Guide to:
Timesheets and Expenses

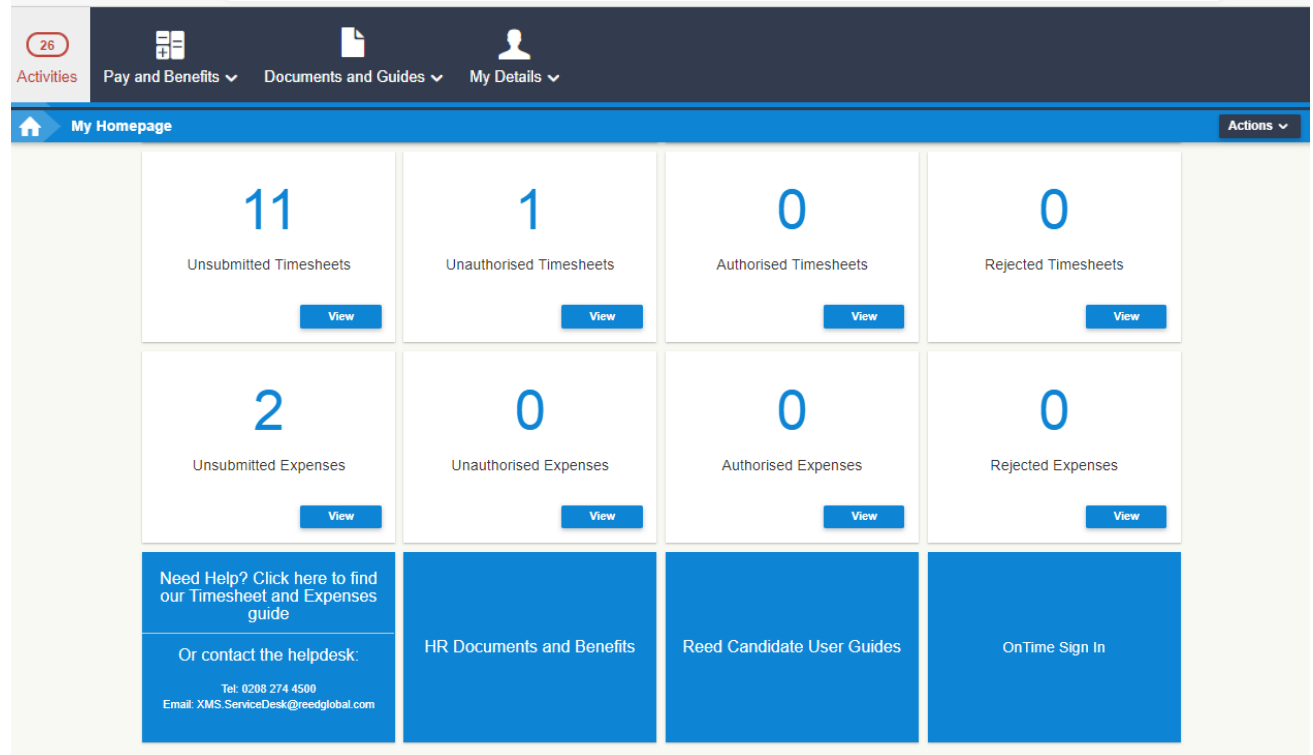# This guide explains:

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① Log in to XMS by clicking the link below –
www.xms-portal.com

On your **Homepage** you have different Pods for all your timesheets:
Unsubmitted
Unauthorised
Authorised
Rejected

② Click on a Pod to take you to the relevant timesheets.
To **submit** a timesheet click on the **Unsubmitted Timesheets** pod.

N.B. You do not need to submit a timesheet with 0 Hours if you have not worked that week. A warning validation message will be displayed when submitting 0 hours/days/activities claimed.

If you have any questions regarding timesheets, please contact your Consultant.

① A Tile will display for each Unsubmitted Timesheet.
Use the details, such as 'date', to find the timesheet you want to submit.

If you are in working in more than one place, you can use details such as Job Title and Working Address to find the right timesheet.

② Click on **Actions**, then **View** to go into the timesheet.

① Enter the **Start Time** and **End Time** for the days you have worked.

Times need to be entered in 24 hour format, so if you worked from 9am to 1pm, type 09:00 and 13:00.

② Add any **Unpaid Breaks** by typing in the number of hours, then minutes.

