

## Source One Staffing Customer Intro to Web Center

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This instruction manual is meant for Source One Staffing customers and is intended to walk you through the features of our Web Center module. This module provides a direct link to our Tempworks software and contains a variety of features that you, our customer, can utilize to enhance your relationship with Source One Staffing. While using this manual, hyperlinks can take you from the table of contents directly to the section you wish to read, as well as from the section headers back to the table of contents. The screenshots that have arrows have a letter corresponding to the step in the instructions that the arrow refers to. As always, if you have any questions, please feel free to reach out to our office for any assistance. Thank you.

## 1) [Log In](#)

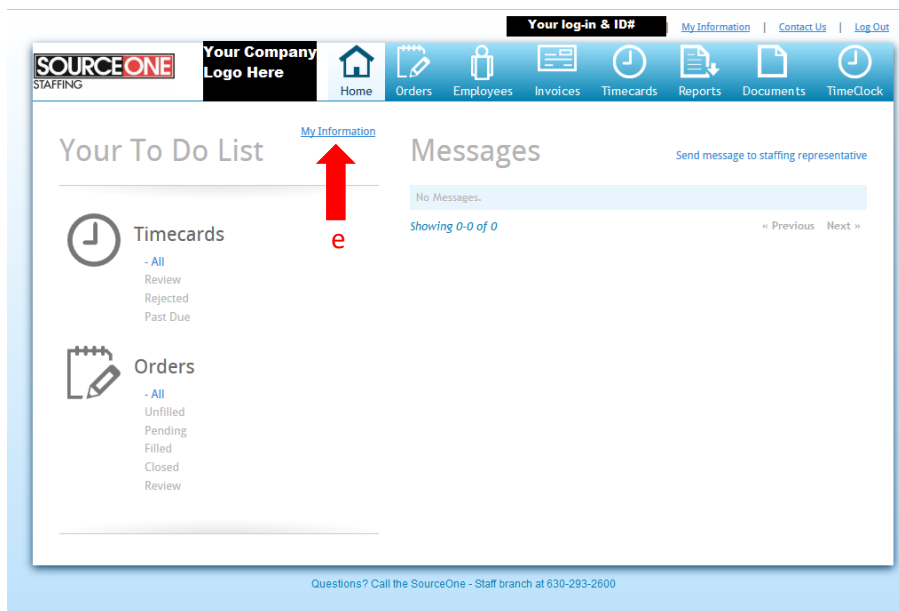
- a. Enter the website for Web Center in your browser.
  - i. For the best results, use Google Chrome or Firefox.
  - ii. Web site:
    1. A link to web center is provided on the Source One Staffing web page at: <https://www.sourceonestaff.com>
    2. The direct link to Web Center is: <https://webcenter.tempworks.com/TwSelect/SourceOne/Account/Login>
      - a. If the above link does not work, highlight the link and copy and then paste in your browser window
- b. Enter your log-in and password
  - i. If you do not have credentials, please contact your Source One Staffing representative



Welcome to WebCenter. Please log in.

A screenshot of a login form. It features a "Username:" label followed by a text input field. Below the input field is a red error message: "The Username field is required." Below that is a "Password:" label followed by a password input field with masked characters. To the left of the password field is a checkbox labeled "Keep me logged in". To the right of the password field is a blue "Log In" button. At the bottom of the form are two links: "Forgot username?" and "Forgot password?".

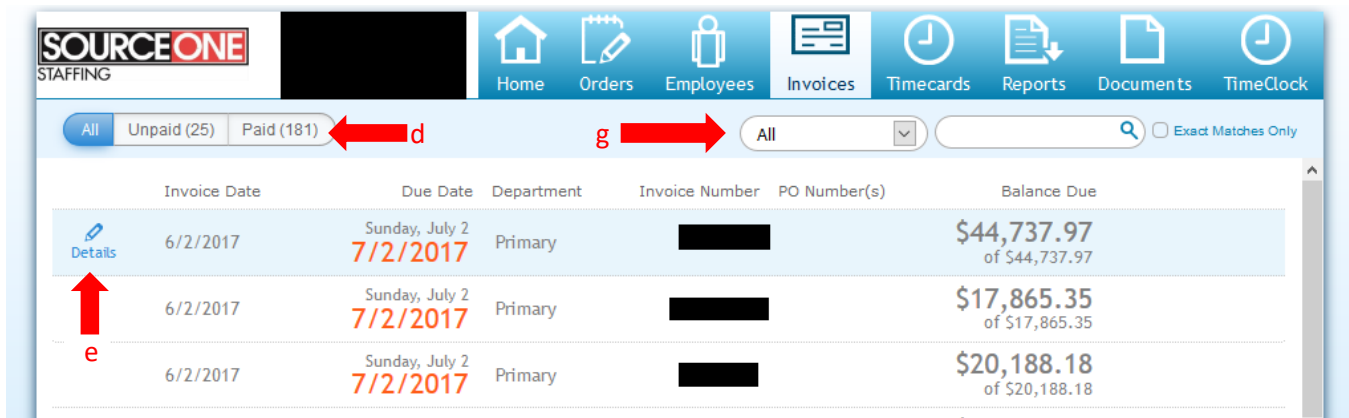
- c. Upon successful log-in, you will be brought to the Web Center Home Page
- d. This screen will have several options to choose from
- e. The "My Information" section will allow you to customize your notifications, change your e-mail address, or change your password
- f. Please insure that all contacts in your company that will require access to Web Center, be provided to your Source One Staffing representative. The following information is required:
  - i. Name (First & Last)
  - ii. E-mail address
  - iii. Job Title / Description
  - iv. Direct phone number if different from main



