Timesheets

Client Guide

Vol. 11

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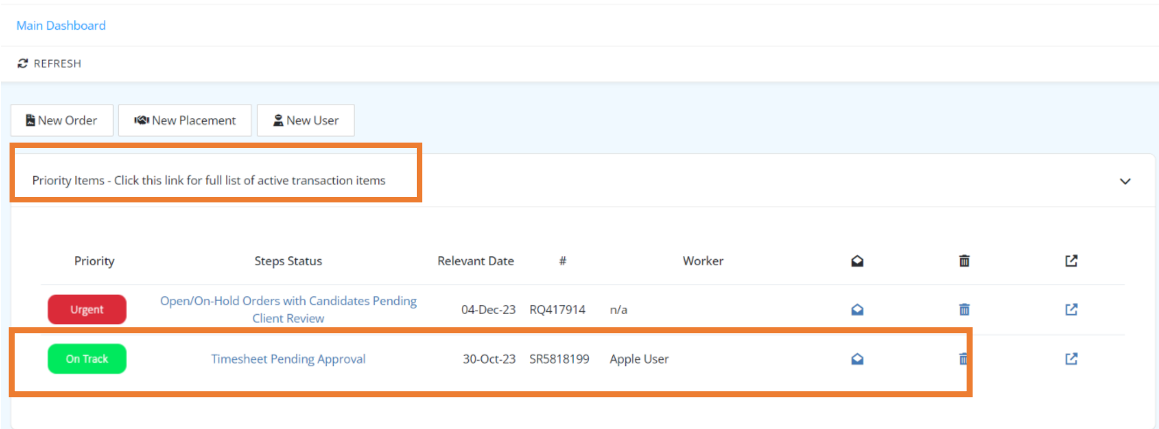
Content

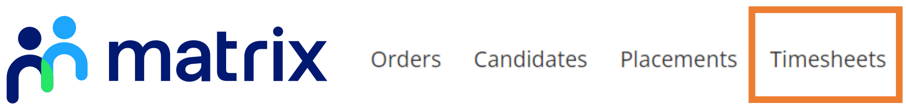
Locating Timesheets

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.

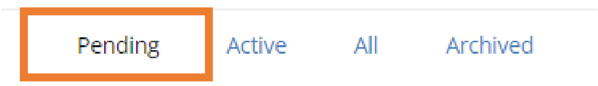
1. You receive email notifications when a Timesheet is submitted for your approval. You can see pending timesheets under your **Priority Items.**



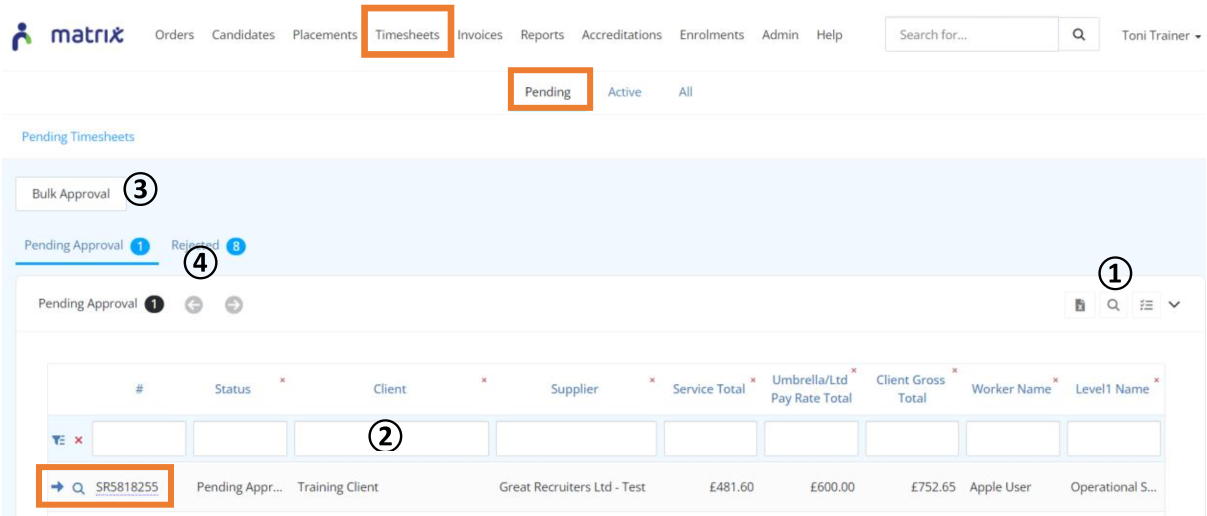
2. Or you can navigate to the subsection of timesheets on your home screen or under the Timesheets Navigational Tab



