



## Timesheets

### Client Guide Vol. 11

## Content

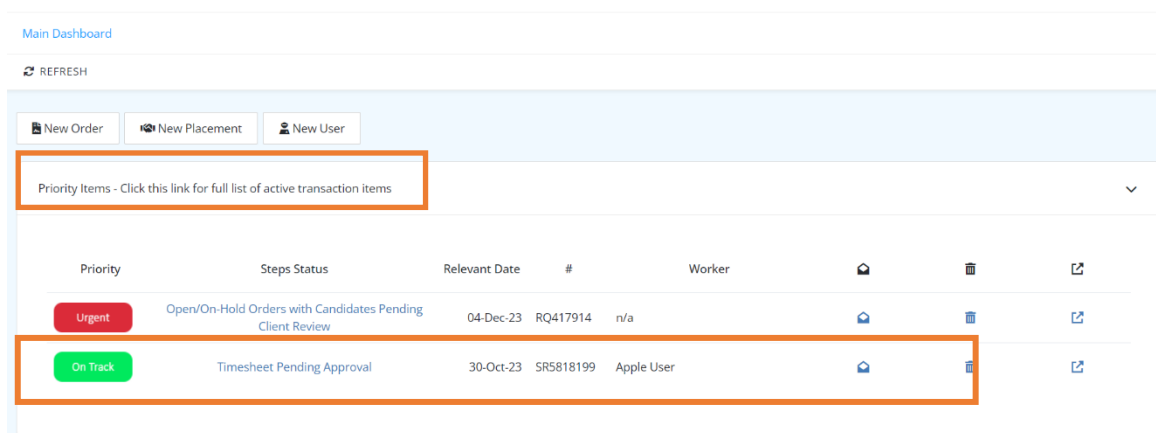
<b>Locating Timesheets.....</b>	<b>3</b>
<b>Reviewing Timesheets.....</b>	<b>5</b>
<b>Approving Timesheets.....</b>	<b>7</b>
<b>Rejecting Timesheets.....</b>	<b>8</b>
<b>Overview of the Bulk Approval.....</b>	<b>10</b>
<b>Need More Support?.....</b>	<b>12</b>



## Locating Timesheets

Timesheets will be submitted on Matrix-CR.net for hours worked by an agency worker with an active Placement. The timesheets will be submitted weekly and cover the hours worked Monday – Sunday; the week ending date being the Sunday.

1. You receive email notifications when a Timesheet is submitted for your approval. You can see pending timesheets under your Priority Items.



Main Dashboard

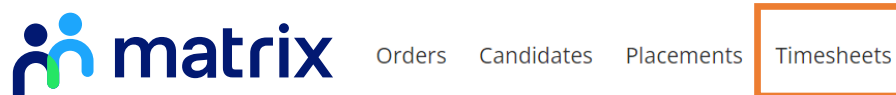
REFRESH

New Order New Placement New User

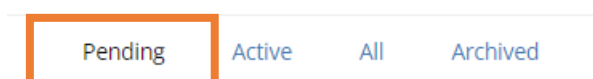
Priority Items - Click this link for full list of active transaction items


Priority	Steps Status	Relevant Date	#	Worker			
Urgent	Open/On-Hold Orders with Candidates Pending Client Review	04-Dec-23	RQ417914	n/a			
On Track	Timesheet Pending Approval	30-Oct-23	SR5818199	Apple User			

