

# **Guide to: Timesheets and Expenses**

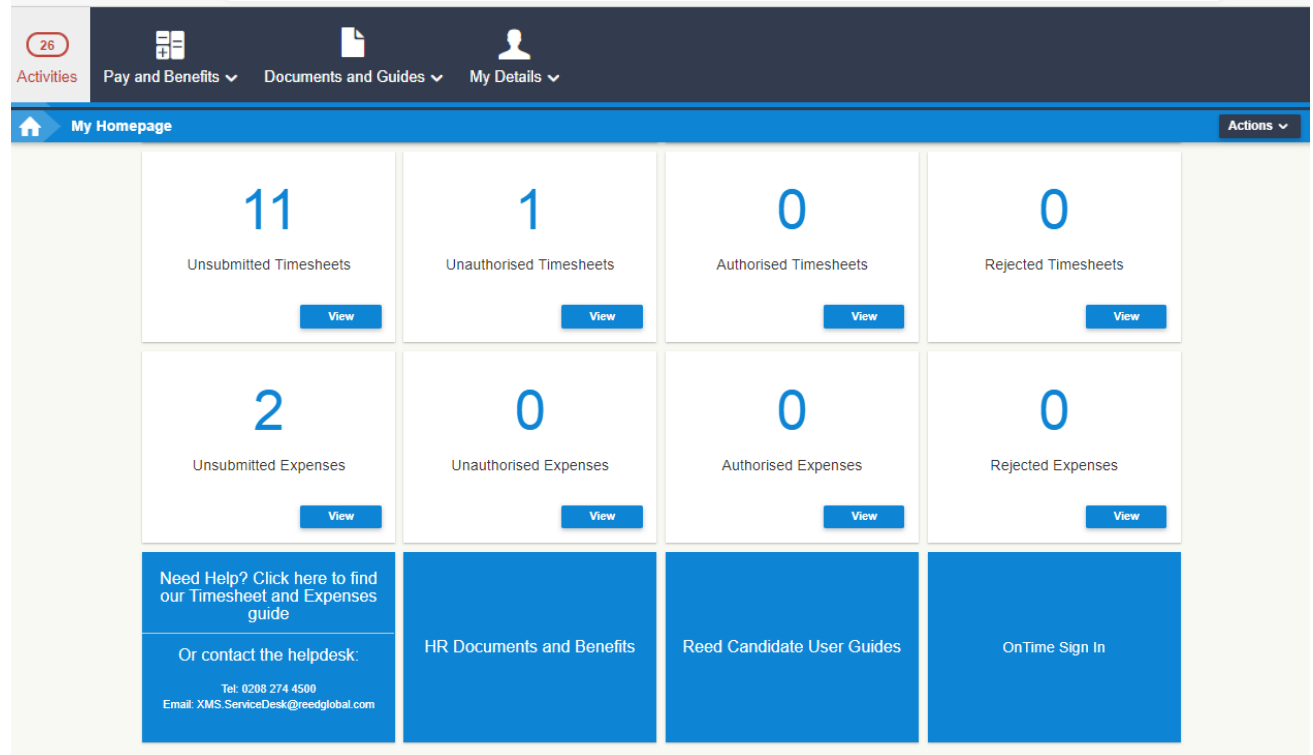
### **This guide explains:**

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# Submitting your timesheet – Step 1

①

Log in to XMS by clicking the link below –  
[www.xms-portal.com](http://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.

## Submitting your timesheet – Step 2

1

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

The screenshot shows the 'Timesheet and Expenses' interface. On the left, there's a sidebar with filters for Status (Not Submitted, Authorised), Procurer Organisation, Job Title, Type, and Fulfilment Authorising Manager. The main area displays a list of timesheets for 'Joanna Bloggs'. The first timesheet is for 'Joanna Bloggs - Chef' with Item ID 0000 689D / 1. The 'Dates' field is highlighted with a blue box, showing 'Sat 27/01/2018 - Fri 02/02/2018'. Other details include 'Total Hours: 00h 00m', 'Altered: No', and 'Working Address: 1 Road, 1RD'. The second timesheet is for 'Joanna Bloggs - Business Consultant' with Item ID 0000 688E / 1. The third timesheet is for 'Joanna Bloggs - Chef' with Item ID 0000 6891 / 1. Each timesheet entry has a 'Not Submitted' button and an 'Actions' dropdown menu.

