



Timesheet Portal System

Manager Training Presentation



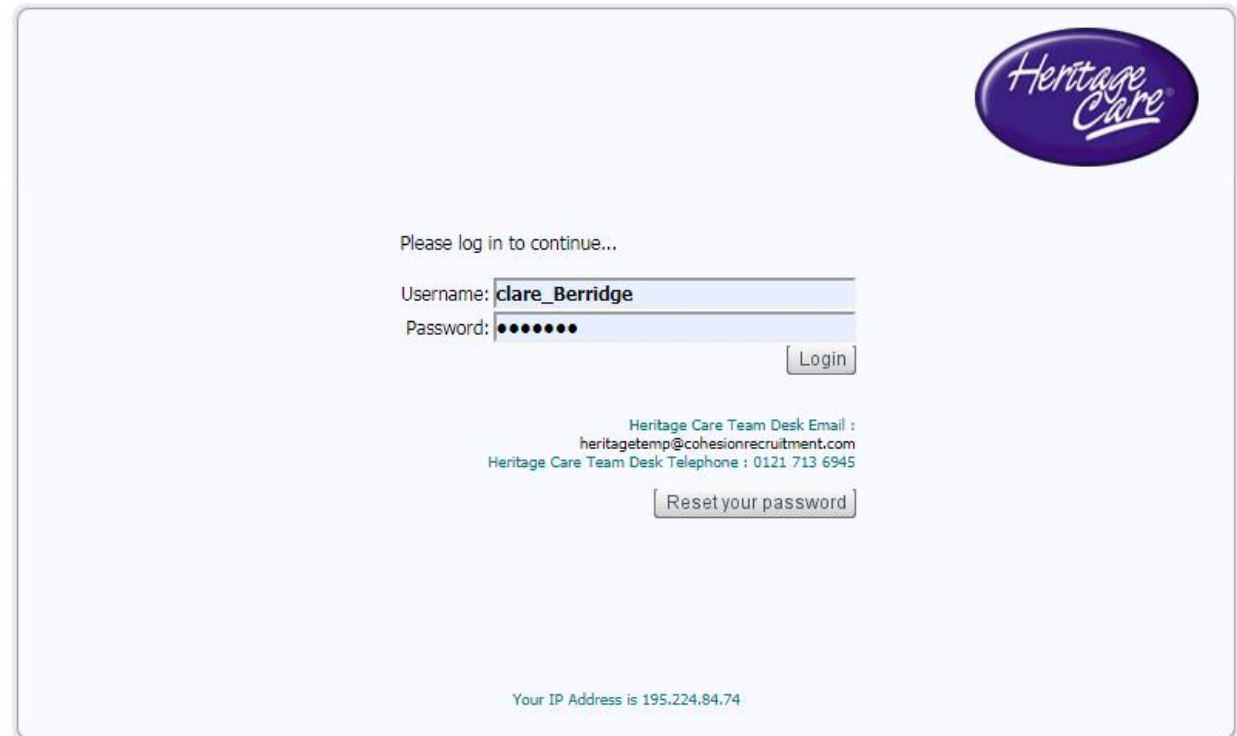
Welcome to the Timesheet Portal
System!





<https://heritagecare-mors.career-portal.co.uk/portal.php>

To access the Timesheet Portal,
first log into your Mors account

A screenshot of a web login page for Heritage Care. The page has a light blue background. In the top right corner, there is a purple oval logo with the text "Heritage Care" in white. The main content area contains the text "Please log in to continue...". Below this, there are two input fields: "Username:" with the value "clare_Berridge" and "Password:" with a masked password of seven black dots. To the right of the password field is a "Login" button. Below the login fields, there is contact information for the Heritage Care Team Desk: "Heritage Care Team Desk Email : heritagetemp@cohesionrecruitment.com" and "Heritage Care Team Desk Telephone : 0121 713 6945". Below this contact information is a "Reset your password" button. At the bottom center of the page, it says "Your IP Address is 195.224.84.74".