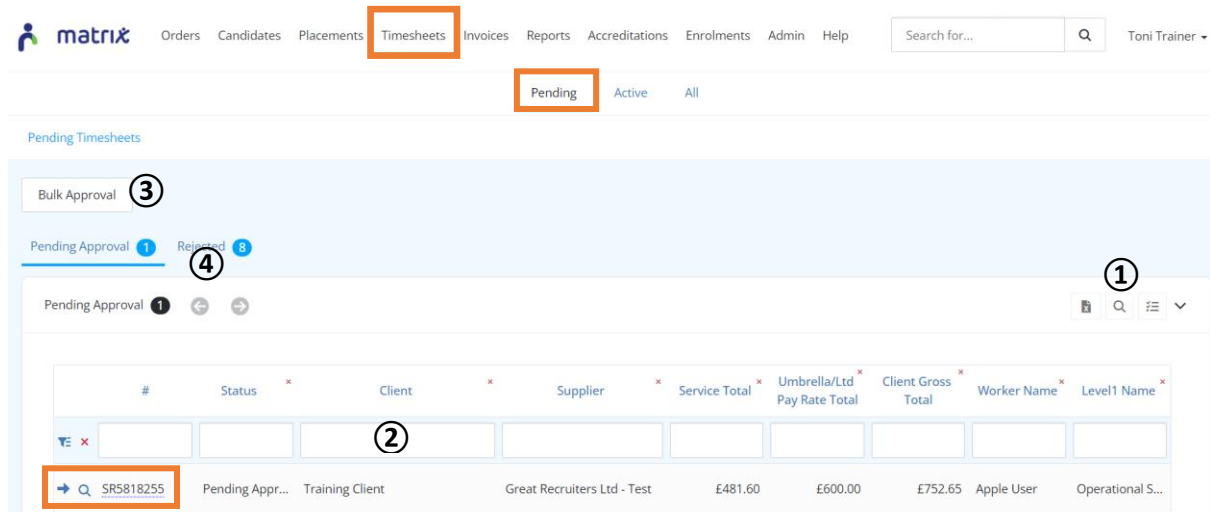
2. Or you can navigate to the subsection of timesheets on your home screen or under the Timesheets Navigational Tab



3. Select 'Pending' on the sub tab.




4. To open and review a specific Timesheet, click the  icon to the left of the Timesheet number as highlighted below and this will take you to the timesheet.



The screenshot shows the Matrix application interface. The top navigation bar includes 'Orders', 'Candidates', 'Placements', 'Timesheets', 'Invoices', 'Reports', 'Accreditations', 'Enrolments', 'Admin', and 'Help'. A search bar and user name 'Toni Trainer' are on the right. Below the navigation, there are tabs for 'Pending', 'Active', and 'All'. The main content area is titled 'Pending Timesheets' and features a 'Bulk Approval' button (callout 3), 'Pending Approval' (callout 1) and 'Rejected' (callout 8) tabs. A table of pending timesheets is displayed with columns: #, Status, Client, Supplier, Service Total, Umbrella/Ltd Pay Rate Total, Client Gross Total, Worker Name, and Level1 Name. A search filter 'SRS5818255' is applied to the '#' column (callout 2). A table row is highlighted with an arrow icon (callout 4) pointing to the timesheet number 'SRS5818255'. A callout 1 points to the table's filter and view options.

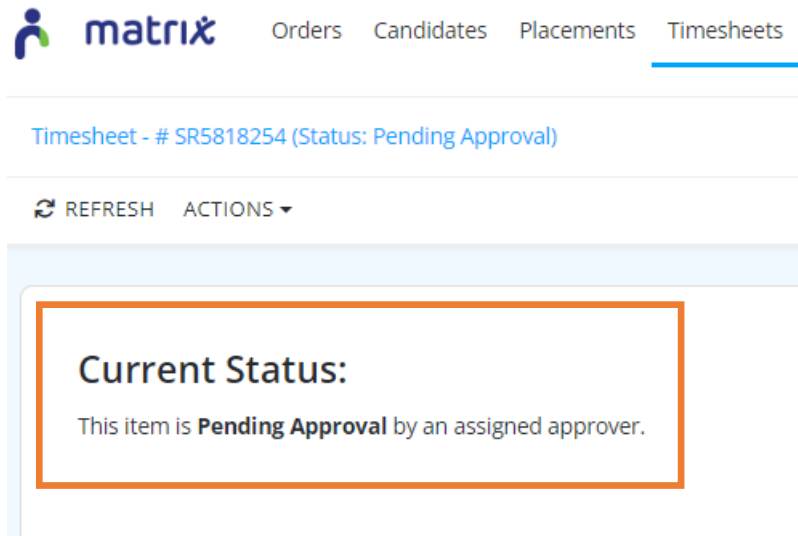
#	Status	Client	Supplier	Service Total	Umbrella/Ltd Pay Rate Total	Client Gross Total	Worker Name	Level1 Name
SRS5818255	Pending Appr...	Training Client	Great Recruiters Ltd - Test	£481.60	£600.00	£752.65	Apple User	Operational S...