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.

This close-up shows the 'Actions' dropdown menu for the first timesheet entry. The menu is open, showing two options: 'View' and 'Create Expense Claim'. The 'View' option is highlighted. The background shows the timesheet entry for 'Joanna Bloggs - Chef' with Item ID 0000 689D / 1.

## Submitting your timesheet – Step 3

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	<input type="text" value="09:00"/>	<input type="text" value="13:00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="4"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Sun 28/01/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Mon 29/01/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Tue 30/01/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Wed 31/01/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Thu 01/02/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Fri 02/02/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Total					<input type="text" value="4"/>	<input type="text" value="0"/>	

Candidate's Comments

Manager's Comments

Save

Submit

3

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

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.

# Submitting your timesheet – Step 4

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	<input type="text" value="09:00"/>	<input type="text" value="12:00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="3"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Sat 27/01/2018	<input type="text" value="12:30"/>	<input type="text" value="17:00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="4"/>	<input type="text" value="30"/>	<input type="button" value="X"/>
Sun 28/01/2018	<input type="text" value="00:00"/>	<input type="text" value="00:00"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Mon 29/01/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Tue 30/01/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Wed 31/01/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Thu 01/02/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Fri 02/02/2018	<input type="text" value="--:--"/>	<input type="text" value="--:--"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="button" value="+"/>
Total					<input type="text" value="7"/>	<input type="text" value="30"/>	

Candidate's Comments

Manager's Comments

2

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

3

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

Save

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.

# 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**.

The screenshot shows a user interface for managing timesheets. At the top, there is a dark blue header bar. Below it, a blue bar contains the text 'Awaiting Authorisation' and a dropdown menu labeled 'Actions'. The 'Actions' dropdown is open, showing two options: 'Create Expense Claim' and 'Recall'. An arrow points from the 'Recall' option to a text box on the right. Below the header, there is a light blue bar with the text 'd times in 24hr format'. Below this, there is a table with four columns: 'Start Time', 'End Time', 'Unpaid Breaks', and 'Time Claimed'. The table has three rows of data. The first two rows have empty input fields for 'Start Time' and 'End Time', and '0' for 'Unpaid Breaks'. The third row has '09:00' for 'Start Time', '17:30' for 'End Time', and '1' for 'Unpaid Breaks'. The 'Time Claimed' column has two sub-columns, with values '7' and '30' in the third row.

Start Time	End Time	Unpaid Breaks		Time Claimed	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text" value="09:00"/>	<input type="text" value="17:30"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="7"/>	<input type="text" value="30"/>

③

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

④

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

# 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

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	08:30	16:30	0	0	0	0
Sun 11/08/2019	08:30	16:30	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