- g. You can set up your supervisors to have access to only the employees they are responsible for by providing your SOS representative with how you would like your company's access broken down.
- h. (HINT) If you have multiple supervisors overseeing different groups of employees (departments), you can set up your company in a way where you can have a main manager overseeing the entire employee pool and supervisors set up to view ONLY the employees in their group / department. This would enable your company to make it the responsibility of the supervisors to be responsible for their department and would give the Department Manager the ability to oversee the activities of the department supervisors.

## 2) Invoices Section

- a. This section will allow you to view both current (amount due) and past (paid) invoicing
- b. Click the invoice tab
- c. When invoices populate, they will populate with the most current invoice first

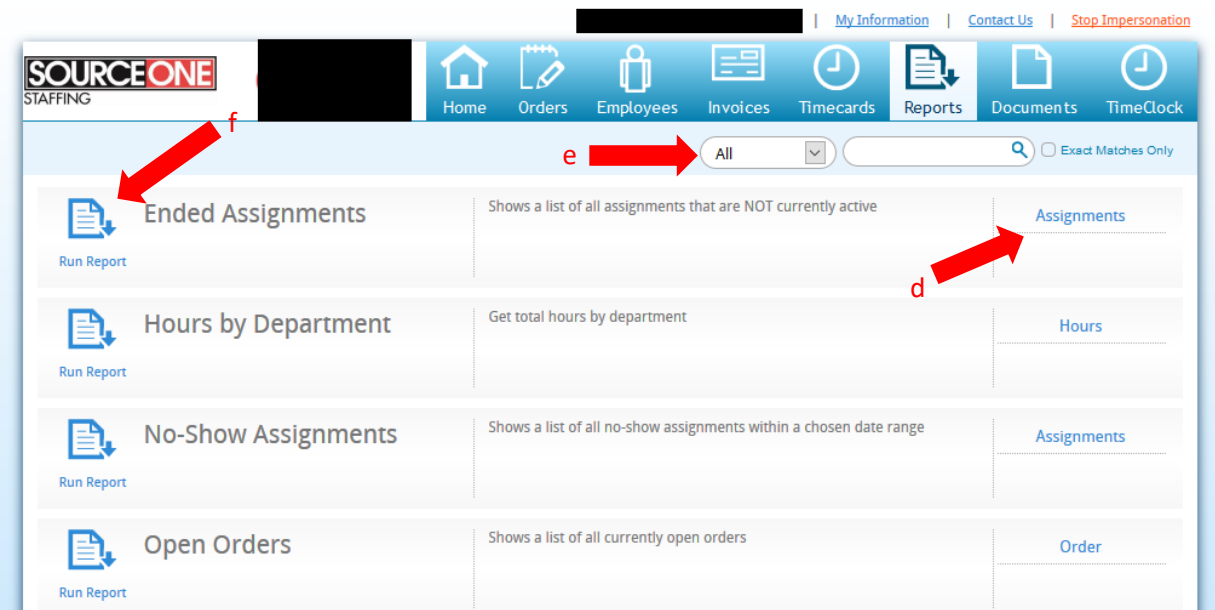


- d. You can select "all" invoices or either paid or unpaid invoices to be shown by clicking the specific box
- e. You can choose to see the details of the invoice by highlighting the invoice and selecting the details icon
  - i. This will show exactly what the invoice shows such as employee name, hours worked, etc.