- 1. Search and Field Options** – Click to bring up free text boxes to add filters. Click Fields to select the fields you want displayed and can apply relevant filters. Use the tick boxes and click  when happy with fields selected.
- 2. Free Text boxes** – Free text boxes to apply filters. Once typed hit the 'Enter' key on keyboard to apply. You can clear the filters by clicking  and pressing 'Enter' on your keyboard.
- 3. Bulk Approval** – Button for Bulk Approval of timesheets
- 4. Rejected Tab** – Tab to see list of Timesheets in rejected status.



## Reviewing Timesheets

You will now be on the timesheet itself and you will see the current status show as 'This item is Pending Approval by an assigned approver.'



The screenshot shows the Matrix web application interface. At the top, there is a navigation bar with the Matrix logo and the text 'matrix' followed by menu items: 'Orders', 'Candidates', 'Placements', and 'Timesheets'. The 'Timesheets' menu item is highlighted with a blue underline. Below the navigation bar, the page title is 'Timesheet - # SR5818254 (Status: Pending Approval)'. Underneath the title, there are two buttons: 'REFRESH' with a circular arrow icon and 'ACTIONS' with a downward arrow icon. The main content area features a light blue box with a white background and an orange border. Inside this box, the text reads: 'Current Status: This item is **Pending Approval** by an assigned approver.'

### 1. Timesheet Status



- a. **Pending Approval** – With the Client to Approve
- b. **Approved** – Has been approved ready for invoicing.
- c. **Rejected** – Has been rejected as incorrect, agency notified to correct and re-submit.
- d. **Invoicing** – Currently going through the invoicing process.
- e. **Invoiced** – Has been invoiced.

### 2. Timesheet Summary – Basic summary of submitted timesheet

3. **Other Items** – access to sub sections of timesheet i.e., current approvers against Timesheet, expense documents (if applicable)



Timesheet - # SR5818199 (Status: Pending Approval) **1**

Timesheet # : SR5818199  
 Job Title : Admin Assistant  
 Supplier : Great Recruiters Ltd - Test  
 Client : Training Client  
 Status : Pending Approval  
 Placement # : SA393306 **2**

Worker : Apple User  
 Start Date : 30/10/2023  
 End Date : 05/11/2023

Total Units : 30.00  
 Total Hours : 30.00  
 Total Expenses Units : 0.00  
 Service Total : £306.30

Links

Printable Detail

Other Items **3**

- Activity
- Approvers **1**
- Documents **0**
- Evaluation **5**
- Notes **0**
- Questions - Supplier **0**
- Self Assessment **5**

Timesheet Items **4**

Item Category	Item Type	Date Item	Rate Type	Cost Code	Units	PAYE Pay Rate	Umbrella/Ltd Pay Rate	Client Charge	Service Amount	Umbrella/Ltd Service Amount	Client Net	Start Time	End Time	Break Time
Hours	Monday	30/10/23	Regular	0920/0200	6.00	£10.21	£12.72	£13.56	£61.26	£76.32	£81.36	09:00	16:00	1.00
Hours	Tuesday	31/10/23	Regular	0920/0200	6.00	£10.21	£12.72	£13.56	£61.26	£76.32	£81.36	09:00	16:00	1.00
Hours	Wednesday	01/11/23	Regular	0920/0200	6.00	£10.21	£12.72	£13.56	£61.26	£76.32	£81.36	09:00	16:00	1.00
Hours	Thursday	02/11/23	Regular	0920/0200	6.00	£10.21	£12.72	£13.56	£61.26	£76.32	£81.36	09:00	16:00	1.00
Hours	Friday	03/11/23	Regular	0920/0200	6.00	£10.21	£12.72	£13.56	£61.26	£76.32	£81.36	09:00	16:00	1.00
					<b>30.00</b>	<b>£51.05</b>	<b>£63.60</b>	<b>£67.80</b>	<b>£306.30</b>	<b>£381.60</b>	<b>£406.80</b>			<b>5.00</b>
<b>Σ:</b>					30.00	£51.05	£63.60	£67.80	£306.30	£381.60	£406.80			5.00

**4. Timesheet Items – Break down of timesheet. You can click on the white writing of ‘Timesheet Items’ to open the timesheet detail further if required.**

1. Scroll down to the bottom, to timesheet items to review the timesheet – Check that the all the information submitted by the worker is correct.

