# **QUICK GUIDE:** DAILY/WEEKLY SUPPLIER ACTIVITIES

WorkRecords

| Monitor Worker Activity | Who/When |
|---|---|
| **DAILY: Check worker use of kiosk to see if any employees have not checked in/out as expected.**<br>☐ **Run Reports:** *Daily WorkClock Activity* <u>and</u> *Review for Unusually Large Hours* <u>and</u> *Who Forgot to Clock Out.*<br>—Review "exceptions" and address discrepancies and coach workers as needed.<br>**WEEKLY: Check worker use of kiosk to see if problems were corrected and to monitor for overtime.**<br>☐ **Run Report:** *Weekly WorkClock Activity Report* <u>and</u> *Monitor Workers for Overtime.*<br>—Contact client supervisor about any issues that need to be corrected and coach workers as needed. | |
| **Download Hours and Present Invoice** | |
| **Ensure that all TimeCards were approved.**<br>☐ **Run Report:** *Step 1: Search for Missing TimeCards.*<br>—Close out orders if the worker is no longer active OR zero approve TimeCards if the worker had no time that week, but will be returning.<br>—Gather more information about missing TimeCards and contact client to resolve. (Be sure your dates match your client's week-ending date.)<br>☐ **Run Report:** *Step 2: Review Unapproved WorkSegments.*<br>☐ **Run Report:** *Search for Duplicate Orders/Search for Workers with more than 1 Active Order.*<br>—Check for Duplicate Active Orders to avoid miscalculation of OT and remove confusion for the worker when checking in by the buyer when editing. | |
| **Export approved TimeCards.**<br>☐ **Run Report:** *Step 3: Weekly TimeCards Download.* | |
| **Present invoice (<u>once</u> the corporate invoice has generated an invoice in your back office system).**<br>☐ **Generate Invoice:** Go to *Invoices>Invoice Customers*. (Be sure to widen the range of the dates to include any timecards approved late.) | |
| **Add Workers and Manage Order Confirmations As Needed** | |
| **Set up new workers.**<br>☐ Input worker name and their 9- digit Unique Identifier (eg: Social Security number) into WorkRecords.<br>☐ Upload security photos.<br>☐ Help workers register magnetic stripe cards.<br>☐ Orient workers to use kiosk – how to clock in and select their Shift and WorkGroup.<br>☐ **Create Orders:** Check for previously created orders, **Run Report:** *Search Orders*. Then go to *Orders>Add Worker – Create Order.*<br>☐ Create Order Templates as needed. | |
| **Close orders in WorkRecords when the end of the assignment is confirmed.**<br>☐ **Close Orders in Groups:** Go to *Orders> Close Orders in Group* **<u>Or</u>** **Close Single Orders:** Go to *Reports>MyViews>Search Orders*. | |
| **Contact support@workrecords.com for assistance.** | |

**KEY:** Download Quick Guide View Training Session **Run Report:** Go to *Reports>My Views*

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