Please enter start and end times in 24hr format

Date	Start Time	End Time	Unpaid Breaks		Time Claimed		
Sat 27/01/2018	🕐 09:00	🕐 13:00	0	0	4	0	➕
Sun 28/01/2018	🕐 --:--	🕐 --:--	0	0	0	0	➕
Mon 29/01/2018	🕐 --:--	🕐 --:--	0	0	0	0	➕
Tue 30/01/2018	🕐 --:--	🕐 --:--	0	0	0	0	➕
Wed 31/01/2018	🕐 --:--	🕐 --:--	0	0	0	0	➕
Thu 01/02/2018	🕐 --:--	🕐 --:--	0	0	0	0	➕
Fri 02/02/2018	🕐 --:--	🕐 --:--	0	0	0	0	➕

Total 4 0

③ Once you have entered your hours the last column will automatically populate to confirm the total hours you have worked.

Candidate's Comments

Manager's Comments

Save   Submit

④ You can add comments for your Manager in the **Candidate's Comments** box if there are any aspects of the timesheet that you want to make them aware of.

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① If you have worked two shifts on one day, click on the **+** icon to add an extra row.

Please enter start and end times in 24hr format

Date	Start Time	End Time	Unpaid Breaks		Time Claimed		
Sat 27/01/2018	09:00	12:00	0	0	3	0	+
Sat 27/01/2018	12:30	17:00	0	0	4	30	×
Sun 28/01/2018	00:00	00:00	0	0	0	0	+
Mon 29/01/2018	--:--	--:--	0	0	0	0	+
Tue 30/01/2018	--:--	--:--	0	0	0	0	+
Wed 31/01/2018	--:--	--:--	0	0	0	0	+
Thu 01/02/2018	--:--	--:--	0	0	0	0	+
Fri 02/02/2018	--:--	--:--	0	0	0	0	+
				Total	7	30	

② You can click on the **X** icon to delete the extra row if you no longer need it.

Candidate's Comments

Manager's Comments

Save   Submit

③ Once you've completed the timesheet click **Submit**.

Top Tip: If you want to keep track of your hours during the week, you can enter your hours each day, clicking **Save** each time to save the timesheet and come back to it later.

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Recalling an incorrect timesheet

If you have submitted a timesheet but need to change something, you are able to correct it by recalling and resubmitting the timesheet.

① Click into the **Unauthorised Timesheets** pod on your Homepage.

② Find the correct timesheet from the list and click **Actions** then **View**.

| Awaiting Authorisation | Actions ⌄ |

Create Expense Claim
Recall

③ In the timesheet, click **Actions,** then **Recall** to make the timesheet editable so you can make changes

d times in 24hr format

	Start Time		End Time		Unpaid Breaks		Time Claimed	
⏱	--:--	⏱	--:--	0	0	0	0
⏱	--:--	⏱	--:--	0	0	0	0
⏱	09:00	⏱	17:30	1	0	7	30

④ Once you are ready to resubmit the new version of your timesheet, Click **Actions** then **Submit**.

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Resubmitting a rejected timesheet

If your Manager queries your timesheet or wants you to amend something they can reject it so that it comes back to you. If this happens it will appear in the **Rejected Timesheets** pod on your Homepage.

① From your Homepage, click on the **Rejected Timesheets** Pod

② Open the Timesheet by selecting **Actions** then **Redo**.

The Timesheet is now editable and you can make changes

🏠 Timesheet ▶ **Mandy Jenkinson - Administrator [02617398]**   Rejected   ‹ Prev Recent ⌄ Next ›   **Actions ⌄**

This Timesheet has been rejected. If you wish to re-submit this Timesheet, click on the Actions button, then click Redo.

Details

Please enter start and end times in 24hr format

Date	Start Time	End Time	Unpaid Breaks		Time Claimed	
Sat 10/08/2019	⊙ --:--	⊙ --:--	0	0	0	0
Sun 11/08/2019	⊙ --:--	⊙ --:--	0	0	0	0
Mon 12/08/2019	⊙ 08:30	⊙ 16:30	1	0	7	0
Tue 13/08/2019	⊙ 08:30	⊙ 16:30	1	0	7	0
Wed 14/08/2019	⊙ 08:30	⊙ 16:30	1	0	7	0
Thu 15/08/2019	⊙ 08:30	⊙ 16:30	1	0	7	0
Fri 16/08/2019	⊙ 08:30	⊙ 16:30	1	0	7	0
				Total	35	0

