

INTIME - MANAGER GUIDE

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How To Guide

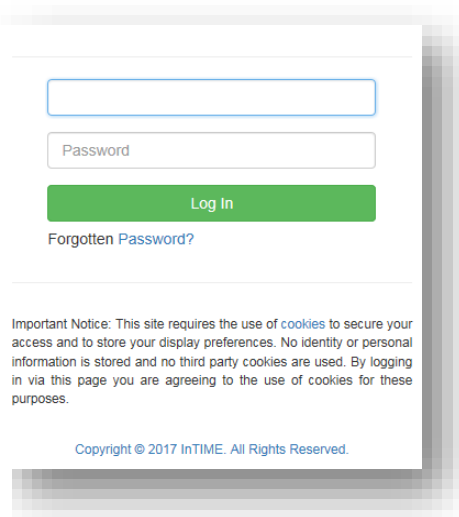
Your self-service portal

In addition to approving timesheets and expenses, you have access to the following functions:

- View and print sales invoices or credit notes.
- Access to summary information of your contractors.
- Action agency information requests, acceptance of contract and compliance documentation and/or submit queries using the comments feature.

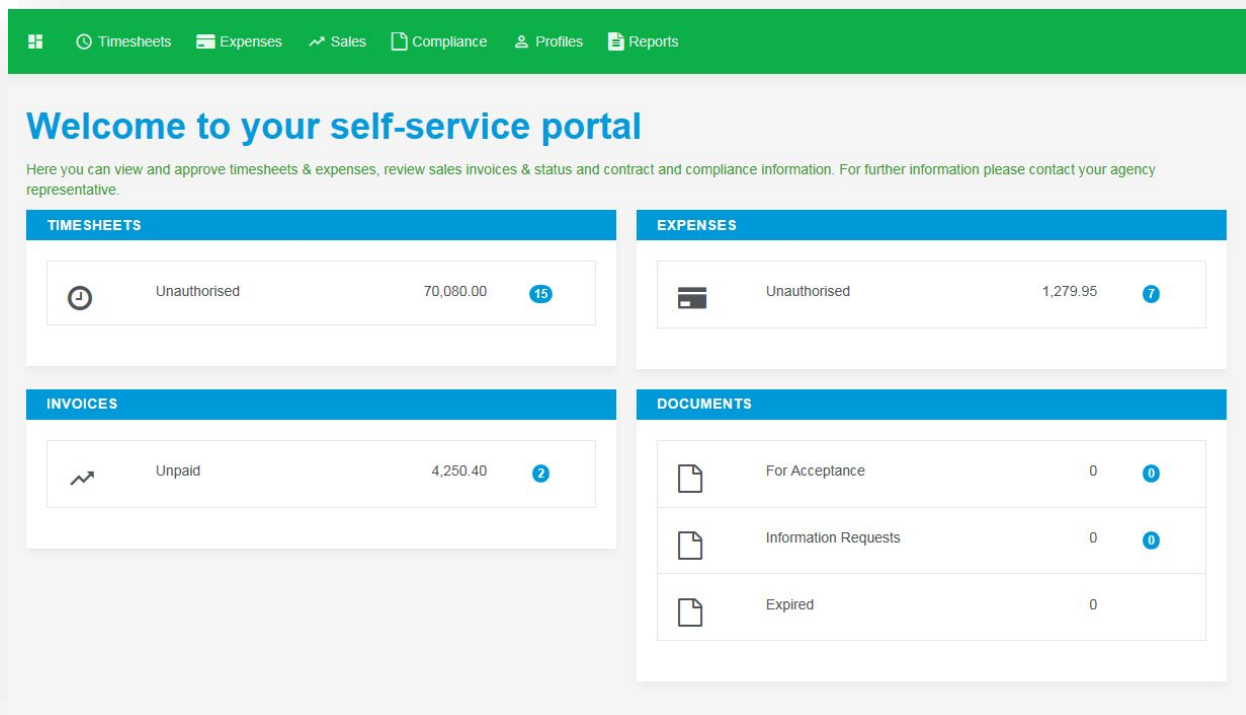
Accessing InTime

To get started with InTime, use the URL provided by your agency administrator. You will be prompted for your username and password, which will have been generated and sent to you directly from the InTime system or via your agency administrator.

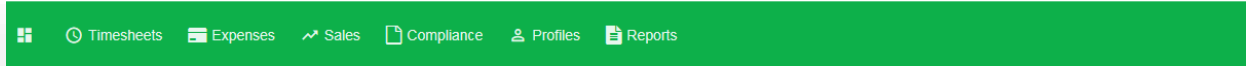


Your homepage

Once you have logged in, you will be presented with the main InTime homepage, with your dashboard.



