INTIME

Manager Guide

syntax

CONTENTS

Your self-service portal 2
Accessing InTime 2
Your homepage 2
Your dashboard 3
Timesheet and expenses basics 3
Approve or reject timesheets/expenses 4
Email approval 5
Approved timesheets/expenses 5
Search 5
Contract documents 6
Sales invoicing 6
Viewing profile information 7

Your self-service portal

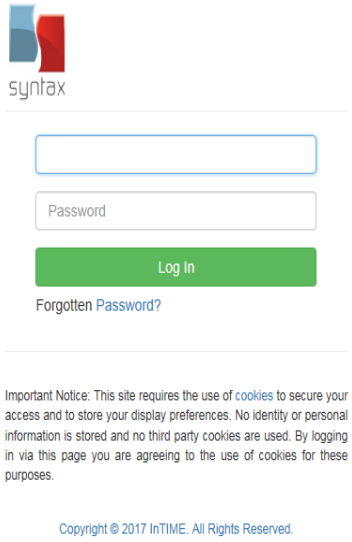
In addition to approving timesheets and expenses, you have access to the following functions:

- 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

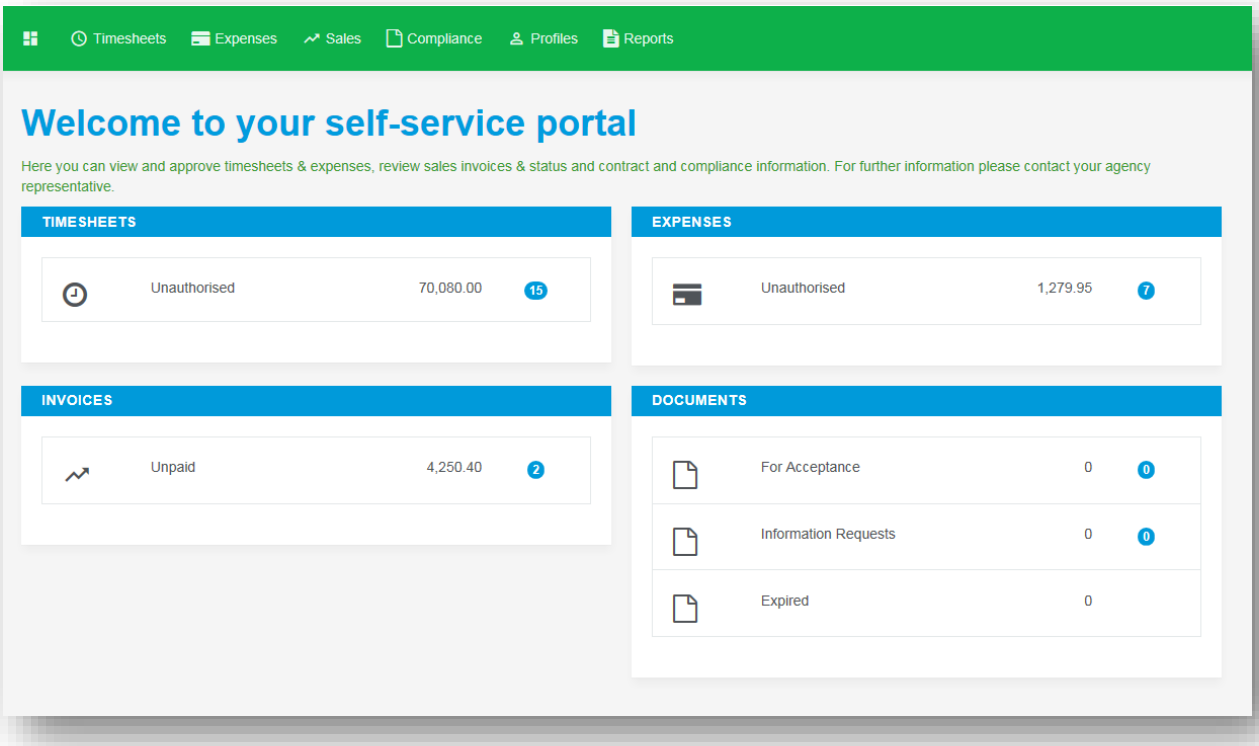
To get started with InTime, use the URL provided by your agency administrator. You will be prompted for your username and password, which will have been generated and sent to you directly from the InTime system or via your agency administrator.