Candidate's Comments

Manager's Comments
Wrong will has been filled in

③ If you want to see any Manager comments, click on the previous version and then come back to the current version to make the changes.
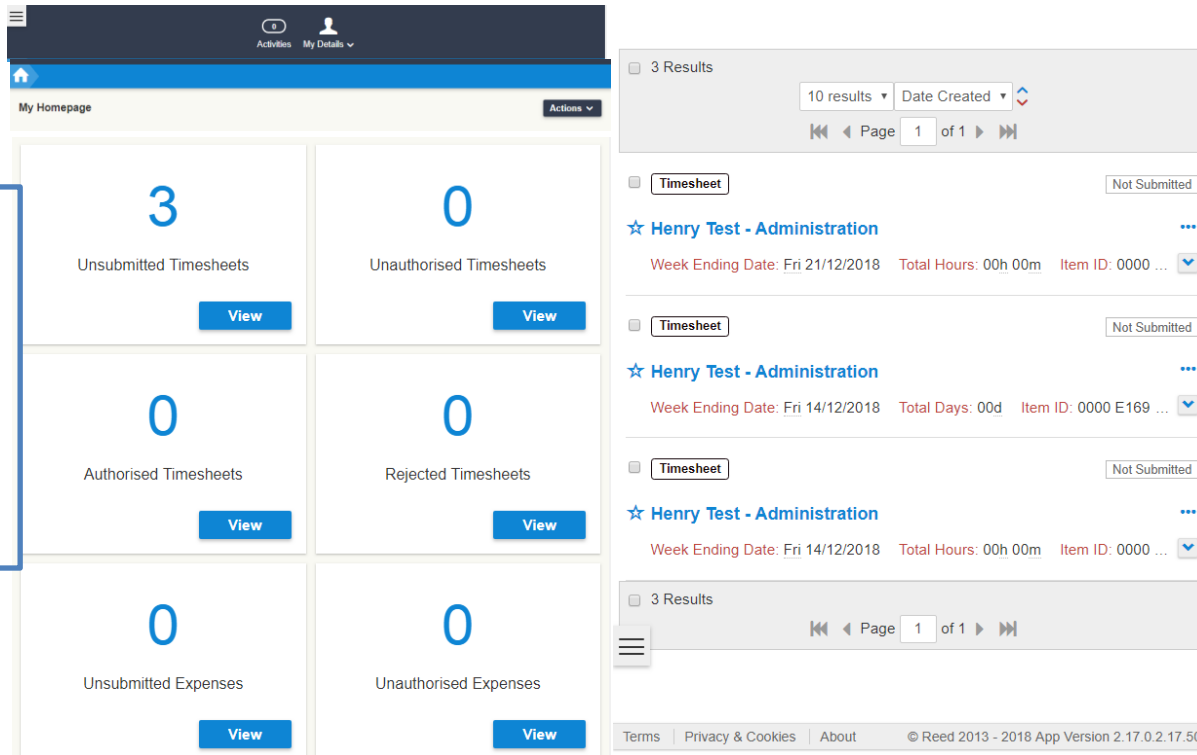
④ Once you are ready to resubmit the new version of your Timesheet, click **Submit**

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① Log in to XMS, on a mobile device, by clicking on the link
www.xms-portal.com

On your **Homepage** you have different Pods for all your timesheets:
Unsubmitted
Unauthorised
Authorised
Rejected

② Tapping on a pod will take you through to a list of relevant timesheets.

My Homepage   Actions ⌄

3		0
Unsubmitted Timesheets		Unauthorised Timesheets
View		View

0		0
Authorised Timesheets		Rejected Timesheets
View		View

0		0
Unsubmitted Expenses		Unauthorised Expenses
View		View

3 Results
10 results ▾ Date Created ▾
|◀ ◀ Page 1 of 1 ▶ ▶|

Timesheet   Not Submitted
☆ Henry Test - Administration   ⋯
Week Ending Date: Fri 21/12/2018   Total Hours: 00h 00m   Item ID: 0000 …

Timesheet   Not Submitted
☆ Henry Test - Administration   ⋯
Week Ending Date: Fri 14/12/2018   Total Days: 00d   Item ID: 0000 E169 …

Timesheet   Not Submitted
☆ Henry Test - Administration   ⋯
Week Ending Date: Fri 14/12/2018   Total Hours: 00h 00m   Item ID: 0000 …

3 Results
|◀ ◀ Page 1 of 1 ▶ ▶|

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N.B. – You do not need to Submit a Timesheet with 0 Hours if you have not worked that week.