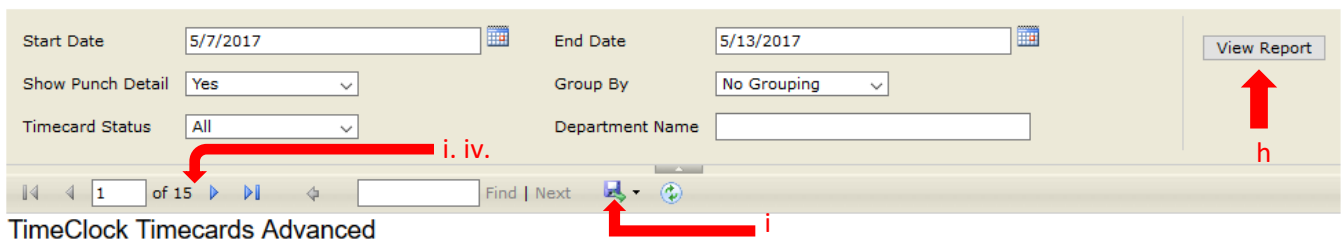
- f. All other information is standard such as invoice date, due date, invoice number, as well as balance due
- g. If you are looking for something specific, you can use the search boxes.
  - i. Click the arrow in the left box to reveal the searchable categories
  - ii. Enter the specific search key word(s) in the left box
  - iii. **(HINT)** If the information on the screen “doesn’t look right”, or some information seems to be missing, always check the search boxes to insure that something is not being “searched” as the system will filter out anything outside of the search criteria.

### 3) Reports

- a. This section will provide you with access to reports that can be run by you, the customer.
  - i. The actual reports provided to you are based on , the specific access that you have as a user (permissions), as well as the features that you are utilizing as a customer (IE: on-line timecard reporting etc)
- b. When the “Reports” section opens, a listing of the available reports to you will be shown.
- c. The page will show the report name, a brief description of the report and a category



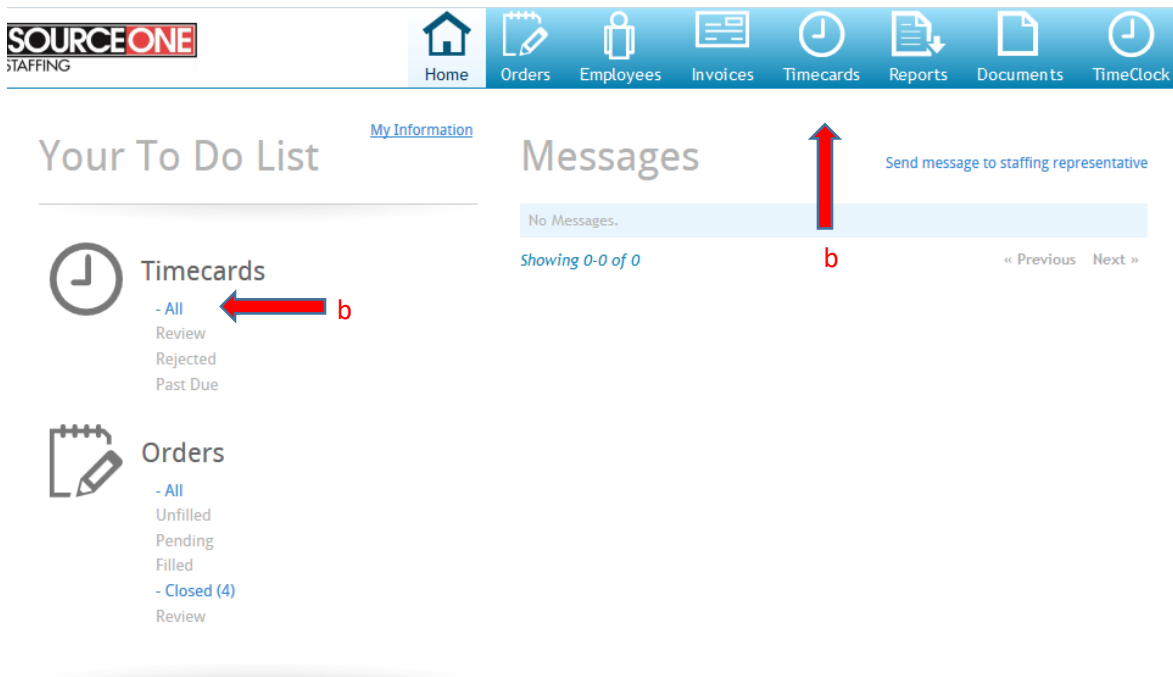
- d. You can filter by category by clicking on the category in the 3<sup>rd</sup> column.
- e. You can search based on specific terms by using the search box
  - i. Click the arrow in the left box to reveal the searchable categories
  - ii. Enter the specific search key word(s) in the left box
  - iii. **(HINT)** If the information on the screen “doesn’t look right”, or some information seems to be missing, always check these boxes to insure that something is not being “searched” as the system will filter out anything outside of the search criteria.
- f. To run the report, click on the “Run Report” icon to the left of the specific report you wish to view.
  - i. The report will open as a tab in your browser