3. Select 'Pending' on the sub tab.



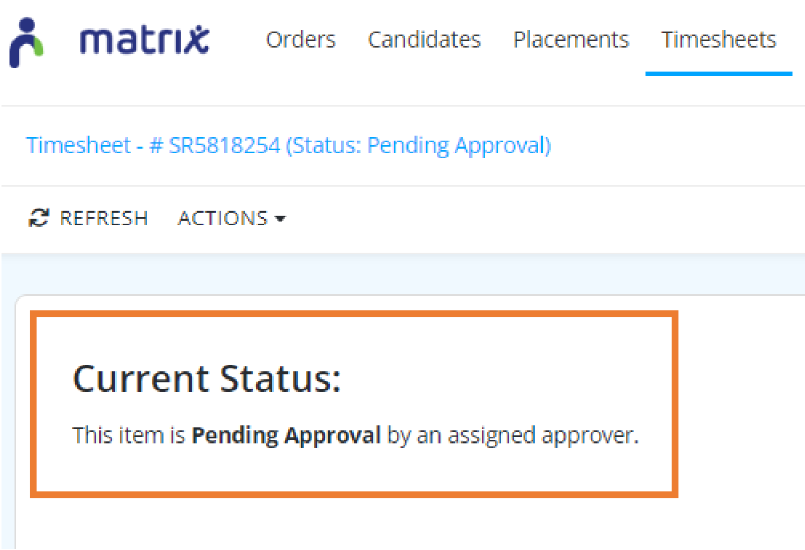
4. To open and review a specific Timesheet, click the Icon to the left of the Timesheet number as highlighted below and this will take you to the timesheet.



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 OK 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.



1. Timesheet Status

    a. **Pending Approval** – With the Client to Approve

    b. **Approved** – Has been approved ready for invoicing.

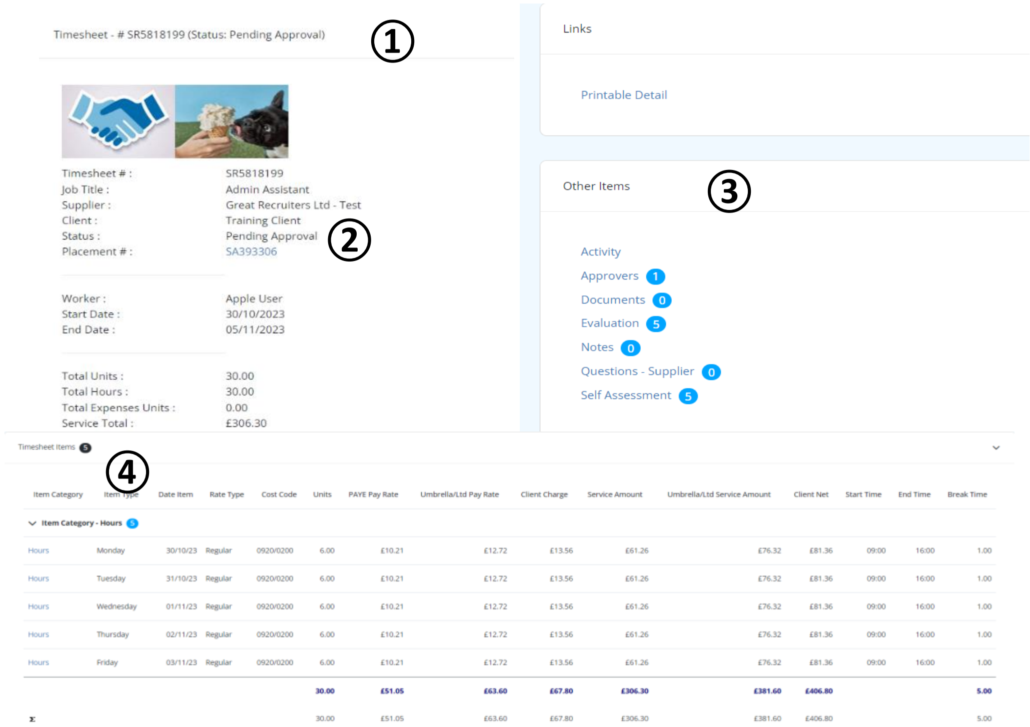
    c. **Rejected** – Has been rejected as incorrect, agency notified to correct and re-submit.

    d. **Invoicing** – Currently going through the invoicing process.

    e. **Invoiced** – Has been invoiced.

