

Table of Contents

1. Purpose.....	2
2. Prerequisites.....	2
3. Setting up your Client Portal Account.....	2
3.1. Request Access to Client Portal.....	2
3.2. Client Contact Portal Invite	3
4. Navigating Client Portal	4
4.1. Client: Home Tab	4
4.2. Client: Orders Tab	5
4.3. Client: Employees tab	7
4.4. Client: Invoices Tab.....	8
4.5. Client: TimeCards Tab.....	9
4.6. Client: Reports Tab	11
4.7. Client: Documents Tab	12
4.8. Client: TimeClock Tab	12
4.9. Client: How to Reset Your Password.....	13
5. TempWorks Knowledge Base	13
6. Version History.....	14

1. Purpose:

The Client Portal (WebCenter) gives you, the client contact, access to important information including invoices, reporting, and employee lists from CGS.



2. Prerequisites

You must be authorized and listed as a contact for the Company and have a company email address to access CGS's Client Portal. Please have an authorized representative from the Company contact CGS to have you added.

3. Setting up your Client Portal Account

Existing client contacts must receive an invitation from CGS to set up your login information to access CGS's Client Portal. *Log in credentials must be created for each authorized client contact.*

3.1. Request Access to Client Portal


Complete the Request Online Access form [here](#) to request an invite be sent to you.

REQUEST ACCESS, OR NEED HELP?

Name*

Email*

Your Message*

 Send

3.2. Client Contact Portal Invite

1. Click the link in the invitation and follow the steps to create your account.
 - Create a username
 - Create a password

##ContactName##

You have been invited to use Client Portal functionality for ##CustomerName##. CGS's Client Portal is your online resource for information regarding ##CustomerName##, and may be used to communicate with CGS.

Before being able to use your Client Portal, you will first need to register by navigating to the link below.

To continue setting up an account, click [here](#).

To unsubscribe from this notification, please click [here](#).

Thank you,

[CGS](#)

4. Navigating Client Portal

Keep in mind that you may not be able to see all the options available as Client Portal may be limited by your role.

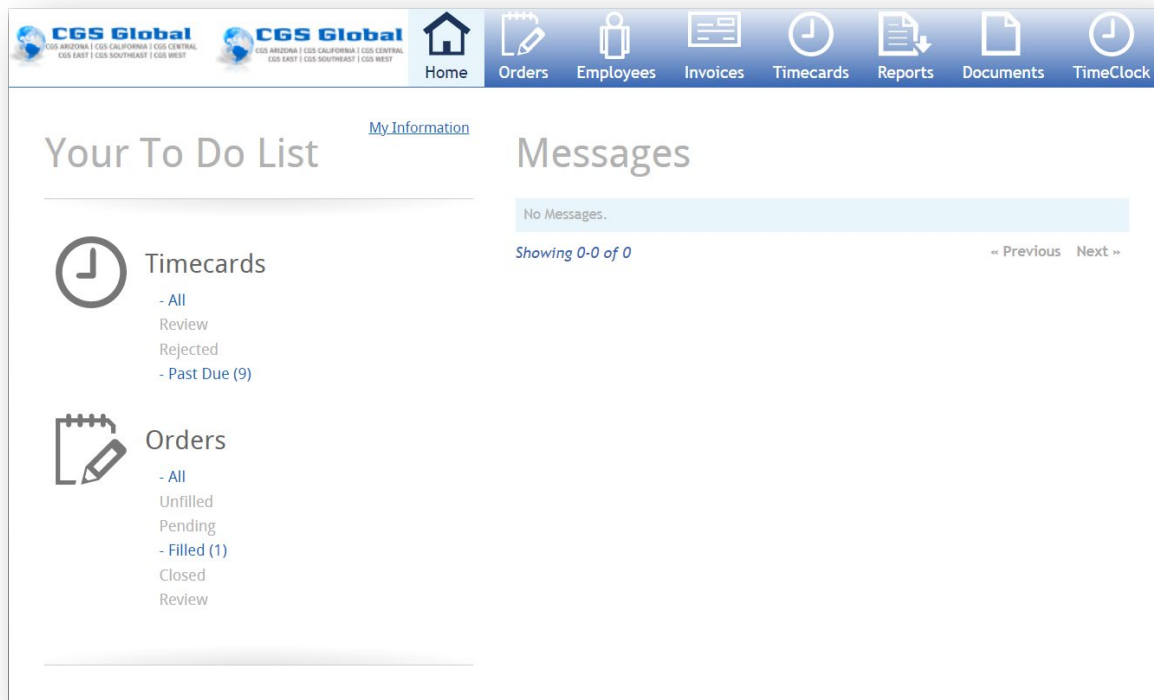
- ✓ Client: [The Home Tab](#)
- ✓ Client: [The Orders Tabs](#)
- ✓ Client: [The Employees Tab](#)
- ✓ Client: [The TimeCards Tab](#)
- ✓ Client: [The Reports Tab](#)
- ✓ Client: [The Documents Tab](#)
- ✓ Client: [The TimeClock Tab](#)
- ✓ Client: [How to Reset Your Password](#)

