Timesheet Management

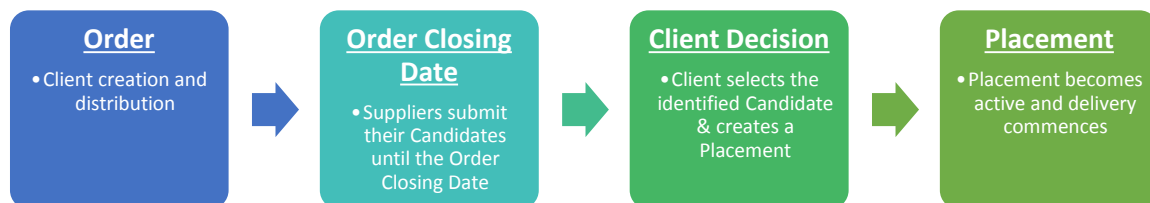Client Guide - Agency Workers

v3.0

Contents

Overview

The Matrix-CR.Net system is a sophisticated web based technology platform used by clients and suppliers to aid in the efficient and fair procurement of services through a 12 step process.

Orders (client service needs) and Candidates (supplier service bids) within the system are broken down into two separate metrics: Attributes and Price.

Attributes - 60%
- Objective specification of service needs – In a closed question format

+

Price - 40%
- Rate submitted by a supplier to deliver the specified service

=

Candidate - 100%
- Attributes that can be met
- Price of service

The client inputs to what percentage these two metrics will account for in the complete Candidate score, which defines how the Matrix-CR.Net system will rank those Candidates into a shortlist.

During the Order creation and distribution period, a client also sets out timescales that outline the subsequent periods where Candidates can be reviewed.

Order
- Client creation and distribution

➡

Order Closing Date
- Suppliers submit their Candidates until the Order Closing Date

➡

Client Decision
- Client selects the identified Candidate & creates a Placement

➡

Placement
- Placement becomes active and delivery commences

The client will review the Candidates as they are submitted, interview if they wish and reject any non-compliant Candidates.

Once the Order Closing Date has passed, the client will be able to progress their chosen Candidate through to the Placement (contract) step and this finalises the procurement process, after which the service delivery can commence.

This guide is a step-by-step walk through of:

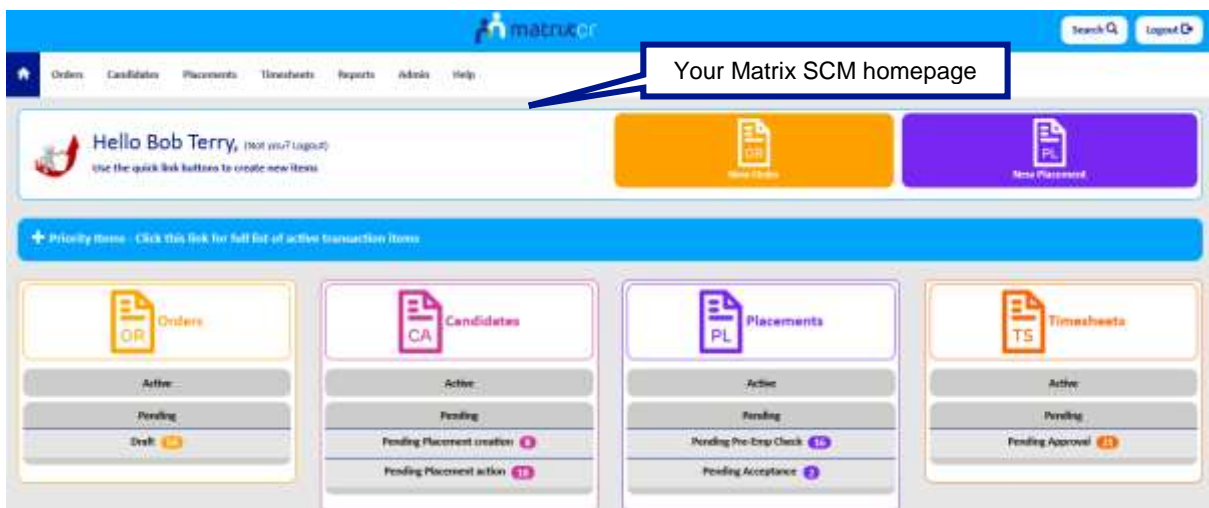➔ Reviewing Timesheets
➔ Approving & rejecting Timesheets