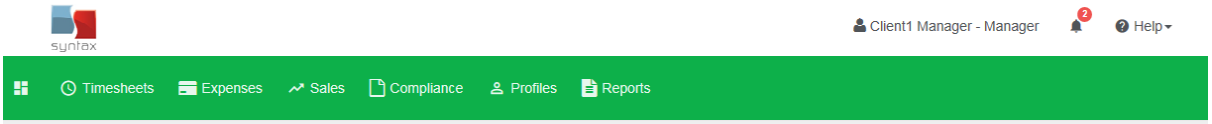
.



Your homepage.

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

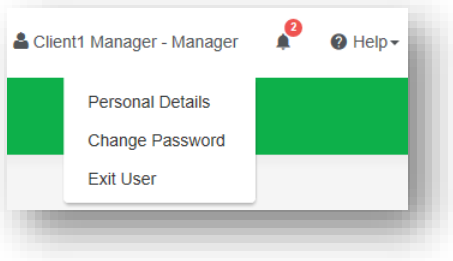




The navigation menu is located across the top of the page. Please be aware that the list of items in the menu bar can vary depending on the agency's requirements.

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 the 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.

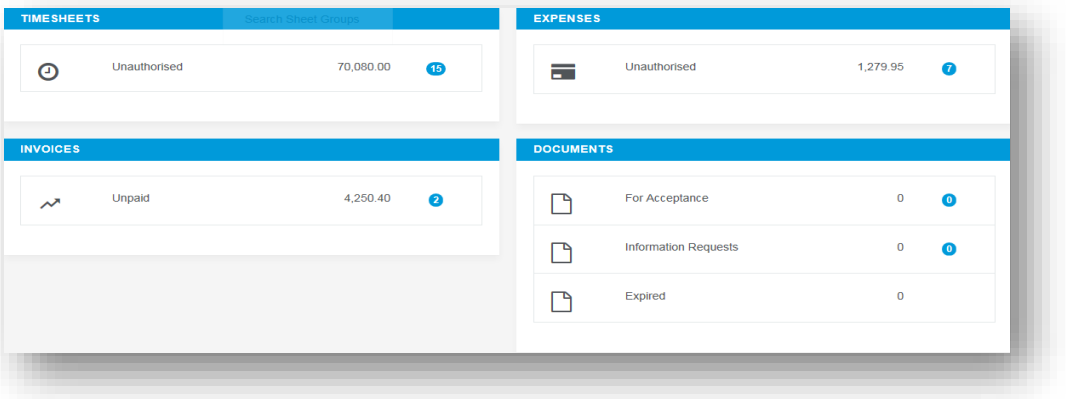


In the top right-hand corner of your screen

- 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.

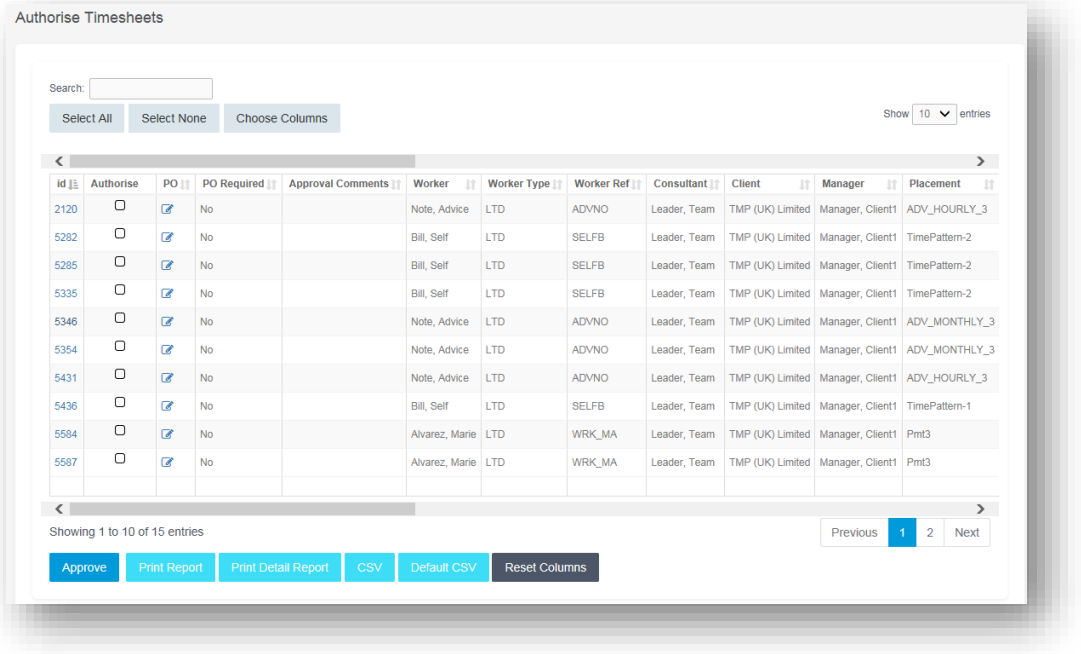


Timesheet and expense basics

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.