4.1. Client: Home Tab

Gives the client contact(s) access to important information including orders, invoices, and reporting options. You may also review and approve the time for your employees.

- ☞ **Your To Do List:** this section represents items that need your attention such as action items or items requiring your review.
 - **My Information:** update your e-mail address, change your password, etc.
 - **Notifications:** update the notifications you would like to receive.
- ☞ **Messages:**

This is a general message board your staffing specialist/agency might use to post useful reminders.



4.2. Client: Orders Tab

Create New Orders to request people for your job.

New Order Request

Bill Rate

Customer

Job Description

Duration

Number of Personnel Required

Pay Rate

Purchase Order

Shift

Job Title

Start Date

Start Time

Supervisor



Supervisor Phone Number

Worksite

[Submit Request](#)

View existing orders, staffing status, and details, such as:

- **Labor:** job information specific to the order
- **Description:** summary of the job information, if provided
- **Contacts:** contacts for the job and role
- **Assignments:** field employees assigned to the order
- **Reviewers:** company contacts who review the order, if applicable
- **Skills:** skills required for the order, if provided/available

Home
Orders
Employees
Invoices
Timecards
Reports
Documents
TimeClock

All
Unfiled
Pending
Filled (1)
Closed
Review

All

 Exact Matches Only

[\(+ Create Purchase Order](#) |
 [\(+ Create Order Request](#) |
 [Manage Cost Centers](#)

Showing 1-1 of 1
« Previous 1 Next »

Job Title	Status	Worksite	Start Date	Workers Needed
Labor	Filled	<your worksite	7/16/2020	0

Showing 1-1 of 1
« Previous 1 Next »

Copy Order
Enter Time
Candidates

Labor

Start Date: 7/16/2020

OrderID: 3378	Department: Corporate
Order Status: Filled	Shift:
Order Date: 7/20/2020	Start Time:
Duration: Indef	End Time:
Workers Assigned: 96 of 1	Est. End Date:
Candidates: 0	Dress Code:
PO Number: Mount-It	Safety Notes:
PO Value:	Bill Rate: \$23.80
Cost Center:	Pay Rate: \$17.00
SubEntity:	

Description
Contacts
Assignments
Reviewers
Skills

warehouse

4.3. Client: Employees tab

View a list of employees on a particular order, including their assignment, timecard, and their skills.

The screenshot displays the 'Employees' tab in the CGS Global Client Portal. The top navigation bar includes icons for Home, Orders, Employees, Invoices, Timecards, Reports, Documents, and TimeClock. Below the navigation, there are filters for 'All', 'Current (10)', and 'Past (89)'. A search bar is present with a dropdown menu set to 'All' and a search icon. The main content area is divided into two sections:

Employee List: A table showing a list of workers with columns for Name, Current Jobs, and ID. The list includes Bruce, Susie, Pedro, Adrianna, Lily, and Juan.

Name	Current Jobs	ID
Worker, Bruce	0	12345
Worker, Susie	0	12345
Worker, Pedro	0	12345
Worker, Adrianna	0	0
Worker, Lily	0	12345
Worker, Juan	0	12345

Employee Detail View (Bruce Worker): This view shows the following information:


- Enter Time** and **Candidacies** buttons.
- Assignments**, **Timecards**, and **Skills** tabs.
- Labor** section: Order 3378 - Corporate Department, Status: Open.
- 4/6/2023 - Present** date range.
- Supervisor: Strongwater, Jason**.

At the bottom of the page, there are pagination controls showing 'Showing 1-20 of 99' and navigation arrows.

4.4. Client: Invoices Tab

View invoices, details of an invoice, & print your invoices.

- Select an invoice and the pencil icon to view details about that particular invoice.