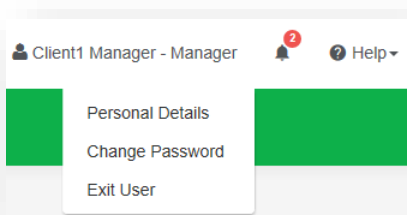
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The navigation menu is located across the top of the page. Please be aware that the list of items in the menu bar can vary depending on the agency's requirements.

The menu bar options will include the following as shown above:

- A multi square icon – taking you back to your homepage.
- Timesheets – provides access to unauthorised, historic approved and rejected timesheets and a timesheet search function.
- Expenses – this provides the same visibility as is available on the timesheet function.
- Sales – provides ability to access invoices and credit notes.
- Compliance – to facilitate information requests and issue documentation.
- Profiles – this gives details of your placements and associated clients
- Reports – Depending on the agency's requirements.

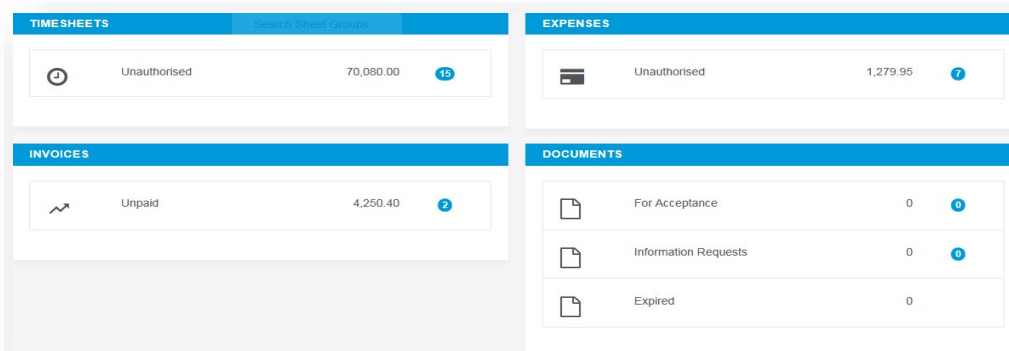


In the top right hand corner of your screen

- Your name – Click on this, options appear for you to:
 - ✓ Update your personal details.
 - ✓ Change password.
 - ✓ Exit InTime.
- Bell Symbol – Advises you of notifications.
- Help – takes you to our on line documentation help bank.

Your dashboard

On your main home screen, your personal dashboard will provide you with a real-time status of your current unauthorised timesheets and expenses. You will also see unpaid invoices and any contract documentation all of which you can easily access directly from the dashboard.



How To Guide

Timesheet and expense basics

Statuses of timesheets and expense claims explained:

Authorise: Timesheets displayed are awaiting authorisation.

Unauthorised: Timesheets displayed are awaiting authorisation but are viewable only on the dashboard.

Approved: An approved timesheet or expense is one that you have approved for payment.

Rejected: A rejected timesheet or expense that has been rejected by you. You can provide a comment as to why the timesheet or expense was rejected. Once rejected, the timesheet becomes a draft for editing and resubmitting by the contractor.

Approve or reject timesheets/expenses

To approve timesheets or expenses, go to Timesheet or Expenses on the menu bar and click **Authorise**. You will then be presented with a list of all timesheets or expenses submitted by contractors that require approval. Alternatively, you can use the dashboard on your homepage and select the appropriate item.

Authorise Timesheets

Search:

Select All Select None Choose Columns Show 10 entries

| id | Authorise | PO | PO Required | Approval Comments | Worker | Worker Type | Worker Ref | Consultant | Client | Manager | Placement |
|------|--------------------------|-------------------------------------|-------------|-------------------|----------------|-------------|------------|--------------|------------------|------------------|---------------|
| 2120 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Note, Advice | LTD | ADVNO | Leader, Team | TMP (UK) Limited | Manager, Client1 | ADV_HOURLY_3 |
| 5282 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Bill, Self | LTD | SELFB | Leader, Team | TMP (UK) Limited | Manager, Client1 | TimePattern-2 |
| 5285 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Bill, Self | LTD | SELFB | Leader, Team | TMP (UK) Limited | Manager, Client1 | TimePattern-2 |
| 5335 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Bill, Self | LTD | SELFB | Leader, Team | TMP (UK) Limited | Manager, Client1 | TimePattern-2 |
| 5346 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Note, Advice | LTD | ADVNO | Leader, Team | TMP (UK) Limited | Manager, Client1 | ADV_MONTHLY_3 |
| 5354 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Note, Advice | LTD | ADVNO | Leader, Team | TMP (UK) Limited | Manager, Client1 | ADV_MONTHLY_3 |
| 5431 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Note, Advice | LTD | ADVNO | Leader, Team | TMP (UK) Limited | Manager, Client1 | ADV_HOURLY_3 |
| 5436 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Bill, Self | LTD | SELFB | Leader, Team | TMP (UK) Limited | Manager, Client1 | TimePattern-1 |
| 5584 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Alvarez, Marie | LTD | WRK_MA | Leader, Team | TMP (UK) Limited | Manager, Client1 | Pmt3 |
| 5587 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No | | Alvarez, Marie | LTD | WRK_MA | Leader, Team | TMP (UK) Limited | Manager, Client1 | Pmt3 |