- g. Based on which report you choose, you will be required to choose parameters or groupings (IE: dates)
- h. Once all the information is input, click the “View Report” icon
  - i. By leaving some info blank, the report will pull up all information and will ignore that particular parameter. IE: in the example shown, no “department name” was provided, so the report will pull up all departments
- i. To convert from a web page to a savable format (IE: Excel, PDF, CSV, etc.) after the report displays, click the save icon
  - i. Choose the format you wish the information to be saved in by clicking on it
    - 1. The most common will be “EXCEL”. This will save the file to the current version of Excel running on your computer.
  - ii. Follow the onscreen prompts as to whether to “save” or “open” the file
  - iii. (HINT) It is easier to “open” the file. Once the file opens, click the “enable edit” button in Excel (usually will show as a light yellow bar under the tool ribbon) and then save to your computer. By clicking the “save” option, it will save a copy of the sheet in your “Downloads” folder.
  - iv. (HINT) Viewing reports (especially multiple page reports) is easier when converted to a format such as Excel or a PDF versus trying to view the report as a tab. In order to view past page 1, you have to click the page arrow or enter the page number you wish to view.

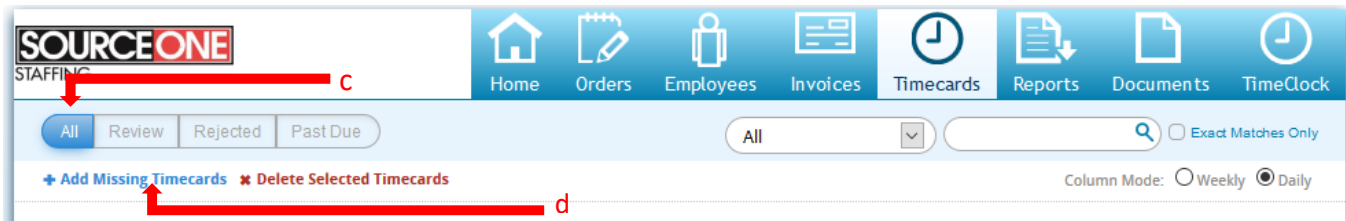
#### 4) [Creating Employee Timecards](#)

Either you, or your employee, has the ability to enter the amount of time that the employee is working on a given day. There are two options when entering time. The time can be recorded in either a total hours worked format, or the amount of hours worked can be recorded based on the time an employee punches in and out, as well as recording a punch in and out for an unpaid lunch. The lunch must be at least 30 minutes in length and the employee may not perform any function related to his or her job or on behalf of the Company in which they are employed at.

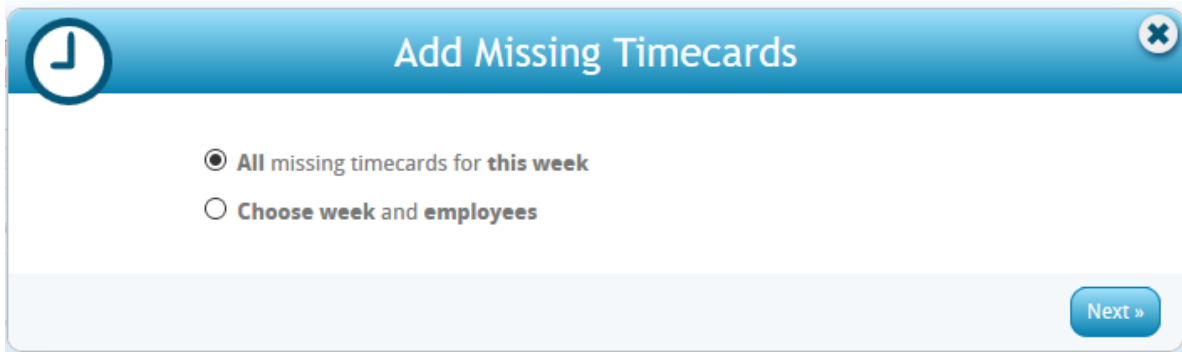


- a. You must create a timecard for each employee for each week they work whether you are recording the time, or the employee is recording their own time.