2

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

The Timesheet is now editable and you can make changes

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

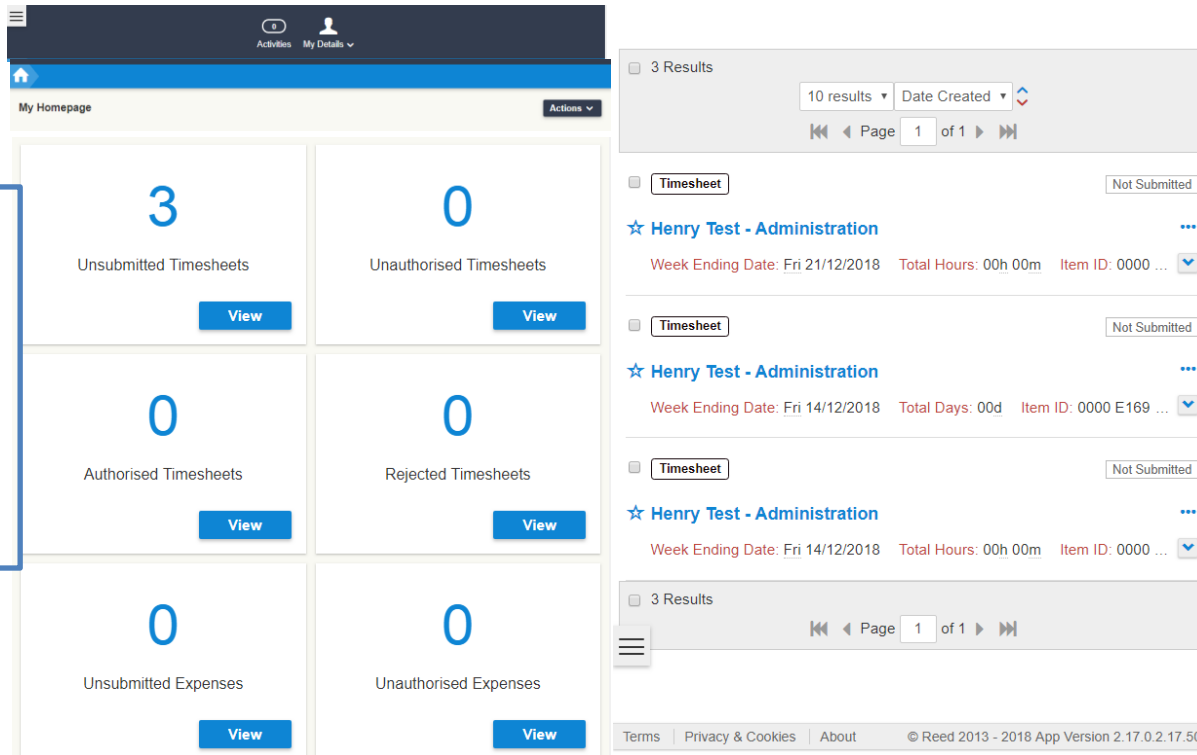
Once you are ready to resubmit the new version of your Timesheet, click **Submit**



# Submitting your timesheet on a mobile device – Step 1

1

Log in to XMS, on a mobile device, by clicking on the link  
[www.xms-portal.com](http://www.xms-portal.com)



2

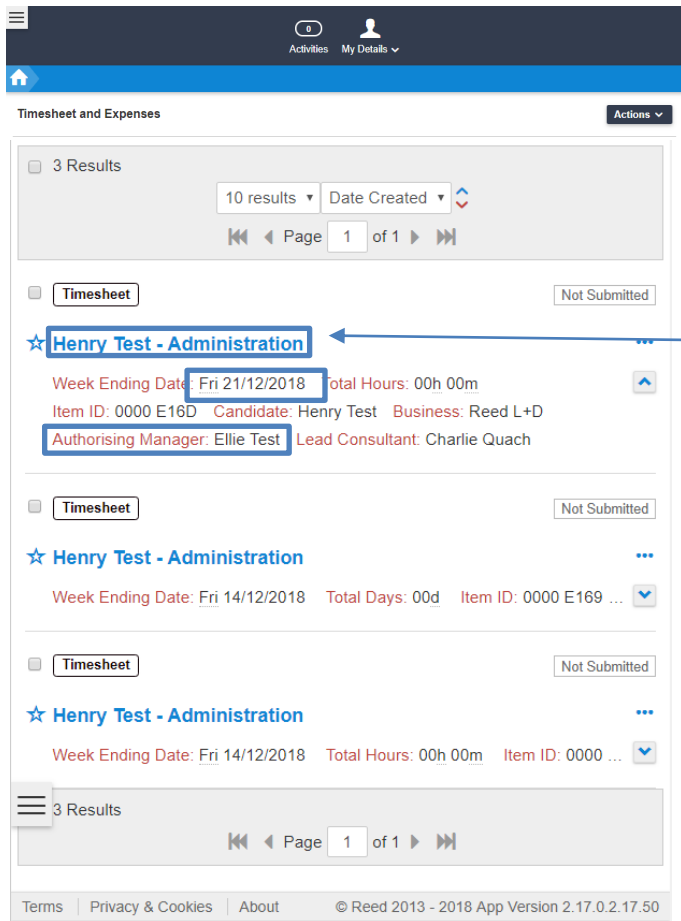
Tapping on a pod will take you through to a list of relevant timesheets.