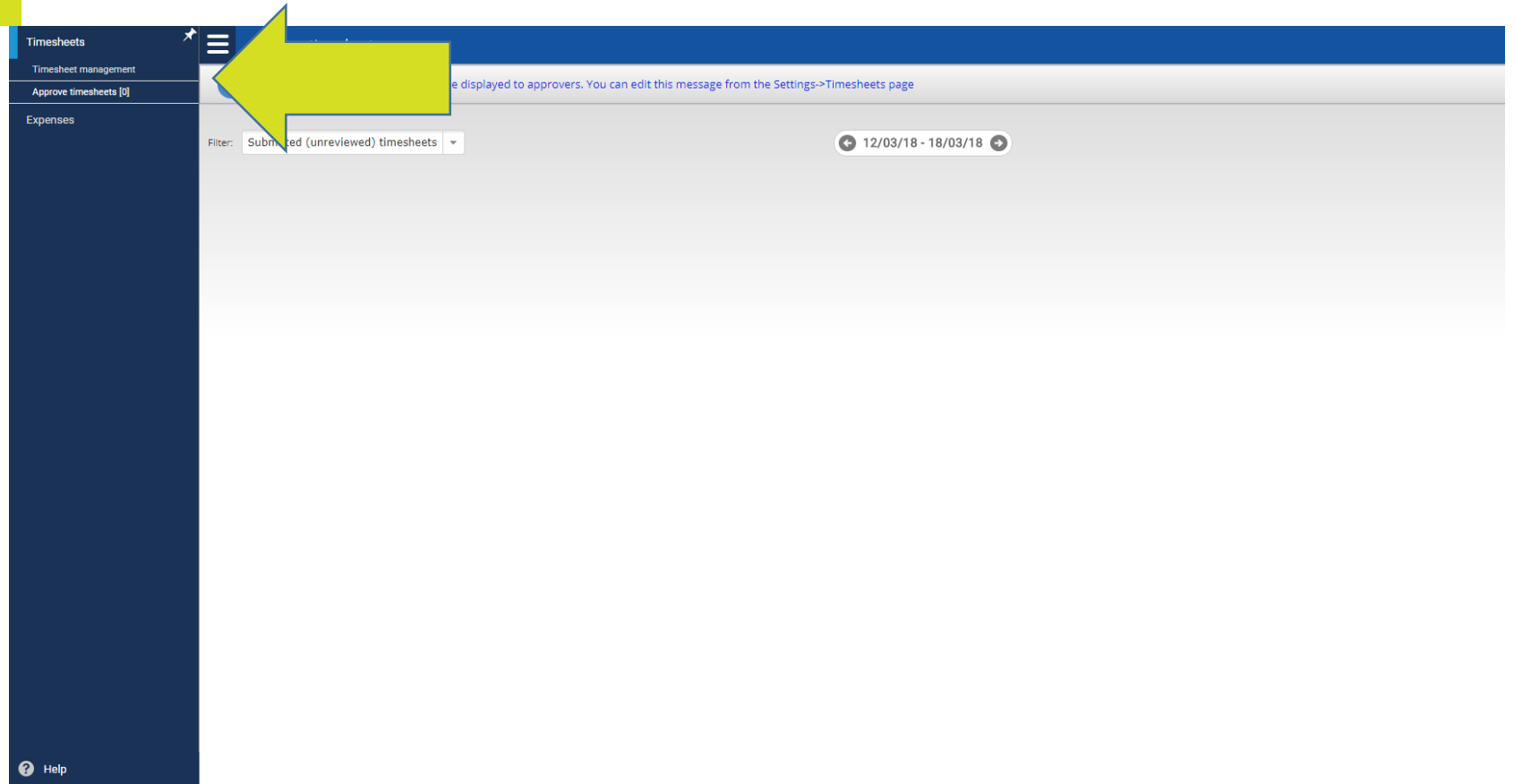
Once on your home page, click on the 'Timesheet Portal' option

This will automatically re-direct you to the timesheet portal.

A screenshot of the Cohesion recruitment portal interface. At the top left, there are navigation links: "Home | Password | Help | Log Out" and "Timesheet Portal" with a green arrow pointing to the right. A large yellow arrow is overlaid on the image, pointing from the right towards the "Timesheet Portal" link. At the top right, there is a purple oval logo with the text "Heritage Care" in white script. Below the navigation links is a horizontal menu with buttons for "Admin", "C+S", "Temp", "Perm", "Temp Shifts", "Offers", "App Search", and "MI". The main content area features a "Status Updates (General)" section with a dropdown menu currently set to "Acknowledged". Below this, it states "There are currently 0 Acknowledged". Further down, there is a section titled "Permanent Recruitment Team Contact Details" with the email address "heritagecare@cohesionrecruitment.com" and the telephone number "0121 713 6947". At the bottom, a red dashed line separates the contact information from a security notice: "Please note as a security measure you will be logged out after 60 minutes of inactivity." and "Your IP Address is 195.224.84.74".