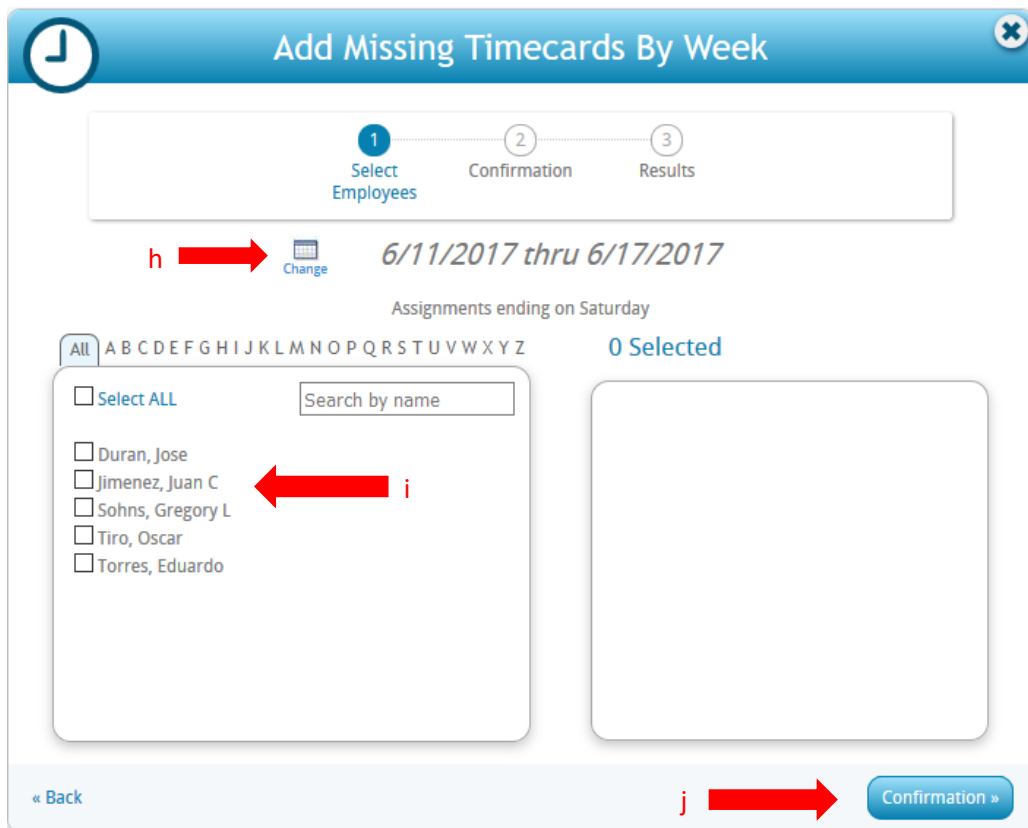
- i. Timecards are created weekly and are based on the week end date (Sunday)
- b. Click on either “All” under the “Timecards” heading under the “Your To Do List” on the home page, or the “Timecards” icon in the tool bar.



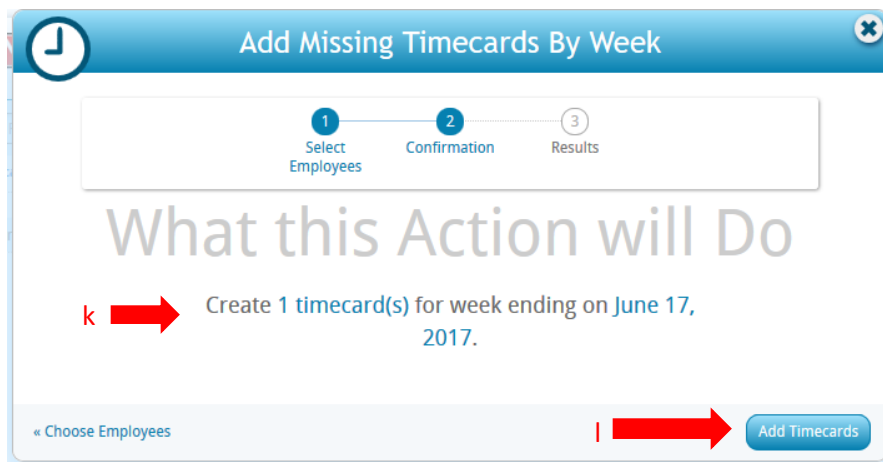
- c. Insure the “All” tab is highlighted in the upper left corner under the Source One logo
- d. Click the “+ Add Missing Timecards” option



- e. You can choose to add all missing timecards for whatever the current pay period week is or to choose a week and the employees you wish to add a timecard for
- f. Choosing the “all...” option will create a timecard for any employee that is currently shown on assignment at your location / company (depending on how your and your company’s profiles are set up in our system)
- g. When you choose what week / employees to create, it allows you to only create select timecards.