If you have any questions regarding completing your timesheet, please contact your Consultant.
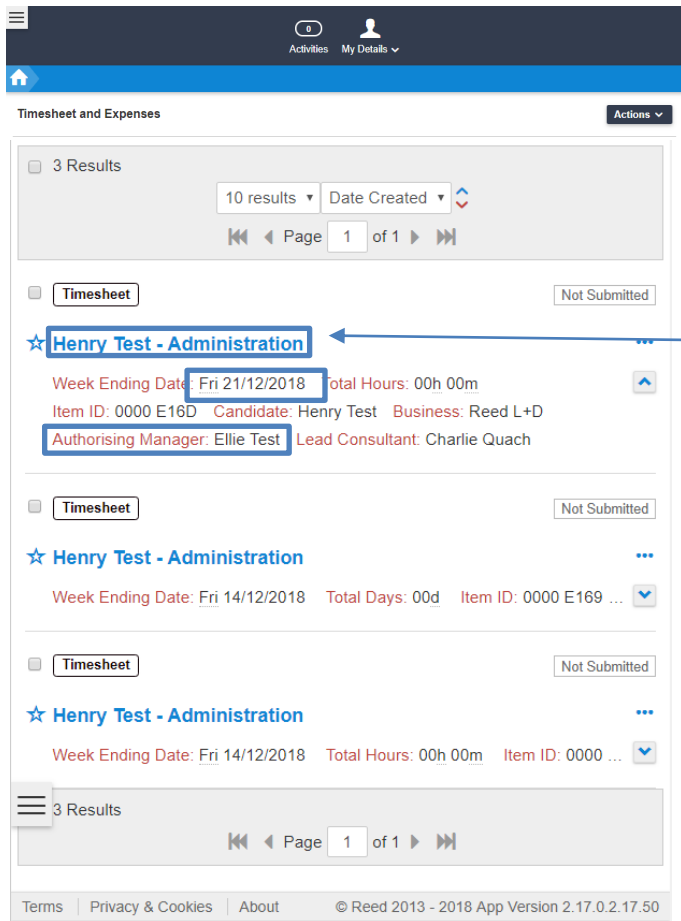
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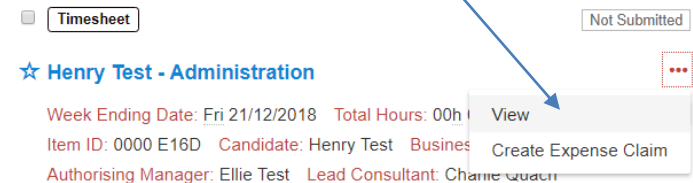① Use the details, such as 'date', to find the timesheet you want to submit.

If you are in more than one Booking, you can use details such as Job Title and Authorising Manager to select the correct Timesheet.

② Tap on the three dots at the top of the timesheet, then **View**.

Thu 13/12/2018 +

Start Time
🕐 09:00

End Time
🕐 17:00

Unpaid Breaks Hours
1

Unpaid Breaks Minutes
0

Time Claimed Hours
7

Time Claimed Minutes
0

Fri 14/12/2018 +

Start Time
🕐 09:00

End Time
🕐 17:00

Unpaid Breaks Hours
1

Unpaid Breaks Minutes
0

Time Claimed Hours
7

Time Claimed Minutes
0

Total

Total Time Claimed Hours
21

Total Time Claimed Minutes
0

Candidate's Comments   Top ^

① Enter your hours for each day in a 24 hour format. For example if you worked from 9am to 5pm type 09:00 and 17:00.

② You can add the length of any **Unpaid Breaks** in the Hours and Minutes boxes.

③ Once you have entered your hours the last section will automatically populate to confirm the total time you have worked.

④ You can add comments to your Manager in the **Candidate's Comments** box if you need to make them aware of anything.

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①

If you worked two shifts on one day, tap on the **+** icon to add an extra slot.

Tue 09/10/2018

Start Time
🕐 09:00

End Time
🕐 12:00

Unpaid Breaks Hours
0

Unpaid Breaks Minutes
0

Time Claimed Hours
3

Time Claimed Minutes
0

Wed 10/10/2018

Start Time
🕐 --:--

End Time
🕐 --:--

Unpaid Breaks Hours
0

Unpaid Breaks Minutes
0

Time Claimed Hours
0

Time Claimed Minutes
0

Thu 11/10/2018

Start Time
🕐 09:00

End Time
🕐 17:00   Top ⌃

Unpaid Breaks Hours
0

Unpaid Breaks Minutes
30

Tue 09/10/2018

Start Time
🕐 09:00

End Time
🕐 12:00

Unpaid Breaks Hours
0

Unpaid Breaks Minutes
0

Time Claimed Hours
3

Time Claimed Minutes
0

Tue 09/10/2018

Start Time
🕐 15:00

End Time
🕐 18:00

Unpaid Breaks Hours
0

Unpaid Breaks Minutes
0

Time Claimed Hours
3

Time Claimed Minutes
0

Wed 10/10/2018

Start Time
🕐 --:--

End Time   Top ⌃
🕐 --:--

Unpaid Breaks Hours
0

Unpaid Breaks Minutes
0

For example: If you worked from 09:00 to 12:00, then from 15:00 to 18:00, enter these in two different time slots

②

Fill in the hours for the second shift in the new slot that appears.

