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**.

> If any key info is missing (e.g., Payroll Code, Payment Code), timesheet generation will fail and display a message listing the issues.

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Candidate Functionality (iqxWEB)

Candidates can:

- 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.

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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.

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Colour Coding in IQX

Status	Colour	Description
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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)

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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).

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🔧 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**, 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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