Timesheet Items **5**

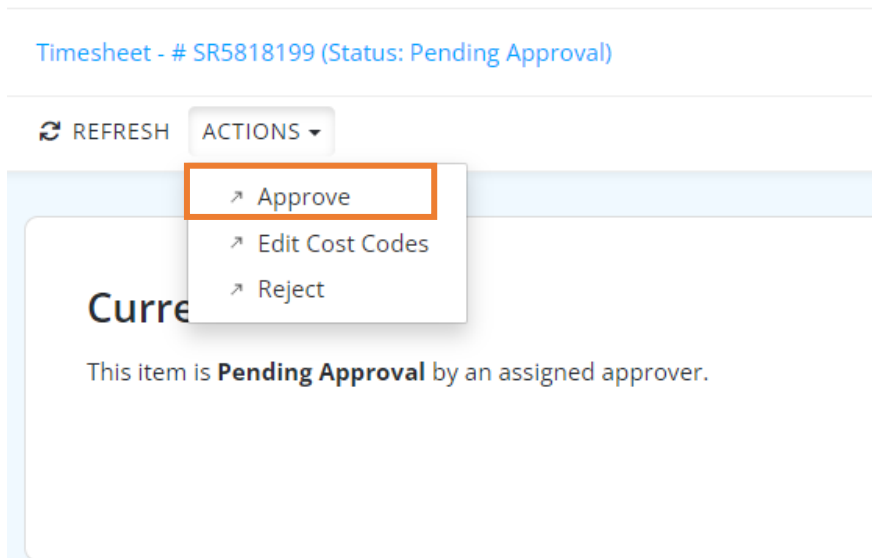
Item Category	Item Type	Date Item	Rate Type	Cost Code	Units
<b>Item Category - Hours <b>5</b></b>					
Hours	Monday	18/12/23	Regular	0920/0200	8.00
Hours	Tuesday	19/12/23	Regular	0920/0200	8.00
Hours	Wednesday	20/12/23	Regular	0920/0200	8.00
Hours	Thursday	21/12/23	Regular	0920/0200	8.00
Hours	Friday	22/12/23	Regular	0920/0200	8.00

Once you have reviewed the timesheets you are ready to either approve or reject the timesheet

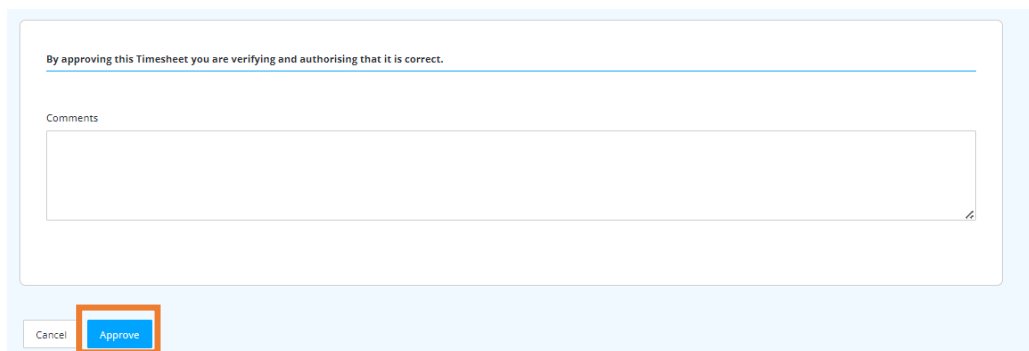


## Approving Timesheets

To approve the timesheet, scroll to the top of the timesheet and click **ACTIONS** and approve.