Glossary

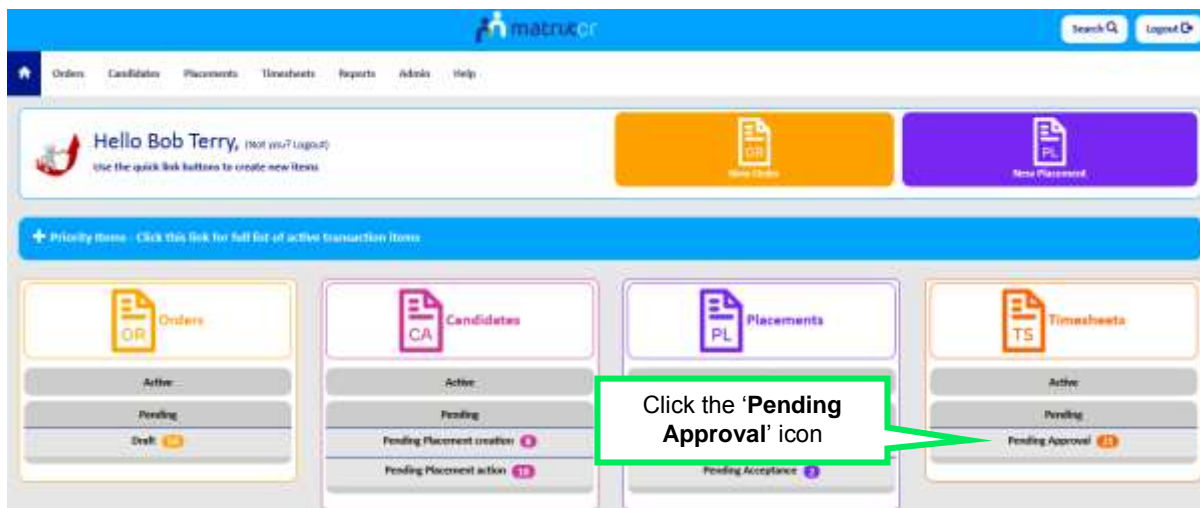| Terminology	Description
Order	A client request for a service needed, containing service details
Candidate	Supplier's offer submission against a client's Order criteria
Category	Type of service, e.g. Training Services, Agency Workers
Job Title	Service title and summary of any standard service details A Job Title will auto-populate sections of the Order
Location	Where the service will be carried out
Client Manager	The Matrix-CR.Net user procuring the service through the system
Cost Codes	Budget from which the service will be paid
Profile	Free-text Order criteria
Attributes	Pre-configured Order criteria, classified into Pre-Employment Checks, Skills and Qualifications
Distribution	Circulation of an Order
Weightings	Client's prescribed values to Order sections
Draft	Saved workings but process incomplete
Order Close Date	The date an Order closes to further Candidates