Showing 1 to 10 of 15 entries

Previous 1 2 Next

Approve Print Report Print Detail Report CSV Default CSV Reset Columns

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You can approve in one of two ways: Bulk approve: tick each item listed in the Authorise column that you want to approve, enter your password and then click Approve. Approve each timesheet individually by clicking on the timesheet ID. You will see a summary of the placement and the timesheet details.

Authorise Timesheet 5285 for Mr Self Bill

TIMESHEET

Timesheet for Mr Self Bill

| | | | |
|---------------------------|-------------------------|----------------------|-----------------------|
| Timesheet ID: | 5285 | Timesheet Status: | Submitted |
| Submitted At: | 12/05/2017 at 10:56:09 | Submitted By: | Mr Self Bill |
| Pending Approval By: | Mr Client1 Manager | Reject Reason: | |
| Timesheet Approval Route: | Client Manager Approval | Approving Manager: | |
| Period Ending: | 14/05/2017 | Timesheet Duration: | weekly |
| Placement Ref: | TimePattern-2 | Placement Period: | 01/07/2016 to Unknown |
| Job Title / Sector: | Job Title | Worker: | Mr Self Bill |
| PO: | | Client Site: | |
| Agency: | Demo Agency | Consultant: | Team Leader |
| Client: | TMP (UK) Limited | Manager: | Mr Client1 Manager |
| Total Hours: | 24:00 | Total Decimal Hours: | 24.00 |
| Hourly Rate Total: | | Fixed Rate Total: | 24:00 (3.00 units) |
| Fixed Rate Breakdown: | Full Day : 3.0 | Total Charge: | GBP 1,800.00 |

| Date | Rate | Start | Finish | Break | Hours | Decimal |
|------------|----------|-------|--------|-------|-------|---------|
| 08/05/2017 | Full Day | | | | | 1.00 |
| 09/05/2017 | Full Day | | | | | 1.00 |
| 10/05/2017 | Full Day | | | | | 1.00 |

APPROVALS

| Type | Result | Route | Date/Time | Approver | Comment |
|------|--------|-------|-----------|----------|---------|
|------|--------|-------|-----------|----------|---------|

RATINGS

| | | | | | |
|------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Appearance: | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Professionalism: | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Attitude: | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Timekeeping: | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

PO

Comment or Rejection Reason

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You must enter your password at the bottom of the screen and click either Approve or Reject. If you select Reject, you will be presented with a new page asking for a reason for the rejection. This reason will be sent back to the contractor so they can act accordingly.

Email approval

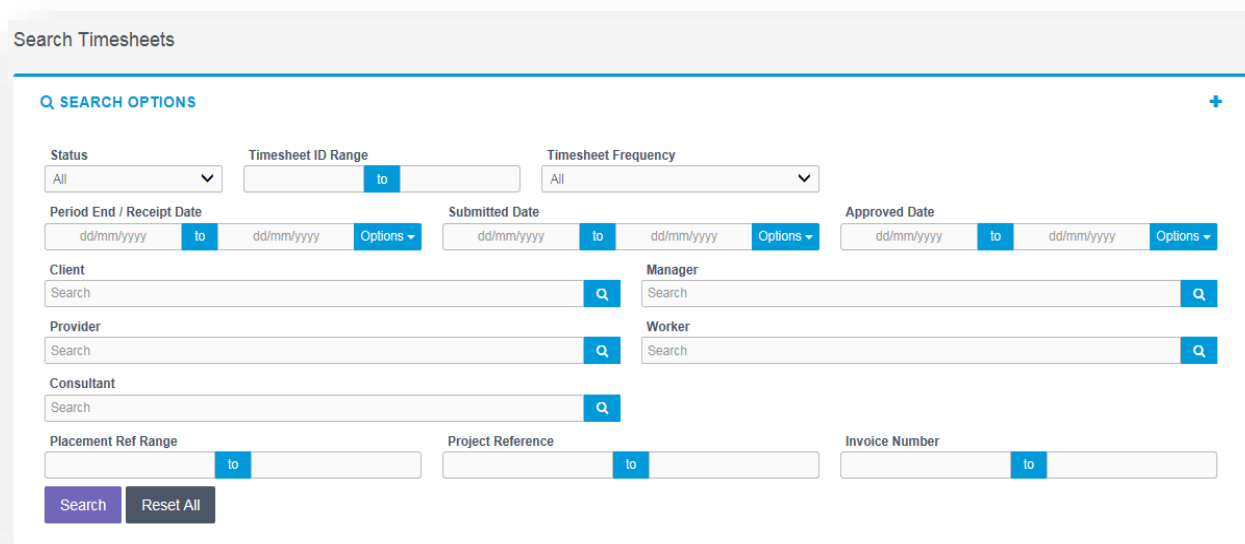
If you have been set up for email approval, you will receive an email with the timesheet/expense attached, containing links to approve or reject the timesheet. There is one approval link and a reject link for each configured rejection reason.