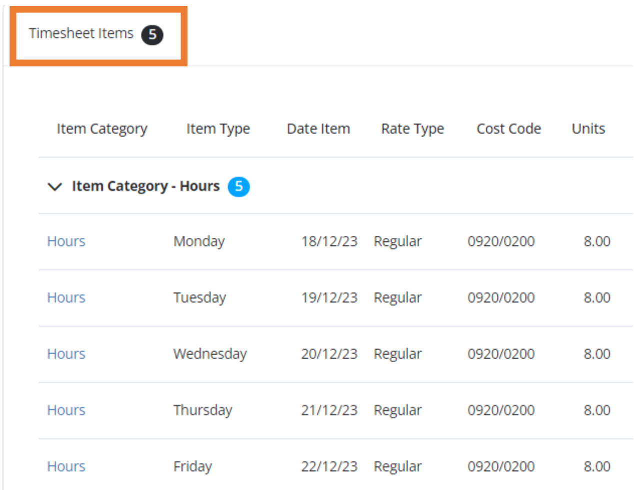
2. **Timesheet Summary** – Basic summary of submitted timesheet

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



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.

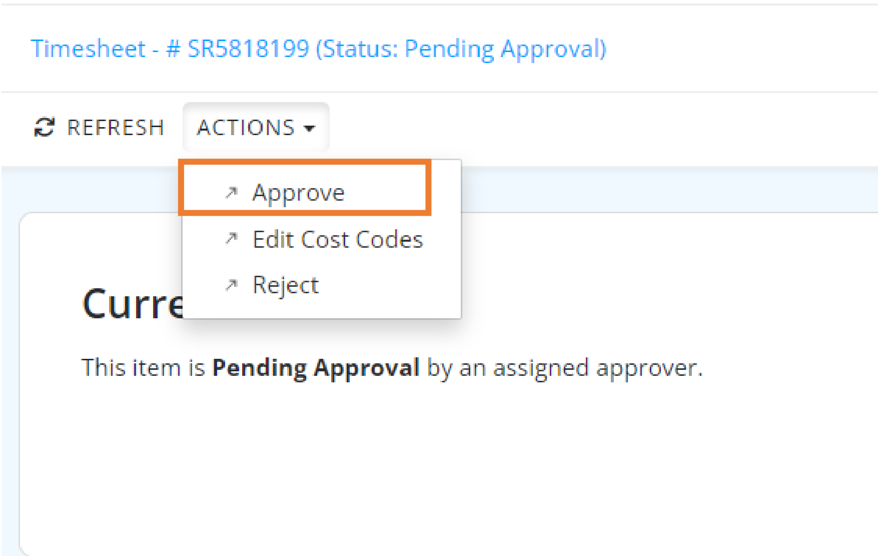
1. Scroll down to the bottom, to timesheet items to review the timesheet – Check that the all the information submitted by the worker is correct.



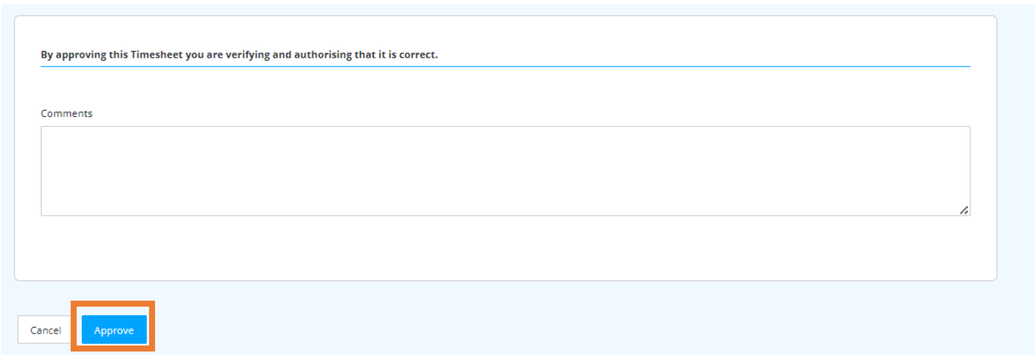
Once you have reviewed the timesheets you are ready to either approve or reject the timesheet