Login

1. Login to your Matrix-CR.Net system:

1.
Type your username here

3.
Click here to enter the site

2.
Type your password here
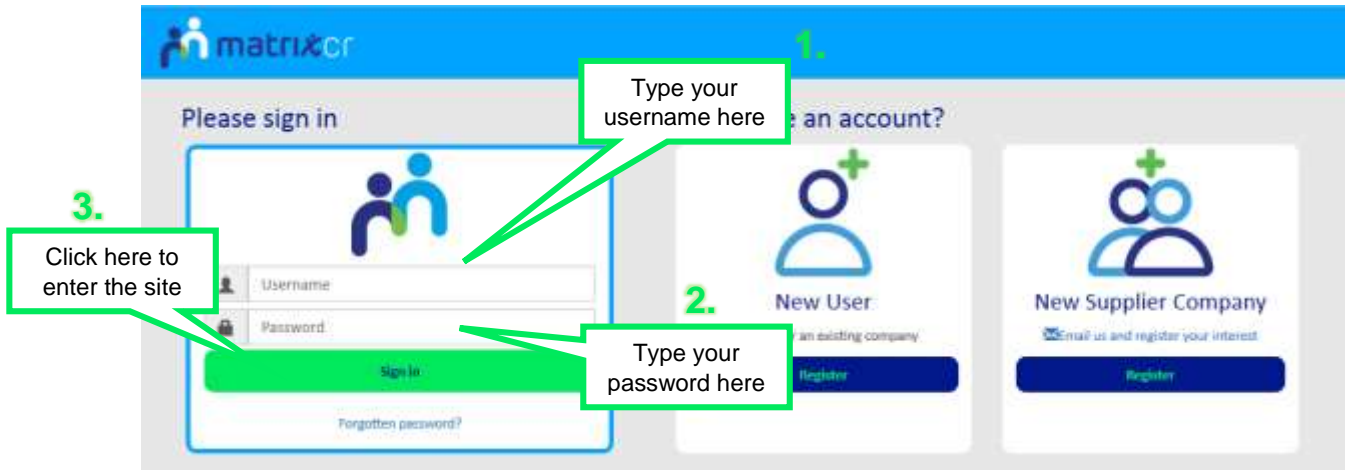
2. You will be taken directly to your Matrix-CR.Net homepage:
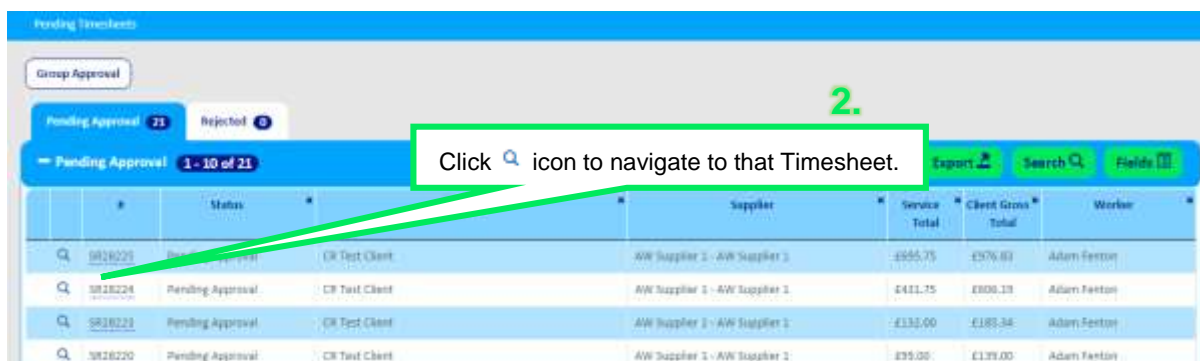

Your Matrix SCM homepage

Timesheets

1. When you have an active or recently completed Placement, a supplier will submit Timesheets for services delivered.
2. These Timesheets will be sent to you for review.
3. When a Timesheet is submitted it will be in the Timesheet section of your homepage, under the '**Pending Approval**' section

4. You will be taken to a list view of all your Timesheets that are Pending Approval

5. This will take you to the Timesheet summary page to review

All Timesheet items are listed on the summary page. You need to review these and check they are correct.

3.

6. To progress, click '**Actions**'

a. Approve:

Detail comments for your Activity Log.

1.

2.

