



E-Timesheets Guide

Overview

E-Timesheets is an enhanced, web-based alternative to manual timesheet processing, integrated tightly with IQX through **iqxWEB**. It allows candidates, clients, and consultants to manage timesheet entry, approvals, and submissions in real-time with reduced administrative overhead.

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□ System Configuration

To enable E-Timesheets:

1. Go to **Maintenance → General Settings**.
 1. Set **Group:** `Temps`, **Number:** `330`, **Value:** `Y`.
 2. On the **Client Record**:
 1. Navigate to **Miscellaneous / A-C Setup**.
 2. Tick the **E-Timesheets** checkbox to enable web timesheet access.
 3. Ensure each Vacancy has:
 1. Correct pay/charge rates, shift patterns, and timesheet authorisers (if applicable).
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□ Timesheet Creation & Lifecycle

Creating E-Timesheets

- In IQX: **Temp Desk → Timesheets → Create**. - E-Timesheets are generated **provisionally** with:
 1. Prefix: `E`
 2. Bold Red Font in IQX
 - These appear immediately in the candidate or client's iqxWEB account under **Current Timesheets**.
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□ Candidate Functionality (iqxWEB)

Candidates can (if allowed):

- View and manage their timesheets in real-time.
- **Edit, add, delete, and duplicate** shifts.
- **Add expenses** and **upload receipt images**, if enabled.
- See **pay rates**, but not charge rates.
- Use **Calculate** to trigger rate scripts (unless automated).

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📄 Signing Options

Candidates complete timesheets by choosing one of two options:

1. Complete and Sign Now

- Candidate taps **Complete and Sign**. - Hands the device to the **Manager**, who:

1. Signs the form digitally.
2. Provides **Name, Email, Job Title**.

- Signature is **geo-tagged** with:

1. **Date, Time, and GPS Location**.

- A PDF is uploaded into IQX, visible in the Timesheet record.

2. Complete and Send for Approval**

- Candidate either:

1. Enters the **Client's Email Address** manually, or
2. Selects from a predefined **Timesheet Authoriser** dropdown (linked to Vacancy Roles).

- The client receives an email with a secure link to review and sign. - Process mirrors on-device signing with the same PDF creation and audit log.

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□□ Client Access & Authorisation

If enabled, clients can:



- Log in to **the Client Portal**. - View **Outstanding**, **Submitted**, and **Authorised** timesheets. - **Authorise**, **Sign**, or **Query** timesheets.

1. When querying, clients can enter comments or reasons.

- If allowed, **edit shifts** directly—changes sync back to IQX. - View **expense records** and attached images.

Clients cannot see pay rates unless explicitly configured. Charge rates are visible if permitted.

□ Consultant Involvement

Even if candidates and clients handle the end-to-end process, consultants can:

- View and **finalise** E-Timesheets in IQX. - Access attached PDFs, signatures, GPS location data. - Review **Query History** from clients.

If the `AUTOAPPROVETIMESHEET` setting is enabled, authorised timesheets can auto-finalise without consultant input.

□ Colour Coding in IQX

Status	Colour	Description
_____	_____	_____
Provisional E-Timesheet	Bold Red	Awaiting submission
Completed but unsigned	Pink	Waiting for client signature
Authorised (client signed)	Purple / Black	Final stage (or ready for consultant)

□ Security & Audit Trails

All digital signatures and submissions are:

- **Time-stamped**. - **Geo-tagged** (with device location). - Saved as **read-only PDFs** in the Timesheet record. - Logged with full user details (signer name, email, position).



□ Troubleshooting & Admin Notes

- **No Timesheet in iqxWEB?** Check if all fields (Units Paid, Charge Code, Payroll Info) are populated and correct.
- **Login Issues?** Reset passwords via **Person Record → Website Rights**.
- **Missing Signature?** Confirm the correct signing route was followed and the client email is valid.

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□ Summary Workflow

1. **Consultant** creates provisional timesheet in IQX.
2. **Candidate** logs in via iqxWEB, enters shifts and expenses.
3. Candidate selects either:
 1. **Sign Now** (for manager), or
 2. **Send for Approval**.
4. **Client** signs via web link or logs into portal.
5. **PDF** is uploaded to IQX with audit details.
6. Optional: **Consultant** finalises if manual review is required.

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□ Related Help Docs

- [UG6-29: E-Timesheets Overview](<https://iqxusers.co.uk/iqxhelp/doku.php?id=ug6-29>) - [UG12-02b: e-Timesheet Authorisation](<https://iqxusers.co.uk/iqxhelp/doku.php?id=ug12-02b>)

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