Approving Timesheets

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

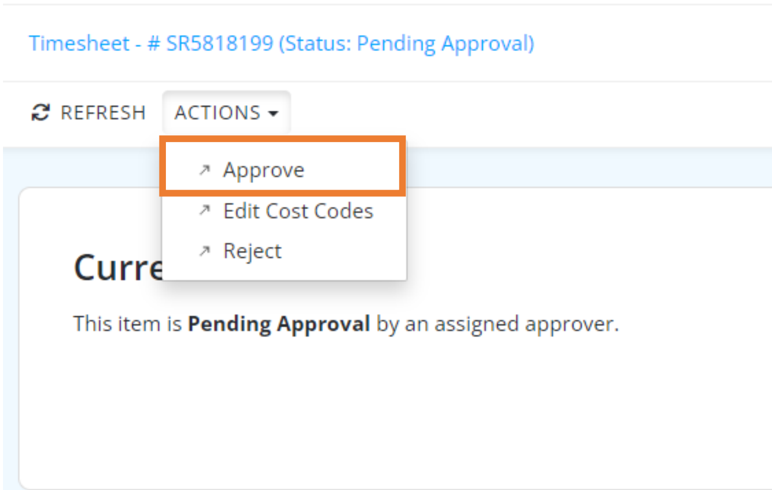


On the next page, scroll to the bottom and click approve again.

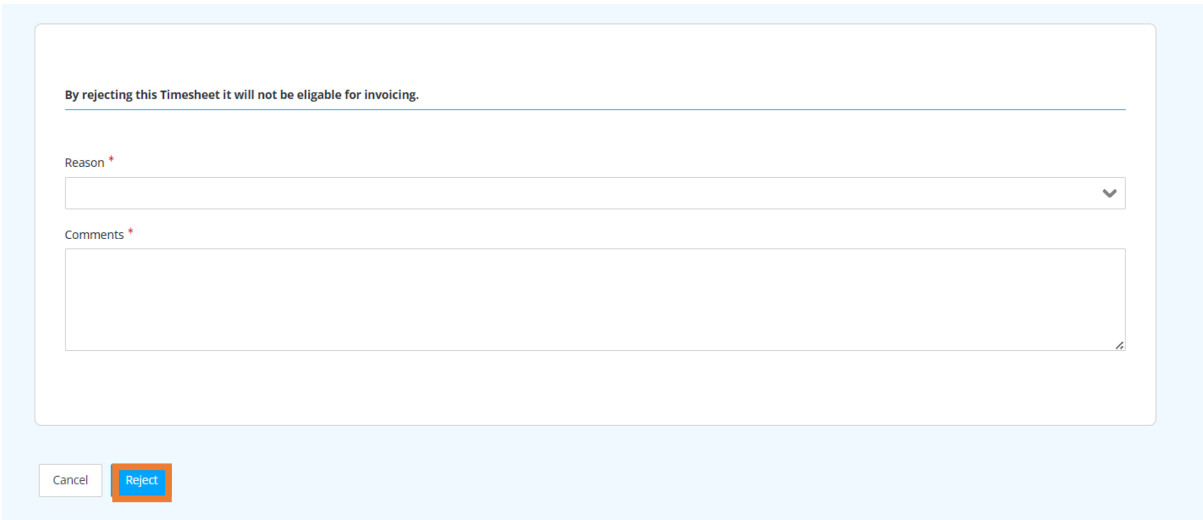


Rejecting a Timesheet

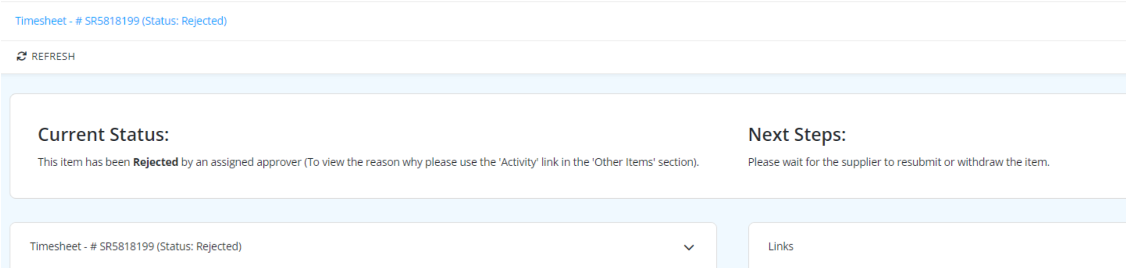
To reject the timesheet, scroll to the top of the timesheet and click ACTIONS ▾ and reject.