Click '**Approve**' to continue.
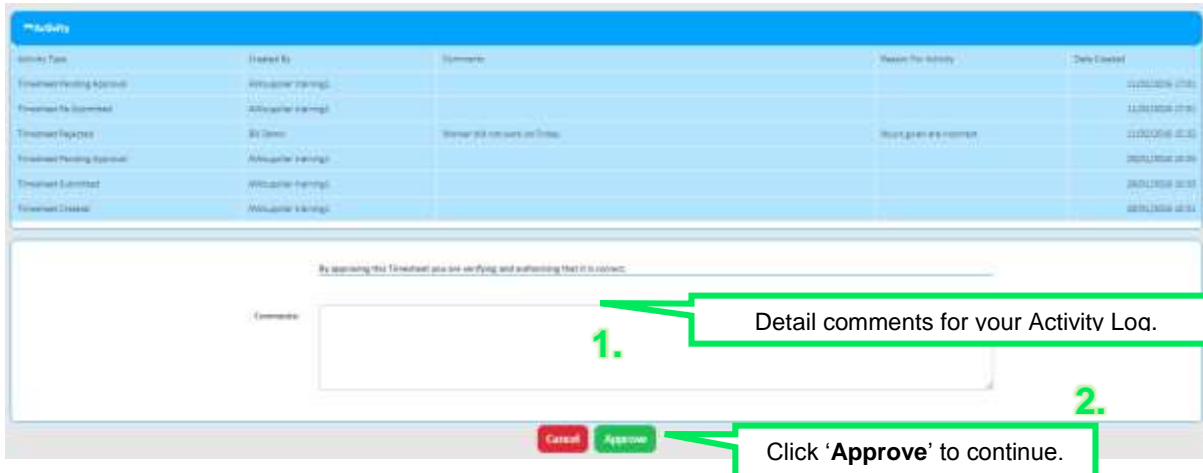
i. Complete supplier assessment:

3.

Use the ▾ icon and the comments box to evaluate the supplier's service.

Click '**Next**' to continue. **4.**

ii. Detail any comments:

Detail comments for your Activity Log. **5.**

Click '**Complete**' to finish. **6.**
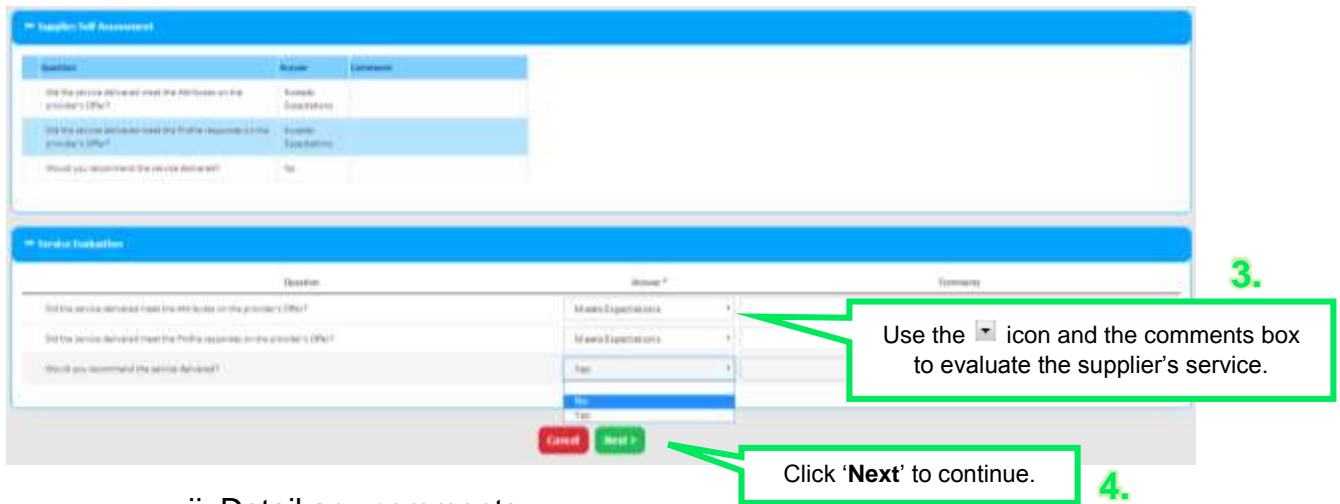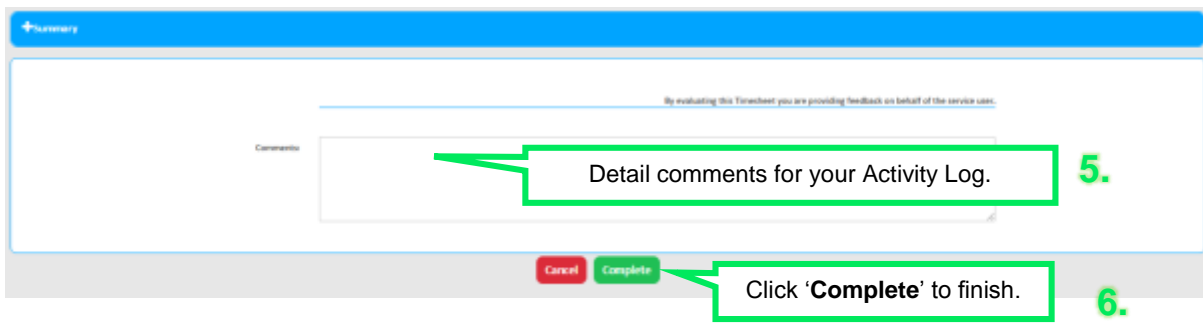
iii. The Timesheet status will update:

Timesheet - # SR28225 (Status: Approved)

Refresh   Actions ▾

Current Status:
This item has been **Approved** for invoicing.

Next Steps:
No further action is required and the item will be invoiced shortly.
An assigned approver can use the green 'Actions' button at the top of the page and select Unapprove if there is an error with this item.

b. **Edit Cost Codes:**

Timesheet Items

Item Category	Item Type	Item Date	Rate Type	Cost Code *	Start Time	End Time	Break Time
Hours	Monday	15/06/2015	Regular	CR003 ▾	09:00	11:00	0.00
Hours	Tuesday	16/06/2015	Regular	CR003 ▾	09:00	11:00	0.00
Hours	Wednesday	17/06/2015	Regular	CR003 ▾	09:00	11:00	0.00
Hours	Thursday	18/06/2015	Regular	CR003 ▾	09:00	11:00	0.00
Hours	Friday	19/06/2015	Regular	CR003 ▾			
Hours	Saturday	20/06/2015	Regular	CR003 ▾			
				CR003			

1. Use the ▾ icon to select the correct Cost Code for each item.

Cancel   Finish

2. Click '**Finish**' to complete and update the Timesheet items.

The Timesheet items will update on the main summary page.

c. **Reject**

By rejecting this Timesheet it will not be eligible for invoicing.

Reason: *   Hours given are incorrect   ▾

Comments: *

1. Use the ▾ icon and the comments box to provide comprehensive reasons as to why this Timesheet is being rejected.

Cancel   Reject

Click '**Reject**' to complete and reject this Timesheet.

2.

The Timesheet status will update:

7. The Timesheet will update with your completed action

Timesheet - # SR28223 (Status: Rejected)

Refresh

Current Status:
This item has been **Rejected** by an assigned approver (To view the reason why please use the 'Activity' link in the 'Other Items' section).

Next Steps:
Please wait for the supplier to resubmit or withdraw the item.

Notes:

➔ If you reject a Timesheet it will be returned to the supplier with your rejection reasons.

➔ A supplier can then edit the Timesheet, update and re-submit.

➔ You will be notified when a Timesheet is re-submitted by a supplier and need to follow the same process as above.

➔ Only approved Timesheets will be progressed to the Self-Bill, Invoice and Payment steps in the process.