- h. Select the date range
  - i. Click on the calendar
  - ii. Click on the Sunday of t pay period
- i. Select the employees you wish to add timecards for by either clicking on the “select all” option or individually checking the box next to each employee’s name.
- j. When finished, click the “confirmation” icon



- k. Review the number of timecards you are creating and the week ending date.
- l. If the information is correct, click the “Add Timecards” icon.
- m. You will receive a confirmation of the number of timecards that were added.
- n. The system will then display the timecards for the persons that you just created.

o. You can see that there is one time card created for the employee and that the status of the timecard is “not submitted”

### 5) Entering Time on an employee Timecard

Either a company supervisor or an employee can enter the time that an employee worked on the timecard created in Web Center. If an employee will enter their own time, please see the Employee Web Center Instruction manual. It is suggested that if a company will require employees to record their own time, a computer be made available to the employees to accomplish this. Otherwise, the company supervisor will be required to input the time for each employee. There a number of configurations that can be applied to the Timecard module. A Source One Staffing representative can review these settings prior to launch to insure that this feature is optimized for your company.

a. Navigate to enter time.

- i. Click on the “Timecards” button on the top ribbon
- ii. Click on “All” under the “Timecards” header under “Your To Do List”



**SOURCEONE STAFFING**

Home Orders Employees Invoices Timecards Reports Documents TimeClock

All Review (1) Rejected Past Due (4) All Exact Matches Only

+ Add Missing Timecards ✖ Delete Selected Timecards Column Mode: Weekly Daily

Week ending on June 17, 2017 **48.00 Total Hours**

Paycode	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total Hours	Adjustments	Gross	Details	Copy	Delete
Reg	0.00	8.00	8.00	8.00	8.00	8.00	0.00	40.00 Hours	\$0.00	\$480.00	<input type="button" value="Details"/>	<input type="button" value="Copy"/>	<input type="button" value="Delete"/>
Reg	0.00	0.00	0.00	0.00	8.00	0.00	0.00	8.00 Hours	\$0.00	\$84.00	<input type="button" value="Details"/>	<input type="button" value="Copy"/>	<input type="button" value="Delete"/>
Reg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 Hours	\$0.00	\$0.00	<input type="button" value="Details"/>	<input type="button" value="Copy"/>	<input type="button" value="Delete"/>
Reg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00 Hours	\$0.00	\$0.00	<input type="button" value="Details"/>	<input type="button" value="Copy"/>	<input type="button" value="Delete"/>

**48.00 Total Hours**  
\$0.00 Total Adjustments

Hide Details No More Timecards

**Jimenez, Juan C** June 11, 2017 to June 17, 2017 Primary | PO#: | Gross Pay: \$480.00  
WAREHOUSING NOC. Paycode Reg Print

	Sun 6/11/2017	Mon 6/12/2017	Tue 6/13/2017	Wed 6/14/2017	Thu 6/15/2017	Fri 6/16/2017	Sat 6/17/2017
Punch In		8:30 AM	9:00 AM	9:00 AM	8:30 AM	9:00 AM	
Lunch Out		12:00 PM			12:15 PM		
Lunch In		12:30 PM			12:45 PM		
Punch Out		5:00 PM	5:00 PM	5:00 PM	5:00 PM	5:00 PM	
	0.00	8.00	8.00	8.00	8.00	8.00	0.00

40.00 Regular 0.00 Overtime 0.00 Double Time **40.00 Total Hours — \$480.00**

Notes

0 of 4 timecards selected Submit Selected Timecards

- b. Ensure that you are entering time for the correct week
- c. Enter the time that the employee worked during the week by entering total daily hours or by recording the employee's punch in / out times
  - i. To enter a total number of hours worked per day
    1. Click on the day you wish to enter hours
    2. Enter total hours worked in decimal form (IE: 45 minutes = 0.75 hours)
    3. Use the "TAB" key to navigate between boxes
  - ii. To record punch times
    1. Click the "Details" icon to the right of employee's total hours calculation
    2. The details footer will appear
    3. Enter punch times using the colon as well as "a" for AM and "p" for PM
    4. You can enter any notes on the employee's time by clicking "Notes" and entering text.
    5. When finished click "Hide Details"
    6. The days next to the employee will calculate with total hours worked per day
- d. Ensure that "Total Hours" for each employee has calculated correctly.

- e. When all employees' time has been entered, ensure that the total hours for all employees is correct
  - f. Submit timecards for review and approval
    - i. Click the box to the left of the week ending date or next to each individual employee
    - ii. Click "Submit Selected Timecards" when you wish to submit the timecards for review.
    - iii. If the employee enters their own time, there will be a blue lock to the left of the employee name (where the submit check box would be) and the status will show "submitted"
      - 1. If a change is required, see step 7, [Correcting / Changing Timecards](#)
  - g. (HINT) It is better to record actual punch times. This gives you a record of actual time in and time out as well as any unpaid break time. This is a valid record of hours worked in case any employee makes a wage & hour claim.
- 6) [Reviewing / Approving Timecards](#)

## My Information

# Your To Do List

### Timecards

- All
- Review (2) ← b
- Rejected
- Past Due

- a. Timecards that have been submitted (either by the Supervisor or by the employee) will show as timecards that must be reviewed by you (the Customer Supervisor)
  - i. The "review" icon will turn blue and number of timecards required to be reviewed will be listed.
- b. Click on "Review" under "Your To Do List"
- c. Timecards requiring review will be listed