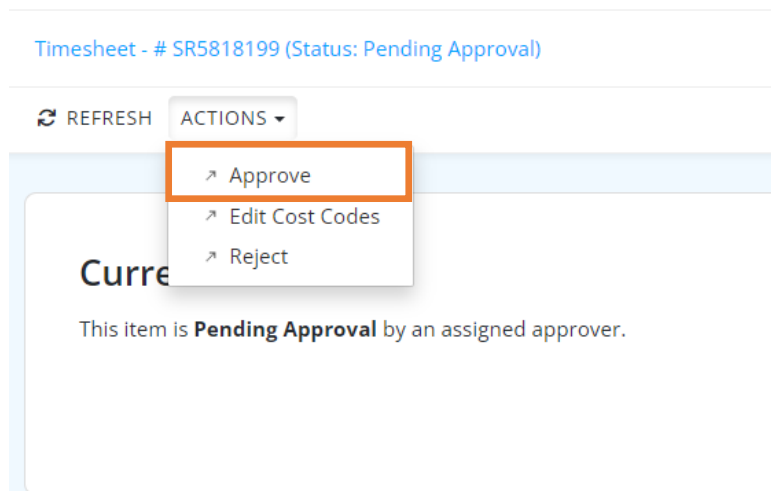


On the next page, scroll to the bottom and click approve again.

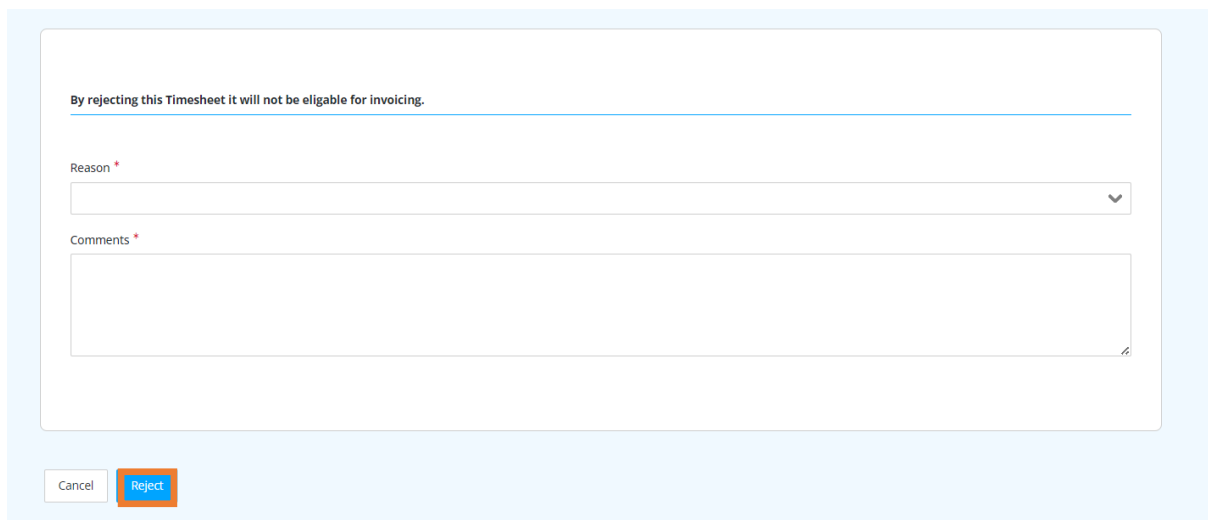


## Rejecting a Timesheet

To reject the timesheet, scroll to the top of the timesheet and click **ACTIONS** and reject.



Select a reject reason and leave a comment then click reject.



The screenshot shows a dialog box for rejecting a timesheet. At the top, it says "By rejecting this Timesheet it will not be eligible for invoicing." Below this, there is a "Reason" dropdown menu and a "Comments" text area. At the bottom, there are two buttons: "Cancel" and "Reject".



You will then see the current status of the timesheet to show that this has been rejected.