Invoice Date	Due Date	Department	Invoice Number	PO Number(s)	Balance Due
 1/18/2023	Wednesday, January 18 1/18/2023	Corporate	30005174		\$0.00 of \$15,420.06
1/11/2023	Wednesday, January 11 1/11/2023	Corporate	30005040		\$0.00 of \$14,298.78
1/4/2023	Wednesday, January 4 1/4/2023	Corporate	30004951		\$0.00 of \$12,903.93
12/28/2022	Wednesday, December 28 12/28/2022	Corporate	30004875		\$0.00 of \$13,078.74
12/22/2022	Thursday, December 22 12/22/2022	Corporate	30004863		\$0.00 of \$13,437.50
12/21/2022	Wednesday, December 21 12/21/2022	Corporate	30004807		\$0.00 of \$14,146.04
2/21/2023	Tuesday, February 21 2/21/2023	Corporate	30005467		\$0.00 of \$14,184.49
2/14/2023	Tuesday, February 14 2/14/2023	Corporate	30005402		\$0.00

4.5. Client: TimeCards Tab

Manage, Review, & Submit employee TimeCards.

The screenshot displays the CGS Global TimeCards interface. At the top, there is a navigation bar with icons for Home, Orders, Employees, Invoices, Timecards, Reports, Documents, and TimeClock. Below this is a filter bar with tabs for 'All', 'Review', 'Rejected', and 'Past Due (9)'. A search bar and a 'Column Mode' selector (Weekly/Daily) are also present.

The main content area shows a summary for the week ending on April 9, 2023, with a total of 0.00 hours. Below this is a table listing workers and their timecard details:

Worker	Paycode	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total Hours	Adjustments	Gross	Actions
Worker, Bruce	Reg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00	Details, Copy, Delete
Worker, Susie	Reg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00	
Worker, Lily	Reg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00	
Worker, Pedro	Reg	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00	\$0.00	

Below the table, there is a 'Hide Details' button and a detailed view for 'Worker, Lily' for the period 'April 3, 2023 to April 9, 2023'. The detailed view includes a table for punch in/out times and breaks:

	Mon 4/3/2023	Tue 4/4/2023	Wed 4/5/2023	Thu 4/6/2023	Fri 4/7/2023	Sat 4/8/2023	Sun 4/9/2023
Punch In							
Paid Break 1 (min)							
Paid Break 2 (min)							
Punch Out							
	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Summary for Worker, Lily: 0.00 Regular, 0.00 Overtime, 0.00 Double Time, 0.00 Total Hours — \$0.00.

On the right side of the detailed view, there are sections for 'Breaks Received? Yes/No:' (yes) and 'Were you injured? Yes/No:' (no).

At the bottom of the interface, a blue bar indicates '0 of 9 timecards selected' and a 'Submit Selected Timecards' button.

Approve/Reject Timecards from the review Tab (timecards must be submitted by employee and/or client before they will be available before they can be approved).

The screenshot displays the 'Timecards' section of the CGS Global Client Portal. The navigation bar includes 'Home', 'Orders', 'Employees', 'Invoices', 'Timecards', 'Reports', 'Documents', and 'TimeClock'. The 'Timecards' tab is active. Below the navigation bar, there are filter tabs: 'All', 'Review (1)', 'Rejected', and 'Past Due'. The 'Review (1)' tab is highlighted with an orange box. A search bar and a search icon are also present. The main content area shows a table of timecards with the following data:

Details	Employee	Job Title / Department	Week Ending On	Hours / Adjustments
Print Timecard Order History	Alvarado, Vanessa	Corporate - Internal Department Recruiting & Talent Management Coordinator	10/22/2023	40.00 Hours Reg \$0.00 Adjustments

At the bottom of the table, there is a 'Show More Timecards' link with a dropdown arrow. Above the table, there are links for 'Approve Remaining' and 'Reject Remaining'.

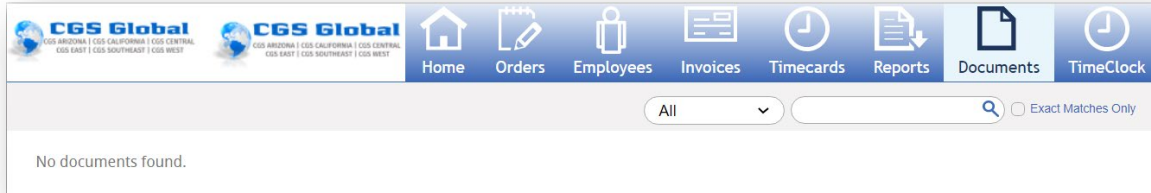
4.6. Client: Reports Tab

Access, view, and print your paychecks.

