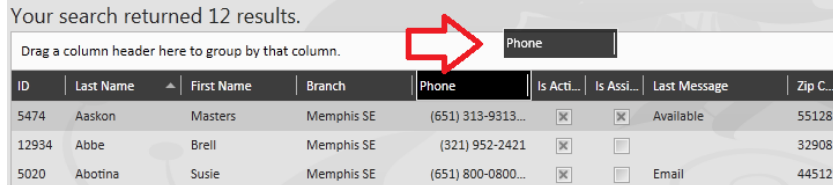


- This Employee's resume will open

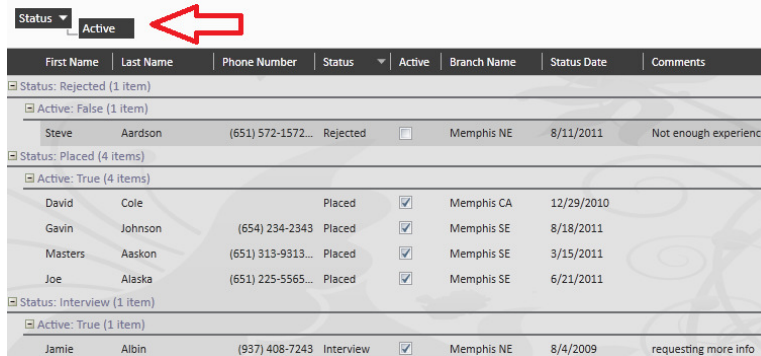


- Change and rearrange columns:
 - **Any time** a grid of information is displayed in TempWorks Enterprise, the Columns can be rearranged as needed or desired...

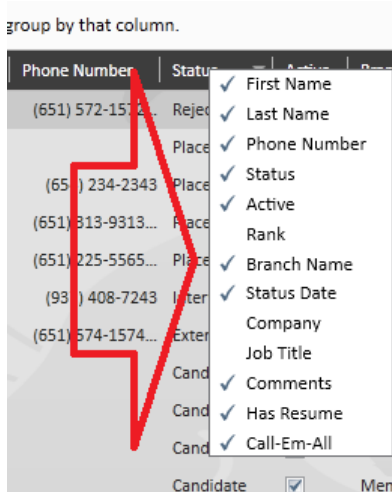
- **Sort** the grid based on any Column by clicking on the Column Header
 - Click once to sort in Ascending Order
 - Click again to sort in Descending Order
 - Click a third time to sort in Original Order
- **Rearrange the Column Order** by dragging and dropping the Column Header to where you want it to be



- **Group** your data by any column by dragging and dropping the Column Header(s) to the area just above the headers



- Once the Grid is Grouped click on any Column Header to sort by that Column
- To Ungroup simply drag and drop the column headers back into the Column Header row
- **Include or Exclude Columns** by right clicking on the Column Header row



The Column Headers which have a check mark in front of them are currently displayed in the grid

To hide a column click to remove the check mark

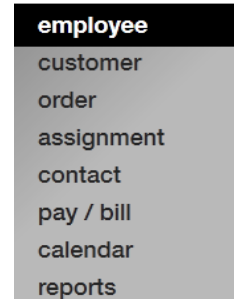
To unhide a column click to add the check mark

- Customize navigation tree options:

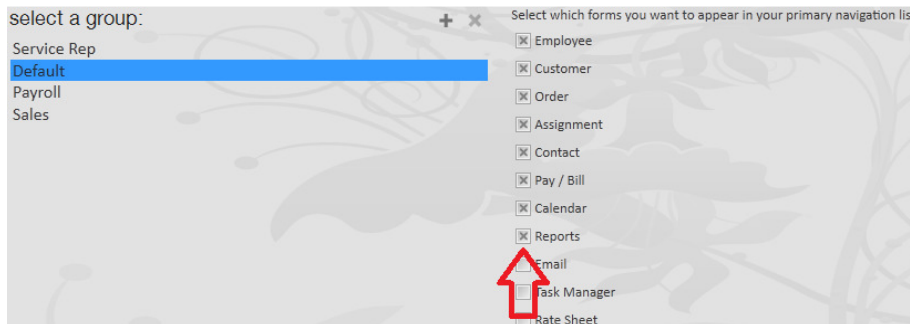
When working in TempWorks Enterprise there is always a main **Navigational Tree** in the lower left corner of your screen.