All Review (3) Rejected Past Due (2)

All ▼

🔍

Exact Matches Only

Details Employee Job Title / Department Week Ending On Hours / Adjustments

Approve Remaining Reject Remaining

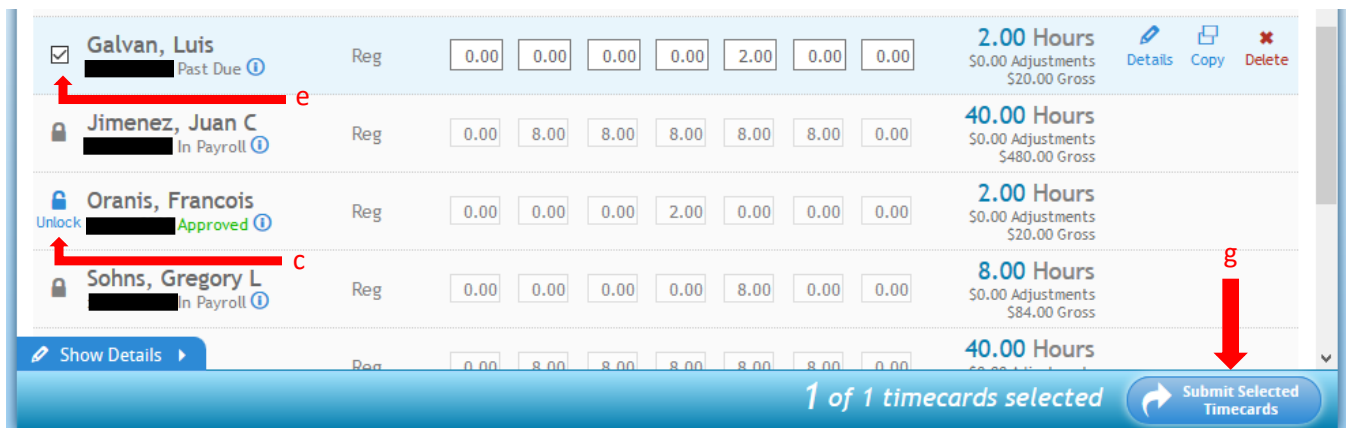
	Employee	Job Title / Department	Week Ending On	Hours / Adjustments	
<div style="display: flex; gap: 5px;"> <span>Print</span> <span>Timecard</span> <span>Order</span> </div> <div style="font-size: 0.7em; margin-top: 5px;"> <span>History</span> </div>	<b>Duran, Jose</b> <small>xxx-xx-1032</small>	Primary Department WAREHOUSING NOC.	<b>6/17/2017</b>	<b>40.00 Hours Reg</b> <small>50.00 Adjustments</small> <small>\$440.00 Gross</small>	<div style="display: flex; gap: 10px;"> <span style="background-color: #6c757d; color: white; padding: 5px 10px;">Approve</span> <span style="background-color: #dc3545; color: white; padding: 5px 10px;">Reject</span> </div>
<div style="display: flex; gap: 5px;"> <span>Print</span> <span>Timecard</span> <span>Order</span> </div> <div style="font-size: 0.7em; margin-top: 5px;"> <span>History</span> </div>	<b>Jimenez, Juan C</b> <small>xxx-xx-4531</small>	Primary Department WAREHOUSING NOC.	<b>6/17/2017</b>	<b>40.00 Hours Reg</b> <small>50.00 Adjustments</small> <small>\$480.00 Gross</small>	<div style="display: flex; gap: 10px;"> <span style="background-color: #6c757d; color: white; padding: 5px 10px;">Approve</span> <span style="background-color: #dc3545; color: white; padding: 5px 10px;">Reject</span> </div>

- d. Ensure you are approving for the correct week
- e. Approve all timecards that are correct by:
  - i. Clicking "approve" next to the employee's hours
  - ii. Clicking "Approve Remaining" if you wish to approve all timecards shown

1. Clicking this option will have a confirmation box pop up with all employees listed and ask you to confirm this is what you want to do.
- f. A green “Approved” notation will show next to the employees
- g. To reject a timecard(s), follow the above steps and click the reject option.
  - i. When a timecard is rejected, you will be asked to provide a reason for the rejection. If the employee entered their own time, this will act as a guidance as to how the employee can correct the timecard and resubmit.

## 7) [Correcting / Changing Timecards](#)

- a. You can change a timecard(s) after approving the timecard (or at any time prior to that), click back on the “All” icon in your to do list.



