Administration Activity Guide

Welcome to the Front Office Activity Guide. In this guide, we will guide you through different exercises to put your TempWorks knowledge to the test.

**Keep in mind this activity guide is designed for a test system. Always consult with your manager or team before updating anything in a live system.**

**Software included in this guide:**

* [Enterprise](http://kb.tempworks.com/help/appstempworkscom-workarounds) – TempWorks’ computer application based full front and back office software
* [Beyond](http://kb.tempworks.com/help/beyond---how-to-log-in) – TempWorks’ browser based front office software for use on your computer and mobile device
* [HRCenter](http://kb.tempworks.com/help/hrcenter-overview) – TempWorks’ online application and on-boarding software
* [WebCenter](http://kb.tempworks.com/help/webcenter-vs-hrcenter) – TempWorks’ online web portal for your employees and customers to communicate information

This workbook is first separated into three different levels of knowledge:

Levels

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Each level is separated into different administration roles: Front Office, Back Office, WebCenter, and HRCenter.

**Instructions:**

* This guide has been designed so you can fill it out electronically or print it out for your convenience. Check off each item as you complete them in the TempWorks Demo system
* The brainstorming questions at the end of each record section are made to help you think about different scenarios. There can be multiple correct answers to each of these questions, so we recommend discussing them with your team or other coworkers.
* Keep in mind that every admin may have different levels of access so you may or may not be able to complete all items in this guide. Items marked with an \* are particularly limited to only certain systems so you can skip those items you do not have access to.

# Level 1: The Basics

Welcome to the first level of our activity guide. In this level, we will review some basic admin information including adding to system drop downs, creating more options, and configuring your system to work best for your company.

**Front Office**

[ ]  You just started working with a new customer who needs Sandwich and Ice Cream Artists -

* Create the new job titles
* Create an Interest Code Subcategory for Food Artist Qualities
* Create interest codes for different qualifications and experience that might be needed for the new job you are staffing and add them to the subcategory

[ ]  You’ve started a new ad campaign, add a new how heard of option to track how much business comes in from it

[ ]  Your team wants to track when they do safety inspections on site – create a new message action code that will allow them to log the message with notes on the customer/contact records

[ ]  Your sales team wants to track when they have sent a proposed contract to a client, add the sales pipeline status

[ ]  Your company just signed a contract with a customer that requires a safety certificate document to be signed by all employees – Add the safety cert to the required documents options and make sure it expires every 6 months

[ ]  Your company has decided to give sales credit to teams of sales members – Create 2 teams: Northwest & Southeast

[ ]  Find a report for each of the following criteria:

* Employee name & email address
* Number of hours an employee worked each week
* Active Assignments for a Customer

***Brainstorm:*** Talk with your sales team about your current sales process. Write down a few key benchmarks and decide if you want to log those with message action codes, interest codes, or the sales pipeline status options. What might be the benefit of using each option?

**Back Office**

[ ]  You are now staffing Ice Cream and Sandwich Artists – create a new worker comp code: MN 9083

[ ]  Create a multiplier code for a 1.4 regular mark up and 1.5/2 for OT/DT. Make sure that when someone uses this code that they can enter a pay or bill rate to calculate the other

[ ]  You just received a child support notice from a new county called Bermuda County Child Services – add the new authority in your system

[ ]  Your company is now allowing employees to have a % of their check be deposited in another account – Add a new adjustment type for the secondary direct deposit

***Brainstorm:*** Discuss the pros and cons of Multiplier Codes vs. Rate Sheets. What options work best for your company?

**WebCenter**

[ ]  Your company wants branch managers to have limited access to WebCenter Admin – create a new role with the following permissions only

* Able to see a list of all users by type and be able to activate or deactivate them
* Able to impersonate a user if they are having trouble logging in
* Have access to notifications to re-subscribe as necessary

[ ]  Set up a new Branch Manager with access to WebCenter Admin with the role you just created

[ ]  Grant an employee access to WebCenter without time entry – impersonate them to ensure they have the right credentials

[ ]  Upload a new employee handbook and make sure all employees can see it

***Brainstorm:*** What is the difference between WebCenter Roles and WebCenter Configs?

 **HRCenter**

[ ]  Your company just updated their branding – Setup your Branding Theme in HRCenter:

* Upload a favicon
* Upload Logos
* Add background & primary color

[ ]  You’ve noticed a lot of applicants have resumes, turn on the show the resume upload option on your registration page

[ ]  Some of your recruiters are complaining that applicants are not entering a phone number on their application - Require phone number on registration

[ ]  You have decided to ask employees a list of questions before and after they work for a customer, create the survey and add it as a page

[ ]  A customer has a non-disclosure agreement they want all employees who work there to sign, use form builder to add the signature and create the page

***Brainstorm:*** What is the difference between a workflow and a page? Can you have multiple workflows? What are the benefits of using a workflow? Brainstorm some ideas of workflows you might want.

# Level 2: Intermediate

Welcome to level 2 of the Admin Activity Guide. In this level, we will dive a little deeper into our admin topics including Timecards, page creation, and order related options.

**Front Office**

[ ]  Now that you are working with a company in the food industry, you want to start categorizing your customers that work in different lines of business – Create a new business code for Food Industry and make sure you can add it to a customer record

[ ]  Your Branch Managers have agreed that all recruiters need to ask the same 3 questions in an interview and their answers should be recorded on the employee record – Create an interview questionnaire with the following questions:

* What is your favorite color? (should be a drop down of color options)
* What do you think of garden gnomes?
* Would you rather fight one horse-sized duck, or 100 duck-sized horses?