Report Title	Description	Output Type
Approved Web Timecards	Shows a list of approved timecards, their employee and a breakdown of hours	Timesheet
Approved Web Timecards Detail	Shows a list of all approved timecards that were submitted through WebCenter	Timesheet
Assignment History by Department	Get all assignments within a date range and sorted by department	Assignments
Average Assignment Length	View a line chart of average assignment lengths within a chosen date range	Assignments
Current Assignments	Shows a list of all assignments that are currently active	Assignments
Current Timecard Status	Shows a list timecards for week ending dates between the given date range. Has a host of different filtering options.	Timesheet
Daily Time	Shows a list of all time entered between a start time and end time on a chosen day	Hours
Daily Time (Hours)	Shows a list of all time entered between a start time and end time on a chosen day	Hours

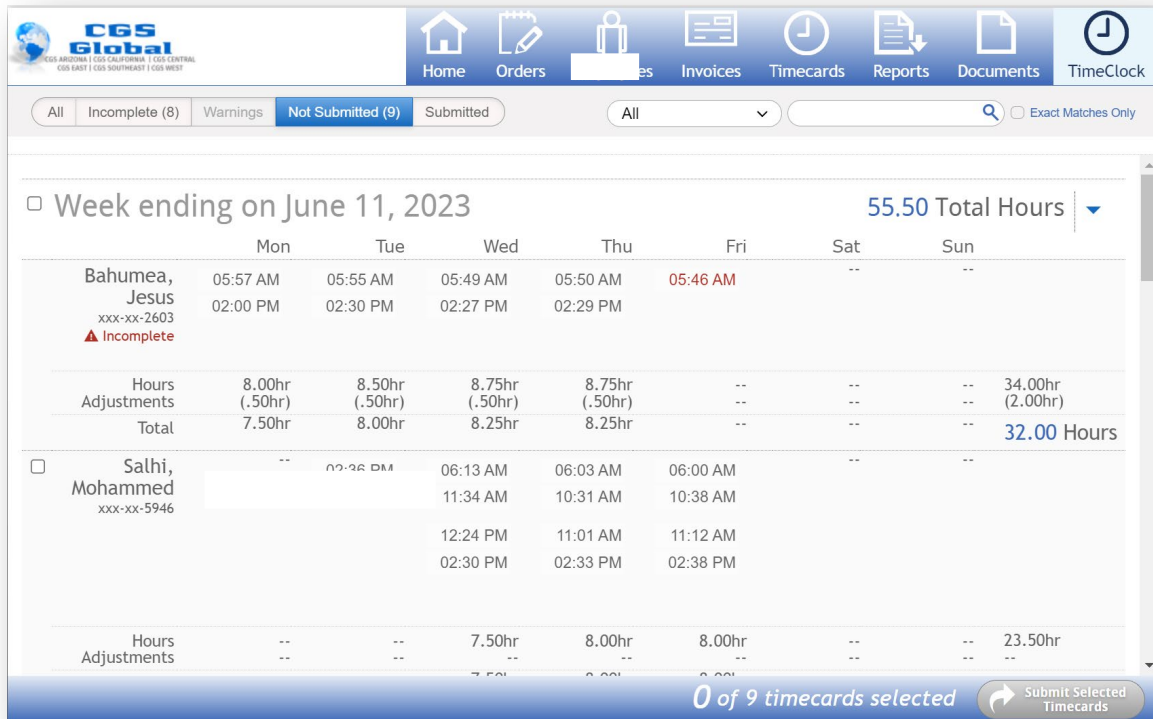
4.7. Client: Documents Tab

Can view CGS Documents or forms that a client may need.



4.8. Client: TimeClock Tab

Used when you elect to use time clock, and the mobile app for users to punch in/out for work.



4.9. Client: How to Reset Your Password

Click - *Forgot password* – to have an email sent to reset your password. You can also [contact](#) CGS if you need assistance.



5. TempWorks Knowledge Base

- ✓ Client: [Employee Portal WebCenter](#)

6. Version History

Version History			
Version	Changes Approvals <small>(Indicate section numbers)</small>	Name	Date
2023.0	Created	Scheibel	4/14/2023
2023.1	Added Timecard Approval section	Scheibel	10/17/2023
