WorkRecords

Training Kiosk: QuickStart and Worker Training Guide

Installing and Connecting the WorkRecords Training Kiosk:

Installing and connecting the WorkRecords Training Kiosk is a simple procedure.

	MOUNT THE TRAINING KIOSK WorkRecords recommends mounting the Training Kiosk near a power source and positioning it on the wall so that it is between 59-62 inches off the ground (measuring from the top of the Kiosk).
	CONNECT TO A POWER SOURCE Plug the Training Kiosk into a reliable power source and turn it on. *Note: It is best if the Kiosk is continually connected to a power source and not unplugged regularly.*
	CONNECT TO THE INTERNET Provide Internet connectivity. *Note: The Training Kiosk shipped to you should already be configured to access your Wi-Fi network. If your Training Kiosk does not connect, please open a Support Ticket.*
	REVIEW FULL DOCUMENT Review *Getting Started*, *Basic Worker Training* and *Additional Worker Training* sections for tips on how best to use the Training Kiosk to train your workers.

Getting Started:

1. WorkRecords has provided you with the following 2 test workers for your use in training new workers at your office.

Test Worker	Last Name, First	Social Security Number
1		
2		

2. A few Magnetic Swipe Cards were sent with your WorkRecords Training Kiosk. WorkRecords recommends that you create Magnetic Swipe Cards for the sample workers listed above. *Note: You can view instructions for creating Magnetic Swipe Cards on the WorkRecords e-Support site by navigating to General WorkRecords Training → Workers - Registration of Magnetic Swipe Cards.*

3. The test workers can check-in/out on sample Orders that WorkRecords has created for a Demo account. These Orders are managed through WorkRecords Support. *Note: Please open a Support Ticket if you have questions or believe you need adjustments to your Orders.*

4. Functionality in WorkRecords can be driven by the Order or by the department/job activity selected by the worker. You will want to pick the Order/department based on the scenarios your workers will likely encounter.

Basic Worker Training:

Step up to the WorkRecords Training Kiosk with the worker that you wish to train.

1. Ask the worker to first use the Magnetic Swipe Card (that is registered to one of the sample workers) to access the Training Kiosk. Also train the worker how to access the Training Kiosk by manually punching in the sample Social Security Number of one of the sample workers.

2. Guide the worker to select the correct Order for which they should be trained. Two Orders exist in the Demo account:
   a. *Order Simple* – This is an Order that reflects the aspects that workers will encounter when checking-in/out while on an assignment.
   b. *Order Complex* – This Order also reflects the same aspects as Order Simple, however, it also provides the ability to train workers on **purchasing a meal** and **entering an AddOn amount at the Kiosk**.

3. Once the worker has selected an Order, guide the worker to select the correct Department in order to train the worker on the appropriate activities for which they need to be trained. The Kiosk will display several Departments. For the purposes of this training, instruct the worker to choose either the Housekeeping or Engineering Department.
   a. Like the Order Simple, the Engineering Department provides functionality that all workers will encounter at the Kiosk.
   b. Selecting the Housekeeping Department allows you to train the worker on scrolling to find the correct job activity and purchasing a meal.

Select one of the Orders:	Order Simple		Order Complex	
After selecting an Order, select a Department:	Housekeeping (Complex)	Engineering (Simple)	Housekeeping (Complex)	Engineering (Simple)
Scrolling to Find the Job Activity	✓	X	✓	X
Purchasing a Meal	✓	X	✓	✓
Entering AddOn amount at the Kiosk (e.g., selling a bottle of water, etc.)	X	X	✓	✓

After the worker checks-in at the Kiosk, they must wait 3 full minutes before attempting to check-out, otherwise the punch is simply removed and they will be checking-in again. (This is a valuable feature for actual use in the field, but you will need to plan your training to accommodate this – see *Additional Worker Training* for ideas and details.)

Additional Worker Training:

This section of the guide provides a suggested outline for your training, as well as details to cover and interesting information to share with your workers or Labor Buyer.

WorkRecords recommends that you address the following training topics:

1. Access the Kiosk to check-in/out using a Magnetic Swipe Card and Social Security Number (Swipe one of the mag cards to demonstrate this feature first. You can manually punch in the other sample worker's SSN by going through this training process a second time.)
2. Change languages displayed on the Kiosk (if available/appropriate)
3. Select from Multiple Orders
4. Check-in (please choose an Order/Department that will allow the worker to experience the features used by your Labor Buyers)
5. Discuss the importance of Security Photos
6. Discuss convenience or rounding rules used by your Labor Buyer
7. Discuss Meal Breaks (i.e., which clients require check-out and which have auto meal breaks)
8. Register Magnetic Swipe Cards
9. Check-out
    a. Done for the day
    b. Meal Break/Purchasing a Meal
    c. Change Department or activity
10. Select an AddOn at the Kiosk

MAGNETIC SWIPE CARDS

1. Workers should always know their Social Security Number in the event that their card is lost or not working.
2. Magnetic Swipe Cards that have been registered for a WorkRecords Kiosk will work on ANY Kiosk regardless of the Supplier that provided the card or the work-site location.
3. Any card with a unique number can be registered (some driver license, most credit cards, library cards, reward account cards and even paycards); however WorkRecords provides Magnetic Swipe Cards free of charge for workers using a WorkRecords Kiosk.
4. Social Security Numbers are never stored on a card. The unique number on the back of the card is linked to the Worker's SSN when registered. SSNs are never stored on the WorkRecords Kiosk or card. This protects the worker should the card be lost or should an unauthorized user attempt to access the Kiosk.
5. To order additional Magnetic Swipe Cards, open an e-Support Ticket by logging in to *www.workrecords.com* and selecting *Support*. Please include the name, physical address, phone number and email address for the main contact to receive the cards. Cards are shipped via FedEx and requests are generally filled within 5-7 business days.
6. Magnetic Swipe Cards can be registered in a variety of ways. For Certified Suppliers, WorkRecords recommends having the worker register their own swipe card as part of their Kiosk training held in the Supplier's office. Please refer to the Magnetic Swipe Card Registration training on e-Support available under *Solutions → General WorkRecords Training → Workers - Registration of Magnetic Swipe Cards → Register Magnetic Swipe Cards* for more information. After logging into WorkRecords.com, click on *Support → Access Training Resources*, then click here to automatically be directed to the training documents.