Timesheet - # SR5818199 (Status: Rejected)

REFRESH

<b>Current Status:</b> This item has been <b>Rejected</b> by an assigned approver (To view the reason why please use the 'Activity' link in the 'Other Items' section).	<b>Next Steps:</b> Please wait for the supplier to resubmit or withdraw the item.
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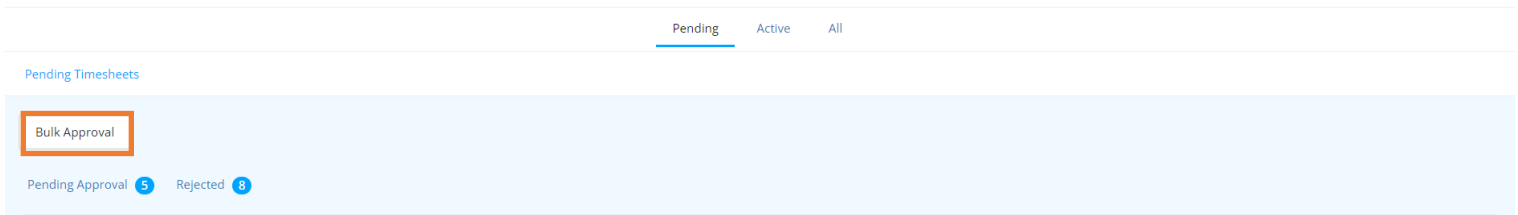
Timesheet - # SR5818199 (Status: Rejected) ▼ Links



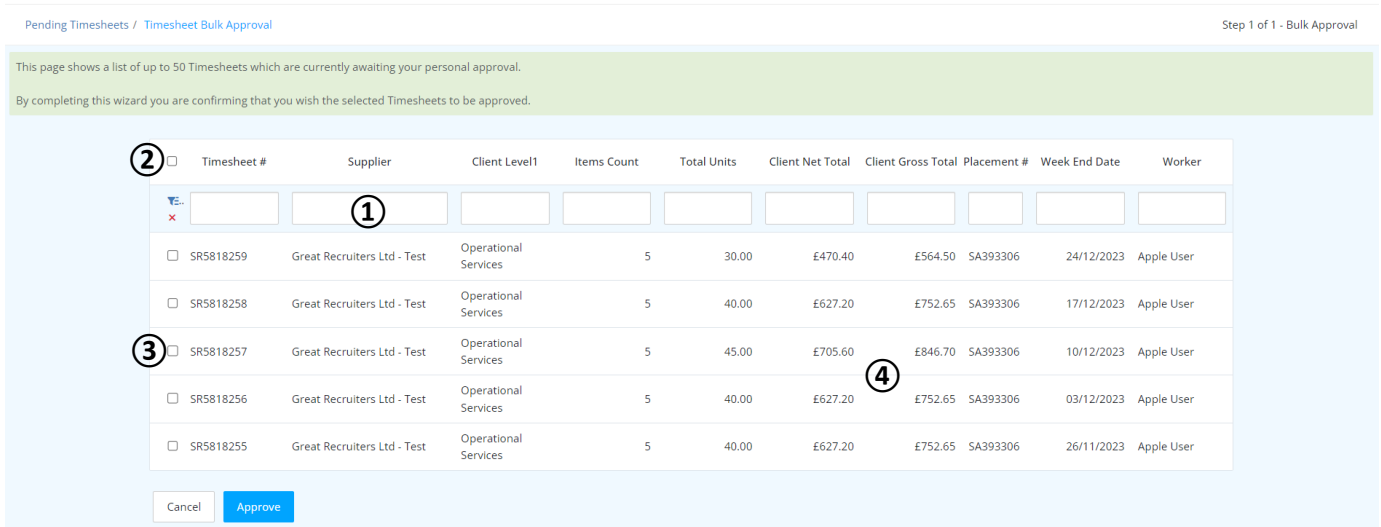
## Bulk Approval of Timesheets

If you have several timesheets to approve, Matrix-CR.net will allow you to approve the timesheets in bulk.

- From the Timesheets tab on the Navigation bar, click 'Pending' and select the **Bulk Approval** button



- Click the select all box to highlight all timesheets.