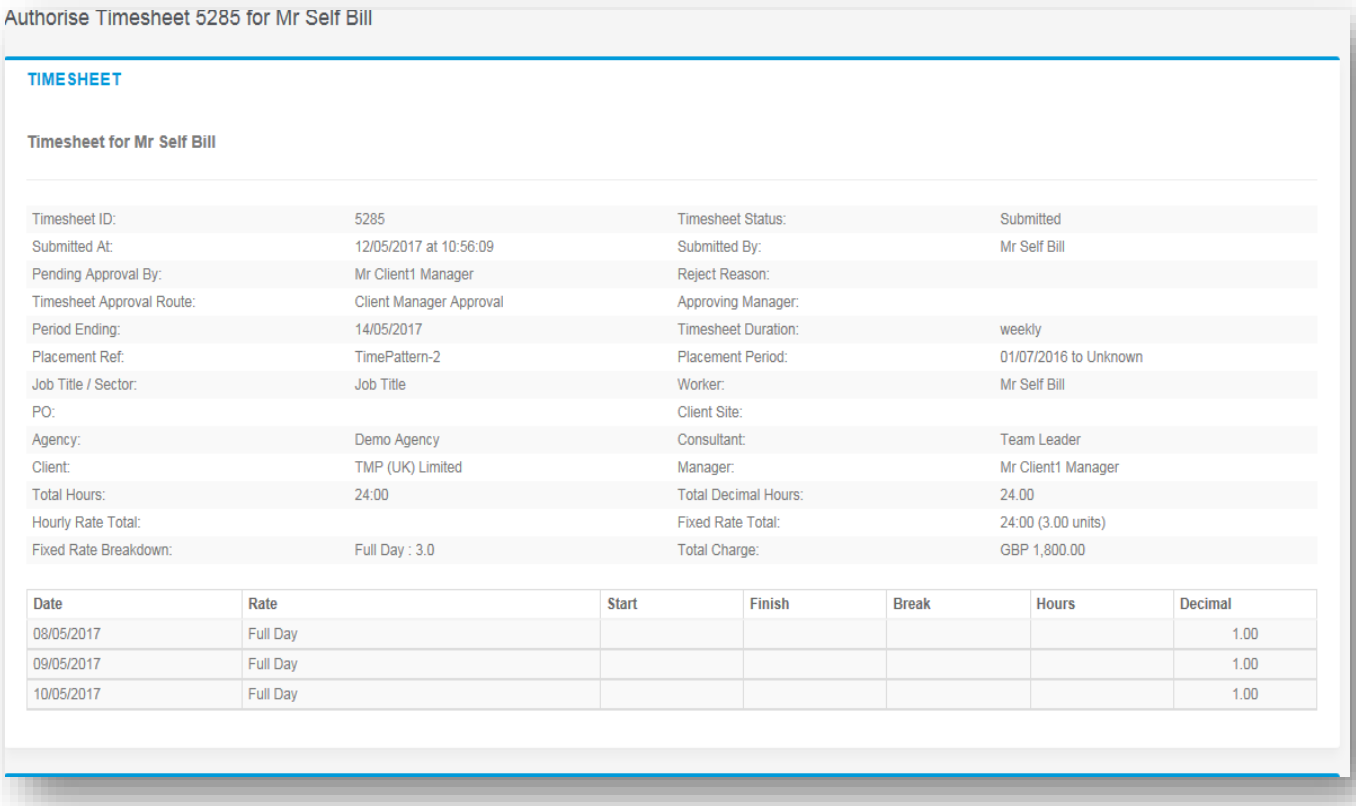
Approve or reject timesheets/expenses

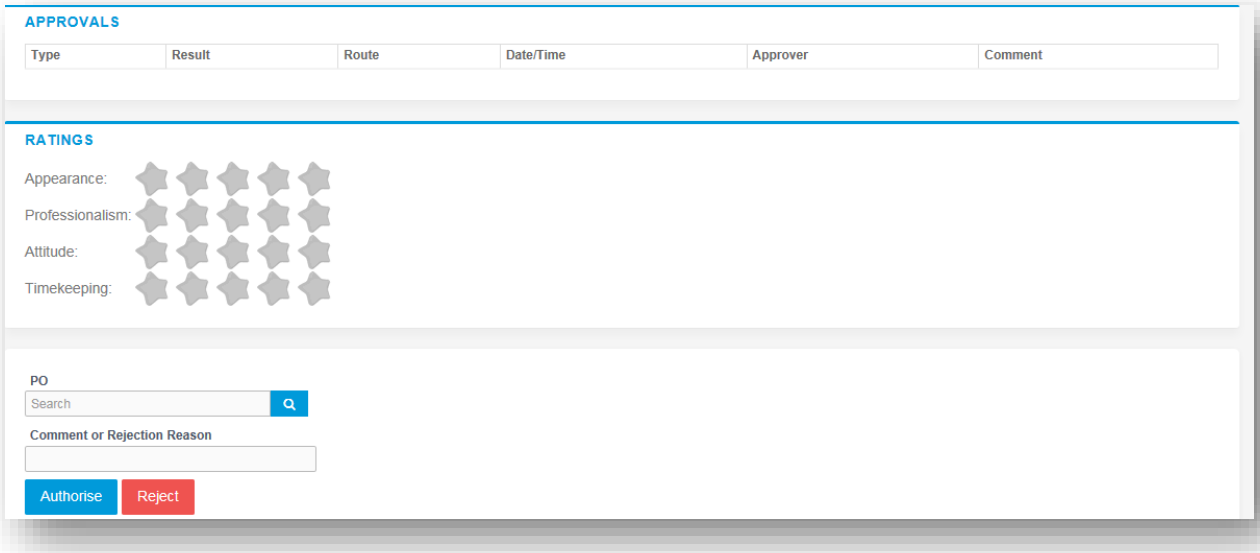
To approve timesheets or expenses, go to Timesheet or Expenses on the menu bar and click Authorise. You will then be presented with a list of all timesheets or expenses submitted by contractors that require approval. Alternatively, you can use the dashboard on your homepage and select the appropriate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



.

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.





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

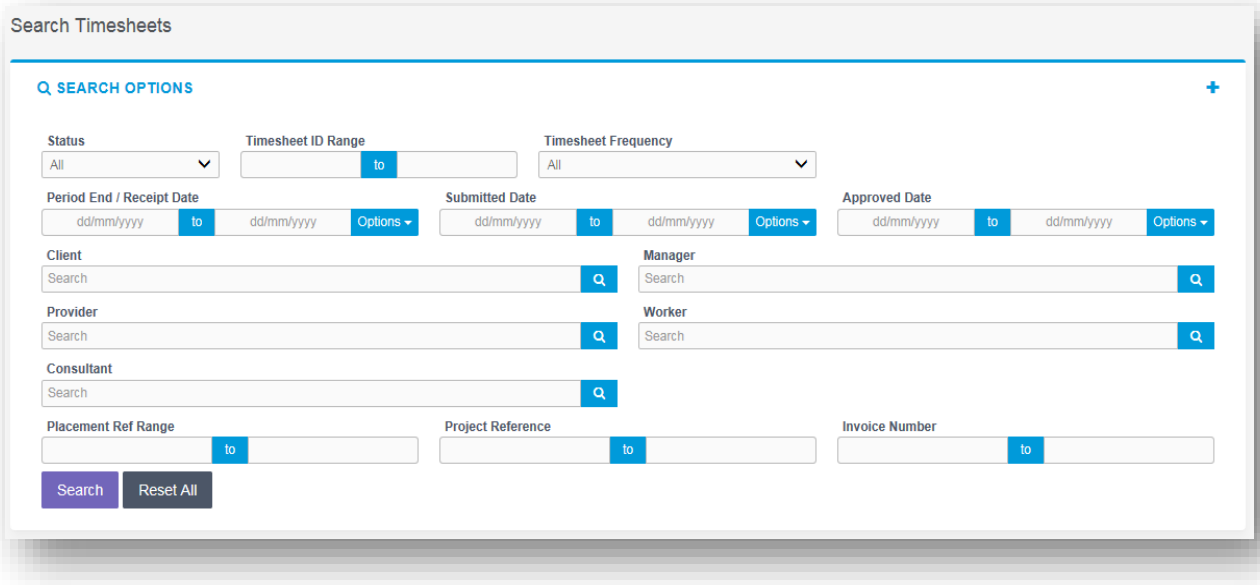
If you have been set up for email approval, you will receive an email with the timesheet/expense attached, containing links to approve or reject the timesheet. There is one approval link and a reject link for each configured rejection reason.

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.

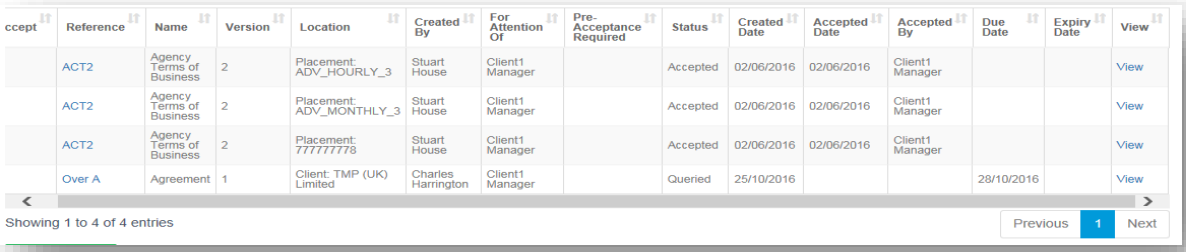
Search

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.



Contract documents

If dashboards are enabled within the agency client portal, contract documents and information requests can be viewed by clicking the relevant item within the contract documents activity dashboard. Alternatively, you can use the Compliance option on the menu bar. To view your assigned documents, click view in the last column of the document list.

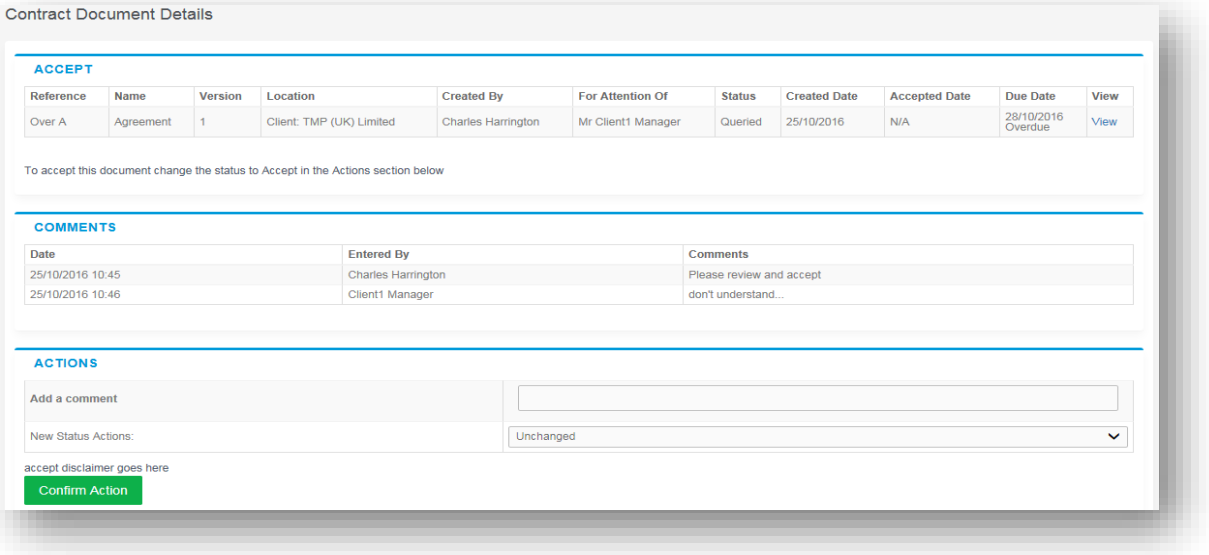


ccept	Reference	Name	Version	Location	Created By	For Attention Of	Pre-Acceptance Required	Status	Created Date	Accepted Date	Accepted By	Due Date	Expiry Date	View
	ACT2	Agency Terms of Business	2	Placement: ADV_HOURLY_3	Stuart House	Client1 Manager		Accepted	02/06/2016	02/06/2016	Client1 Manager			View
	ACT2	Agency Terms of Business	2	Placement: ADV_MONTHLY_3	Stuart House	Client1 Manager		Accepted	02/06/2016	02/06/2016	Client1 Manager			View
	ACT2	Agency Terms of Business	2	Placement: 777777778	Stuart House	Client1 Manager		Accepted	02/06/2016	02/06/2016	Client1 Manager			View
	Over A	Agreement	1	Client: TMP (UK) Limited	Charles Harrington	Client1 Manager		Queried	25/10/2016			28/10/2016		View

Showing 1 to 4 of 4 entries

Previous 1 Next

To accept the document, click on the reference which will direct you to an actions area where you can change the status to accept**.** Click Confirm Action to accept the document



Contract Document Details

ACCEPT

Reference	Name	Version	Location	Created By	For Attention Of	Status	Created Date	Accepted Date	Due Date	View
Over A	Agreement	1	Client: TMP (UK) Limited	Charles Harrington	Mr Client1 Manager	Queried	25/10/2016	N/A	28/10/2016 Overdue	View

To accept this document change the status to Accept in the Actions section below

COMMENTS

Date	Entered By	Comments
25/10/2016 10:45	Charles Harrington	Please review and accept
25/10/2016 10:46	Client1 Manager	don't understand...

ACTIONS

Add a comment

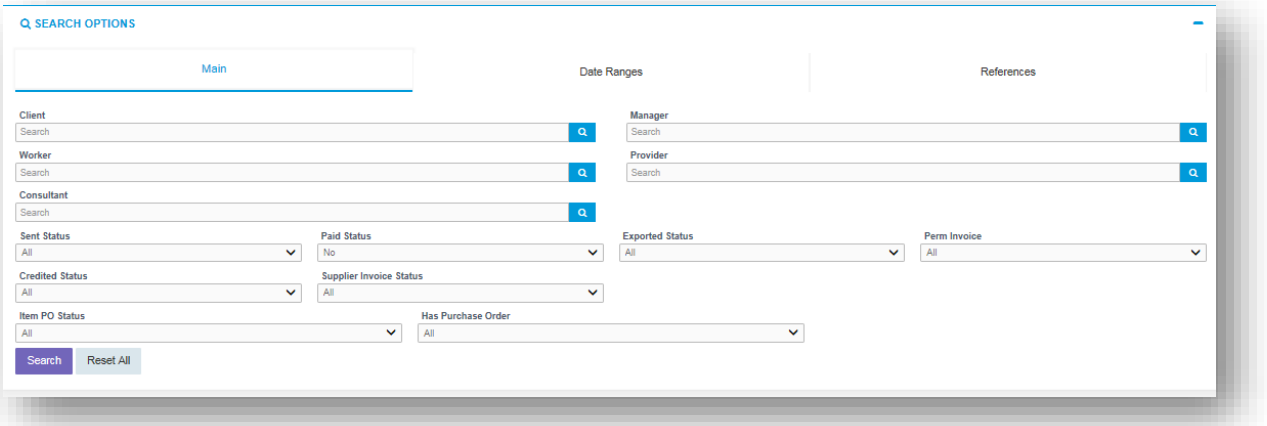
New Status Actions: Unchanged

accept disclaimer goes here

Confirm Action

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.



SEARCH OPTIONS

Main | Date Ranges | References

Client: Search

Manager: Search

Worker: Search

Provider: Search

Consultant: Search

Sent Status: All

Paid Status: No

Exported Status: All

Perm Invoice: All

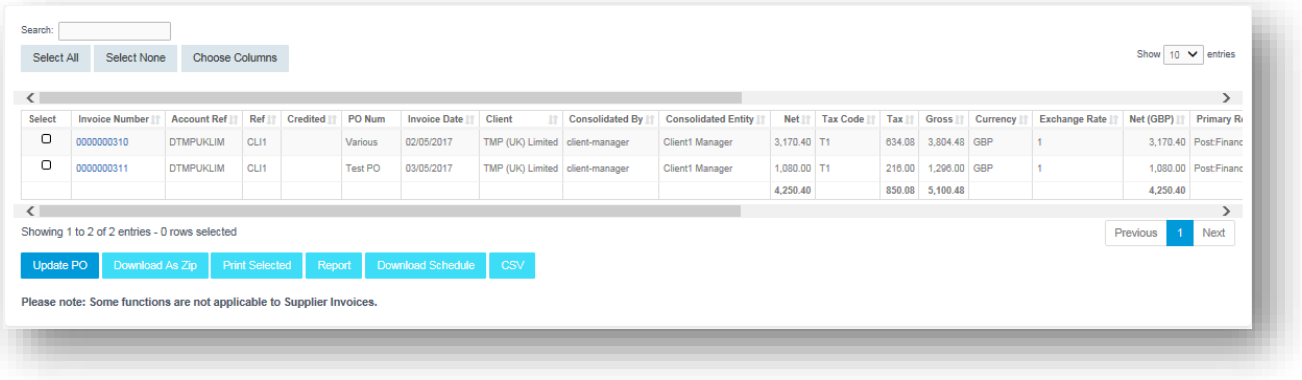
Credited Status: All

Supplier Invoice Status: All

Item PO Status: All

Has Purchase Order: All

Search | Reset All



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 documents.