CHANGING LANGUAGES

1. WorkRecords technology uses Google Translator to display an optional selection of 50+ languages at the WorkRecords Kiosk.
2. Generally no more than 4 languages are displayed on any Kiosk. Language selections are approved by the Labor Buyer.
3. The language can be changed before the worker enters their SSN or swipes their card. If they do not change the language and need to, they can also click *Cancel* to change it and start over.

CHECKING IN AT THE KIOSK

1. Most Labor Buyers have shift, department and job activity as selections.
2. If shift is an option, it must be selected before choosing the job activity.
3. When the job activity has been properly selected, it will be highlighted in blue.
4. After making the job activity selection, select the Check-In button. This will activate the timer to appear for the final step of the check-in process—taking the Security Photo.
5. If an Order has not been created for the worker, they will not be able to check-in at the WorkRecords Kiosk.
6. If an Order was not created as a "Time Clock punch" (Kiosk) Order, the worker will not be able to check-in.

MULTIPLE/DUPLICATE ORDERS

1. When a worker has more than one Order on the Kiosk, it is called a Duplicate or Multiple Order. This can be confusing for (1) the worker, (2) anyone completing the Buyer or Supplier Daily Activities, and/or (3) anyone completing edits since the wrong Order may easily be viewed or edited. Adding a description of the Order (name of job activity or department) in the notes field when creating the Order will help everyone make the correct selection.
2. Duplicate Orders occur when the worker has an Order from the same Supplier, for the same Buyer, and at the same rate. These should be closed immediately to avoid confusion and rework. For more information on Duplicate Orders click here.
3. Multiple Orders occur for a couple of reasons:
   a. The Worker is assigned to complete two different jobs that are billed at different rates.
   b. The Worker is working at the property for more than one staffing supplier or worked for a different supplier in the past that has not closed out the old Order.

POSING FOR A SECURITY PHOTO

1. Security Photos are captured at the end of every action taken at the Kiosk and stored in various views and tools in WorkRecords.
2. Before the photo is taken, a frame will appear in the middle of the screen and a 2-second countdown will begin.
3. Since the height of workers vary, a worker that is too tall to capture their face in the photo frame should step backwards or squat down, and workers that are too short should step forward.
4. Security Photos can be used to confirm the identity of workers, but also to confirm that workers are properly attired when they check-in to begin work and out at the end of the day.

PURCHASING MEALS AT THE KIOSK

1. Some properties provide employee meals for a set fee and the Kiosk has been configured to offer the worker the ability to purchase a meal at the Kiosk.
2. When a meal is purchased at the Kiosk, a meal ticket may be printed or a view is used by the cafeteria worker to verify that the contractor has paid for the meal.
3. The cost of the meal is automatically deducted from the billing and a report is available for the Labor Supplier to account for the deduction through the employee's payroll, eliminating the need for cash handling for each transaction and streamlining the invoice process or both.

ENTERING ADDON AMOUNTS AT THE KIOSK

1. Some properties require that the worker input specific performance measurements for tracking and/or billing. These may be items such as: rooms cleaned, orders fulfilled, etc.
2. Like other items captured at the Kiosk, these can be edited in WorkRecords through the TimeCard editor.

CONVENIENCE RULES

1. First, it is important that a Convenience Rule not be confused with a Rounding Rule. The rules are not the same.
2. A Convenience Rule simply allows a worker to confirm that they are there and ready to start work a few minutes prior to actually starting work.
3. It is important to let your worker know if the Labor Buyer offers this convenience. If the Labor Buyer does, you will want to confirm that the department(s) that the worker is planning to work follow the same rules.
4. Most WorkRecords customers that use Convenience Rules, use a 7-minute Convenience Rule.
5. A worker can tell if they have checked in under a Convenience Rule or Rounding Rule through the box in the upper right hand of the screen that will display the actual and punch time that is recorded in WorkRecords.
6. Be sure to instruct your worker to notify someone that edits need to be made if they check-in during a time that falls under a rule and are instructed to go straight to work.

KIOSK 3-MINUTE RULE

1. When a worker checks in at a WorkRecords Kiosk and then attempts to access the Kiosk within a 3-minute window, their punch will automatically be removed.
2. Why? The software was designed in this manner for two primary purposes:
   a. To reduce edits when a worker makes an incorrect selection at the Kiosk.
   b. To avoid zero-minute WorkSegments (check-in/out during the exact same minute) which cause challenges in some areas of reporting.

CHECKING OUT AT THE KIOSK

1. Workers have 4 different sections available when checking out at a WorkRecords Kiosk:
   a. <u>Done for the Day</u> – Selected when they will not be returning that same work day.
   b. <u>Meal Break</u> – Selected when they are leaving only to take a meal break, but will be returning that same work day. (This includes workers on an overnight shift that may check-out on Saturday and back in on Sunday, but it is still a single work day for the worker.)
   c. <u>Change Department</u> – Selected when a worker is checking out of one department, or even job activity, and plans to immediately check back into another department or job activity.
   d. <u>Cancel</u> – Selected when the worker does not want to check-out.