[ ]  Your company wants to be able to send tasks and share searches with groups of people in Beyond, create 2 teams that make sense for your company

[ ]  Your HR team is using hotlists to keep track of who still needs to fill out paperwork – create two new tags – “Needs I-9” and “Needs Background Check”

[ ]  \* Your team wants to track how many orders they have lost to a competitor or time limit– create a new order status that will close the order and track this

[ ]  \* Your recruiters want to track candidates who have an internal interview scheduled – create a new candidate status.

***Brainstorm:*** You can create as many interview questionnaires as you want. What are some different kinds of interview questions or groups that you would want to ask different groups of people? Brainstorm some ideas here:

**Back Office**

[ ]  Some of your customers want to deliver checks to the employee’s when they come to work while others want to have employee’s pick up their checks at the branch – Create two check delivery codes to track these options

[ ]  You have an employee who has many child-support notices – Create a new child support adjustment code to accommodate the number of child-supports this person has

[ ]  Create a one-time adjustment for mileage reimbursement – This will be added on assignment records or in time entry

[ ]  Your company just added a new bank account, add it to the administration section

[ ]  Your staffing company just got a new insurance plan, create the insurance adjustment in administration

***Brainstorm:*** Why do we create multiple adjustments in administration for the same option (ex. Childsupport1, childsupport2)? What are the benefits of doing it this way?

**WebCenter**

[ ]  You have a new customer contact who wants access to WebCenter for invoicing, set them up with an account

[ ]  One of your customers wants to be able to request orders through WebCenter:

* Set up your configuration options
* Create an Order Template
* Turn on order request options for at least 1 contact

[ ]  That same customer wants to utilize a federal timecard template to allow employees to fill out their timecards electronically:

* Create a timecard template
* Assign it to the customer
* Set up an employee and a customer contact with the correct roles to access to the timecard section of WebCenter

***Brainstorm:*** What is the difference between rounding and snap adjustments for timecards? What other timecard adjustments might be helpful?

**HRCenter**

[ ]  Your company created a safety video, create an information page with this video on it so you can show it to applicants

[ ]  Your company has employee’s sign a non-disclosure form – create this form in HRCenter’s form builder

[ ]  Create a new information page for basic information and customize which fields are hidden or required

***Brainstorm:*** Why do you need to add a page for the form you just created in form builder? Do you need to add this form to a workflow?

# Level 3: Advanced

Welcome to the third and final level of this front office activity guide. This level is meant to really test your administration knowledge.

**Front Office**

[ ]  You have a new customer that provides uniforms for your employees – create a new field that can track shirt sizes for the uniform

[ ]  \* Your team wants to manage employees by the line of work they have experience or want to work in, review the employment categories available and add one for Food Industry.

[ ]  You have a new employee starting tomorrow, set them up in the system:

* Add the User (via Bridge)
* Set up their sec roles to decide what access levels they have
* Set up their security groups to set their security within Beyond

[ ]  \* Create a new assignment status for Fired from Job, this should reopen the order

[ ]  Your company wants to add a personal touch to a big client’s weekly invoice email:

* Create a new email template
* Add it to the billing setup on a customer record
* Make sure they are set to email and have at least one recipient

***Brainstorm:*** What is the difference between Sec Roles and Security Groups? When should you use which?

**Back Office**

[ ]  \* Your team wants to track customers by their account types (invoice setup > Credit and Payroll) – Review the account types already created and deactivate account type you no longer use.

[ ]  Create a new adjustment for a Levy

[ ]  One of your customers is charging for an equipment rental – create a new adjustment to charge the employees for this

[ ]  Your company is no longer staffing for a specific worker comp code – Deactivate Worker Comp Code

[ ]  You have a default ACA Surcharge of 3% of the total payroll costs for each customer – set up this surcharge

[ ]  Setup your PTO or local required Sick time in your system

[ ]  Update your SUTA rates for the new year **(do not do this in a live database)**

[ ]  Your company now matches 401Ks up to 3% - create the adjustments for this

***Brainstorm:*** What is the difference between a one-time adjustment and a reoccurring adjustment? What are some example situations where you would use one or the other?

**WebCenter**

[ ]  Setup your company email to send notifications out of WebCenter **(do not do this in a live database)**

[ ]  Your recruiters want to update the email that is automatically sent when a W2 is available to include a message saying “Thank you for being our employee! We had an amazing year – thanks to you!”

[ ]  \* You have a customer that wants to use a TW TimeClock:

* Set up the timeclock on the customer and order
* Adjust the quick pin length in WebCenter
* Make sure the customer contact has the right role to see timeclock punches

[ ]  Your recruiters want to send an evaluation once an employee has finished working somewhere, create the evaluation with at least 3 questions

[ ]  Reset a password for an employee’s password

***Brainstorm:*** Are you going to be using the customer contact portal? What sections and information do you want them to be able to see? What configuration options exist for this?

**HRCenter**

[ ]  Your company added a Spanish version of your non-disclosure form. Create the Spanish form and add it as a translation

[ ]  Create a workflow with all the pages you have created so far & preview it

[ ]  Your team wants to update the submitted email template to include a Spanish Version

***Brainstorm:*** Where are all the places you can add Spanish translations? How can you make your workflows more customized to support different users?