The selections available in your Navigational Tree can be customized to display your most frequently used areas

- Click on the *E button* in the upper left corner and select *Options*
- Within *Options* select *Navigation*



- From the **Select a Group** area, click to highlight a group. The forms which will appear in the main **Navigational Tree** will be selected. This is indicated by an x in the box preceding the form names:



- Select the Group you would prefer then click save

Your Navigational Tree will now display only the forms for the Group you've selected. If your SecRole permits you can create new groups by clicking the **+** button.

***Note – the All Options selection will still include all areas you have access to.**

- Log message on an assignment:

If a **Message** needs to be linked to an **Assignment** (meaning it should show up on the **Assignment/Order/Contact/Customer/Employee**) instead of starting the **Message** from the **Assignment** area, it can be added from the **Employee's Visifile**.

- Look up the Employee for whom the Message needs to be logged
- From the **Visifile** click to highlight the **Assignment** you'd like to link the Message to
- Click on the *Message Bubble* button in the upper right of the **Visifile/Assignments** area

Title	Customer	Code	Start	End	Bill	Pay	Dept
Access Operator	Crom Equipment	Open	11/1/2008		\$34.00	\$17.00	Primary
Access Operator	Crom Equipment	DE	3/27/2008	8/10/2008	\$35.00	\$24.14	Primary
Access Operator	Crom Equipment	CO	2/8/2008	8/6/2008	3,000.00	\$15.00	Accounting

- The **Message dialog** box will open and the **Employee, Customer, Order** and **Assignment** will automatically be linked to the Message
- Clicking the Link Contact dropdown will display all Contacts affiliated with this Customer/Department including their phone numbers

✕
message

Action Late

Mathew is going to be late, ran out of gas. Called Jim who said he would take Mat a few gallons to help him out and get him to work asap.

details

Date/Time: 8/23/2011 11:17:37 AM

Rep Name: dwood

Link Employee: Marshall, Mathew

Link Contact: Hollingsworth, Jim

Customer	Name	Id	Phone
Link Order	Kozelek, Stephanie	2135	(651) 307-2307x123
Link Assignment	Hollingsworth, Jim	982	(651) 734-9734x123
	Billings, Barbara	2129	(651) 346-2346x123

follow-up

There are currently no follow-up items for this message.

create a task

schedule an appointment

- **Hot Keys:**
There are a multitude of Hot Keys built into TempWorks Enterprise...

Record Type	Navigate to...	Add new...
Employee	Ctrl + 1	Alt + 1
Customer	Ctrl + 2	Alt + 2
Order	Ctrl + 3	Alt + 3
Assignment	Ctrl + 4	Alt + 4
Contact	Ctrl + 5	Alt + 5
Misc		
Save	Ctrl + S	
Refresh	F5	
Resume Parser	Alt + Shift + 1	
Calendar	Alt + F12	
Back	Alt + Left Arrow	
Forward	Alt + Right Arrow	
Home	Alt + Home	
Reports	Alt + R	
Switch Branch	Alt + B	
Assign From Order/Candidate/Search	Ctrl + A	
View Employee Form Order/Cand/Search	Ctrl + G	
Pay/Bill		
Back Office Dashboard	Alt + T	
Time Entry	Alt + I	
Employee Lookup	+(keypad)	
Customer Lookup	*(keypad)	
Copy Current Transaction	Alt + C	
Link Timecard*	Alt + L	
Unlink Timecard*	Alt + U	

*Only available with TimeCard Linker