Once there, you will see the following home screen. Here you have the following options

- 1) Timesheet Management
- 2) Approve Timesheets
- 3) Expenses





1. Timesheet Management

Here you can view and manage the timesheets for the candidates that are specific to your roles

You will be able to filter and sort the timesheets by the date, status and various other fields.

You can view all the candidates, for a specific date range on this screen.

The timesheets can also be downloaded in PDF format

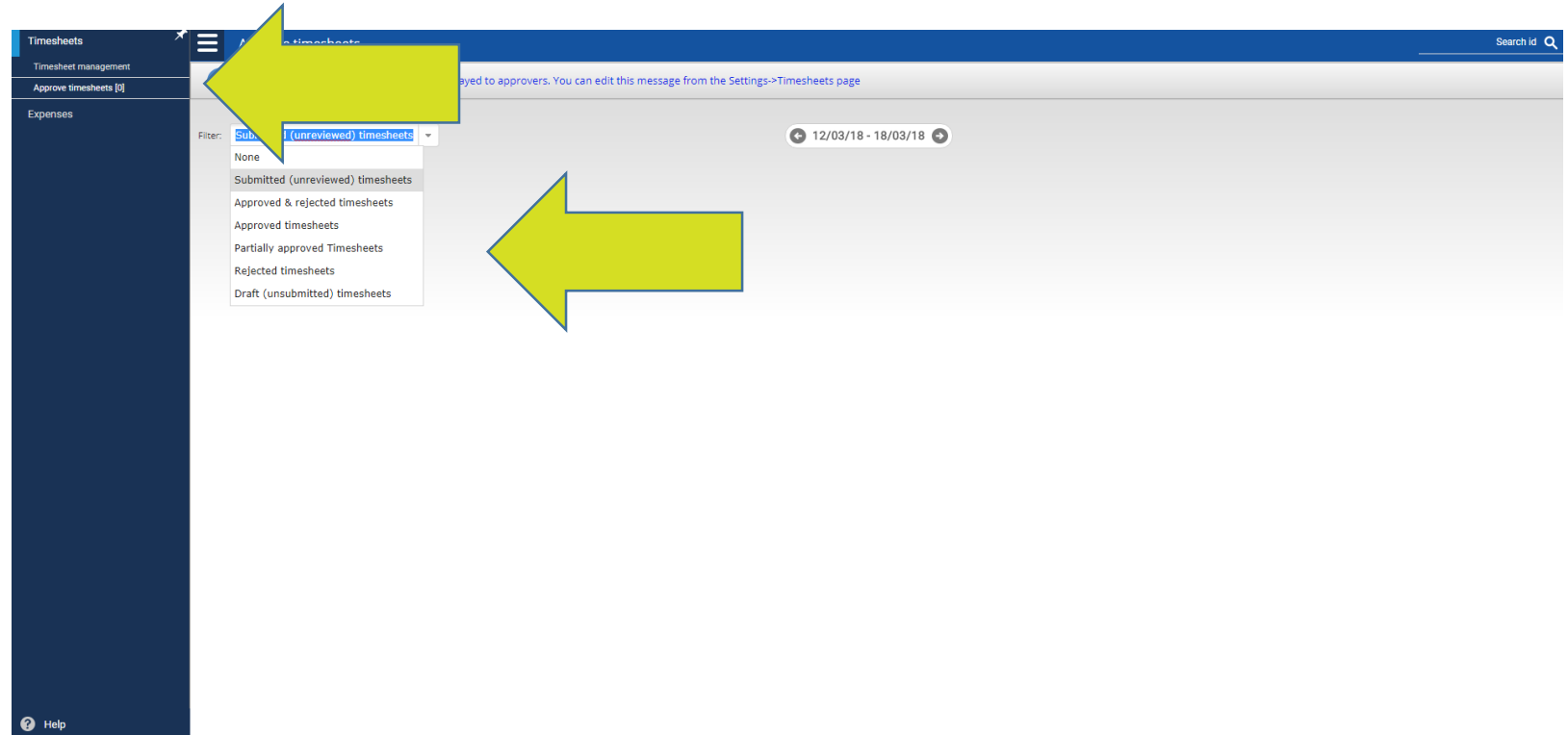
The screenshot shows a web application interface for 'Timesheet reports'. A large yellow arrow points to the 'Download Excel' button. The interface includes a left-hand navigation menu with options like 'Timesheet management', 'My timesheets', 'Expenses', and 'Leave'. The main content area features a 'Download Excel' button, a 'View' dropdown set to 'Timesheet Summaries', and date range filters from '03/07/17' to '19/03/18'. Below these are status filters: Draft, Submitted, Partially Approved, Approved, Rejected, Exported, and Cancelled. A table header is visible with columns: ID, Timesheet Date, Approver, Client, Job Description, Rate, Qty, Units, and Status. The table currently shows 'No records to display.' and includes pagination controls for page size (30) and page number (0 items in 1 pages). A checkbox for 'Show time in HH:MM format' is also present.