## Overview of the Bulk Approval

1. **Free Text boxes** – Free text boxes to apply filters. Once typed hit the ‘Enter’ key on keyboard to apply. You can clear the filters by clicking and pressing ‘Enter’ on your keyboard
2. **Select all Tick Box** – Use this tick box to select all pending approval timesheets currently displayed
3. **Individual Tick Box** – Use this tick box to select individual timesheets for Bulk Approval
4. **Timesheets Summary** – A summary of each pending approval timesheet

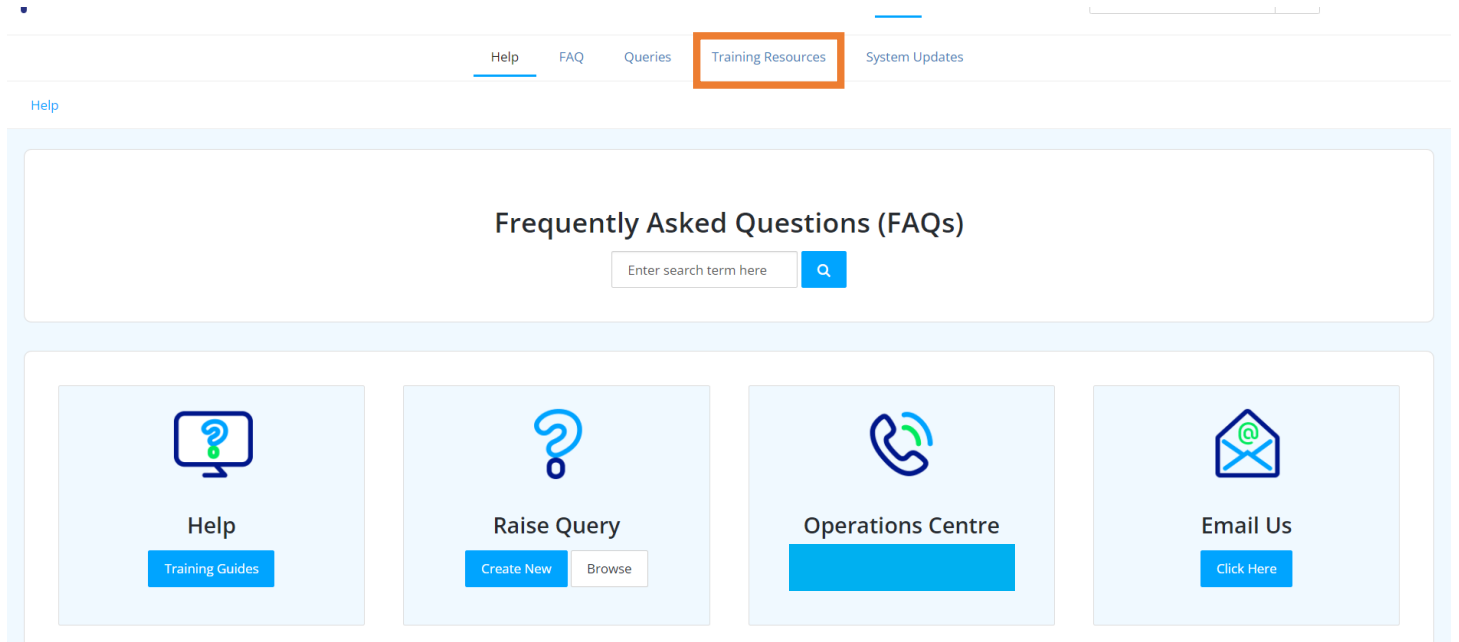
Once you have selected the timesheets you wish to Bulk Approve, click the button

Approve



## Need more support?

You can contact your Matrix Customer Success Executive or another member of the Customer Success Team for assistance with Matrix-CR.net through the following options:



The screenshot shows a navigation menu with the following items: Help, FAQ, Queries, Training Resources (highlighted with an orange box), and System Updates. Below the menu is a 'Frequently Asked Questions (FAQs)' section with a search bar containing the text 'Enter search term here' and a magnifying glass icon. Below the search bar are four main support options, each with an icon and a button:

- Help**: Icon of a monitor with a question mark. Button: Training Guides
- Raise Query**: Icon of a question mark. Buttons: Create New, Browse
- Operations Centre**: Icon of a telephone handset. Button: [Redacted]
- Email Us**: Icon of an envelope with an @ symbol. Button: Click Here

Underneath your help tab you also have access to help guides and videos under 'Training Resources' as highlighted above.

The number for the Customer Success Team will be displayed on the live site.