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Fri 12/10/2018   +

Start Time

🕐 | 09:00

End Time

🕐 | 17:00

Unpaid Breaks Hours	Unpaid Breaks Minutes
0	30
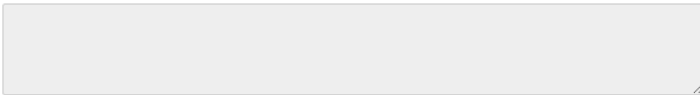
Time Claimed Hours	Time Claimed Minutes
7	30

Total

Total Time Claimed Hours	Total Time Claimed Minutes
15	0

Candidate's Comments

Manager's Comments

Top ^

Save

Submit

> Once you have completed the timesheet, tap the **Submit** button.

Top Tip: If you want to keep track of your hours during the week, you can enter your hours each day, clicking **Save** each time to save the timesheet and come back to it later.

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Expense Claims are linked to timesheets.
An Expense Claim needs to be created from the timesheet for the relevant week.

① Find the timesheet you wish to submit your Expense Claim against.

② Click on **Actions** and **Create Expense Claim**.

N.B. You can only submit an Expense Claim against a Timesheet that has been authorised.

Expense Claims are broken down into different Expense Items. Each Item should be a different expense. E.g. Mileage to drive to a hotel might be one Expense Item, and the cost of the hotel would be another Expense Item.

If you have any queries whilst placing an Expense Claim please contact the XMS Helpline

Details

+ Add

Expense Type	Date	Cost	Receipt?	Code

+ Add

Candidate's Comments

Manager's Comments

Save   Submit

To add an Expense Item, click **+ Add**.

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① Select the **Expense Type** from the drop down menu

Expense Item

②
Input a date and the cost of the Expense.

Expense Type *
Travel (Other) ▼

③
Attach a scanned copy of your receipts. Or, if you don't have the receipt, select a reason in the drop down menu

Date *
dd/mm/yyyy 🗓

Cost Of Expense *
0

☐ Receipt?

Reason for No Receipt
-Please select- ▼

Attachments
📎 Attach file
Maximum file size: 10 MB.
Max. 10 attachments.
ⓘ Allowed file types.

☐ Home to Work?   ☑ Public Transport?

Further Details *

The field is required.

④

Once you have filled in all the details, click **Save**

Save   Close

You can add comments for your Manager in the **Further Details** box.

Please note that when adding mileage claims, the claim is defaulted to 45pm per mile.

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You can add as many "items" as you need to the same Expense Claim

Details

+ Add

Expense Type	Date	Cost	Receipt?	Code	
Car Parking	Fri 05/01/2018	£30.00			Actions ⌄
Hotel	Fri 12/01/2018	£200.00			Actions ⌄

+ Add

Candidate's Comments

Manager's Comments

Save   **Submit**

Once you have completed the Expense Claim click **Submit**.
If you want to retain your changes but not submit the claim, you can just click **Save** to come back to it later.

Recalling an incorrect expense claim

If an Expense Claim is incorrect, you are able to correct it by Recalling and Resubmitting the Expense Claim.

① Click on the **Unauthorised Expenses** pod on your Homepage.

② Find the correct Expense from the list and click **Actions** then **View.**

③ Click Actions and **Recall** to make it editable.

④ Once you are ready to Resubmit the new version of your Expense Claim, click **Actions**, then **Submit.**

Resubmitting a rejected expense claim

If an Expense Claim is rejected by your Manager, it will appear in the Rejected Expense Claims Pod on your Homepage.

① Click on the Pod to view the Expense Claim that has been rejected and open the Claim by clicking **Actions** then **View**.

② Click **Redo** in the Actions dropdown.

③ This will make the Expense Claim editable so you can make any necessary changes.

Once you are ready to Resubmit the new version of your Expense Claim, click **Actions** then **Submit**.

④ You can see any comments that the Manager has left here.

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