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

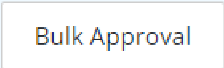


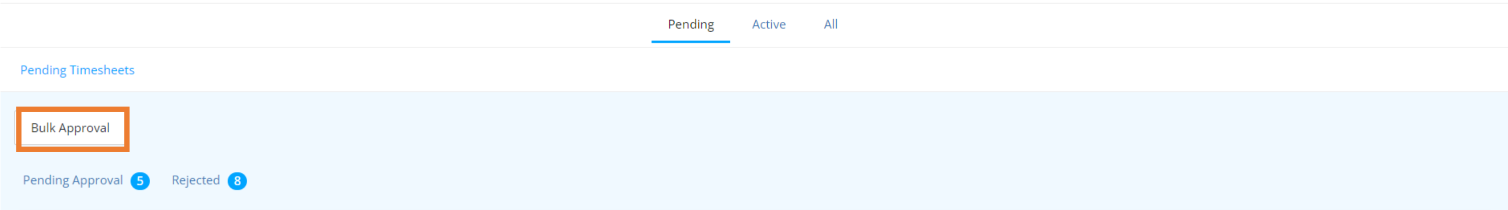
You will then see the current status of the timesheet to show that this has been rejected.



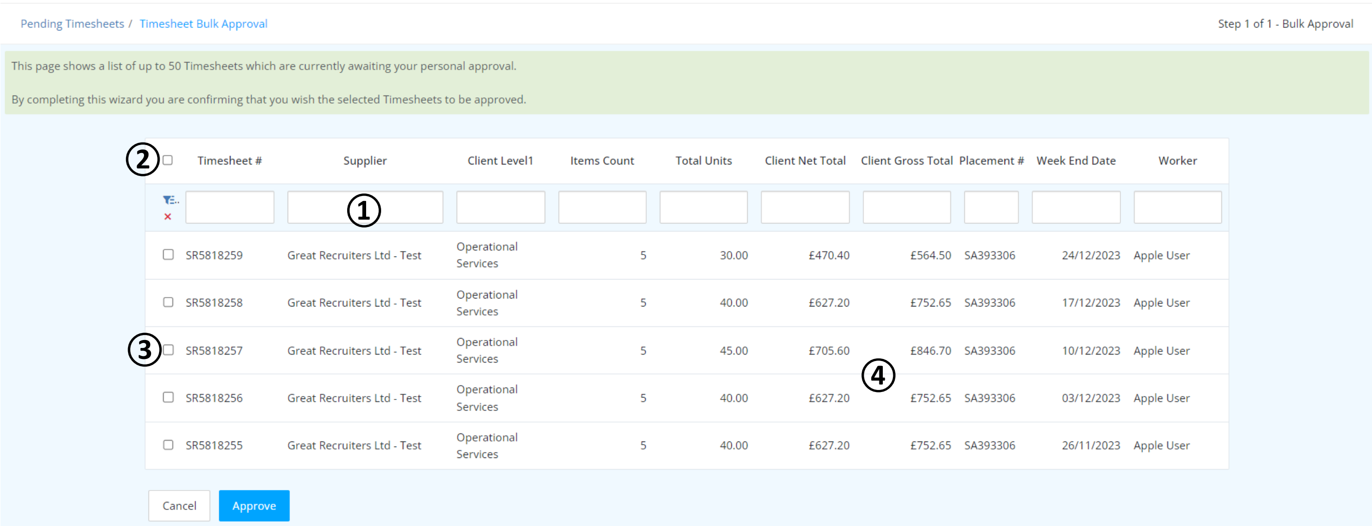
Bulk Approval of Timesheets

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

1. From the Timesheets tab on the Navigation bar, click 'Pending' and select the button 



2. Click the select all box to highlight all timesheets.



Timesheet #	Supplier	Client Level1	Items Count	Total Units	Client Net Total	Client Gross Total	Placement #	Week End Date	Worker
SR5818259	Great Recruiters Ltd - Test	Operational Services	5	30.00	£470.40	£564.50	SA393306	24/12/2023	Apple User
SR5818258	Great Recruiters Ltd - Test	Operational Services	5	40.00	£627.20	£752.65	SA393306	17/12/2023	Apple User