➔ The Self-Bill, Invoice and Payment steps will be automated by the system according to your agreed payment terms with Matrix SCM.

➔ The weekly Matrix-CR.Net Invoice processing on Wednesdays collates all the Timesheets which were approved between the previous Wednesday and the next Tuesday, to create both consolidated client invoices and supplier Self-Bill invoices, around which the agreed payment terms will then apply.

➔ For example, the invoice run on Weds 20 Jun 2012 would collect all Timesheets which were approved between 00:00 on Weds 13 Jun 2012 and 23:59 on Tues 19 Jun 2012, and create one consolidated client invoice and a supplier Self-Bill invoice for each corresponding supplier. These invoices would be dated Weds 20 Jun 2012 and would then require payment according to the payment terms agreed in the contracting process.
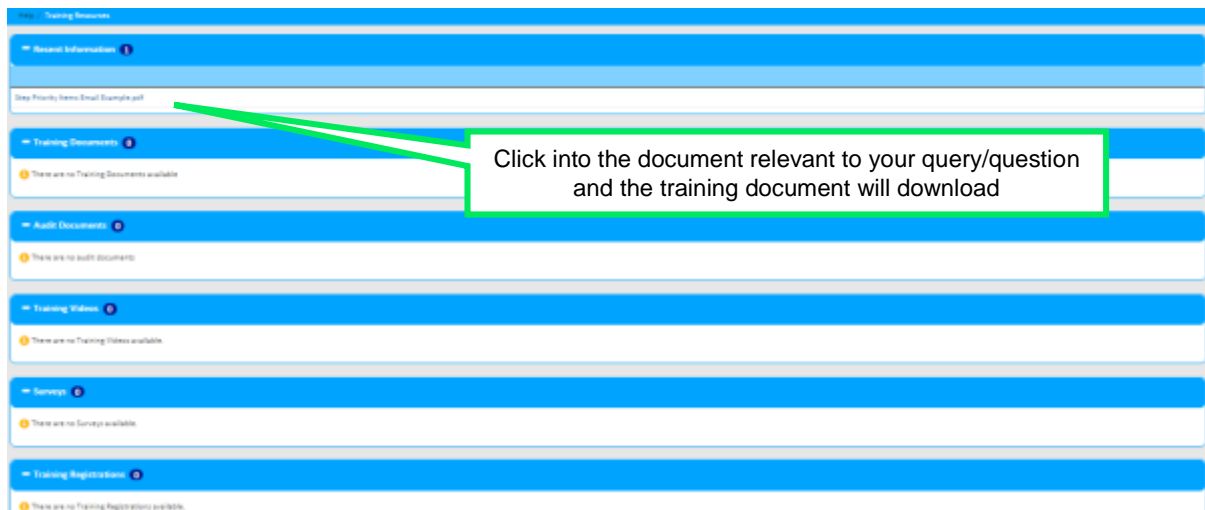
Need More Support?

