

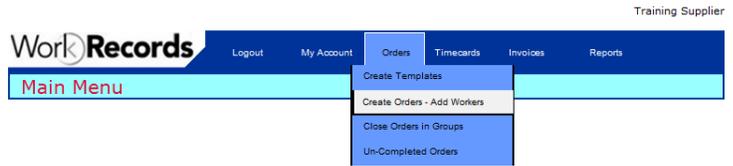
Adding Workers & Upload Photos: Overview

Overview

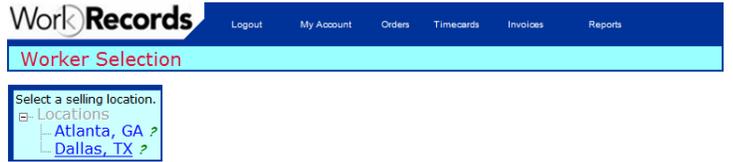
When using WorkRecords, you can add workers at the time that you are creating an order. As an alternative, you can add workers as a separate activity, even if they are not currently assigned to a job. Many of your customers will also require uploading a digital security photograph of workers. This document will walk you through the steps to enter new workers and add photos to new or existing workers in WorkRecords.

Getting Started

1. Go to www.workrecords.com.
2. Log into the system. Go to **Orders**> **Create Orders – Add Workers**



3. Click on your Selling Location in blue.
4. You will see the Worker Selection list. (Your list may be empty or may have workers listed from previous sessions.)

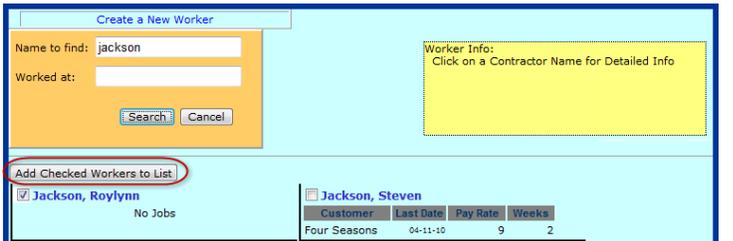
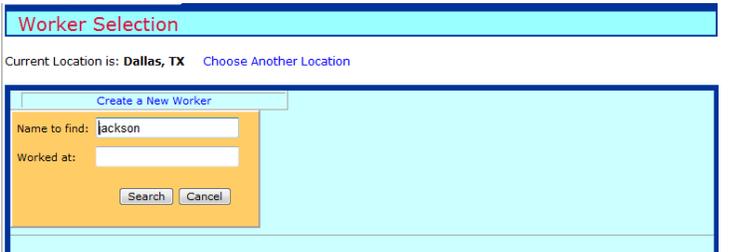


5. The next step is to either:
 - (1) **Add an Existing Worker** to your list (one already entered in the WorkRecords) *or*
 - (2) **Create New Worker** profile (which will add them to the list).



6. **To find a worker already entered:**

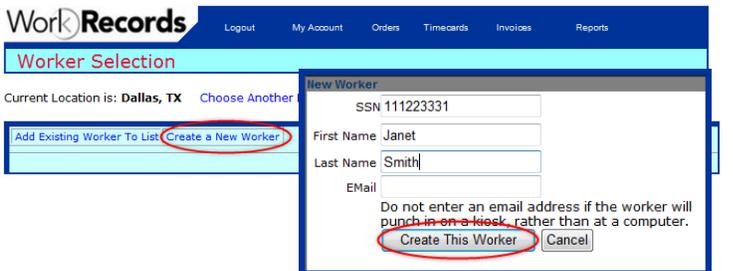
- Click on **Add Existing Worker to List**.
- Type in the name (*last name, first name*) or name fragment of the worker you are looking for.
- Click **Search**
- Find the worker on the list
- Click on the check box to **Add Checked Workers to List**



If you do not find the worker in the list, first make sure you have entered the name or partial name correctly. If the worker still does not appear in the list, add the worker by following step 6.

7. **To add workers to WorkRecords:**

- Click on **Create a New Worker**
- Enter the worker's SSN, first name and last name. Do not enter an email address if this worker will be punching in/out on a kiosk. Email is only required if the worker is entering their hours at a computer.
- Click on **Create This Worker**



8. When you click on **Create This Worker**, one of three things will occur:

- The worker will be added to your list with no changes.
- The worker will be added to your list, but the name or spelling may be different than what you entered. This occurs when you have added a SSN that matches a worker already entered into WorkRecords, but for another staffing supplier. If corrections are needed, please email support@workrecords.com.
- The worker will not be added because they are already in your database. Just follow the instructions to find the worker.

9. At this point you can do several tasks:

1. Start an Order with Checked Workers

Please refer to the training document “Using Templates to Create Order Confirmations” for details on starting a new order.



2. Delete Checked Workers from List

*Check the box next to the workers you want to remove from the list, then click **Delete Checked Workers from List**. This only removes the workers from the list, not from your WorkRecords database.*

3. Print Badges for Checked Workers

Note: *Printing badges is rarely needed any more as it was replaced by magnetic cards. Please refer to the training document – Mag Card Badge Registration Process*



4. Upload Photo (see details on last page)

10. Add a photo of the worker by following these steps:

- Click the **Photo** button next to the worker's name then click **Add New Photo**

Note: if there is a smiley face next to Photo, there is one already uploaded for this worker.

- Just like you upload photos to Facebook, Flickr and other software tools, click **Browse** to find the photo on your computer/network.
- Find the photo, select it and click **Open** and then **Upload the file**
- Drag the flashing box open to its largest size, then move it until it is centered over the picture
- Click **Crop and Accept** and **Close**