SR5818257	Great Recruiters Ltd - Test	Operational Services	5	45.00	£705.60	£846.70	SA393306	10/12/2023	Apple User
SR5818256	Great Recruiters Ltd - Test	Operational Services	5	40.00	£627.20	£752.65	SA393306	03/12/2023	Apple User
SR5818255	Great Recruiters Ltd - Test	Operational Services	5	40.00	£627.20	£752.65	SA393306	26/11/2023	Apple User

Overview of the Bulk Approval

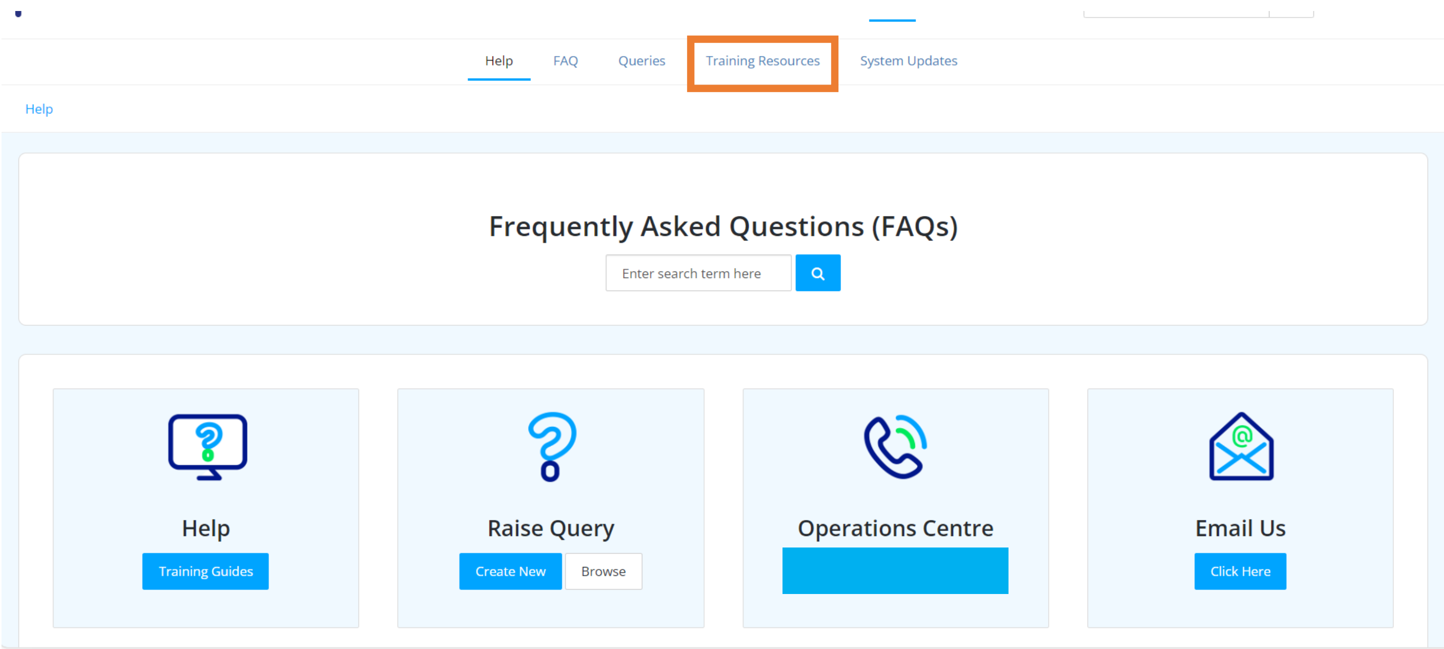
1. **Free Text boxes** – Free text boxes to apply filters. Once typed hit the ‘Enter’ key on keyboard to apply. You can clear the filters by clicking and pressing ‘Enter’ on your keyboard
2. **Select all Tick Box** – Use this tick box to select **all** pending approval timesheets currently displayed
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:



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.