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

**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.

# Submitting your timesheet on a mobile device – Step 2



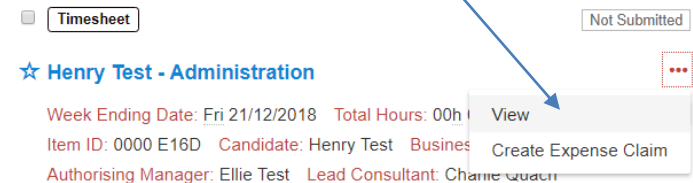
1

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**.



## Submitting your timesheet on a mobile device – Step 3

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.

# Submitting your timesheet on a mobile device – Step 4

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

Unpaid Breaks Hours  
0

Unpaid Breaks Minutes  
30

2

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

**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** x

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  
⌚ --:--


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

## Submitting your timesheet on a mobile device – Step 5

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

**Fri 12/10/2018** 

Start Time  
 09:00

End Time  
 17:00

Unpaid Breaks Hours  
0

Unpaid Breaks Minutes  
30

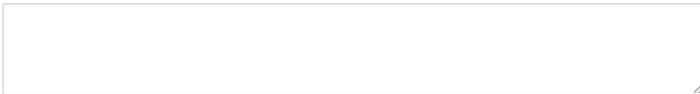
Time Claimed Hours  
7

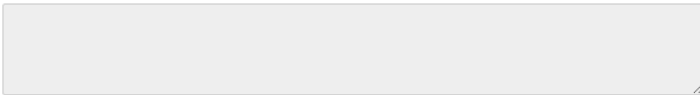
Time Claimed Minutes  
30


**Total**

Total Time Claimed Hours  
15

Total Time Claimed Minutes  
0

Candidate's Comments  


Manager's Comments  


Top 

**Save**

**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.

# Submitting expense claims – Step 1

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.

The screenshot shows a web interface for managing timesheets. On the left, there is a sidebar with filters for Status (Not Submitted, Awaiting Authorisation, Authorised), Procurement Organisation, Job Title, Type, and Fulfilment Authorising Manager. The main area displays a list of timesheets for Joanna Bloggs, Chef. The first timesheet is selected, and the 'Actions' dropdown menu is open, showing options: View, Create Expense Claim, Timesheet authorised (highlighted), and Dismiss. The timesheet details include Item ID: 0000 6891 / 1, Candidate: Joanna Bloggs, Job: Chef, Dates: Sat 13/01/2018 - Fri 19/01/2018, Total Hours: 24h 00m, and Working Address: 1 Road, 1RN.

②

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

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

## Submitting expense claims – Step 2

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
<a href="#">+ Add</a>				

Candidate's Comments

Manager's Comments

[Save](#) [Submit](#)

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

## Submitting expense claims – Step 3

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

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

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

### Expense Item

Expense Type \*

Travel (Other)

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.

Save

Close

② Input a date and the cost of the Expense.

④ Once you have filled in all the details, click **Save**

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



## Submitting expense claims – Step 4

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			<a href="#">Actions ▼</a>
Hotel	Fri 12/01/2018	£200.00			<a href="#">Actions ▼</a>

[+ 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**.

The screenshot shows the 'Expense Claim' interface for 'Joanna Bloggs - Chef'. The status is 'Awaiting Authorisation'. There is an 'Actions' dropdown menu with a 'Recall' option. Below the header is a table with the following data:

Expense Type	Date	Cost	Receipt?	Code
Hotel	Tue 16/01/2018	£30.00		

Below the table are two text areas for 'Candidate's Comments' and 'Manager's Comments'. An arrow points from the 'Recall' button to a callout box.

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.

Expense Claim ☆ Joanna Bloggs - Chef

Rejected Actions ▾

Redo

Details ▾

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

Candidate's Comments

Manager's Comments

No details of expense claim given

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.