

Welcome to In-Time

Manager & timesheet authorisers user guide

TaylorHopkinson



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Welcome to Taylor Hopkinson In-Time.

Our online Timesheet, Expense and Document Management system. We hope you will find the following introduction and instructions helpful and comprehensive. If you have any questions or comments on the system, or require support using it, please contact Fiona McRae, Operations Director fiona@taylorhopkinson.com or call +44 7718 014 396.

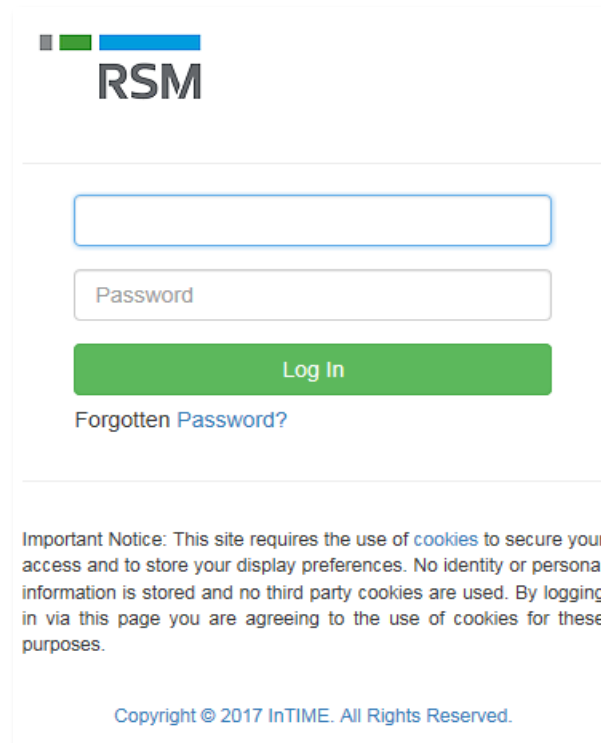
Your self-service portal will allow you to complete the following actions:

- **Approve** timesheets and expenses claims online via email, or by logging into the portal.
- **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.

How to access In-Time

To get started with In-Time, click the link or use the URL below

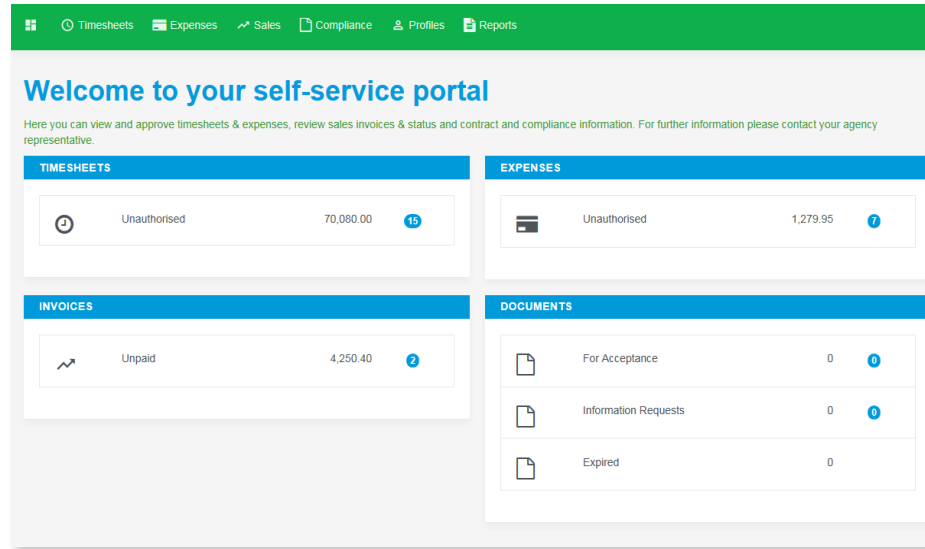
<https://contractors.taylorhopkinson.com>



The screenshot shows the login interface for RSM. At the top left is the RSM logo, consisting of three horizontal bars (green, blue, and red) above the letters 'RSM'. Below the logo is a white login form with a blue border. The form contains three main elements: a text input field for the username, a text input field for the password with the placeholder text 'Password', and a green 'Log In' button. Below the button is a blue link for 'Forgotten Password?'. At the bottom of the form, there is an 'Important Notice' section with a small font size, stating that the site uses cookies for security and preferences, and that no personal information is stored. At the very bottom of the page, there is a copyright notice: 'Copyright © 2017 InTIME. All Rights Reserved.'

You will be prompted for your username and password, which will have been generated and sent to you directly from the In-Time system or via your Taylor Hopkinson Administrator.

Your homepage



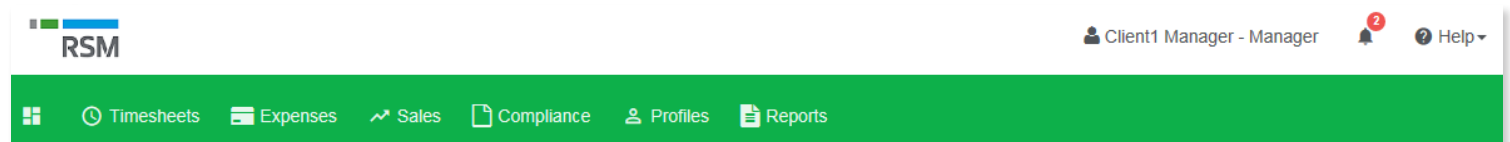
Once you have logged in, you will be presented with the main In-Time homepage, with your dashboard.

Please note, if you have elected to authorise Timesheets via email there is no requirement for you to log into the portal unless you wish to do so.

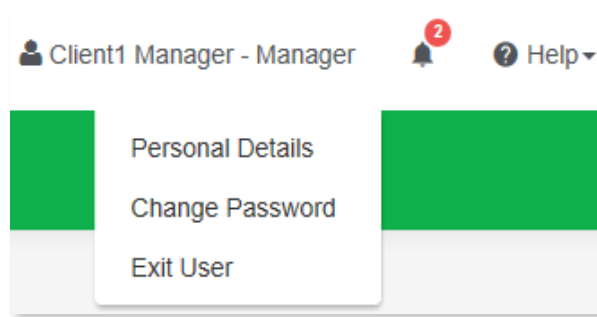
The navigation menu is located across the top of the page. Please be aware that the list of items in the menu bar can vary depending on requirements.

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

- **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.



Your homepage

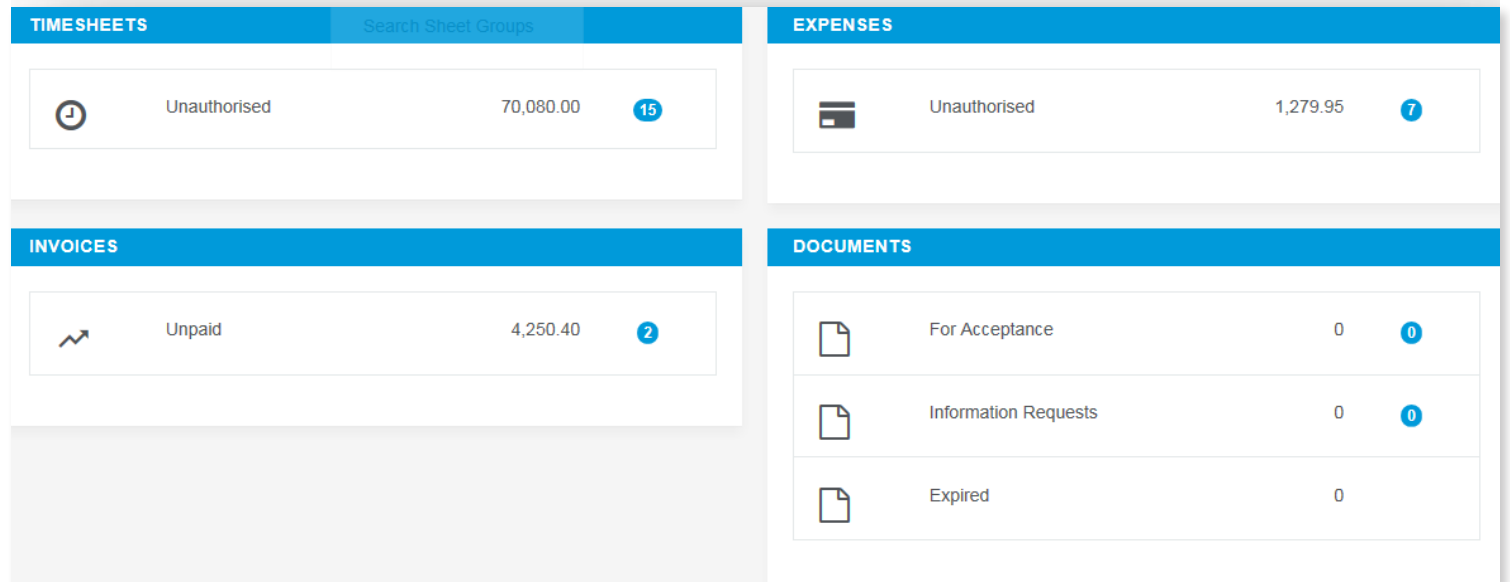


In the top right-hand corner of your screen:

- **Your name** – Click on this, options appear for you to:
 - Update your personal details
 - Change password
 - Request forms for holidays and address changes
 - Exit In-Time
- **Bell Symbol** – Advises you of notifications.
- **Help** – takes you to our online 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 expenses 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

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.

Portal approval

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.

Timesheets

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 type="checkbox"/>	No		Note, Advice	LTD	ADVNO	Leader, Team	TMP (UK) Limited	Manager, Client1	ADV_HOURLY_3
5282	<input type="checkbox"/>	<input type="checkbox"/>	No		Bill, Self	LTD	SELFB	Leader, Team	TMP (UK) Limited	Manager, Client1	TimePattern-2
5285	<input type="checkbox"/>	<input type="checkbox"/>	No		Bill, Self	LTD	SELFB	Leader, Team	TMP (UK) Limited	Manager, Client1	TimePattern-2
5335	<input type="checkbox"/>	<input type="checkbox"/>	No		Bill, Self	LTD	SELFB	Leader, Team	TMP (UK) Limited	Manager, Client1	TimePattern-2
5346	<input type="checkbox"/>	<input type="checkbox"/>	No		Note, Advice	LTD	ADVNO	Leader, Team	TMP (UK) Limited	Manager, Client1	ADV_MONTHLY_3
5354	<input type="checkbox"/>	<input type="checkbox"/>	No		Note, Advice	LTD	ADVNO	Leader, Team	TMP (UK) Limited	Manager, Client1	ADV_MONTHLY_3
5431	<input type="checkbox"/>	<input type="checkbox"/>	No		Note, Advice	LTD	ADVNO	Leader, Team	TMP (UK) Limited	Manager, Client1	ADV_HOURLY_3
5436	<input type="checkbox"/>	<input type="checkbox"/>	No		Bill, Self	LTD	SELFB	Leader, Team	TMP (UK) Limited	Manager, Client1	TimePattern-1
5584	<input type="checkbox"/>	<input type="checkbox"/>	No		Alvarez, Marie	LTD	WRK_MA	Leader, Team	TMP (UK) Limited	Manager, Client1	Pmt3
5587	<input type="checkbox"/>	<input 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

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
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RATINGS

Appearance: 

Professionalism: 

Attitude: 

Timekeeping: 

PO

Comment or Rejection Reason

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.

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.

Search Timesheets

SEARCH OPTIONS +

Status **Timesheet ID Range** to **Timesheet Frequency**

Period End / Receipt Date to **Options** **Submitted Date** to **Options** **Approved Date** to **Options**

Client **Manager**

Provider **Worker**

Consultant

Placement Ref Range to **Project Reference** to **Invoice Number** to

Viewing profile information

There are two types of profile information available as a Manager / Authoriser. They are:

- **Select Contractors from the Profiles menu**, this provides details relating to all contractors who you 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.

Contract documents – COMING SOON!!

We will soon introduce Phase 2 of In-Time which will allow you access to, and acceptance of, contract documents / certification if relevant.

MORE TO FOLLOW VERY SOON!

We hope you will find In-Time an efficient and effective tool for the management of Contractors' Timesheets, Expenses and Documentation. Please direct any questions or comments to Fiona McRae, Operations Director / +44 7718 014 396 fiona@taylorhopkinson.com at any time.

Your feedback is valuable to us!

Thank you!



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