2) Approve Timesheets

In order to approve timesheets for a specific week, you can choose the Approve Timesheets option.

You can also filter this to review timesheets with a specific status.





The candidate will have submitted their timesheet including start time, end time and any breaks that they took.

If they hours are correct, you can approve these. If there is anything incorrect with the submission, please reject the timesheet, including notes. The candidate will get a notification when the timesheet is approved or rejected.

The screenshot shows a web application interface for managing timesheets. On the left is a dark blue sidebar with navigation options: Home, Timesheets, Timesheet management, Submit for others, Unsubmitted Timesheets, Expenses, Leave, Client invoicing, Reports, Tools, and System Management. At the bottom of the sidebar are 'Settings' and 'Help' icons.

The main content area has a blue header with 'Back' and 'Submit for others' buttons, and a search bar on the right. Below the header, the page title is 'Timesheet for: Margaret Kennedy' with 'Timesheet Id:1' on the right. The status is 'Submitted' with a green checkmark icon. A calendar view shows dates from 15 (Mon) to 21 (Sun), with 19 (Fri) highlighted in green, indicating 14:00 hours. Below the calendar, it says 'This timesheet has not been invoiced yet.' and 'Client: Fremantle Trust'. The job is 'Care Worker Level 2' with a 'Basic Rate' of 00:00 for each day except Friday, which is 14:00. 'Additional Info' states: 'Test timesheet from real data - 7 hours submitted'. The 'Timesheet total hours' is 14:00, and 'Hour units per day' are 00:00 for Mon-Thu, 14:00 for Fri, and 00:00 for Sat-Sun. Action buttons include 'Hide actions', 'Hide notes', 'Download', 'Edit', 'Approve' (with a green checkmark), and 'Reject' (with a red X). A dropdown menu for 'Select an approver to approve this timesheet' is open, showing 'Joanne Head' selected. A large yellow arrow points to the 'Approve' button.

Date	User	Note
26/02/18 09:42	Margaret Kennedy	Timesheet submitted
26/02/18 09:51	Joanne Head	Approved
26/02/18 15:19	Clare Berridge	Timesheet submitted by Clare Berridge on behalf of Margaret Kennedy



Expenses are submitted separately and are available to approve, in the same way, in the expenses section

A screenshot of a software interface for managing expenses. The page title is "Approve expenses". On the left, a dark blue sidebar contains navigation options: "Timesheets", "Expenses", and "Approve [0]". The main content area has a top navigation bar with a search box labeled "Search Expense Id". Below this is a "Create" button, which is highlighted by a large yellow arrow. Underneath the "Create" button is a "Submit" button and a row of status filters: "Paid", "Approved", "Partially approved", "Rejected", "Submitted", "Draft", and "Cancelled". A table header is visible with columns: "Date", "Submit date", "Contractor name", "Expense form approver", "Client name", "Job description", "Expense form description", "Expenses total", and "Status". Each column has a search icon. Below the table, a message states: "There are no expense forms for you to approve. Try increasing the date range or turning off some of the filters by unchecking the filter boxes." At the bottom of the main area, it says: "To view an expense form, click on the row to open it." A "Help" icon is located in the bottom left corner of the sidebar.



Expenses

The potential type of expenses which temporary workers are allowed to claim for are:

- Travel between offices, which must be pre-agreed with the individual managers.
- Parking Charges (not fines)
- Congestion Charges (not fines)



Thanks for your time!