- b. The timecards that have not been processed by Source One payroll will show.
- c. Next to each employee, a blue lock icon will show
- d. Click on the lock to unlock the employee.
- e. The lock will turn into a check box
- f. Make whatever necessary changes are required to the timecard and click the check box next to the employee’s name when completed
- g. Click on “Submit Selected Timecards”
- h. A confirmation box will be displayed showing the total number of timecards that have been submitted to Source One for payment
- i. You will have to approve the timecard as before.
- j. (HINT) A status will show under each employee to show where the employee’s timecard is within the process
  - i. “Past Due” = the timecard has been created but not been submitted for approval and is awaiting an action that should have taken place
  - ii. “Approved” = the timecard has been approved and has been submitted to Source One for payment.
  - iii. “Submitted” = The timecard has been completed by either the employee or you, the client, and is waiting to for approval.
  - iv. “In Payroll” = Source One has received the timecard and is processing (note that the lock will be gray and you will not be able to re-open the TC)

## 8) [Creating Pre-Employment Pages](#)

Source One can create pages for you to add to a pre-employment package that employees would complete prior to arriving to your location. All pages would be created by Source One based on information and format provided by you. Please note that Source One can provide this service for pre-employment policy **ONLY** and not training documents or programs.

- a. Read and sign documents
  - i. Send a copy of the document to Source One that you wish to have added to your pre-employment packet. Examples of these documents can be:
    1. General safety policies
    2. Dress code policies
    3. Aptitude tests
  - ii. Documents will be reviewed by Source One to insure compliance with all current laws and regulations
    1. No training documents or programs are acceptable for this service due to laws governing the compensation of employees for training specific to their position.
- b. Aptitude Tests
  - i. Copies of the test are forwarded to Source One
  - ii. All questions must be provided to Source One, as well as all answers
    1. True / false questions: if the question is true or false
    2. Multiple choice questions will require all answers with an indication of which answer is correct.
- c. Source One will create the documents and review with you prior to publication
- d. All documents will be uploaded into HR Center in the form a work flow
  - i. The work flow is a listing of pages that will be assigned to all potential employees.
  - ii. The employee will electronically sign all documents upon completion
- e. You will be given the opportunity to “test drive” the workflow to see if it meets with your standards.
- f. Copies of all signed documents, etc., are forwarded to you to be kept as an electronic copy upon completion.
- g. Electronic copies of all documents, etc., are maintained on the TempWorks server as well for back-up purposes
- h. Source One assumes any liability or responsibility for any of the information or policies that are provided by the Client Company

## 9) [Reviewing Employees](#)

You can review all existing as well as previous employees that have worked at your site. This will allow you to review previous weeks’ time, as well as assignments and skills the employee reports.

The screenshot shows the SOURCE ONE STAFFING HR Center interface. The top navigation bar includes Home, Orders, Employees, Invoices, Timecards, Reports, Documents, and TimeClock. Below the navigation bar, there are filters for 'All', 'Current (5)', and 'Past (18)'. A search bar is also present. The main content area displays a table of employees with columns for Name, Current Jobs, and ID. A detailed view for Jose Duran is shown on the right, including tabs for Assignments, Timecards, and Skills, and a list of checks with dates and invoice links.

Name	Current Jobs	ID
Arias, Sergio	0	1661793
Bradley, Adam	0	1669279
Campos, Alberto	0	1643754
Campos, Jamie	0	4450319
Chairez, Francisco	0	1670563
Davis, Steven	0	3617923
Duran, Gerardo	0	2125873
Duran, Anthony	0	2973139
Duran, Jose	1	1652501
Escalante Rodriguez, Pastor	0	1643938

Jose Duran

Assignments | Timecards | Skills

Check #20919  
WAREHOUSING NOC. (1276293) - 40.00 hours  
6/8/2013  
[View Invoice](#)

Check #21078  
WAREHOUSING NOC. (1276293) - 40.00 hours  
6/15/2013  
[View Invoice](#)

Check #21125  
WAREHOUSING NOC. (1276293) - 40.00 hours  
6/22/2013  
[View Invoice](#)

Check #21265  
WAREHOUSING NOC. (1276293) - 40.00 hours  
6/29/2013  
[View Invoice](#)

Check #21403  
WAREHOUSING NOC. (1276293) - 24.00 hours  
7/6/2013  
[View Invoice](#)

- a. Click on the “Employees” icon on the top ribbon
- b. A listing of all employees will populate
  - i. Sort by “current” or “past” by clicking on the icon above the employee’s name
  - ii. Further refine by entering info into the search fields
  - iii. Sort by clicking the headings
- c. In the details section, you can view the employee’s assignments, timecards, or skills

10) [Reviewing Orders](#)

- a.
- 11) **Many other features are under construction. They will be rolled out to you as soon as they are completed.**