Approved timesheets/expenses

Once you have approved these, they can be accessed by clicking Approved on the Timesheet or Expenses menu. Clicking on the ID of the item will open it fully providing more detail.

Search

If you need to find a timesheet or expense item, you can select the 'Search' feature from the Timesheet or Expense menu. Within this search form you can specify various dates, placements or timesheet criteria to find specific timesheet or expense items.



The screenshot shows a search interface titled "Search Timesheets". At the top left, there is a magnifying glass icon and the text "SEARCH OPTIONS", followed by a plus sign icon. The form contains several search criteria sections:

- Status:** A dropdown menu with "All" selected.
- Timesheet ID Range:** Two input fields with a "to" separator and a blue search icon.
- Timesheet Frequency:** A dropdown menu with "All" selected.
- Period End / Receipt Date:** Two date input fields (format dd/mm/yyyy) with a "to" separator, an "Options" dropdown, and a blue search icon.
- Submitted Date:** Two date input fields (format dd/mm/yyyy) with a "to" separator, an "Options" dropdown, and a blue search icon.
- Approved Date:** Two date input fields (format dd/mm/yyyy) with a "to" separator, an "Options" dropdown, and a blue search icon.
- Client:** A search input field with a blue search icon.
- Manager:** A search input field with a blue search icon.
- Provider:** A search input field with a blue search icon.
- Worker:** A search input field with a blue search icon.
- Consultant:** A search input field with a blue search icon.
- Placement Ref Range:** Two input fields with a "to" separator and a blue search icon.
- Project Reference:** Two input fields with a "to" separator and a blue search icon.
- Invoice Number:** Two input fields with a "to" separator and a blue search icon.

At the bottom left of the form, there are two buttons: "Search" (purple) and "Reset All" (grey).

How To Guide

Sales invoicing

Your portal allows you to view and download sales invoices. You can view unpaid invoices by selecting the Unpaid option from your dashboard. Alternatively, you can use the Sales option on the menu bar, and use the search facility.

Q SEARCH OPTIONS

Main

Date Ranges

References

Client
Search [q]

Worker
Search [q]

Consultant
Search [q]

Manager
Search [q]

Provider
Search [q]

Sent Status: All [v] | Paid Status: No [v] | Exported Status: All [v] | Perm Invoice: All [v]

Credited Status: All [v] | Supplier Invoice Status: All [v]

Item PO Status: All [v] | Has Purchase Order: All [v]

Search [q] | Reset All [x]

Search: []

Select All | Select None | Choose Columns

Show 10 entries

| Select | Invoice Number | Account Ref | Ref | Credited | PO Num | Invoice Date | Client | Consolidated By | Consolidated Entity | Net | Tax Code | Tax | Gross | Currency | Exchange Rate | Net (GBP) | Primary R |
|--------------------------|----------------|-------------|------|----------|---------|--------------|------------------|-----------------|---------------------|----------|----------|--------|----------|----------|---------------|-----------|------------|
| <input type="checkbox"/> | 0000000310 | DTMPUKLIM | CLI1 | | Various | 02/05/2017 | TMP (UK) Limited | client-manager | Client1 Manager | 3,170.40 | T1 | 634.08 | 3,804.48 | GBP | 1 | 3,170.40 | PostFinanc |
| <input type="checkbox"/> | 0000000311 | DTMPUKLIM | CLI1 | | Test PO | 03/05/2017 | TMP (UK) Limited | client-manager | Client1 Manager | 1,080.00 | T1 | 218.00 | 1,298.00 | GBP | 1 | 1,080.00 | PostFinanc |

Showing 1 to 2 of 2 entries - 0 rows selected

Previous 1 Next

Update PO | Download As Zip | Print Selected | Report | Download Schedule | CSV

Please note: Some functions are not applicable to Supplier Invoices.

Viewing profile information

There are two types of profile information available as a manager. They are:

- Select Contractors from the Profiles menu, this provides details relating to all contractors who are assigned to you.
- Select Placements from the Profiles menu, this will provide you a list of all active placements that you are responsible for. You can obtain more information relating to the placement by clicking on the reference/name.

This will show all details such as the agency, worker, manager and consultant associated with the placement as well as any reference codes, start and finish dates, job descriptions and contract docum