If you need more support regarding anything detailed in this guide, please use the help functions available within your Matrix-CR.Net account:
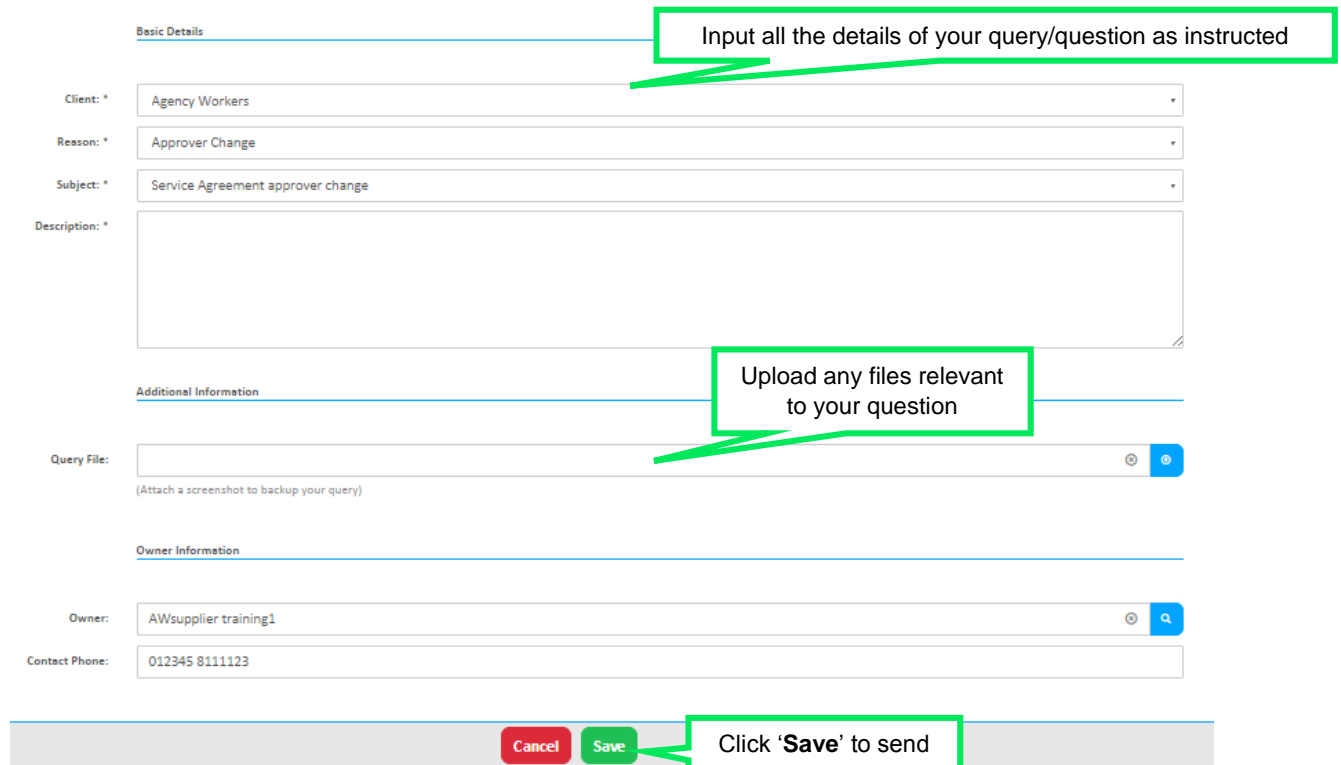

Click into the '**Help**' link available on your system homepage

You will be taken to the help and support section where you have a number of different ways of finding the answer to any questions you may have:

Here are listed the contact details for the Matrix SCM operations centre

a) Click here to view all available training guides

b) Click here to raise a Query

c) Click here to open Live Support

a)   Training Guides / Documents / Videos are available for you to view and use as support:

Click into the document relevant to your query/question and the training document will download

b) Queries can be raised to the Matrix SCM Account Management team:

A member of the Matrix SCM Account Management team will be assigned to your Query and they will respond to you with an answer.

Each individual Query has its own unique reference number which will detail the question and the response.

You can look through all the Queries you have raised and any that have been raised by members of your team by clicking into the 'Browse' link under the Queries section of the help and support section.

c) Live Support is an instant chat help function where you will be conversing with a member of the Matrix SCM Account Management team in real-time:

Welcome to Online Support! Please outline you query in detail (providing order/placement/timesheet numbers) and if you are a client or supplier.

Fields marked with * are required

Please select the department you would like to reach:

- Support for CR.net   🟢 Online!
- Support for SProc.Net   🔴 Offline Send a Message

Your Name: _____ *

Your Company _____ *

Your Question (please include any order/placement/timesheet numbers and the issue): *

[   ]

[Start Chat]

> Input your details and the details about your question as instructed

> Click '**Start Chat**' to bring up the instant chat

All the system help and support option are also available on your system homepage: