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User Guide

Eclipse for Temps and Contractors

eclipse™
RECRUITMENT MANAGER

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Eclipse for Temps and Contractors:

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Features and Related Topics:

1 Introduction:

This manual is essential for those recruiting temporary and contract staff and covers aspects of Eclipse such as the configuration of user profiles and Eclipse default preferences for temp recruitment and timesheet management, settings for PAYE candidates and self employed contractors, candidate scheduling, creating and amending temp contracts and timesheet processes in Eclipse.

2 Configuring User Profiles:

As with most other significant procedures in Eclipse only those with the relevant permissions will be able to perform certain actions associated with temp contracts, timesheets and invoices. Individual user permissions are granted within the 'User Administration section in the 'Maintenance Menu'. The following points explain the various user permissions that may require some thought.

2.1 Record Access:

There is a feature within Eclipse that allows candidates to be listed as unsuitable for specific clients in the database. This in turn prevents such candidates from being assigned to temp contracts associated with those clients. Only those with permission to do so can manage candidate unsuitable list administration in Eclipse. Place a tick in the 'Allow Unsuitable List Administration' box in the 'Record Access' tab of a user profile as shown below:

To allow unsuitable list administration, place a tick in the 'Allow Unsuitable List Administration' box

2.2 Sections Tab:

This part of a user profile specifies which sections of the Eclipse interface are visible to the user. For example, in the case of perm recruitment it is possible to 'switch off' the temporary functionality by de-selecting the 'temporary contract' and 'timesheet' options. In this case, ensure that these sections are selected so the temp contract and timesheet functionalities are available to the user. It is still possible to hide the invoicing tab if needs be.

To enable the temp contract and timesheet functionality, tick the relevant boxes
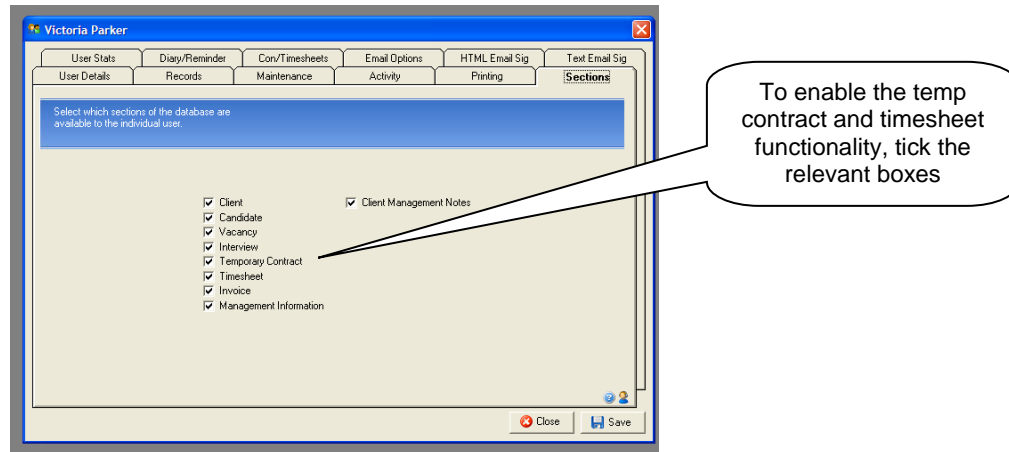
Selecting these options will allow access to the temp contract and timesheet tabs in the main interface as shown below:

The temp contract and timesheet functionality are now activated in the main interface
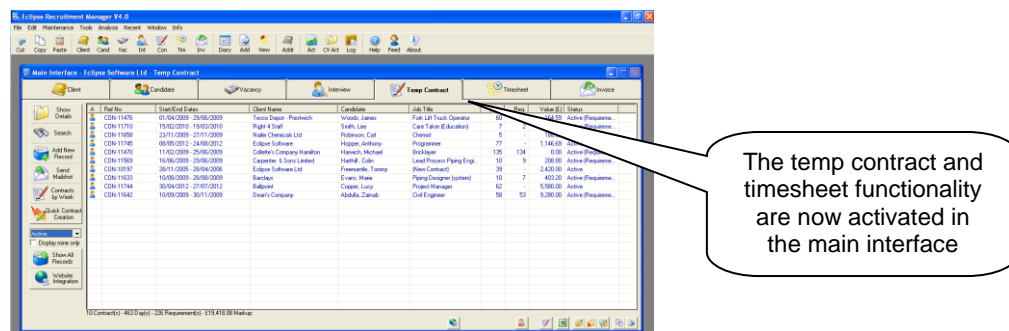
2.3 Contracts / Timesheets Tab:

Within this tab, user permissions are granted in relation to both temp contracts and timesheet management. It is worth noting that the timesheet procedure within Eclipse is split into 3 separate actions:

1. Processing
2. Authorising
3. Invoicing

It is therefore possible to separate the responsibility of the three stages of timesheet management between multiple users of the software (E.g. one person processing timesheets, a second person authorising timesheets and a third person invoicing timesheets.) Or alternatively, assign just one person the responsibility of the whole process. The various permissions relevant to temp contracts and timesheets will now be explained individually:

The 3 stages of processing timesheets can be shared between users of the software
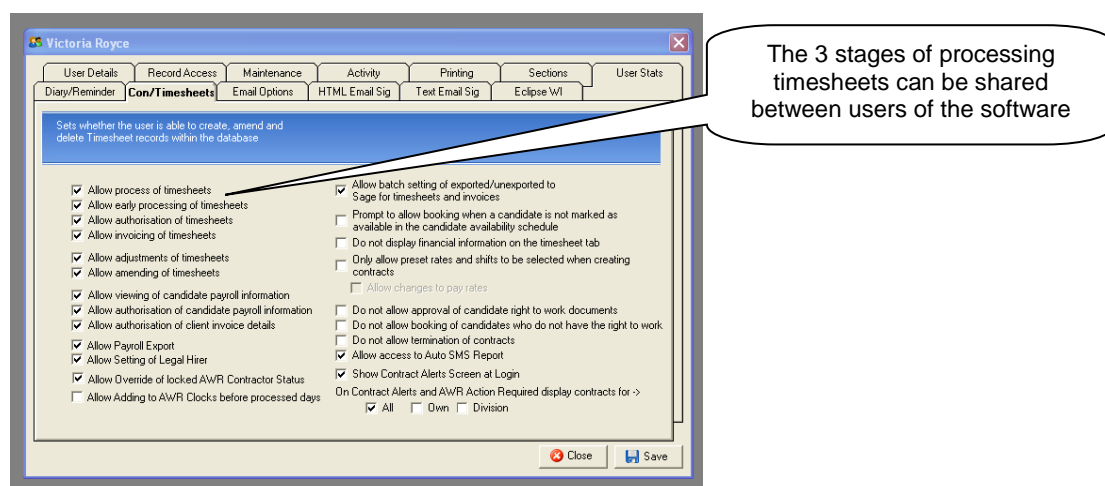
Allow process of timesheets:
This is the first step of the timesheet management and the point at which timesheets are first checked against the Eclipse record. Timesheets are processed on or after the last day that the timesheet relates to.

Allow early processing of timesheets:
Allowing early processing of timesheets allows the timesheet to be processed from the first day that the timesheet relates to.

Allow authorisation of timesheets:
This is the second stage of the timesheet management process and occurs after the processing phase. This is usually the point at which the details are checked for the second time and amendments can still be made.

Allow invoicing of timesheets:
The final step is to Invoice the timesheet which creates the invoice record within Eclipse. These stages have been broken down into permissions so that control measures can be taken with multiple users potentially sharing the different levels of responsibility along the chain.

Allow adjustments of timesheets:
Adjustments to timesheets may take place once a timesheet has been invoiced. This action will create a new timesheet which will also need to be processed etc.

Allow amending of timesheets:
Where information in a timesheet record needs changing after it has been authorised, this is called an amendment. Those with this permission can simply select the 'Edit' button in the record and amend the figures where required. Where permission has not been granted to make amendments and the 'Edit' button is selected, Eclipse displays a warning prohibiting the action.

Allow Viewing of Candidate Payroll Information:
Selecting this option will allow access to view (but not amend) the 'Other Details' tab within candidate records which contains candidate payroll preferences and bank account details and AWR status. Where permission is denied, the 'Other Details' tab is entirely locked and cannot be viewed as shown below:
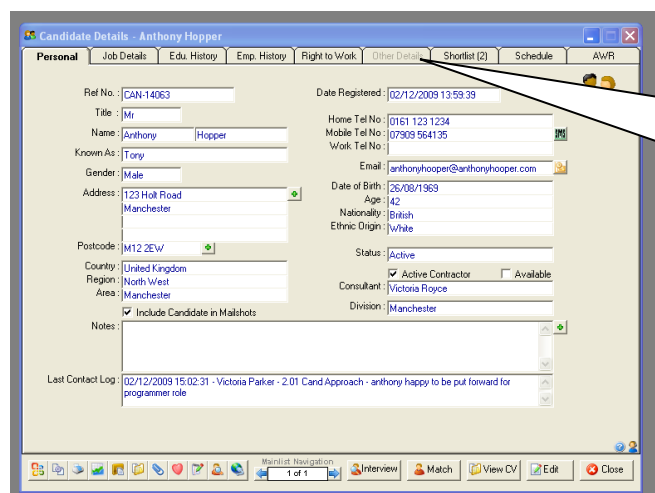
Where permission has been denied to VIEW candidate's payroll details, the 'Other Details' tab is locked and cannot be viewed.

Allow Authorisation of Candidate Payroll Information:
Selecting this option allows the user to edit candidate's payroll information within the 'Other Details' section and authorise the details by selecting the 'Payroll Information Authorised' tick box. This confirms the information is correct and locks the information for editing. The following screen demonstrates this:
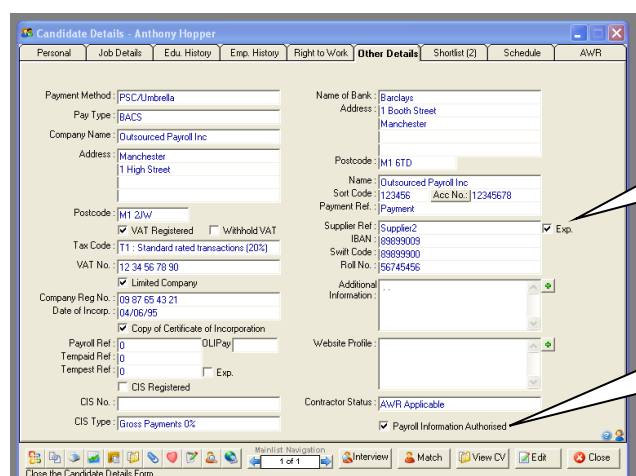
This example demonstrates where permission has been granted to amend and authorise payroll details

Selecting the 'Payroll Information Authorised' tick box locks the payroll details for editing

This information will now be carried through to any subsequent temp contracts for this particular candidate.

Allow Authorisation of Client Invoice Details:
Selecting this option allows the user to confirm clients' invoicing preferences are correct. Once the 'Invoice Details Authorised' button is selected within a client record the details are locked for editing.

Allow Setting of Legal Hirer:
This related to the AWR functionality within Eclipse. By default this permission is set to 'disabled' for all users. This setting allows the setting of the legal hirer in a multi-client, multi-branch setup within Eclipse. This is particularly important as not correctly linking client records to the correct 'Legal Hirer' client record in Eclipse could cause multiple clocks for the same legal hirer to run concurrently but seemingly unconnected, potentially risking a candidate missing out on equal treatment.

Allow Override of locked AWR Contractor Status:
When a temp contract record is created in Eclipse, the AWR contractor status of the candidate is 'locked in' to the contract record. This enables Eclipse to know whether or not this contract needs to be considered for an AWR clock and can be manually changed at any point up to the time that the first timesheet is processed. This permission enables elevated privileges for the user to change the status after the first timesheet has been processed in the case that a contract has been included or excluded from AWR incorrectly.

Allow Adding to AWR Clocks Before Processed Days:
This permission allows for information to be added to a candidate's AWR clock before any related timesheets are processed. For example this information could be a break in employment due to sickness etc.

Allow Batch Setting of Exported / Un-exported to Sage for Timesheets and Invoices:
The permission to allow batch setting of timesheets and invoices is only applicable where integration with a payroll and invoicing system is required. This setting allows a user to change the status of multiple records to exported or un-exported.

Prompt to Allow Booking when a candidate is Not Marked as Available in the Availability Schedule:
This setting only applies where the default setting for the candidate schedule is to assume that the candidate is 'unavailable' unless otherwise specified. If that is the case, if ticked, this setting will still allow the candidate to be booked onto a temp contract even if they are not marked as available in their schedule. Eclipse will inform the user that this is the case.

Do Not Display Financial Information on Timesheet Tab:
If ticked this will not display the values in the 'hours' and 'Mark-up' columns on the timesheet tab along with the cumulative totals at the foot of the list.

Only Allow Preset Rates and Shifts to be Selected When Creating Contracts:
This setting will only allow the user to select from default rates and shifts or those set up specifically for a client in the database. This prevents the user from creating temp contracts with ad-hoc pay rates for candidates and ad hoc invoice rates for clients. This setting is useful where all rates are pre-agreed with clients and the appropriate default templates are available

Allow Changes to Pay Rates:
This is an extension of the previous setting and allows the amendment of candidate pay rates within default and pre-set rate and shift templates.

Do Not Allow Approval of Candidate Right to Work Documents:
Selecting this option prevents the user from approving candidate right to work documents.

Do Not Allow Booking of Candidates Who Do Not Have The Right to Work Check:
This option prevents users from assigning candidates to temporary contracts where they do not comply with the candidate right to work feature. E.g. the candidate has documents outstanding.

Do Not Allow Termination of Contracts:
If ticked, this option will not allow the user to terminate temp contracts.

Allow Access to Auto SMS Report:
Where the Auto SMS feature is enabled, selecting this option allows access to a report via the 'Tools' menu, detailing SMS activity within Eclipse.

Show Contract Alerts Screen at Login - All / Own / Division:
These settings apply to the 'contract alerts' feature. This details contracts' that have ended without the assignment of a candidate and have therefore 'timed-out', and unassigned contracts that have started but not yet finished are therefore still have potential to profit. This alert will appear at log-in and will provide details of either 'all' contracts that fall into the above criteria, the users 'own' contacts or their 'divisions' contracts.

3 Configuring Eclipse Default Preferences:

There are three tabs in the Eclipse Default Preferences section of the Maintenance Menu that require some consideration in terms of using Eclipse for managing temporary contracts. These are the Temp Contract, Invoice and Timesheet tabs. The following section explains these in more detail.

3.1 Temp Contract Tab:

This tab sets the default values relating to temp contracts and contains the settings for the options described earlier in the Rates & Shifts section. These are the starting values that are initially selected when creating any new temp contract or rate and shift template from a client record or indeed global templates via the Maintenance Menu. Other options define additional aspects of the Contract's behaviour.

These are the % at which candidate holiday pay and employers NI are calculated

This box defines whether blank days in a candidates schedule should be treated as unavailable instead of available

These options define timesheet frequency and period end
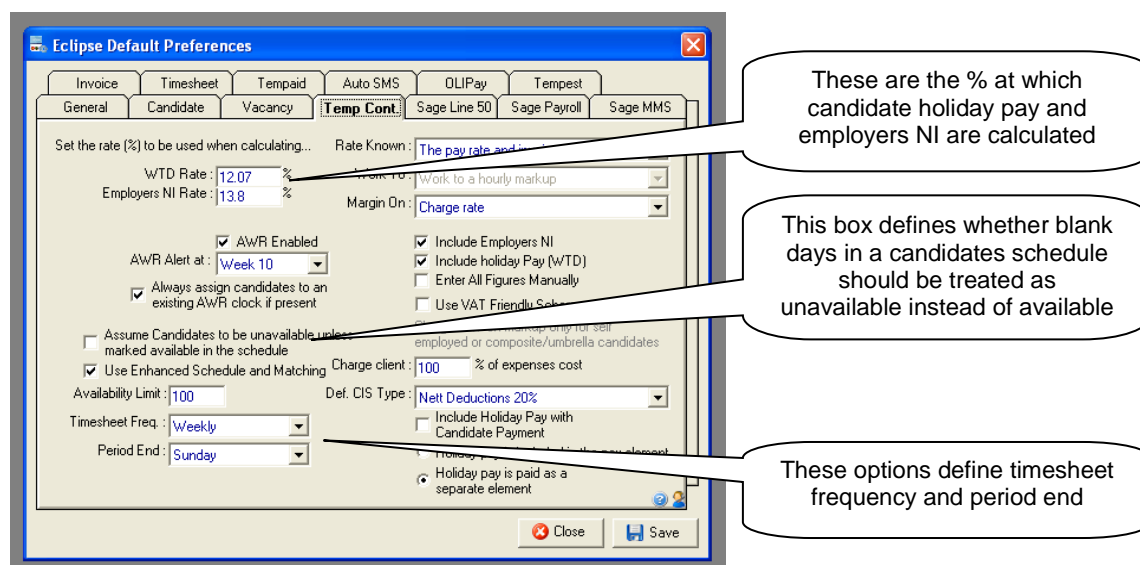
WTD Rate:
This is the percentage at which candidate holiday pay (Working Time Directive) calculations should be made. From April 2009 this figure is 10.17%. All new temporary contracts will display this value and will calculate candidate's holiday pay entitlement accordingly.

Employers NI Rate:
This is the percentage at which Employers National Insurance is calculated in Eclipse and is set to 12.8%. This calculation does **NOT** take into consideration the 'free pay' element where National Insurance is not applicable to the first portion of an employees' wage. The reason being that this allowance may have already been applied to a candidate's wage paid elsewhere and is therefore not applicable.

AWR Enabled (Tick Box):
This is the system default setting to enable / disable the AWR clock system. This setting is automatically enabled where the default country is set to 'United Kingdom'.

AWR Alert at:
Selecting a week in this field will mean that all Contracts with a clock at that stage or afterwards will be included in the contract warnings in the 'Contract Alerts' screen.

Always assign candidates to an existing AWR clock if present (Tick Box):
Ticking this box will automatically link a candidate to an existing AWR clock with the same legal hirer if there is one already in existence.

Assume candidates to be unavailable unless marked as available in the schedule:
This tick box defines whether or not blank days in a candidate's schedule are to be treated as available or unavailable. By default, Eclipse assumes that a blank day is available unless otherwise marked. Selecting this option will reverse the feature and consider candidates to be 'unavailable' unless marked as 'available' in the schedule.

Use Enhanced Schedule and Matching:
This tick box enables the enhanced schedule and matching feature where candidates can be assigned as available for certain shifts or hours rather than the day as a whole. This feature should be used in conjunction with the 'Candidate Shift Availability' and 'Candidate Reason for Un-availability' sections of the Maintenance Menu.

Availability Limit:
When performing a candidate match against a vacancy the amount entered will be the maximum amount of candidate that will be shown. It is set to 100 by default but can be made higher or lower if required.

Timesheet Frequency:
This is the frequency at which timesheets are due.

Period End:
This is the last day of the week that the timesheet relates to.
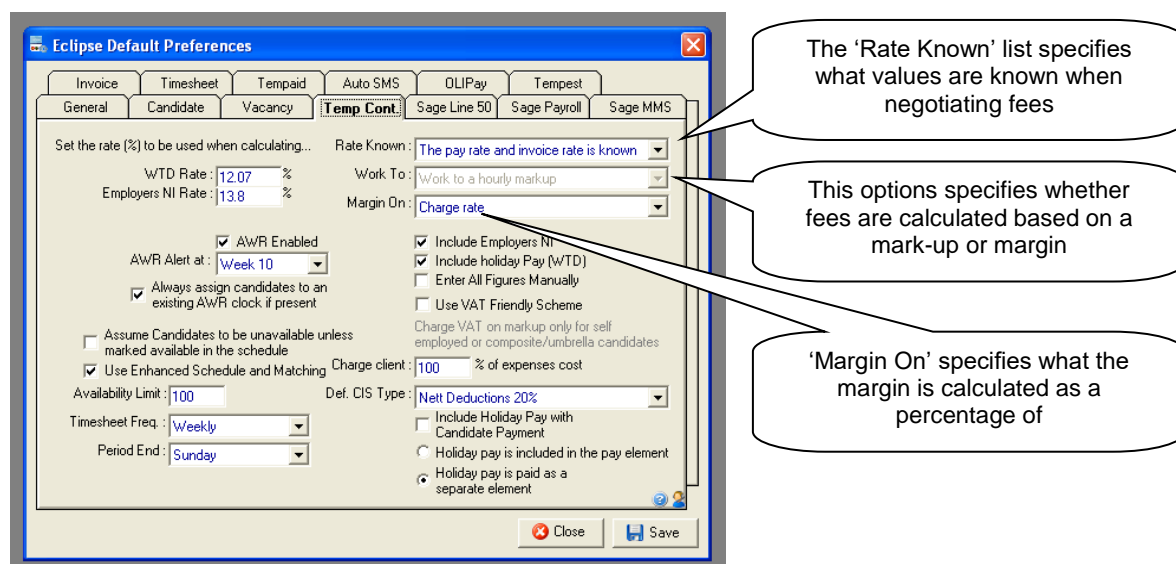
The three drop down lists at the top right hand side set the default values which help to calculate rates in Eclipse. These will also be copied through to all new temp contracts created in Eclipse.

Rate Known:
The 'Rate Known' list specifies what values are known when negotiating fees. The four options are:

- The pay rate is known
- The charge rate is known
- The invoice rate is known
- The pay rate and invoice rate are known

For the purpose of Eclipse, the definitions of 'pay rate', 'charge rate' and 'invoice rate' are:

- Pay rate: The gross pay the candidate will receive per unit of work (E.g. hourly / daily)
- Charge rate: The cost to the agency (pay rate + WTD + Employers NI)
- Invoice rate: The cost to the client

Work To:
The second list 'Work To' specifies whether fees are calculated based on a mark-up or margin. Therefore the two options are as follows:

- Work to an hourly mark-up: A fixed value in £'s per hour / day
- Work to an hourly margin: A percentage calculated on a choice of values

Margin On:
'Margin On' specifies what the margin is calculated as a percentage of:

- Pay rate only
- Pay rate and WTD
- Charge rate
- Invoice rate
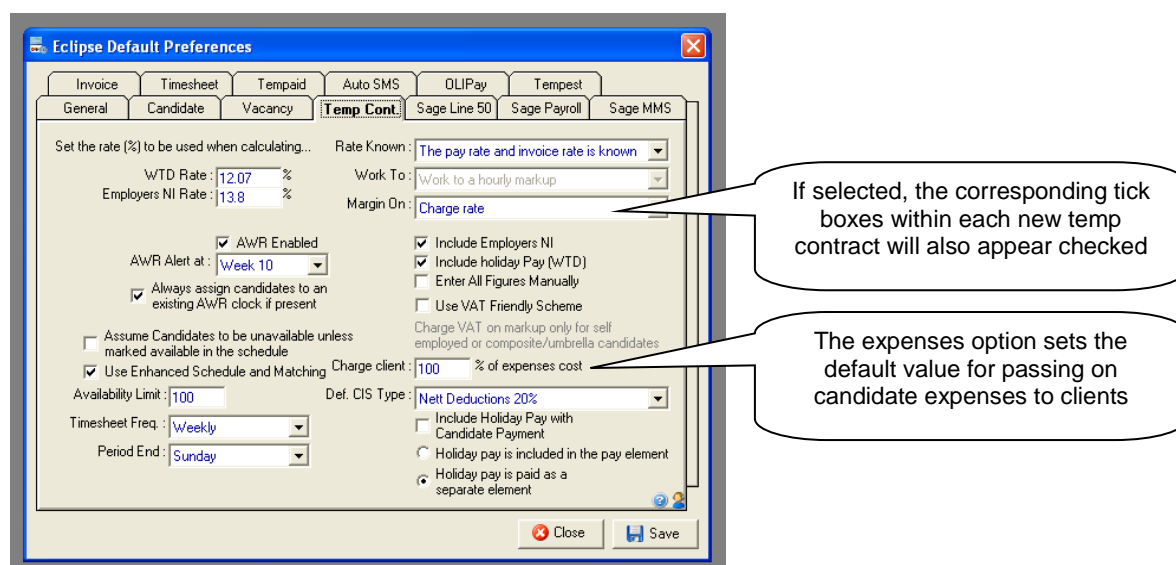
Include Employers NI:
The first tick box on the right hand side will, by default, tick the 'Include Employers NI' box on all new temp contracts and rate and shift templates.

Include Holiday Pay (WTD):
Secondly, ticking 'Include Holiday Pay (WTD)' ticks the corresponding box on all new contracts.

Enter All Figures Manually:
Selecting 'Enter All Figures Manually' does exactly as it suggests and unlocks all fields for manual entry.

Use VAT Friendly Scheme:
If the 'Use VAT Friendly Scheme' option is ticked, by default any contracts that are created for self employed or PSC/Umbrella candidates will only charge VAT on the mark-up portion of the invoice rather than the whole amount.

Expenses:
The expenses option sets the default percentage of candidate expenses to be charged back to clients. This potentially allows for a percentage increase to be added onto expenses costs or the percentage of expenses reduced, e.g. sharing expenses costs with clients. To add a mark-up, increase the percentage as required. E.g. to add 10% set the value to 110%. To split the cost in half, add a percentage value of 50%. This is only a default value and can be overridden on a per contract basis.

Default CIS Scheme:
This is the 'Construction Industry Scheme' and is only applicable to contracts associated with contractors in the construction industry. For these candidates it is compulsory to be CIS registered. In terms of Eclipse, this means that candidates are paid as contractors but a percentage of their gross total pay is deducted through the CIS scheme and passed onto the Department of Work and Pensions. Choose the default option from the three available in the drop down menu, these are: Gross Payments 0%, Nett Deductions 20% and Net Deductions 30%. This percentage will be carried through to all candidate records where the CIS box is ticked. However, the option to change the percentage is available in the candidate record itself.

Include Holiday Pay with Candidate Payment:
This option relates to the export of information to Sage Payroll. Where this box is ticked the holiday pay value will be exported to Sage. If not ticked then no holiday pay value is exported. This is the master setting however this can be changed on a per contract basis.

Holiday Pay is Included in the Pay Element:
This option allows for instances where candidate's holiday pay is included within their basic pay rate instead of 'in addition to' their basic pay. In instances where this option is selected, the WTD (Working Time Directive) column within the rate calculations should be left at £0.00.

Holiday Pay is Paid as a Separate Element:
The final option on this screen allows for instances where candidate's holiday pay is calculated in addition to their basic pay rate instead of 'including' it in their basic pay. In instances where this option is selected, the WTD (Working Time Directive) column within the rate calculations will display the holiday pay value.

3.2 Invoice Tab:

The settings in the 'Invoice' tab set the default values for payment terms, invoice templates for the batch printing option and invoice referencing. Please note that invoice terms and templates can be altered on an individual client level where required. Additional invoice templates can be created in the 'Document Templates' section of the 'Maintenance Menu'.

'Invoice Prefix' specifies what will appear before the reference number on invoices generated in Eclipse

'Invoice Offset' alters the starting point for invoice numbering in Eclipse

The VAT recalculation option will become redundant after January 2010
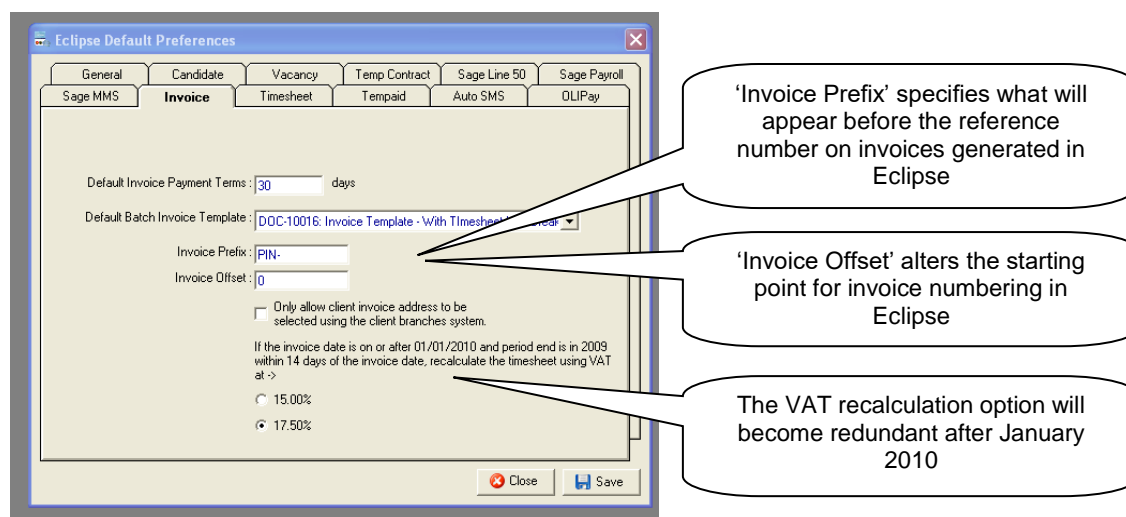
Default Invoice Payment Terms:
This option specifies the default payment terms to be carried through to client records and subsequently invoices. Please not that this value can be amended where necessary on a per client basis.

Default Batch Invoice Template:
Within Eclipse there is the functionality to batch print invoices. This option sets the default invoice template which will be used in the event of a batch print run. Upon purchase of Eclipse, the system provides two basic example templates, one suitable for permanent invoices and a second for temporary invoices. These templates can be amended as required or completely new versions configured. Selecting the drop down menu here will display all templates configured in relation to invoices. Choose the option which is most likely applicable to the majority of clients. Please note that within each individual client record the template option can be amended if necessary.

Invoice Prefix:
The invoice prefix field specifies what will appear before the reference number on invoices generated in Eclipse. 'PIN' is the default but this can be altered as desired.

Invoice Offset:
'Invoice Offset' alters the starting point for invoice numbering in Eclipse. For example, if the final invoice number of an existing system stands at 99 and the first invoice to be generated in Eclipse needs to be 100, then the invoice offset would be 99.

Only allow client invoice address to be selected using the client branches system:
Within the 'Branches / Financial' tab of each client record it is possible to enter an invoice address for the client that differs from the client address entered on the 'Client Details' tab. Where this option is left un-ticked the invoice address can be manually typed or selected from a drop down list of related branches. Where this option is ticked, only the address of a related branch can be selected.

3.3 Timesheet Tab:

The next tab of Eclipse Default Preferences relates to timesheets and the options related to the process, authorisation and invoicing of those timesheets in Eclipse.

This option only allows timesheets to be processed and authorised using the fax / image method

Use the green '+' button to specify the folder in which faxed imaged of the timesheets will be saved

By adding a value in this section allows you to set the national living wage for candidates over the age of 25.

Only allow timesheets to be processes and authorised using the fax/image method:
Placing a tick in this box prevents the processing and invoicing of timesheets using any method other than the fax / image feature.

Use the 'Timesheet Queue Folder per Division system:
Where users are assigned to a division and the fax / image method is employed to process and authorise timesheets, selecting this option will allow for a queuing system. For example, in the instance where are three divisions within a company, a timesheet folder per division can be configured. As the timesheets come in via the faxed image method they can then be saved into the relevant folder.

To assign a timesheet folder to a division, re-visit the user administration section of the maintenance menu and double click on a division. Locate the folder via the green '+' button which will open the Windows file manager.

On the process timesheet by image form, filter out timesheets where the rates are not agreed
As it suggests, selecting this option will only display timesheets records if their rates have been agreed with the client.

Timesheet Image Folder:
Where timesheets are to be processed and authorised using the fax / image method but NOT the timesheet queuing system, use the green '+' button to open the Windows file manager and locate the folder in which the timesheets will be saved.

Processing without Signed Contract:
This option is a control feature associated with signed contracts. Where a copy of a signed contract is not present in the temp contract record in Eclipse the preference can be set to simply 'Allow' the processing of associated timesheets, 'Warn' that a copy of the contract has not been attached but still allow the processing of timesheets or 'Prevent' the processing of any associated timesheets until the signed contract has been attached.

Processing Without Invoice Address Approved:
Where a client's invoice address has not been approved within the 'Branches / Financial' tab of the client record, this option will either 'Allow', 'Warn' or 'Prevent' the processing of any associated timesheets until it has been approved.

Processing Without PO Number:
Where it has been specified in the 'Branches / Financial' tab of a client record that a purchase order number is required on any associated invoices before they can be paid, this option will either 'Allow', 'Warn' or 'Prevent' the processing of any timesheets until the purchase order number has been entered into the associated temp contract record.

Processing without AWR equal treatment:
Every Contract that is created and eligible for AWR has a tick box which defines whether or not the rates associated with that Contract can be deemed to be equivalent to Equal Treatment Comparators. Eclipse has a function that will allow the decision of whether to "Warn", "Block" or "Allow" when trying to process a timesheet that does not have this tick box ticked. The default value when the update is installed is "Warn" which will display a pop up warning to the user but give them the option to process the timesheet anyway.

Invoicing without Invoice Address Approved:
Where a client's invoice address has not been approved within the 'Branches / Financial' tab of the client record, this option will again 'Allow', 'Warn' or 'Prevent' the invoicing of any associated timesheets until it has been approved.

Invoicing without PO Number:
Where it has been specified in the 'Branches / Financial' tab of a client record that a purchase order number is required on any associated invoices before they can be paid, this option will again 'Allow', 'Warn' or 'Prevent' the invoicing of any associated timesheets until the purchase order number has been entered into the associated temp contract record.

Assign candidate where the client invoice address not approved:
Where a client's invoice address has not been approved and a candidate is assigned to a related temp contract, Eclipse gives the options to either 'Allow' the candidate to be assigned, 'Warn' that the client's invoice address has not yet been approved or 'Prevent' the candidate from being assigned. This is particularly useful in temporary and contract recruitment where it is imperative that the correct invoicing preferences have been configured as these preferences impact on timesheet and invoice management within Eclipse.

Candidate Date of Birth Not Present
If the candidates date of birth is not present on the candidate record, then Eclipse can 'Warn' you that the date of birth is not present, 'Allow' will let you save the candidate record without a date of birth present and 'Prevent' will not let you save the record without a date of birth present. This permission is connected to the national Living wage on the next paragraph.

Over 25 and below the specified amount
If a candidate is over the age of 25 and below the threshold stated Eclipse can 'Warn' you that the candidate is 25 or above and below the threshold at the point of being assigned to a contract, 'Allow' will ignore that the candidate is below the threshold at the point of being assigned to a contract, and 'Prevent' will stop you from assigning a candidate to a booking if aged 25 or above and below the set threshold.

4 Configuring Candidate PSC/Umbrella Companies:

This section need only be considered where temps or contractors are paid through a PSC (Personal Services Company) or umbrella company. Details of each PSC or Umbrella company can only be configured via the Maintenance menu. On an individual candidate basis, where the temp or contractor is paid via a PSC or Umbrella, the appropriate details can be selected from a drop down menu. This prevents the need for repetitive entry of the same PSC or Umbrella details.

This feature also enables Eclipse to group candidates by PSC or Umbrella for searching and reporting on timesheets. Additionally, where a payroll export bolt-on is activated, candidate payments can be grouped for export.
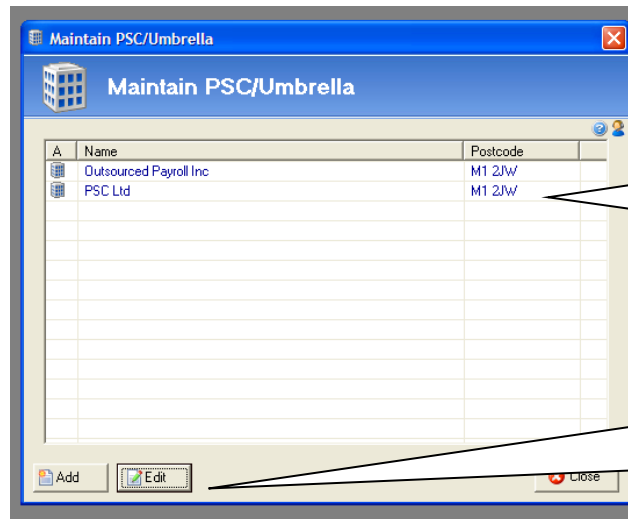
This section need only be considered where temps or contractors are paid through a 'PSC' or 'Umbrella' company

Maintenance of this section is performed in much the same way as the other sections of the Eclipse Maintenance Menu

Adding and editing of this section works in the same way as with the other Maintenance Menu options. Clicking the 'Add' or 'Edit' buttons open the 'PSC / Umbrella Details' screen as shown below.
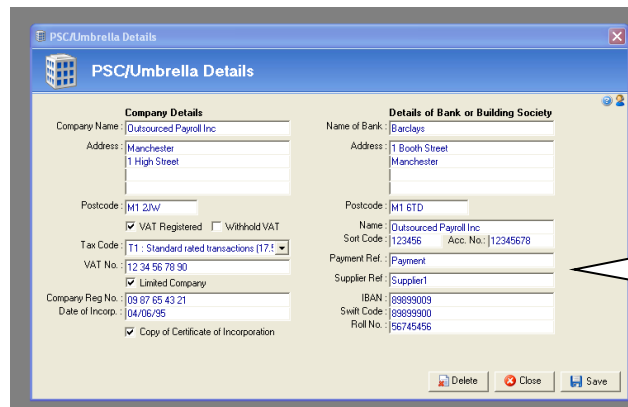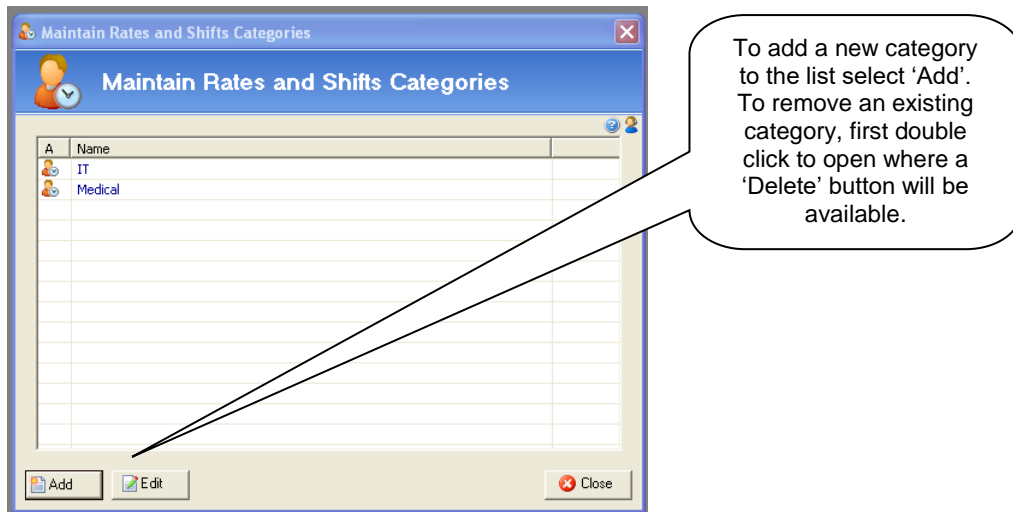
The details entered within this screen will be copied through to candidate records when linking them to particular PSC or Umbrella companies

The details entered within this screen are then automatically copied through to candidate records when linking them to a particular PSC or Umbrella company. This ensures that all information is accurate for all candidates paid in this manner.

5 Configuring Rate & Shift Categories:
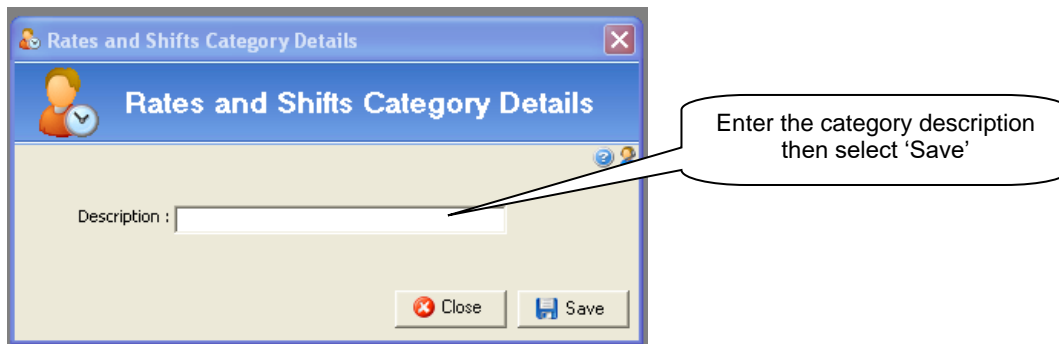
This section is used in conjunction with 'Default Rates and Shifts' which are discussed in the following section. The rates and shifts category section allows a customisable list to be created and assigned to rates and shifts presets. Each client can then be assigned to a category (in the Branches / Financial tab of each individual client record) and when picking a rate and shift present from the contract forms it will filter the presets according to the category selected.

As with other sections of the Maintenance Menu, this section is initially blank when purchasing Eclipse. The example below shows the categories that have already been configured.

To add a new category to the list select 'Add'. To remove an existing category, first double click to open where a 'Delete' button will be available.

To add a new category select the 'Add' button, the following screen is displayed:

Enter the category description then select 'Save'

Enter the category description and then select 'Save'. In order to remove a category, open an existing category where a 'Delete' button will be available. The 'Client Rate Category' is searchable from both the client search form and also the contract search form.

6 Configuring Rate and Shift Templates:

Rate and shift templates can be set on a system wide or client specific basis. Setting templates for common temp contract bookings will provide a shortcut when creating new bookings in Eclipse.

6.1 Default Rate and Shift Templates:

System wide rate and shift templates can be used to create temp contract bookings for any client in the database where certain information will be pre-populated. These are known as default rates and shifts. The same feature is available for setting rate and shift templates where agreements are in place for individual clients. This is performed within the individual client record rather than the Maintenance menu. In addition to using rate and shift templates, rates and shifts can be created on a 'per' booking / ad hoc basis at the point of creating a temp contract in Eclipse.

As with other sections of the Maintenance menu, this section is initially blank when purchasing Eclipse. The example below shows templates that have already been configured and clearly shows the template 'Description', the 'Industry' that the template relates to, the 'Rates and Shifts Category' and whether or not the rates are equal treatment comparable (ET) in relation to AWR.

To open any of these templates simply double click.
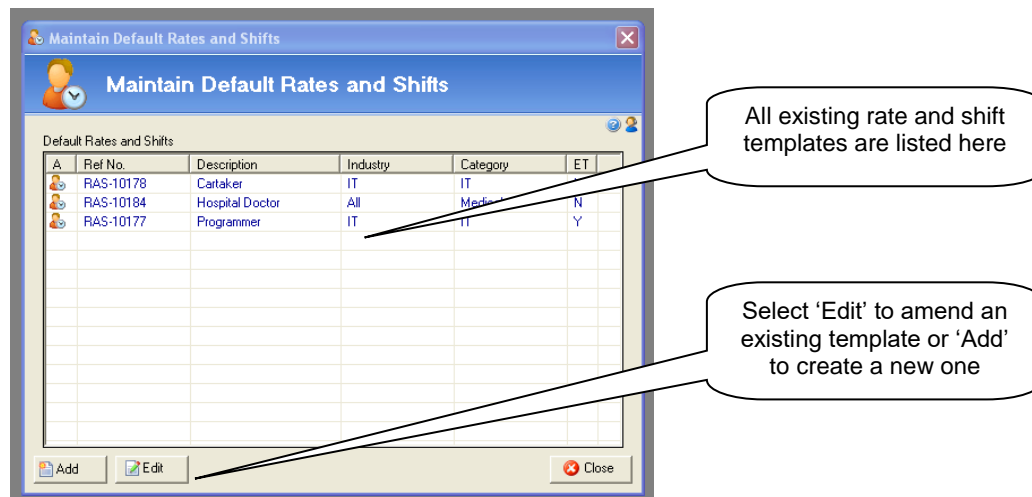
To create a default rate and shift template, select the 'Add' button from the foot of the screen. The following 'Client Rates and Shifts' screen will appear:

To aid explanation, the screen has been broken down into three sections as follows:

Section 1:   Information known
Section 2:   Rates
Section 3:   Shift pattern
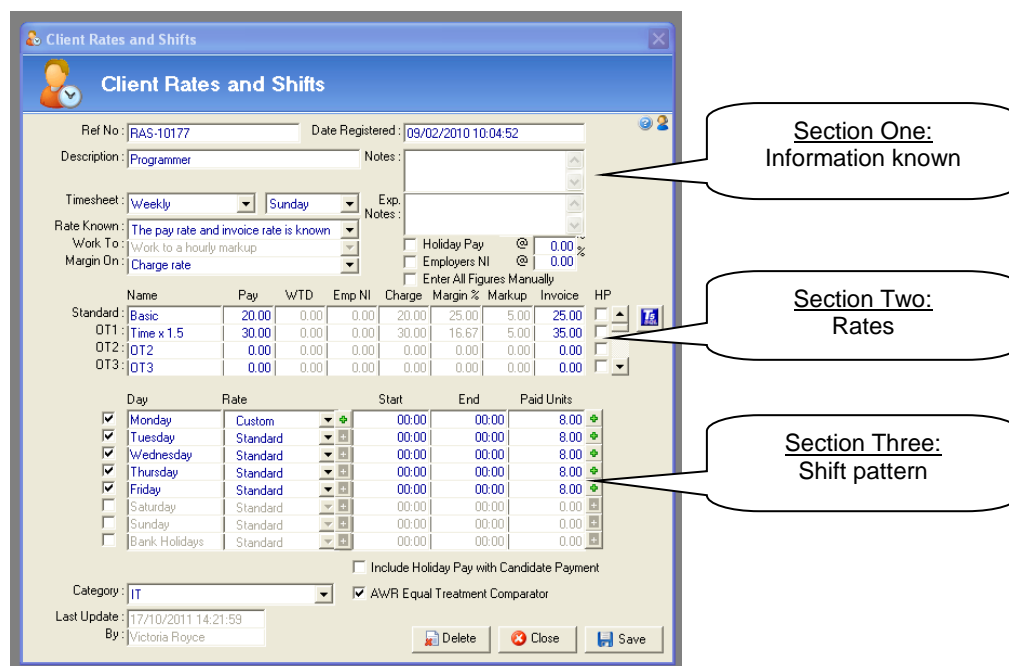
Section One: Information Known:

The top section of this screen allows for some specific information about the template:

Ref No:
When the rates and shift template is saved it will be allocated a reference number beginning with 'RAS'. Until it is saved the reference number appears as 'RAS-NEW'.

Date Registered:
This captures the time and date of template creation. This cannot be amended or deleted.

Description:
The description of the rates and shift template can be either the specific job title or something more general e.g. 'minimum wage / basic shift'. The example above shows a minimum wage calculation.

Notes:
This is a free notes box which can be used to highlight any additional information about the rate and shift template. Any notes entered here will be copied through to any subsequent contract and timesheet records.

Exp Notes:
This is a free notes box which can be used to highlight any expenses information. Any notes entered here will be copied through to any subsequent contract and timesheet records.

Timesheet:
The two fields in this section indicate the timesheet frequency and the last working day of the working week. These values can be set in the Eclipse Default Preferences section of the Maintenance menu.

The following three fields indicate how the rates are calculated and based on what values:

Rate Known:
From this drop down, specify which values are 'known' when negotiating fees. The four options are as follows:

- The pay rate is known
- The charge rate is known
- The invoice rate is known
- The pay rate and invoice rate are known

For the purpose of Eclipse, the definitions of 'pay rate', 'charge rate' and 'invoice rate' are as follows:

- Pay rate: The gross pay the candidate will receive per unit of work (E.g. hourly / daily)
- Charge rate: The cost to the agency (pay rate + WTD + Employers NI)
- Invoice rate: The cost to the client

Note: The default preference can be set via the 'Eclipse Default Preferences' section of the 'Maintenance Menu' which is explained later in this guide.

Work To:
From this drop-down menu, specify whether fees are calculated based on a mark-up or margin:

- Work to an hourly mark-up: A fixed value in £'s per hour / day
- Work to an hourly margin: A percentage calculated on a choice of values

Note: The default preference can be set via the 'Eclipse Default Preferences' section of the 'Maintenance Menu' which is explained later in this guide.

Margin On:
If rates are calculated based on a percentage margin, specify what the margin is calculated as a percentage of:

- Pay rate only
- Pay rate and WTD
- Charge rate
- Invoice rate

Note: The default preference can be set via the 'Eclipse Default Preferences' section of the 'Maintenance Menu' which is explained later in this guide.

Holiday Pay:
To include holiday pay in the rate calculations, tick this box. The default value set in 'Eclipse Default Preferences' (Explained later in this guide) will automatically appear in the box to the right. From 1st April 2009, the 'Working Time Directive' value is set at 12.07%.

Employers NI:
Similarly to holiday pay, to include employers National Insurance contributions in the calculation, this box should be ticked and the percentage entered at 12.8%. This value is also set via the 'Eclipse Default Preferences' section of the Maintenance Menu.

Please note this calculation does not take into consideration the 'free pay' element where National Insurance is not applicable to the first portion of an employees' wage. The reason being that this allowance may have already been applied to a candidate's wage paid elsewhere and is therefore not applicable.

Enter All Figures Manually:
Ticking this box allows the user to manually enter all the figures in 'section two' when calculating rates.

Section Two: Rates:

In this section, up to ten pay rates calculations can be entered e.g. standard rate, overtime rate, day rate, night rate etc. By entering the known values as outlined above, Eclipse will automatically calculate the remaining fields in the grid.

In this section up to ten pay rate calculations can be made

The following section explains each of the nine columns in the rates calculation box:

Name:
On the left of the grid each row is labelled E.g. Standard, OT1, OT2 to indicate the various pay rates associated with the template. The same labels appear in the first column of the grid itself. These labels can be changed as required E.g. Day Rate, Night Rate and Overtime Rate. It is possible to set up to 10 pay rates per contract.

Pay:
The 'Pay' column indicates the amount the candidate will receive per unit of work. The unit can be either hourly, daily or by shift.

WTD:
The amount of 'Working Time Directive', otherwise known as holiday pay, is automatically calculated assuming the 'Holiday Pay' box is ticked and the percentage indicated in the section above. The holiday pay is only calculated for those rates where the 'HP' box is ticked. (See 'HP' description below)

Employers National Insurance:
This is the value of 'Employers National Insurance' contribution payable assuming the box is ticked in the section above and the percentage value indicated.

Charge:
The 'Charge' is the cost of the booking to the agency per unit worked.
For example, for PAYE candidates: Charge = Pay + WTD + Employers National Insurance

Margin %:
The 'Margin' is the % profit earned. As indicated above, the margin can be calculated on several values: the pay rate only, the pay rate + WTD, the charge rate or the invoice rate. The mark-up value will alter dependent upon what the margin % is calculated on.

Mark-Up:
The 'Mark-Up' is the profit per unit of pay to the agency after deductions.

Invoice:
The 'invoice' rate is the amount invoiced or charged to the client.

HP:
This tick box includes or excludes 'holiday pay' in the individual rate calculations. Please note that holiday pay is not usually included in overtime payments. Holiday Pay is also known As WTR (Working time Regulation) or WTD (Working Time Directive) and is labelled as WTD in the rates section.

Section Three: Shift Pattern:

The final section sets the shift pattern for the template. Specify which days of the week a candidate may be required to work and at what pay rate. If the hours of work are known, these should be specified.

To indicate that a particular day of the week may appear in the shift pattern, tick the corresponding box on the far left of the grid. These are not to be confused with the 'actual' requirement days, rather the 'typical' shift pattern

Select the desired pay rate from the drop down menu. Be aware that Eclipse automatically defaults to the 'Standard' pay rate unless otherwise specified. There is the option to create a 'Custom' pay rate within this section which allows the input of multiple rates on the same day e.g. 'Standard' rate for the first 4 hours and then OT1 thereafter. Selecting the 'Custom' option displays the following window:

In the example above 'Standard' rate of pay will be paid up to 8 hours. Between 8 and 10 hours the 'OT1' rate will be paid. Anything over 10 hours will be paid at 'OT2' rate. In terms of related timesheets, Eclipse will populate the 'OT' fields accordingly.

Back in the main screen, if known, enter the typical start and end times of the shift. It is not necessary to specify these values however this will have an effect on the availability of any candidates assigned to a temp contract using this particular template.

Finally, enter the number of paid units per day. If the rates in section two were calculated on an hourly basis, the number of paid units will be the number of hours to be worked per day. If the pay rate calculated above was a daily rate, the number of paid units will be '1'.

If the pay rate and shift pattern is consistent throughout the week, there is no need to repeatedly enter the details, simply click the [+] on the right of the first line and the details will be copied down the grid to the other days selected by a [Tick] on the left.

Include Holiday Pay With Candidate Payment:
Selecting this option indicates that the candidate's holiday pay will been calculated within their pay rate and not in addition to their pay rate. If this is the case, ensure to un-tick the holiday pay box on the right of the pay rate line so the WTD value appears as £0

AWR Equal Treatment Comparator (Tick Box):
Setting 'Equal Treatment' rate templates in Eclipse is one of the most important aspects of managing AWR compliance. These templates are used as 'Equal Treatment' safe comparator rates when setting up Equal Treatment Contracts and can be used when creating a Contract. If a tick is placed in the 'AWR Equal Treatment Comparator' box, then this will copy through to the Contract, allowing uninterrupted processing of timesheets and negating the need to split a Contract when equal treatment is   reached.

Category:
Choose the rate and shift category from the list. In this example the 'IT' category has been chosen. Going forward, where client records have been placed into the 'IT' category, only rate and shift pre-sets relating to 'IT' will be displayed in the contract forms when choosing pre-set rates and shifts templates
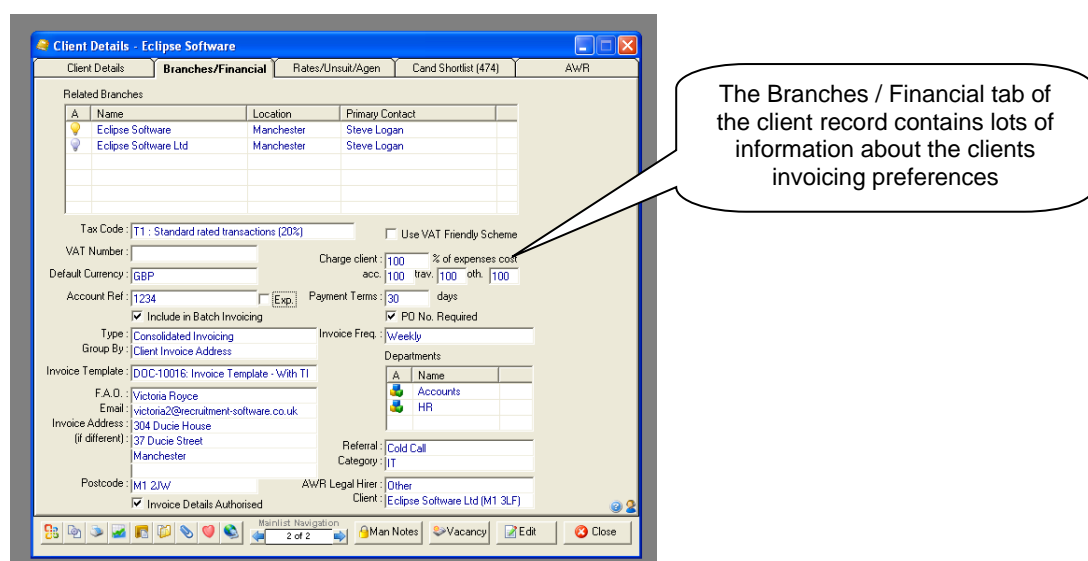
On completion of the template, select 'Save. The template will now be available to use in conjunction with any client in the Eclipse database.

7 Configuring Client Records:

Client invoicing preferences are configured within the Branches / Financial tab of individual client records. This includes information such as the type of invoicing, preferred invoicing addresses and frequency. Although this information can be added by any user, only those with permission to do so can authorise it and therefore lock the details for editing.

In addition to this, Eclipse default preferences can be configured to allow, warn or prevent timesheets from being processed until certain information have been provided and confirmed within associated client records. Please refer to section 3.3 for more information on these default preferences. Ultimately this should prevent the instance where clients are issued invoices with incorrect details. There is also the facility within a client record to create a list of unsuitable candidates. Where candidates are named on this list Eclipse will not allow them to be assigned to a temporary contract for this client. Both client invoicing preferences and unsuitable list administration will be discussed in this section.

7.1 Client Invoicing Preferences:

The Branches / Financial tab of the client record contains lots of information about the clients invoicing preferences

Related Branches:
This section allows individual client records in Eclipse to be linked together. For example, where there are multiple branches or locations of the same client. The important thing to remember here is to first create the individual client records for each branch or location and then link them together.

The image above shows the clients 'Eclipse Software Ltd' and 'Eclipse Software' linked together with 'Eclipse Software Ltd' the head office and 'Eclipse Software the branch. The head office is identified with a lit light bulb. The 'Eclipse Software' record will also be updated at this point to show the link. Multiple client records can be linked together in this way. To switch the head office from one client to another, first highlight the client to be assigned as the head office and select 'Assign'. The head office will be amended in each of the linked records.

To link another client with Eclipse Software Ltd, select 'Add'. Eclipse will now ask a series of questions to ascertain whether the client currently being viewed is to be assigned as the head office or a branch. These questions are shown in the following examples. Answer the questions accordingly.

To link a client record with the one currently being viewed, select 'Add'

Eclipse will now ask a series of questions to ascertain whether the client currently being viewed is to be assigned as the head office or a branch
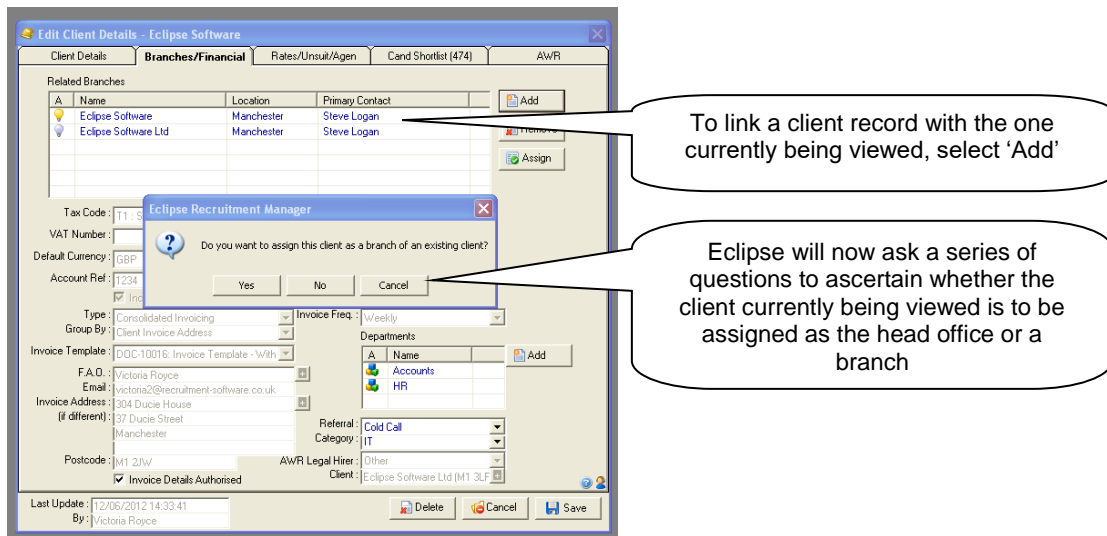
Where the answer to the above question 'Do you want to assign this client as a BRANCH of an existing client' is 'No', a second question is posed: 'Do you want to assign this client the HEAD OFFICE of an existing client':

Where the answer to the first question 'Do you want to assign this client as a BRANCH of an existing client' is 'No', a second question is posed

'Do you want to assign this client the HEAD OFFICE of an existing client?'

Finally, the search window is displayed. Search for the related branch and select 'Save'. Each client record will now be linked together and no further action is required.
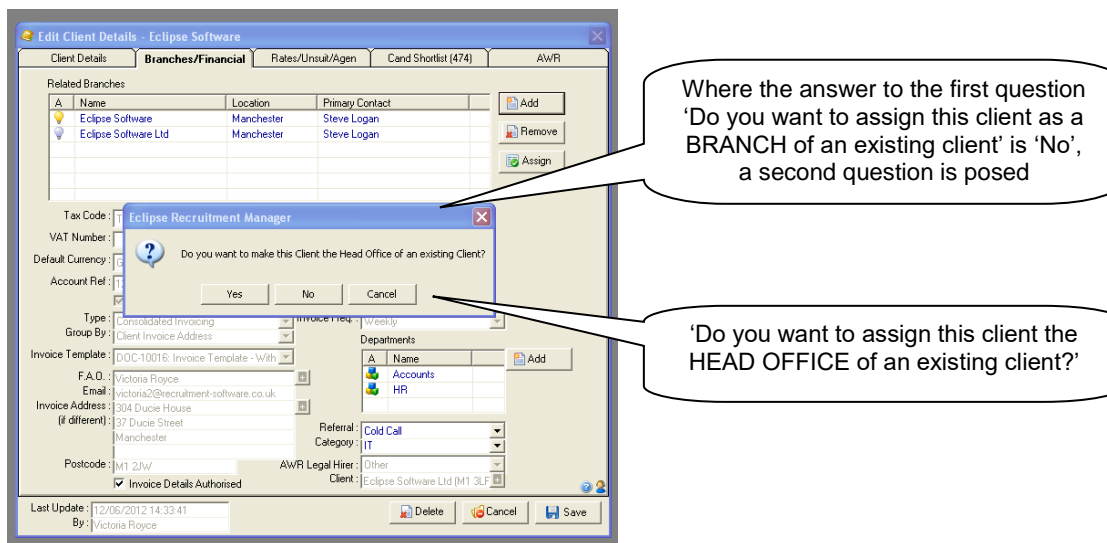
Finally, the search window is displayed. Search for the related branch and select 'Save'

Each client record will now be linked together and no further action is required.
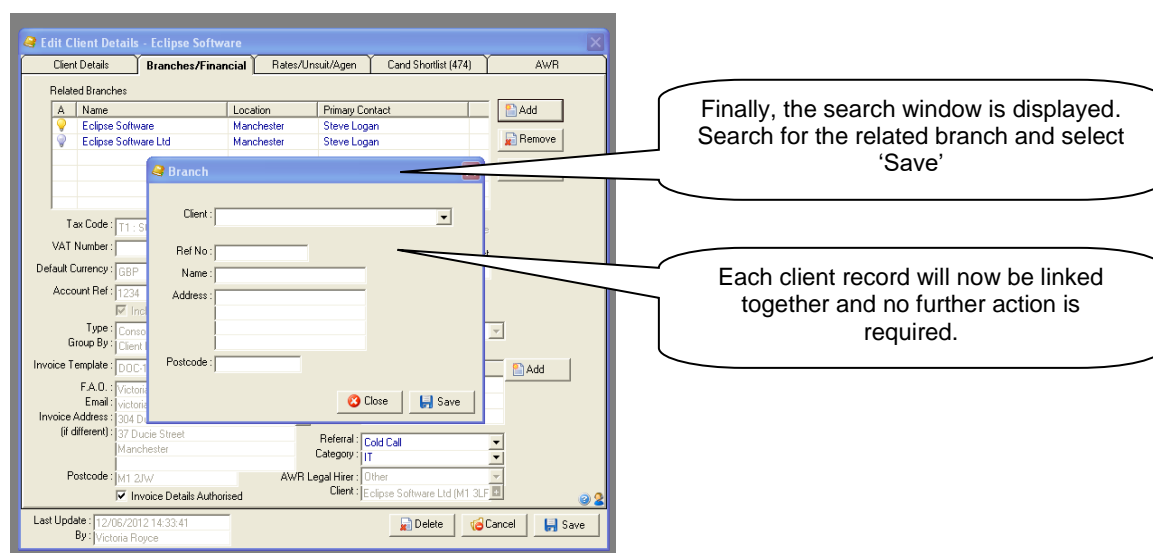
Tax Code:
Select the tax code applicable to the client from the drop down list. This will be the amount of tax added onto the value of invoices in Eclipse. Additional tax codes can be configured via the 'Tax Codes' section of the 'Maintenance Menu'.

VAT Number:
This is the Client's VAT number.

Default Currency:
The default currency field also relates to client invoices and is the currency that the invoice will be calculated in. Currencies and their exchange rates are configured via the 'Maintenance Menu' in the 'Currency Table' section.

Account Ref:
The 'Account Reference Number' is the number allocated to the client in the chose accounts software package. Where invoicing information is to be exported from Eclipse, this number is mandatory. The tick box to the right 'Exp' will only appear when certain back-office bolt-on's are activated and indicates that the client details have been exported from Eclipse.

Include in Batch Invoicing (Tick Box):
Placing a tick in this box will include the client in the batch invoicing process where required.

Type:
This also relates to client invoices, more specifically where the invoices relate to candidate timesheet values rather than permanent placement fees. There are two options in the drop down list: 'Invoice per timesheet' which creates an individual invoice for each and every time sheet relating to the client, and secondly, 'Consolidated Invoicing', which takes all timesheet values for the client and creates one invoice.

Group By:
This is used in the batch invoice creation and gives the option to group by client invoice address, contract location, timesheet number, employee, period end or timesheet PO number.

Invoice Template:
The 'Invoice Template' drop-down, lists all the invoicing templates available. Eclipse is supplied with two standard templates however, additional templates can be configured in the 'Document Templates' section of the 'Maintenance Menu'. Selecting the template here will ensure that all future invoices printed from Eclipse for the client will look the same.

FAO and E-mail:
FAO (For the attention of) indicates the name of the person who invoices should be addressed to anmd their e-mail address. As shown below, selecting the green '+' button displays a list of the client contacts from the 'Client Details' tab earlier:

Selecting the green '+' button displays a list of the client contacts from the 'Client Details' tab earlier

Select the desired client contact from the window then select 'Save'
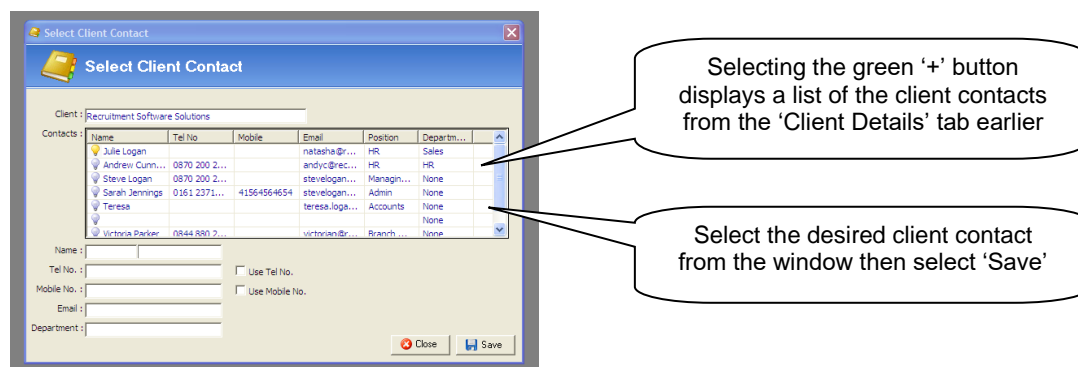
Invoice Address (if different):
Where invoices are to be sent to an address other than the main client address in the 'Client Details' tab, complete this section. Please note that a default preference can be set to only allow the selection of an invoicing address from a related branch. Please see the setting up Eclipse User Guide for more information. Where this setting is not selected, any other client record in the database can be chosen as the invoicing address regardless of whether it is linked to the client in question or an address can be manually entered.

Use VAT Friendly Scheme (Tick Box):
Ticking this box will apply the VAT friendly scheme to client invoices. This only applies VAT to the mark-up value of invoices and not the total NET value.

Charge Client 100% of Expenses Cost:
This section indicates what percentage of any candidate expenses are to be passed onto the client. The default value can be set via the 'Eclipse Default Preferences' section of the 'Maintenance Menu'. In addition to this, percentage splits can be configured for expenses relating to accommodation, travel and other. These settings will be pulled through to any temporary contracts and timesheets associated with this client.

Payment Terms:
This value can also be set via the 'Eclipse Default Preferences' section of the 'Maintenance Menu' and indicates what length of time clients have to pay their invoices once issued. This can be changed on an individual client basis from the default.

PO Number Required:
In some cases, clients issue a purchase order number upon confirmation of a placement. Where this is the case, the PO number must generally be present on the associated invoice before the funds will be released for payment. There is the facility in Eclipse to force the input of PO numbers before invoices can be created in relation to a placement. This will ultimately prevent the situation where invoices are issued to clients without a PO number and a request is subsequently made for a re-print, thus delaying payment. Place a tick in the box to indicate that a purchase order number is required and set the relevant Eclipse default preferences.

Invoice Frequency:
The drop down menu lists several options for invoice frequency and indicates at what intervals the client would prefer to receive their invoices.

Departments:
A list of departments within the client can be configured here e.g. 'HR', 'Accounts' etc. Once these have been set up, they are available from the 'Department' drop-down list in each individual client contact record accessed from the 'Client Details' tab.

Referral:
Select where initial contact with the client occurred. This list is also configured via the 'Client Referral' section of the 'Maintenance Menu'.

Category:
The 'Category' field relates to the configuration of default rates and shifts as discussed earlier within this guide.

AWR Legal Hirer and Client:
These fields relate to the management of the agency workers regulation within Eclipse.
For more information about the use of these fields and the AWR feature please refer to the AWR user guide:
www.recruitment-software.co.uk/download/guides/awr.pdf

Invoice Details Authorised [Tick Box]:
Once the client's preferences have been updated within the 'Branches / Financial' tab, tick this box to lock the information in place.

Note:
It is a permission to be able to authorise client invoicing details and therefore tick this box. There are also Eclipse Default Preferences associated with this box and timesheet management within Eclipse, both of which are explained fully in the 'Setting up Eclipse' user guide.
www.recruitment-software.co.uk/download/guides-setting_up_eclipse.pdf

7.2 Purchase Order Numbers:

In some cases, clients issue a purchase order number upon confirmation of a placement. Where this is the case, the PO number must generally be present on the associated invoice before the funds will be released for payment. There is the facility in Eclipse to force the input of PO numbers before invoices can be created in relation to a placement. This will ultimately prevent the situation where invoices are issued to clients without a PO number and a request is subsequently made for a re-print, thus delaying payment. The screen shot below shows the 'Branches / Financial' tab of a client record and indicates the field which specifies that a PO number is required for placements associated with this client.
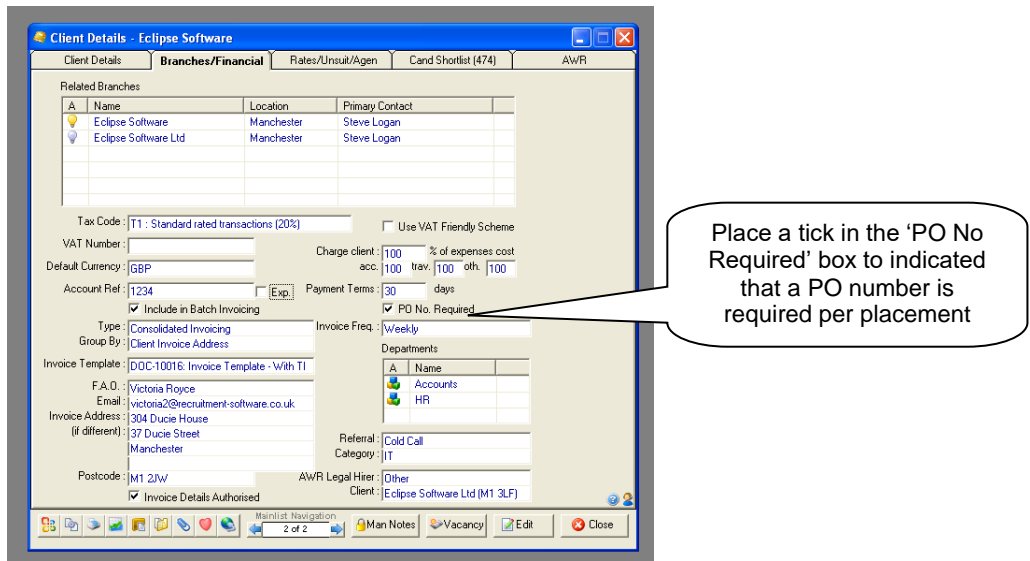
Place a tick in the 'PO No Required' box to indicated that a PO number is required per placement

Eclipse default preferences can be set to warn or prevent the invoicing of timesheets where a purchase order number is not present. Please see section 3.3 for more information regarding this default preference.

7.3 Authorising Client Invoice Details:

Once the client's invoicing preferences have been entered, selecting the 'Invoice Address Authorised' tick box will authorise the details and lock the information. Only those users with the relevant permission are able to authorise client invoice details. In conjunction with this tick box, Eclipse default preferences can be set to warn or prevent the invoicing of timesheets where client invoicing details have not been authorised. Please see section 3.3 for more information regarding this default preference.
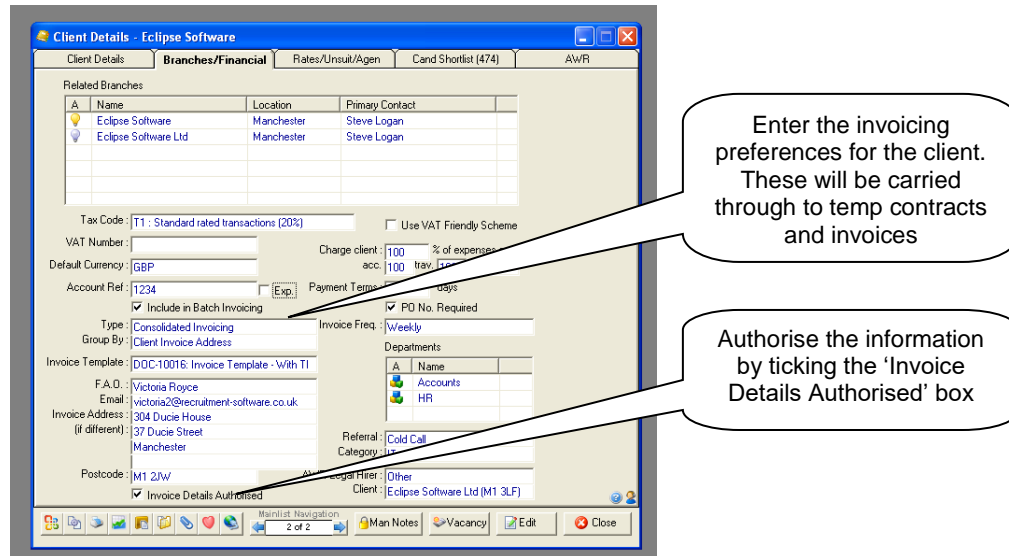
In the example above, the invoicing preferences have been updated and the details authorised. This information will be carried through to any associated temp contracts and invoices.

7.4 Client Unsuitable List Administration:

This feature allows candidates to be marked as unsuitable against specific clients in the database and can be accessed within both client and candidate records. However please note that this can only be carried out by those who have the permission to manage unsuitable list administration. The screen shot below shows the 'Rates / Unsuitable List /Agencies' tab of a client record where 'Robert Smith' has been identified as unsuitable for 'constantly being late'.
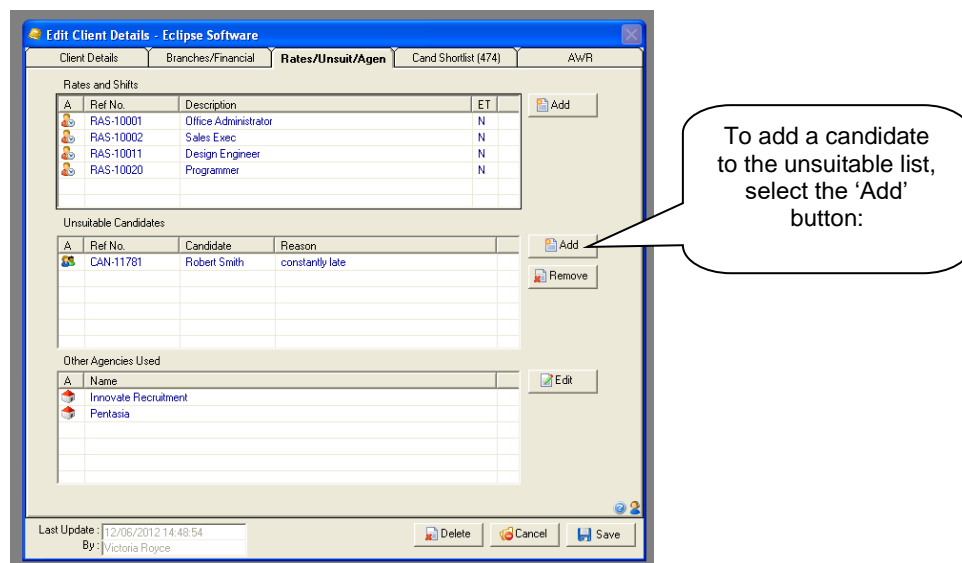
To list a candidate as unsuitable, first ensure the record is in the editable state. Secondly select 'Add' to the right of the 'Unsuitable Candidates' section. The following screen will appear:
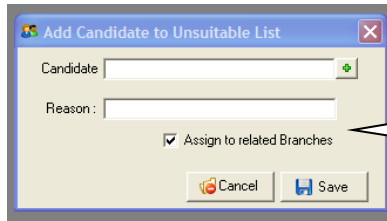
Search for the desired candidate, indicate a reason why they are unsuitable and 'assign to related branches' were applicable

Search for the desired candidate by selecting the green + button to the right of the candidate field. A reason must be provided before the information can be saved. Where the client has related branches, the candidate may also be labelled as unsuitable against those records by simply placing a tick in the 'Assign to related Branches' box

If a candidate has been listed as unsuitable against a client in the database, the information will also be displayed in the corresponding candidate record. By listing a candidate as 'unsuitable' for a particular client, certain safety features are activated. Firstly, when attempting to assign the candidate to a temp booking with that client, Eclipse will not allow the booking and provides a warning. Secondly, Eclipse will not allow the creation of an interview record where a candidate has been listed as unsuitable for the client.

8 Configuring Candidate Records:

Candidate payroll information, right to work documentation and availability are all stored within the candidate record in Eclipse. The following section explains the various payroll options available, the process of approving candidate right to work documents, how to indicate candidate availability and list clients in the database as unsuitable.

8.1 Configuring Candidate Payment Details:

Within a candidate record, the 'Other Details' tab stores information regarding the candidate's preferred payment method and associated bank account details. This screen is particularly important where information is to be exported from Eclipse and into a payroll / accounts package.

Note:
For FULL details regarding the export of information please refer to the associated relevant user guide.
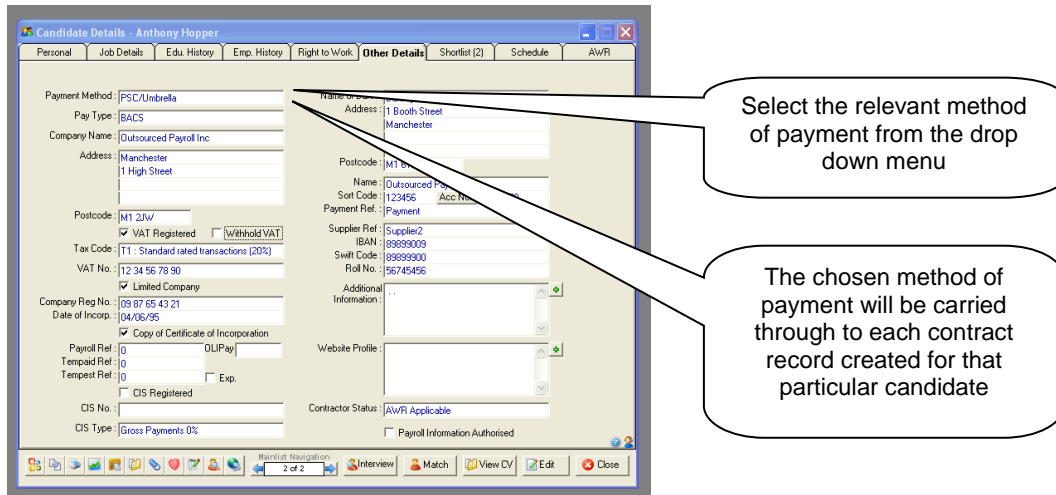
The 'Payment Method' drop down menu provides 4 options for the candidates preferred method of payment these are 'PAYE', 'Self Employed' and 'PSC/Umbrella' and '2nd Tier Agency'. The chosen method of payment will be carried through to each Contract record that is created for that particular candidate. Therefore the payment method type can be changed on a per contract basis.

8.1.1 PAYE Candidates:

Where a candidate is PAYE, select 'PAYE' from the payment method drop-down box. This is the default setting. Selecting PAYE unlocks the fields on the right hand side of the window. The candidate's bank account details can now be inputted into the relevant fields.
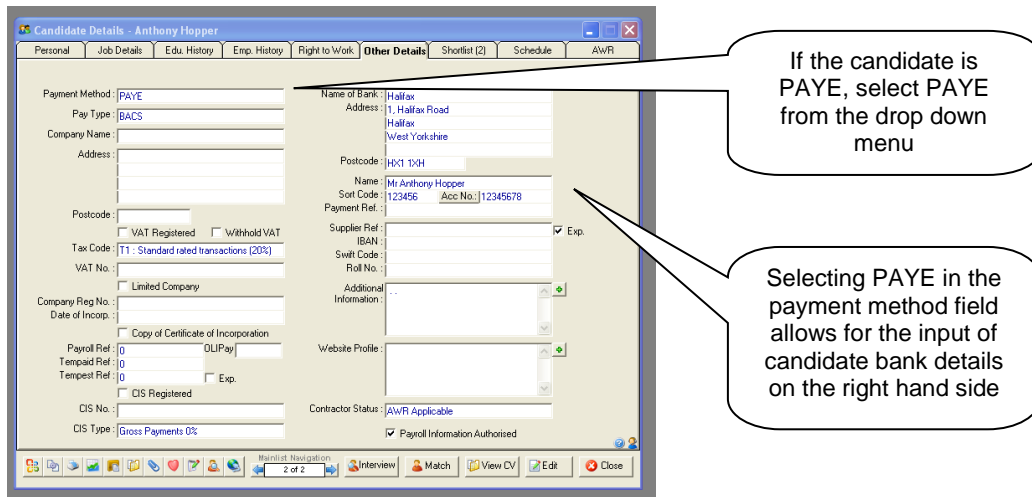
8.1.2 Self Employed Candidates:

If the payment method 'Self Employed' is selected, then all boxes are unlocked for manual entry. Sole-Traders, CIS self employed contractors and those registered as limited companies are labelled as 'self employed' within Eclipse. Where the candidate is a limited company contractor, ensure that the 'Company Registration Number' is provided. Eclipse differentiates between CIS self employed candidates and Limited company candidates using the 'Copy of Certificate of incorporation' tick box which should be selected for limited company candidates. Where a Candidate is VAT registered, complete the 'VAT Number' field.

Where 'self employed' is selected, all fields are unlocked for manual entry

Where a candidate is self employed, the sort code, account number and Sage supplier reference number are required

If the candidate is VAT registered, the VAT registered box must be ticked, the tax code selected an the VAT number entered

CIS Scheme:

For those contractors working within the construction industry, it is compulsory to be registered with The CIS (Construction Industry Scheme). In terms of Eclipse, this means that candidates are paid as contractors but a percentage of gross total pay is deducted through the CIS scheme and passed onto the Department of Work and Pensions. To indicate that a candidate is CIS registered, tick the CIS box and enter the registration number. Finally, select the percentage to be deducted from the drop down menu. The options are Gross Payments 0%, Nett Deductions 20% or Nett Deductions 30%.

To indicate that a candidate is CIS registered, tick the CIS box, enter the registration number and choose the percentage to be deducted
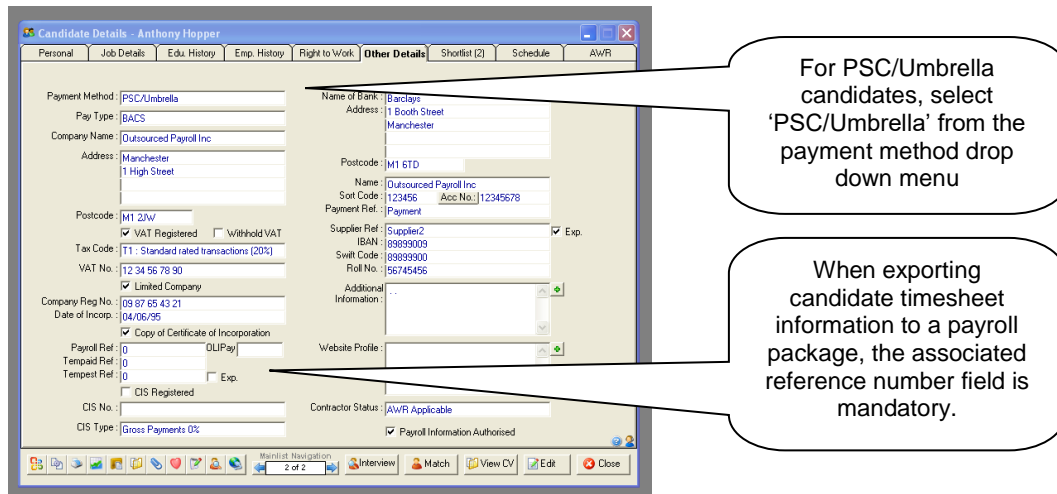
Note:

If a contractor is CIS registered there is no need to include holiday pay and employers national insurance in the rates calculation within the associated contract.

8.1.3 PSC/Umbrella Candidates:

As discussed earlier, candidate PSC/Umbrella companies are configured within the Eclipse Maintenance menu. Therefore when a candidate's payment method is PSC/Umbrella and this has been indicated in the payment method field, selecting the green '+' button to the right of the company name field (as indicated below) will present the list of PSC/Umbrella companies set up in the Maintenance menu. The information within that record will then be automatically populated in the candidate record.

Note:
When exporting candidate timesheet information to a payroll package, the associated reference number field is mandatory.

For PSC/Umbrella candidates, select 'PSC/Umbrella' from the payment method drop down menu

When exporting candidate timesheet information to a payroll package, the associated reference number field is mandatory.
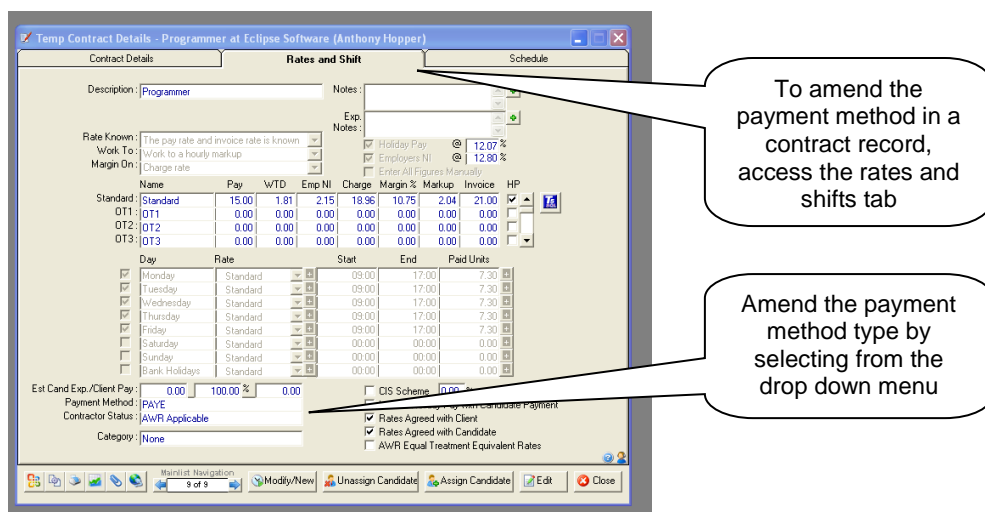
Note:
Changing the candidate's method of payment **WILL NOT** automatically change the method of payment in use on any contracts already set up for that candidate. This means that a candidate can start as PAYE and then become self employed at a later date without affecting any contracts in progress.

If payment method amendments on existing contracts are required and associated timesheets have already been processed, changes will need to be made manually on a per contract basis. In this case the contract needs to be split using the 'Modify / New' button so that the changes to the method of payment can be applied from the correct date. Please see the section on modifying contracts for a more detailed explanation of the process required to make such amendments.

Where a change to a candidate's payment method is required in an existing contract and NO associated timesheets have been processed, the correct payment method can be selected from the payment method field at the foot of the 'Rates and Shift' tab as shown below.

To amend the payment method in a contract record, access the rates and shifts tab

Amend the payment method type by selecting from the drop down menu

8.2 Candidate Right to Work:

The 'right to work' tab within the candidate record stores information relating to the various documents that may be required from candidates before they are 'sent to work' plus details of any other agencies the candidate may be registered with. The list of right to work documents is configured within the 'Maintenance Menu'.

Initially, each document appears in the list with a red cross. This indicates that the document has not been verified for that particular candidate. As documents are received, they can be 'ticked off' in the list, the status updated, notes added against the record and a copy of the document attached for future reference.

To open an individual record from the list, first ensure that the candidate record is in the editable state then double click on the desired document to open the following window:

Not Applicable [Tick Box]:
Where a document is not applicable to the candidate, place a tick in the box. This will shade out the document in the candidate's right to work list.

Description:
This is the name of the document as configured in the Eclipse Maintenance Menu and cannot be changed in the candidate record.

Status:
This could include information about the origin of a reference or who attached the scanned image of the document to the candidate's record
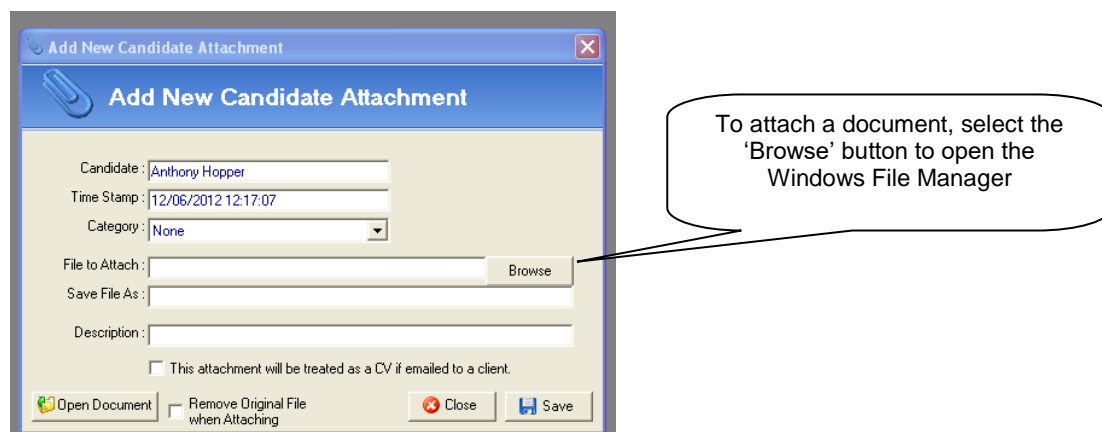
Notes:
This box is for any further information about the candidate's right to work document.

Expiry Date:
Where documents have an expiry date, select the date from the calendar using the + button.

Attachment:
To attach a document browse for the file using the '+' button alongside the 'Attachment' field, the following screen is displayed:

The screen shows the name of the candidate and the time and date. To place the new right to work attachment into a category, choose an option from the drop down list.

Note:
The 'Attachment category' list is configured within the Eclipse 'Maintenance Menu'

Selected 'Browse' to open the Windows file manager and search for the desired document to attach to the candidate's right to work page. Eclipse will complete the 'Save File As' field however a 'Description' must be entered E.g. Reference 1.

The tick box 'This attachment will be treated as a CV if e-mailed to a client' will ensure that the CV History feature will capture CV history associated with this document.

Finally, the tick box 'Remove Original File When Attaching' will remove the original file from its initial location once it is attached to the candidate's record. For example, if the file was saved on the user's desktop, My Documents or on a shared drive, it will be removed.

Date Attached:
This is the date the file was attached to the candidate's record.

Filename:
This is the name of the file attached to the candidate's record.

Approved [Tick Box]:
Eclipse will automatically enter the date attached. Finally to indicate that the document has been approved, place a tick in the 'Approved' box at the foot of the window. Once saved, the details will be updated in the 'right to work' tab:

Where a document is not required for verification, place a tick in the 'Not Applicable' box at the top of the window. Any documents assigned in this way will not count towards the candidate's right to work check-list.

Once the document is approved, the cross is exchanged for a green tick

Select 'Make unassigned entries N/A' to mark all remaining unapproved documents as not applicable

The CRB disclosure box is searchable within the candidate search feature

When all documents in the list are marked as either 'approved' or 'N/A', the 'Right to Work' box will be ticked

Eclipse displays how compliant the candidate is as a percentage. In this example the candidate is 50% compliant

Make Unassigned Entries Not Applicable:
Where a particular document is not required for verification for a candidate, either mark it as 'not applicable' within the individual document record or, to mark all remaining unassigned entries in the list not applicable, select the 'Mark unassigned entries N/A' button as indicated above. This will take all the documents in the list that still appear with a red cross in the list and replace them with 'N/A'. Once all documents in the list are either 'Approved' or marked as 'N/A', the 'Right to Work' box will be ticked. This cannot be ticked manually. The candidate now has the right to work check.

Right to Work [Tick Box]:
This box cannot be ticked manually. Eclipse will only tick this box once all the red crosses have been removed from the candidate's right to work list either by approving them or marking them as 'Not Applicable.

%Complete:
Eclipse calculates how compliant the candidate is as a percentage of the total number of documents required. In the example above only two documents were required from the candidate, one of which has been verified therefore the candidate is 50% compliant.

Depending on the individual user permissions granted within the 'Maintenance Menu', Candidates can either still be booked onto a temp contract booking without the right to work check or they cannot be assigned until all the relevant documents have been received. Either way, Eclipse provides a warning to the user at the point the candidate is assigned.

For more information regarding user permissions, please refer to the 'Setting up Eclipse' user guide: www.recruitment-software.co.uk/downlosd/guides/setting_up_eclipse.pdf

Eclipse contains two separate reports on candidate right to work. The first named 'Right to Work' provides a check list for verifying candidates have the right to work' showing a list of candidates and which documents are outstanding. The second report 'Right to Work Expiry' displays details of any candidates who have documents that are due to expire within 3 months of the current date based on the expiration dates entered against documents in the window above.

Both of these reports can be accessed by the 'Eclipse Reporting' button on the bottom right corner of the main Candidate interface.

CRB Disclosure and Date:
This field can be used to monitor candidate CRB checks. Used the drop down to select 'Yes', 'No' or 'Pending' Use the date field to indicate either the date the CRB was requested or returned.

Ref No:
This field is used to record the CRB reference number

Criminal Record Details:
This box can be used to store details of any criminal convictions the candidate may have. Use the green '+' button to expand the window where required.

Compliance Consultant:
This field allows for the selection of a consultant who is responsible for the compliance of the candidate. This may not necessarily be the same user who 'owns' the candidate record.

Immigration Status:
Used to record the immigration status of candidates

8.3 Candidate Scheduling:

The candidate schedule can be found in the final tab of a candidate record. On a basic level this can be used to indicate when the candidate is or is not available to work.

The schedule can be configured in one of two ways:

1)   To indicate that the candidate is AVAILABLE to work unless otherwise specified
2)   The candidate is UNAVAILABLE unless specified

The preference can be set in the Temp Contract tab of Eclipse Default Preferences.

Secondly, the candidate schedule also displays details of all temp contracts to which the candidate has been assigned and the status of any timesheets associated with those contracts.

In the example below option one is in place where the candidate is assumed to be available to work unless otherwise specified. During the week 15th to 19th March, the candidate has been marked as unavailable to work and is indicated by the letter 'UN' in pink boxes.

To assign the candidate as unavailable for an individual day, simply right click on the desired day and choose 'Assign as Unavailable' from the list.

Note:
To mark multiple days as unavailable, select the first day that the candidate is unavailable by left clicking the mouse, hold down the shift key and left click on the final day still holding down the shift key. When all the days in the sequence are selected, right click whilst still holding down the shift key and choose 'Assign as Unavailable' from the list.

To mark random un-sequential days as unavailable, use the 'Ctrl' key to highlight the days and then right click to assign as unavailable.

Rolling over any of the days in the schedule with the mouse will indicate the date in the top right hand side of the window.

Mark the candidate as either available or unavailable in the candidate schedule

The key indicates the status of any contracts and associated timesheets

Selecting 'Availability' displays both the candidate's booked and unavailable days

Details of any contracts the candidate has been booked onto will appear in the contracts section

As candidates are assigned to temp contracts in Eclipse, the candidate's schedule will automatically be updated to display their movements. The booked days appear in blue in the schedule as shown in the example above. Details of any temp contracts the candidate is booked onto will be listed in the contracts window at the foot of the screen showing the temp contract reference number, the start and end dates, the name of the client, the job title and the status.

To view the candidate's availability within the schedule, select 'Availability' from the 'View' options. This will display both the candidate's 'booked' days and those where they are marked as unavailable to work. Alternatively, to view days assigned to a specific contract and the status of any associated timesheets, select 'Contracts' and highlight the specific contract in the list.

At the very bottom of the screen, Eclipse displays the following information:
- First Contract Start Date
- Late Invoiced Timesheet
- Duration (Days)

The key on the right hand side of the window explains the various symbols that may appear in the candidate schedule relating to the status of a contract and any associated timesheets.

8.4 Candidate Unsuitable List Administration:

A particularly useful feature within Eclipse is the 'unsuitable candidates list'. This can be accessed within either a candidate record or a client record. This feature allows candidates to be marked as unsuitable against various clients in the database and vice versa.

The screen shot below shows the 'Rates / Unsuitable List / Agencies' tab within a client record. The middle section of the tab labelled 'Unsuitable Candidates' displays any candidates that have been indicated as unsuitable for work with this particular client.

To list a candidate as unsuitable, first ensure the record is in the editable state. Secondly select 'Add' to the right of the 'Unsuitable Candidates' section. The 'Add Candidate to Unsuitable List' screen will appear as displayed below.
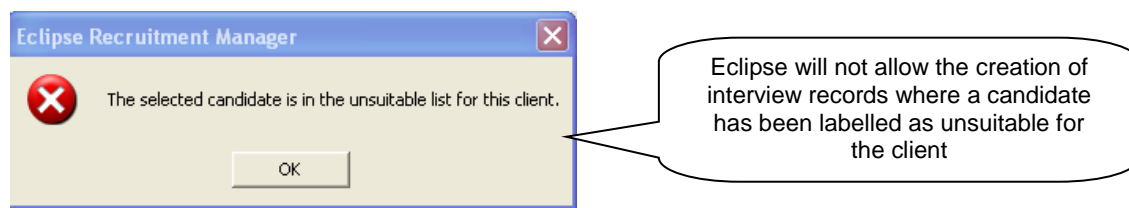
Search for the desired candidate by selecting the green + button to the right of the candidate field. A reason for listing the candidate as unsuitable must be provided before the information can be saved. Where the client has related branches, the candidate may also be labelled as unsuitable against those records by simply placing a tick in the 'Assign to Related Branches' box

If a candidate has been listed as unsuitable against a client in the database, the information will also be transferred to the associated candidate record. It is also possible to label as candidate as unsuitable against a client in the database within the candidate record and will be explained later in this guide.
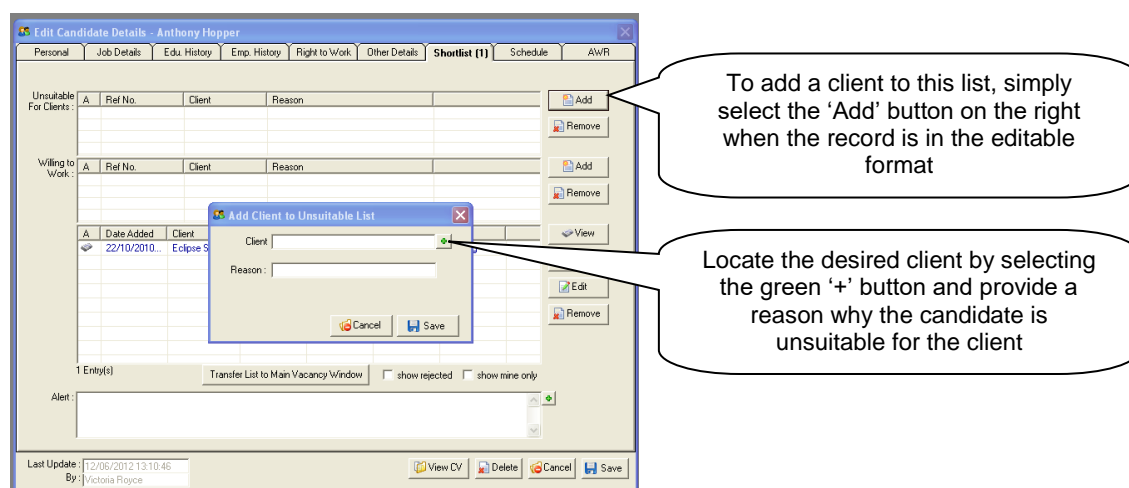
By listing a candidate as unsuitable for a particular client, certain safety features are activated. Firstly, when attempting to assign the candidate to a temp booking with that client, Eclipse will not allow the booking and provides the following warning:

Secondly, Eclipse will not allow the creation of an interview record where a candidate has been listed as unsuitable for the client. The following Eclipse warning is displayed and the record cannot be saved in Eclipse:

Eclipse will not allow the creation of interview records where a candidate has been labelled as unsuitable for the client

The same functionality can be carried out within the candidate record.To add a client to this list, simply select the 'Add' button on the right when the record is in the editable format. The following screen will appear:

To add a client to this list, simply select the 'Add' button on the right when the record is in the editable format

Locate the desired client by selecting the green '+' button and provide a reason why the candidate is unsuitable for the client

Locate the desired client by selecting the green '+' button and provide a reason why the candidate is unsuitable for the client. A reason in this instance may be where a candidate has previously worked at a company and has specifically asked not to be considered for any future roles there. The corresponding client record will be updated with the candidate's details and the reason provided. Any related branches will automatically appear in the 'Unsuitable' list and vice versa.

By listing a candidate as 'unsuitable' for a particular client or vice versa, certain safety features are activated. Firstly, when attempting to assign the candidate to a temp booking with that client, Eclipse will not allow the booking and provides the following warning:

Where a candidate has been labelled as unsuitable, Eclipse will not allow the candidate to be assigned to any associated contract

Secondly, Eclipse will not allow the creation of an interview record where a candidate has been listed as unsuitable for the client. The following Eclipse warning is displayed and the record cannot be saved in Eclipse:
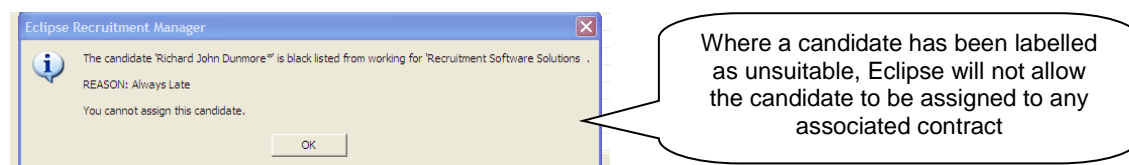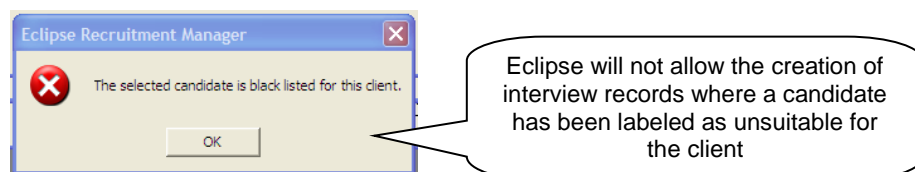

Eclipse will not allow the creation of interview records where a candidate has been labeled as unsuitable for the client

Candidate unsuitable list administration can only be carried out by those with the relevant permission granted within the 'User Administration' section of the 'Maintenance Menu. For further information about User Administration, please refer to the 'Setting up Eclipse' user guide.
www.recruitment-software.co.uk/download/guides/setting_up_eclipse.pdf

9 Creating Temp Contracts:

As with many other features in Eclipse, there is more than one way to create a new temp contract.
For example:

1. Using the automatic prompt or the 'Contract' button in a vacancy record
2. Using the 'Add New' button in the 'Temp Contract' main interface
3. From an 'Accepted' interview where the related vacancy is either 'Temp' or 'Contract'
4. Using the 'New Contract' button in the 'Contracts by Week' view
5. Using the Quick Contract Creator

Methods one, two and three all use a feature called the New Contract Wizard which incorporates an easy three step process to create a new temp contract. Options four and five employ slightly different processes.

However, before considering which method to use it is also worth considering the following point, whether to incorporate an associated vacancy record. Please read the following section carefully in order to decide which method could provide the most beneficial results.

In some cases, it is necessary to create a vacancy record and a temp contract record for a temporary or contract booking. By first creating the associated vacancy record, features such as the 'match' and 'candidate short list' are available.

For example, a vacancy record in Eclipse contains specific information about an actual vacancy including the location of the client, the industry in which the client operates and the core skills and qualifications required from a candidate. By entering the vacancy details, features such as the 'match' are available to quickly locate potentially suitable candidates. Secondly, candidates can be short listed against a vacancy and their progress through the recruitment process tracked.

There are some instances where it is not necessary to create the associated vacancy record, for example if the 'match' or 'short list' features are not required. Whichever method is chosen is entirely dependant upon which characteristics of the software match the processes and work flow of those using it. As a general rule, the recruitment of skilled or long term positions may require features associated with the vacancy record, whereas for unskilled, industrial vacancies such features may provide little benefit.

Below is a brief overview of the pros and cons of creating an associated vacancy record:

Pros:
- Full details of the vacancy are visible including the job description and the required core skills and qualifications. Where the website integration feature is activated, these details can be uploaded to the website.
- The 'Match' feature is available allowing the quick match of candidates to a vacancy based on a variety of criteria.
- Candidates can be short listed against a vacancy allowing the tracking of candidates throughout the recruitment process.
- Multiple contracts can be linked back to one vacancy record allowing quick selection of short listed candidates to 'fill' bookings.

Cons:
- It can be time consuming to create a vacancy for each booking in a busy, fast paced recruitment environment

Methods one, four and five listed above incorporate the creation of a vacancy record. Sections 8.1 to 8.5 explain all five methods of creating temp contracts in Eclipse.

9.1 Creating a Temp Contract via a Vacancy:

This section provides a step by step guide to creating new vacancy records in Eclipse, saving popular vacancies as templates for future use and creating an associated temp contract via a vacancy record.

As with many other features of Eclipse, there is more than one way to achieve the same result, in this case create a new vacancy record. Where there is no pre-configured vacancy template the most efficient route to creating a new vacancy is via a client record. Open the desired client record and select the vacancy button at the foot of the window as pictured below:
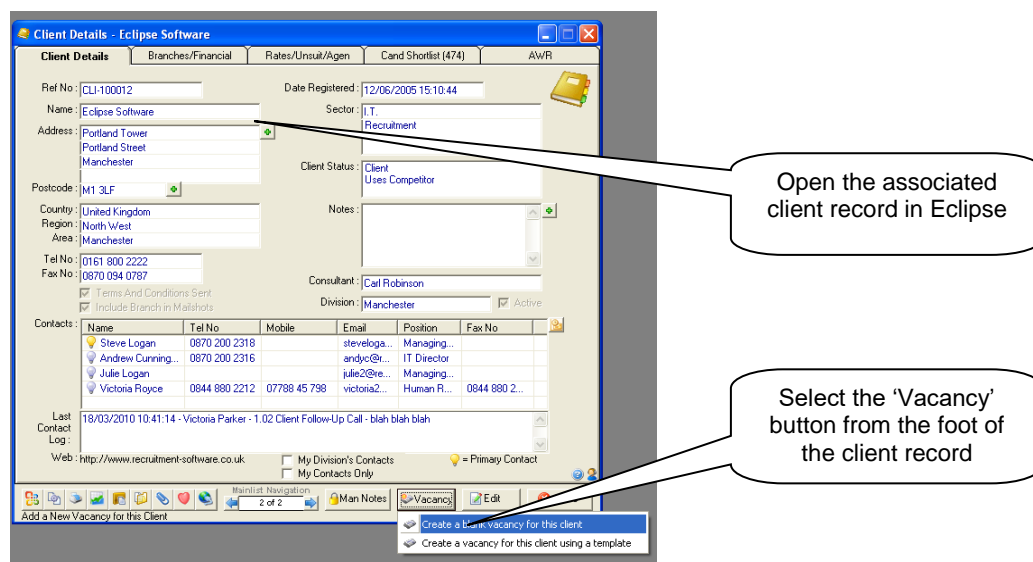
Selecting the 'Vacancy' button from this point provides two options:

1) Create a blank vacancy for this client
2) Create a vacancy for this client using a template

For the purpose of this example, option one is selected. This will automatically create a vacancy record for the selected client and pre-populate some of the client detail in the new vacancy record including the client's name, address and location as shown below.
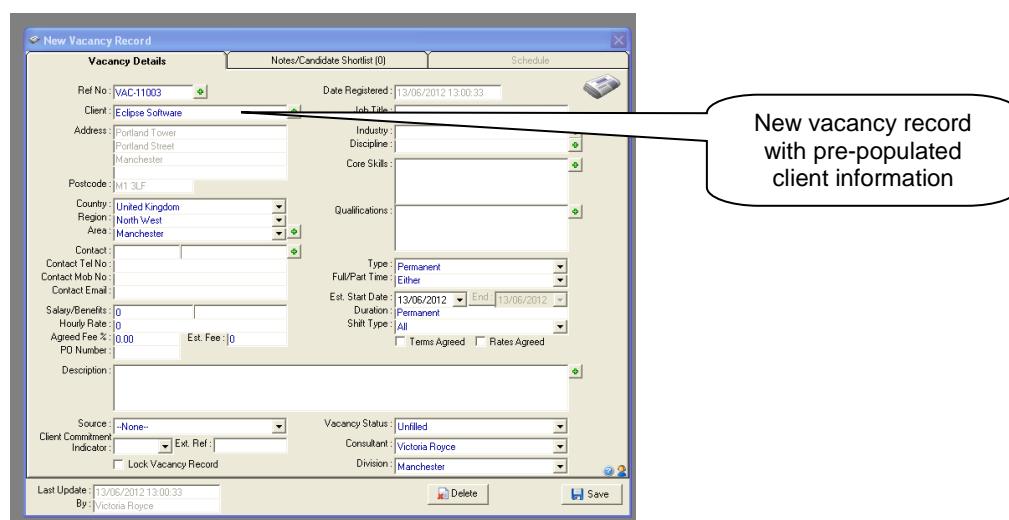
Complete the remaining relevant fields in the vacancy record.

9.1.1 Vacancy Record – Vacancy Details Tab:

This section provides an overview of the vacancy record itself. Please note that some of the fields within this record are relevant only to perm recruitment: and some only to temp and contract recruitment.
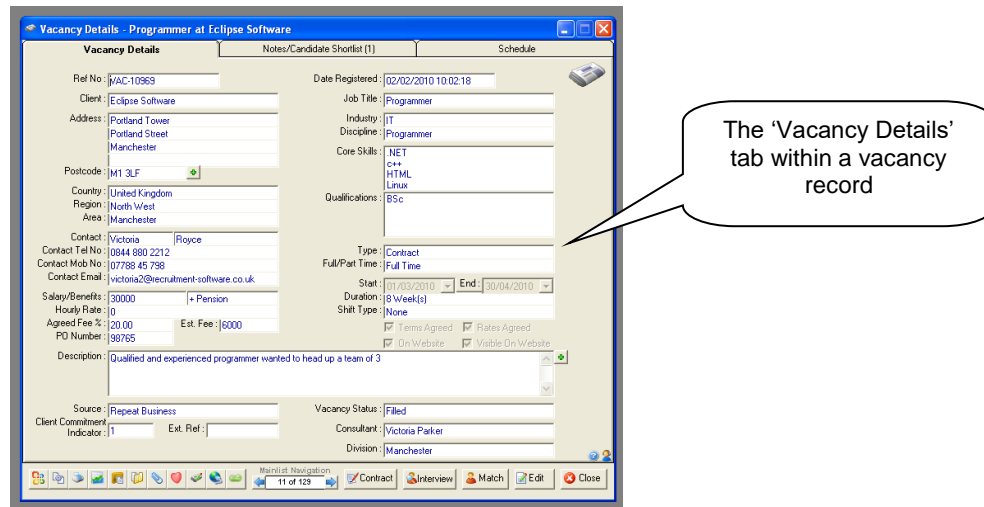
The 'Vacancy Details' tab within a vacancy record

Reference Number:
Whenever a new record is created in Eclipse, it is allocated a system generated reference number. This applies to every single record type. Each vacancy reference number begins 'VAC'. If a record is deleted, the reference number is deleted with it and will not be re-used. The reference number can be over-typed and a manual one entered were required. In the 'Edit' mode, a green '+' button appears next to the reference number field, to re-allocate a system generated number to the record, select this button.
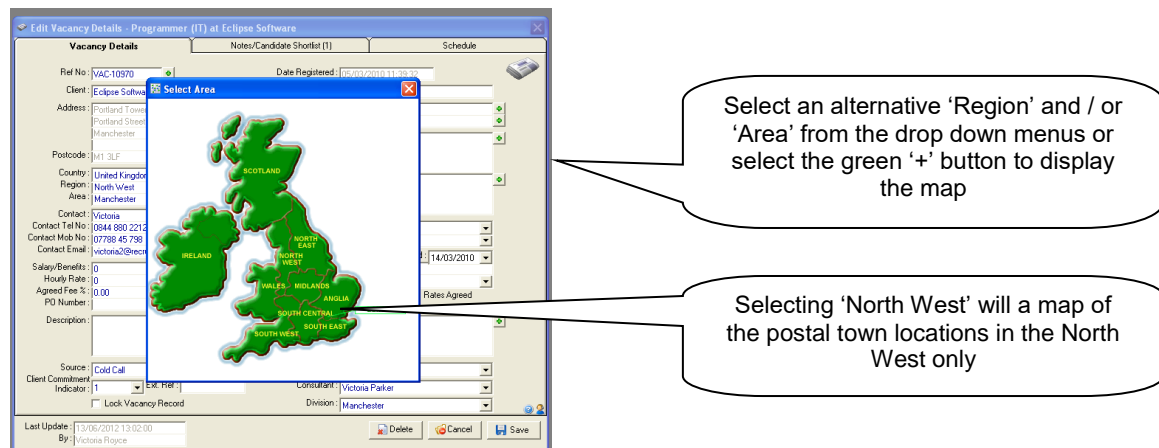
Client:
This is the name of the client that the vacancy refers to. This field is pre-populated when the vacancy button is selected from the bottom of a client record. To search for a client, select the green '+' button to activate the client search screen.

Address, Post Code and Country:
Where the vacancy record is created from within a client record, the address and post code fields will also be completed. Selecting a client via the search screen will also complete the address details of the selected client

Region and Area:
Where a UK post code appears in the address, Eclipse automatically completes the 'Region' and 'Area' fields with the corresponding postal town and region. E.g. where an 'M' post code appears, the area will be 'Manchester' and the region 'North West' etc. However, the region and location can be changed by selecting an alternative from the drop down menus or selecting the green '+' button and using the map. Where additional locations have been added via the 'Countries, Regions and Areas' section of the 'Maintenance Menu' they are available from the drop down list and not the map.

Select an alternative 'Region' and / or 'Area' from the drop down menus or select the green '+' button to display the map

Selecting 'North West' will a map of the postal town locations in the North West only

Contact / Contact Tel No / Contact Mob No and Contact E-Mail:
Once the client details have been confirmed, it is then possible to choose a contact as the main source for the vacancy. Selecting the green '+' button on the right of the contact field will provide a list of contacts for that particular client. Highlight the required contact and select 'Save':

Selecting the green '+' button on the right of the 'Contact' field will provide a list of contacts for that particular client

Highlight the required contact and select 'Save'
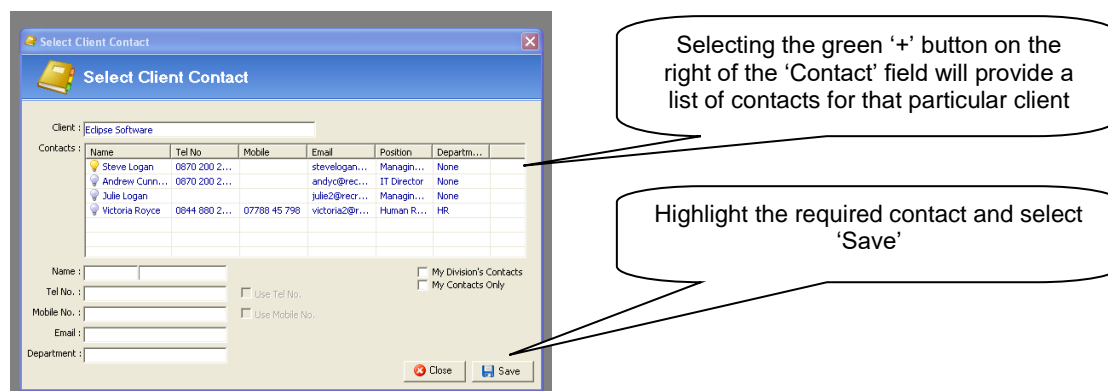
Salary / Bens:
These fields only require completion where the vacancy is Permanent. There are two fields in this section. The first is a purely numeric field and should include an indication of the annual salary for permanent placements. Along with the 'Agreed Fee %' below, this figure will be used to calculate the estimated mark up should a successful placement be made There is no need to include '£' signs etc. in here. The second fields can be used to include any additional benefits the position may include e.g. pension, company car, bonus etc.

Hourly Rate:
Where the vacancy is either temporary or contract this field can be used to indicate the expected candidate hourly pay rate (or daily rate where required). As above, there is no need to include '£' signs etc. Please Note, this is not where the rate calculations for temp and contracts take place, the rate calculator appears in the associated 'temp contract' record.

Note:
This is not where the rate calculations for temporary and contract vacancies takes place. The rate calculator appears in the associated temp contract record. For more information on temp contracts please refer to the 'Eclipse for Temps and Contractors' user guide:
www.recruitment-software.co.uk/download/guides/temp_contracts.pdf

Agreed Fee%:
This field only requires completion where the vacancy is Permanent. This figure is the % of the annual gross salary used to calculate the invoice rate for permanent placements. This figure along with the 'Salary' field above, calculate and populate the 'Estimated Fee' field below. Again, this is a purely numeric field and there is no requirement for '%' signs etc.

Estimated Fee:
The estimated fee is the value of the agreed percentage of the gross annual salary for permanent placements. This is calculated automatically when the two figures are provided in the relevant fields. Manual entry is not permitted in this field.

PO Number:
Complete this field where a 'Purchase Order' number is provided by the client. This is particularly important where the Eclipse Default Preferences and client invoicing preferences have been have been set to indicate this field as mandatory

Date Registered:
At the point of creation, each and every record in Eclipse is time-stamped and displayed in the top right corner of every record. This details the date and time and cannot be deleted or altered.

Job Title:
This is a free text field for the 'Job Title' provided by the client for the vacancy. This does not need to exactly match to a 'Discipline' in the 'Industries, Disciplines and Skills' section providing there is a 'similar' value which can be used to search for candidates with similar work experience.

Industry, Discipline and Core Skills:
Selecting the green '+' button next to the 'Industry', 'Discipline' or 'Skills' fields opens the following window. It is from here that the vacancy can be 'skilled up'. In the example below, an industry sector has yet to be selected therefore the 'Disciplines' and 'Core Skill's displayed are those listed as 'Universal' and no industry specific vales are shown.
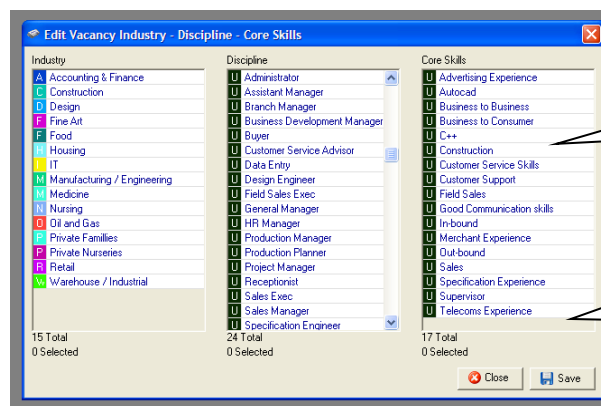

Selecting the green '+' button next to the 'Industry', 'Discipline' or 'Skills' fields opens this window

In this example an industry sector has not yet been selected therefore the only 'Disciplines' and 'Core Skill's displayed are those listed as 'Universal'

In the example below, the industry 'IT' has been chosen which has added all IT related disciplines and core skills to the lists. These are clearly visible in yellow. The universal values also remain as they may also apply to the IT industry. The discipline that most closely matches the job title provided by the client has been selected from the list, in this case 'Programmer' and the desired core skills expected from potential candidates.

Note:
Selection of one industry sector and one discipline is permitted here. However multiple core skill selections are allowed. The values highlighted here will constitute part of the match criteria in the vacancy to candidate and candidate to vacancy match features. This feature is discussed in more detail later in this guide.
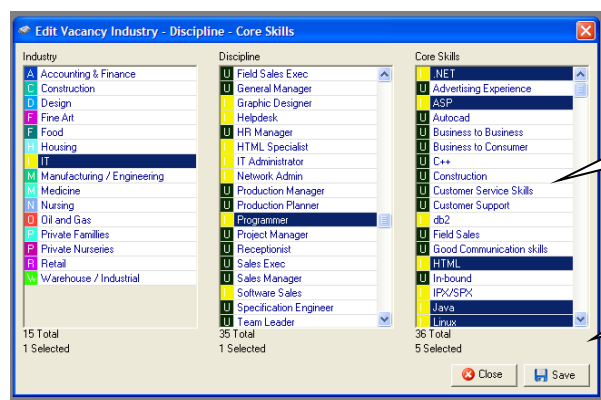

The industry 'IT' is highlighted which has added all IT related 'Disciplines' and 'Core Skills' to the lists

The selection of one 'industry sector' and one 'discipline' is permitted here, however multiple 'core skill' selections are allowed.

Once the relevant values have been highlighted, select 'Save' to transfer the information into the vacancy record.

Qualifications:
Selecting the green '+' button to the right of the qualifications field activates the window below. This displays a list of qualifications configured in the 'Candidate and Vacancy Qualifications' section of the 'Maintenance Menu'. Multiple choices are permitted from this screen. Simply highlight the selections and click 'Save'. The desired qualifications will now appear in the vacancy record.

Selecting the green '+' button to the right of the 'Qualifications' field, activates this window

Multiple choices are permitted from this screen simply highlight the selections and click 'Save'
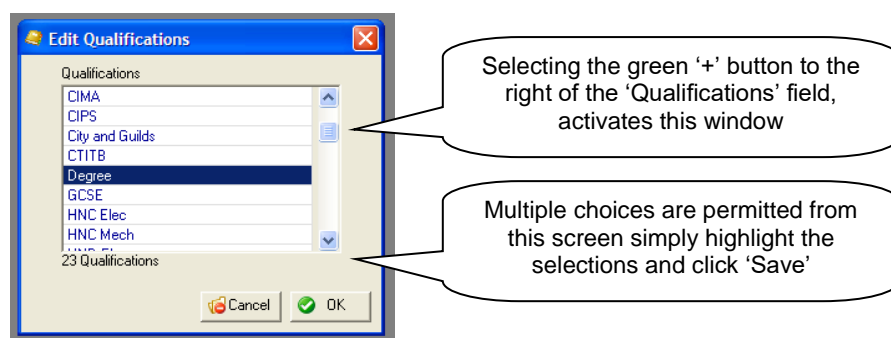
Type:
Select the type of vacancy from the drop down menu. The options available here are: permanent, temporary or contract. Selecting 'Permanent' here will lock the 'Schedule' tab of the vacancy record. Eclipse treats temporary and contract records in exactly the same way, with only one major difference. It is possible to create an invoice directly from an associated interview record if the type 'Contract' is selected. This is useful in the instance of temp to perm placements. Where 'temporary' is selected, an invoice can only be generated through the associated timesheet record. Selecting either 'temporary' or 'contract' allows the creation of an associated temp/contract booking and unlocks the 'Schedule' tab within the vacancy record.

Full Time / Part Time:
This field indicates whether the vacancy is full or part time.

Est. Start Date: / End Date;
Where the vacancy type is permanent, enter an estimated start date for the job. The 'End Date' field will be locked in this instance. For temporary and contract positions, enter both the estimated start and end dates. These dates will be pulled through to any potential temp contract records in order to update the schedule of work. However, this can be amended at the booking stage.

Duration:
If the vacancy type is permanent, by default the duration will be permanent. In the case of temp and contract vacancies where estimated start and end dates have been specified, the duration will be calculated in days or weeks.

Shift Type:
A list of 'Shift Types' can be created in the Eclipse Maintenance Menu'. One of these shift types can be chosen from the drop down menu.

Terms Agreed (Tick box):
Tick box to indicate terms have been agreed with the client

Rates Agreed (Tick Box):
Tick box to indicate rates have been agreed with the client

Description:
The description field can be used to store information relating to the vacancy. Selecting the green '+' button on the right expands the field to provide a larger view of the window.

Source:
This list is configured in the 'Vacancy Source' section of the 'Maintenance Menu' and indicates the origin of the vacancy itself. This can be used to monitor where vacancy traffic is coming from.

Client Commitment Indicator:
This is a 1 to 5 scale which can be used to indicate the commitment of the client and therefore how high on the priority list the vacancy is to fill. How the scale is interpreted is down to the user or the company.

Ex Ref:
The external reference number field may be used to record an additional reference allocated to the vacancy on job boards etc.

Vacancy Status:
By default, the status of all newly created vacancies will be 'Unfilled'. The other default values for vacancy status are 'Filled, 'Partially Filled' and 'Withdrawn'. These cannot be amended or removed, however additional vacancy statuses can be configured via the 'Maintenance Menu'. For more information, please refer to the 'Setting up Eclipse' user guide (Link below)
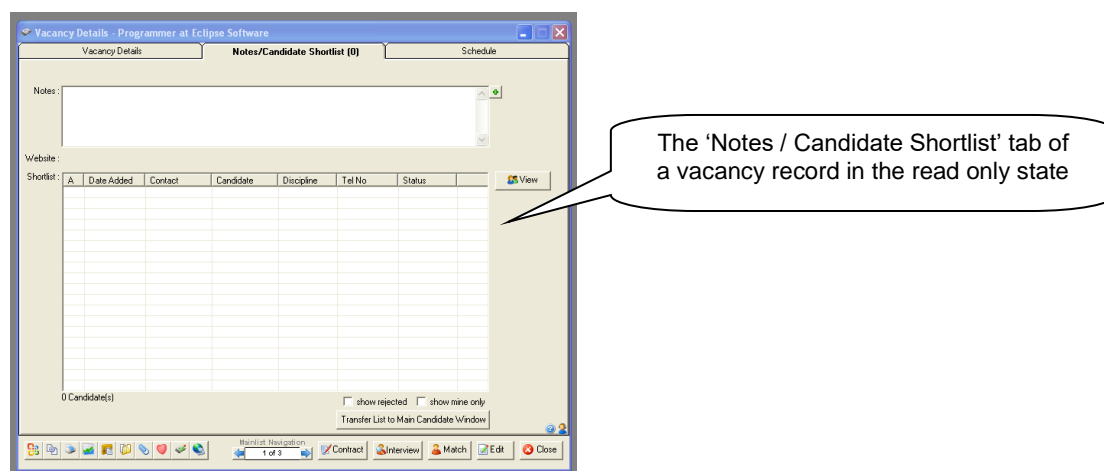www.recruitment-software.co.uk/download/guides/setting_up_eclipse.pdf

Consultant and Division:
By default, the 'Consultant' will be the person who created the record and the 'Division' the area of the company that the consultant belongs to. However, these values can be changed where required simply by selecting the required consultant and division from the drop down lists.

9.1.2 Vacancy Record – Notes / Candidate Shortlist Tab:

The second tab on the vacancy record is labelled 'Notes / Candidate Shortlist' and is shown below in both its saved and editable formats:

The 'Notes / Candidate Shortlist' tab of a vacancy record in the read only state

Notes:
The notes field can be used for any further information regarding the vacancy that is additional to the job description. This could be information about the reason for the vacancy etc. Select the green '+' button to expand the window for a larger view on the text.

Website:
This is the client's web site address. Once the vacancy record is saved, the address becomes a hyper-link directly to the client's website.

Shortlist:
The shortlist feature is an important tool within Eclipse. Within a vacancy record, the short-list can be used to create a list of candidates considered suitable for the vacancy and shows the status of each candidate in relation to the role E.g. CV Sent. There are several ways to shortlist candidates against vacancies and vice versa, each of which is explained in the 'Short-Listing' section of this user guide.

Show Rejected:
Selecting this button will filter this list to show only the candidates who's status is set to 'Rejected' in the shortlist
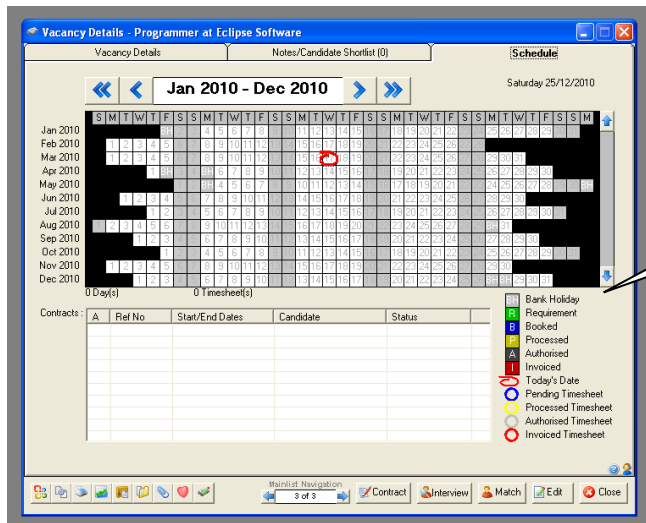
Show Mine Only:
This button does as it suggests and will show only the shortlisted candidates belonging to the user.

Transfer List to Main Candidate Window:
Selecting this button will transfer the list of candidates currently displayed in the shortlist to the main candidate interface.
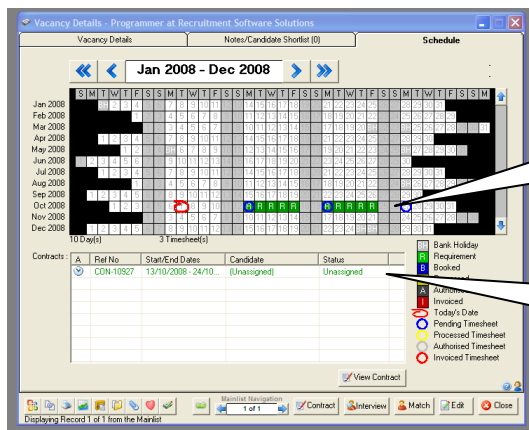
9.1.3 Vacancy Record – Schedule Tab:

The final tab within a vacancy record is the 'Schedule'. Where the vacancy type is 'Permanent' this tab will be locked and cannot be opened, therefore it is only accessible for 'Temporary' and 'Contract' vacancies.

No manual amendments can be made to the schedule. As associated temp contracts are created, the schedule will update. The example below shows details of a temp booking linked to the vacancy. The requirement days are clearly indicated and details of the booking are listed in the 'contracts' window.

As candidates are assigned to temp contracts associated with this vacancy, the appearance of the schedule will change accordingly as per the key on the right hand side. The schedule section of the actual temp contract is very similar and displays similar information.

Highlighting a contract from the list and selecting the 'View Contract' at the bottom will open the temp contract record in Eclipse.

9.1.4 Creating and Using Vacancy Templates:

To save the vacancy as a template for future use select the 'Save this Vacancy as a Vacancy Template' button from the toolbar at the bottom of the vacancy window as shown below. Vacancy records can be saved as templates at any time, not just at the point of creation.
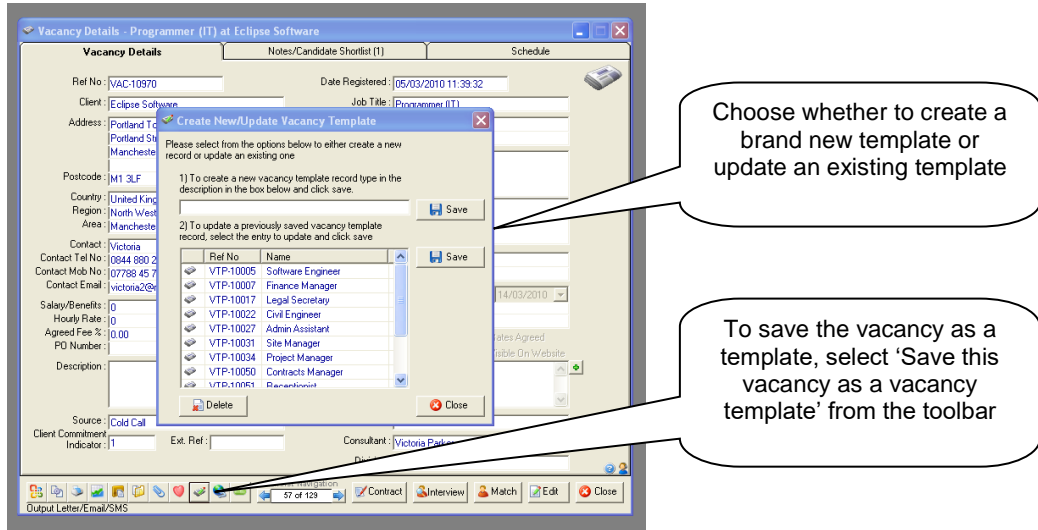

Select whether to create a brand new template, in which case give it a name, or update an existing template by choosing the one in the list to update and select 'Save'.

There are now two ways to create a vacancy using a template, from within the client record or from the Vacancy main interface. This first example demonstrates how to create a vacancy from a template via a client record:
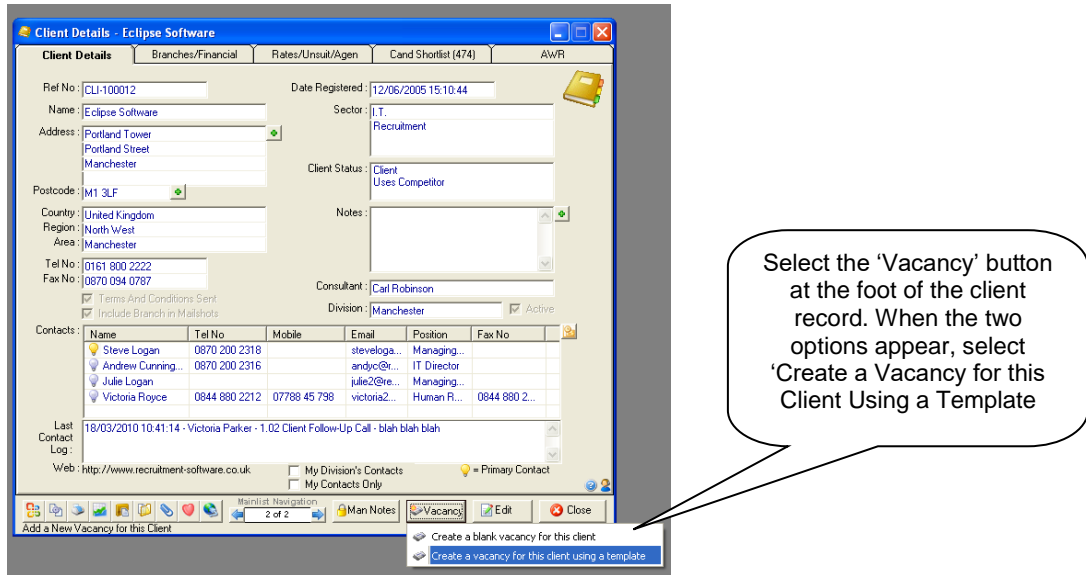

Select the 'Vacancy' button at the foot of the client record. When the two options appear, select 'Create a Vacancy for this Client Using a Template'. This will open a list of possible template to use:
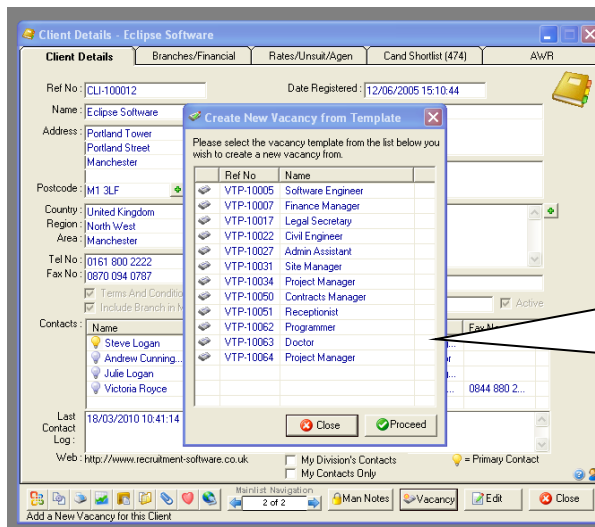
Highlight the desired template in the list and click 'Proceed'. Eclipse will now create a vacancy record with details of both the client and vacancy pre-populated.

To create a vacancy using a template from the main vacancy interface, select 'Add Using Template' from the left hand side of the Vacancy tab. A list of saved templates will appear. Select the desired template and click 'proceed'.

Select 'Add Using Template' on the left side of the Vacancy Main Interface

Choose which template to use and click 'Proceed'
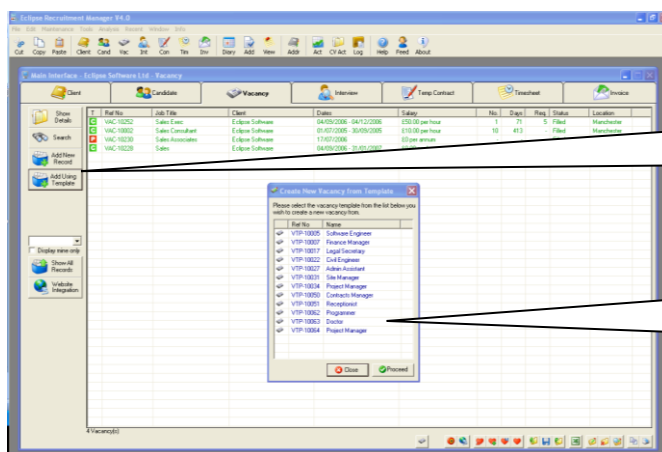
Eclipse will create the vacancy record pre-populating most of the fields.

9.1.5 Creating the Temp Contract from the Vacancy Record:

Once the vacancy record is saved and assuming the 'Type' has been set to either Temporary or Contract, the automatic prompt to create an associated booking will appear as shown below:

Note:
This automatic prompt can be turned on and off via the 'Vacancy' tab in the 'Eclipse Default Preferences' section of the Maintenance Menu. Tick / Un-tick the box 'Display 'Would you like to create a requirement for this vacancy?' if there is no associated record'

Selecting 'Yes' in the prompt or the 'Contract' button at the bottom of the window, activates the 'New Contract Wizard'.
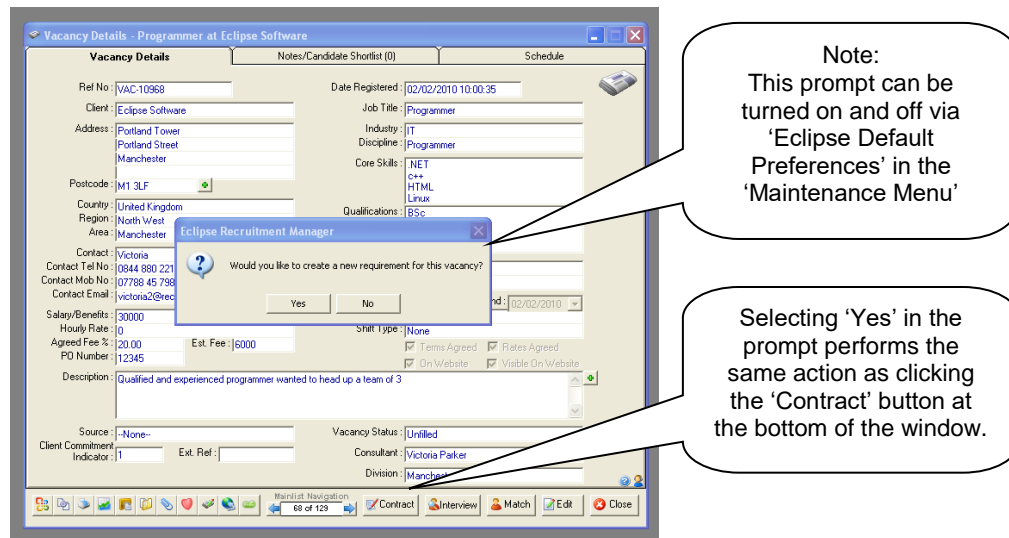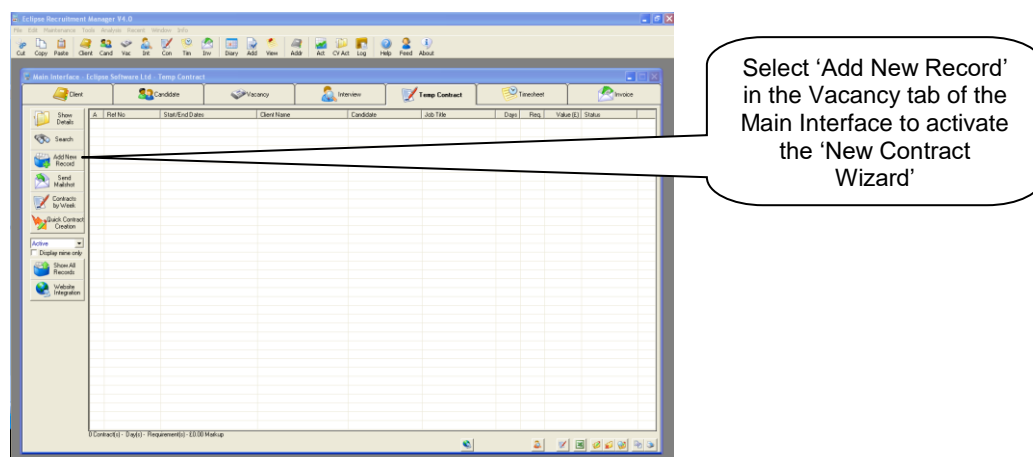

Note:
Using the New Contract Wizard is explained fully in section 8.4

9.2 Creating a Temp Contract via the 'Add New' Button:

The second route to the new contract wizard is via the 'Add New Record' button on the left side of the Temp Contract Main Interface as shown below:

Select 'Add New Record' in the Vacancy tab of the Main Interface to activate the 'New Contract Wizard'

Selecting this button activates the new contract wizard. Using this method to create a temp contract will NOT incorporate a vacancy record.

Note:
Using the New Contract Wizard is explained fully in section 8.4.

9.3 Creating a Temp Contract from an Accepted Interview:

In the instance where a candidate is requested for interview before being accepted on a temporary or contract assignment, an interview record can be created from the vacancy. Select the 'Interview' button as shown below:
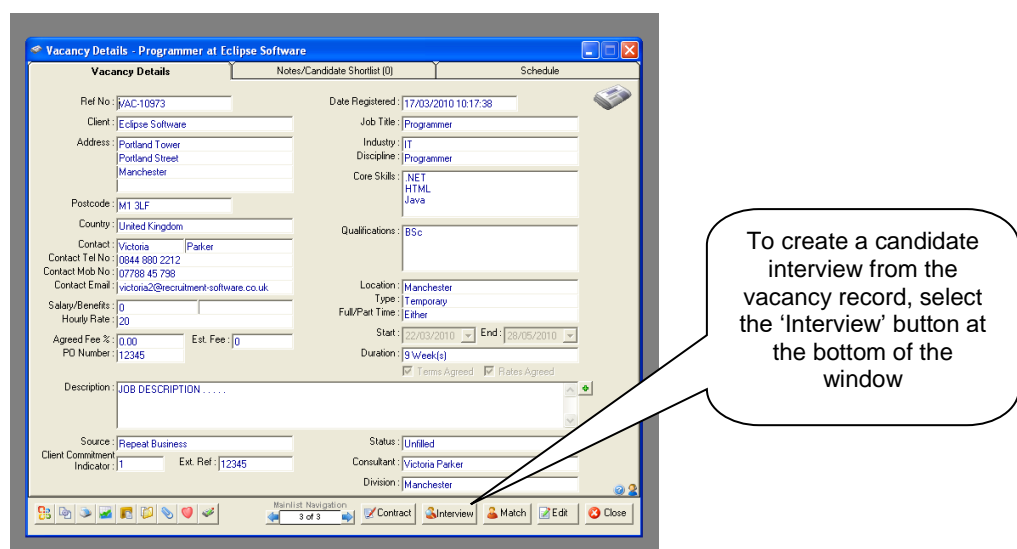
To create a candidate interview from the vacancy record, select the 'Interview' button at the bottom of the window

Selecting this button will present the following window where most of the information is pre-populated, e.g. client details etc. This window is a half-way-house between the vacancy record and the interview record where much of the information can be entered.

This screen is a half-way-house between the vacancy and interview record in Eclipse

Complete as much of the detail as possible and select 'Save' to create the interview record

Fill in the remaining detail in the record and select 'Save' At this point the interview record will be generated in Eclipse.

The following section provides a brief overview of each field:

Type:
This is the type of interview. Select from face to face, telephone or internal.

Client:
When the interview button is selected from within a vacancy record, the name of the client will be pre-populated

Address and Postcode:
This is the address and postcode of the client. Again, where the interview is created from within a vacancy record this information will be pre-populated.

Interview Location:
This is the location of the interview. Where the client does not have any related branches this is the address of the client. Where there are related branches it is possible to select an alternative interview location from the list of related branches.

Job Title:
Were the interview is created from the vacancy record this field will be pre-populated from the information provided in the vacancy.

Date and Time:
This is the date and time of the interview. Once the record id saved the interview will appear in the consultant's diary for this time and date.

Interviewer:
This is the person conducting the candidate's interview. Selecting the green '+' button provides a list of contacts configured for this client in the client record. Choose an interviewer from the list.

Candidate:
This is the candidate selected for interview. To search for a candidate select the green '+' button and search by surname first.

Address and Postcode:
This is the address and postcode of the candidate.

Notes:
This is a free notes section which can be used to store any additional information regarding the interview for example what the candidate may need to take with them or prepare for the interview.

Consultant:
This is the owner of the interview record. The owner of the record will see the interview in their diary on the specified date.

The saved interview record appears as follows:

A saved interview record contains details of the client, candidate and the interview details

Several additional fields now appear in the interview record. Most of the information within these further fields has been pulled through from the various related records in Eclipse.

Reference Number:
Whenever a new record is created in Eclipse, it is allocated a system generated reference number. This applies to every single record type. Each interview reference number begins 'INT'. If a record is deleted, the reference number is deleted with it and will not be re-used. The reference number can be over-typed and a manual one entered were required. In the 'Edit' mode, a green '+' button appears next to the reference number field, to re-allocate a system generated number to the record, select this button.

Duration:
This information is pulled through from the associated vacancy record. In the example above, the vacancy was temporary therefore the duration is also set to temporary.

Salary:
In the case of permanent positions, the salary information is taken from the associated vacancy record.

Accepted Date:
Where the 'Outcome' of an interview is set to 'Accepted' in Eclipse, the system will automatically enter the date in this field.

Est. Start Date:
Again, this information is taken from the associated vacancy record. This is the date given by the client as an estimated start date.

Offer Salary:
In the case of a permanent placement, once the vacancy has been accepted by the candidate, the final offer salary should be entered here. If this differs from the original estimated salary for the position detailed in the associated vacancy record, Eclipse will recalculate the 'estimated fee' based on the new value and the agreed fee%.

Date Registered:
At the point of creation, each and every record in Eclipse is time-stamped and displayed in the top right corner of every record. This details the date and time and cannot be deleted or altered.

Interview No:
The first interview record created for the candidate with reference to a specific vacancy will appear as interview number 1. However, where a candidate is shortlisted for a second or subsequently third interview, additional records can be created and the interview number will be displayed here.

Outcome:
Initially, the outcome of an interview is automatically set to 'Pending'. The other options in the dropdown menu are: rejected, shortlisted, cancelled, offered, candidate declined and accepted.

Eclipse will perform various actions based on the outcome of an interview. For example selecting 'shortlist' will present the option of creating a follow up interview. If the outcome of an interview is changed to 'Accepted' Eclipse allows the creation of a 'Contract' for a temporary role or an 'Invoice' for a permanent placement.

Fee%:
In the case of a permanent placement, this information is also pulled through from the associated vacancy record and is the agreed % of the candidates offer salary that will make up the client invoice for the placement.

Est. Fee:
The estimated fee is the value of the agreed percentage of the gross annual salary for permanent placements. This is calculated automatically when the two figures are provided in the relevant fields. Manual entry is not permitted in this field.

In order to create a temp contract from an interview record, firstly the outcome of the interview must be changed to 'Accepted' as shown below:

Once the outcome has been changed to 'Accepted' the 'Contract' button appears at the foot of the screen. Selecting this button now displays an information screen providing a choice of two actions:

The warning screen says: Do you wish to create a 'one off fee' for this contract? Yes: One off Fee / No: Wages paid by the agency

Selecting 'Yes' allows the creation of an invoice for a one off fee for the placement whereas selecting 'No' will activate the new contract wizard where the temp contract can be created in Eclipse

Note:
Using the New Contract Wizard is explained fully in section 8.4.

9.4 The 'New Contract Wizard':

Once the new contract wizard has been activated through one of its various avenues, there is a simple 3 step process to follow:

1. Step 1 of 3: Rates and Shifts:
   Creates a new contract from a new rate and a shift pattern or from pre-set values

2. Step 2 of 3: Schedule:
   Specifies the exact requirement days for the contract

3. Step 3 of 3: Assign Candidate(s):
   Finally, step 3 confirms the number of requirements.
   At this point the booking can be saved with or without assigning candidates

9.4.1 Step 1 of 3 – Rates and Shifts:

To aid explanation of this screen it is worth noting that the route to activating the new contract wizard is via the 'Add New Record' button in the Vacancy tab of the main interface. Additionally, the screen has been broken down into three sections as follows:

Section One: Information known
Section Two: Rates
Section Three: Shift pattern
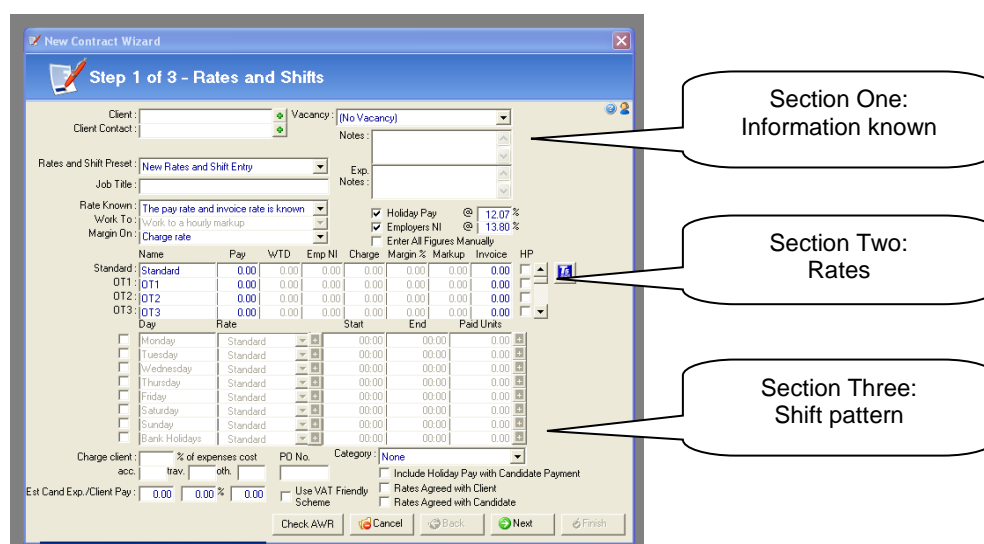
Section One: Information Known:

Client:
Select the client using the green '+' button.

Client Contact:
This field will be pre-populated based on the information available from the associated vacancy record. In the example above, the client contact is Victoria Parker. However, to choose an alternative contact, simply click the green '+' button on the right.

Rates and Shift Preset:
From this drop down menu, choose to create either a 'new rate and shift entry' or select from either client specific or default rates and shifts templates. Remember, where the client has been assigned a rate and shift category, only default templates assigned to the category will be available for selection.

Job Title:
This field is automatically populated assuming the contract wizard was activated via the vacancy record.

Vacancy:
Where there are vacancy records already configured for this client, selecting the drop down will display a list. To link the temp contract to one of these vacancies select it from the list.

Notes:
Quite simply, this is a free notes box allowing the user to enter notes specific to the contract. This notes box will be pulled through to any associated timesheet records for this contract.

Expenses Notes:
Again, this is a free text notes box allowing the addition of expenses notes. This notes box will be pulled through to any associated timesheet records for this contract.

The following three fields define how rates are calculated and based on what values:

Rate Known:
From this drop down, specify what values are known when negotiating fees. The four options are as follows:

- The pay rate is known
- The charge rate is known
- The invoice rate is known
- The pay rate and invoice rate are known

For the purpose of Eclipse, the definitions of 'pay rate', 'charge rate' and 'invoice rate' are as follows:

- Pay rate: The gross pay the candidate will receive per unit of work (E.g. hourly / daily)
- Charge rate: The cost to the agency (pay rate + WTD + Employers NI)
- Invoice rate: The cost to the client

Note: The default preference can be set via the 'Maintenance Menu'.

Work To:
From this drop-down menu, specify whether fees are calculated based on a mark-up or margin. Therefore the two options are as follows:

- Work to an hourly mark-up: A fixed value in £'s per hour / day
- Work to an hourly margin: A percentage calculated on a choice of values

Note: The default preference can be set via the 'Maintenance Menu'.

Margin On:
If rates are calculated based on a percentage margin, specify what the margin is calculated as a percentage of:

- Pay rate only
- Pay rate and WTD
- Charge rate
- Invoice rate

Note: The default preference can be set via the 'Maintenance Menu'.

It is recommended that the above values are kept constant throughout all contracts. Setting the values in the 'Eclipse Default Preferences' section of the 'Maintenance Menu' will aid this process.

Holiday Pay:
If the user wishes to include holiday pay in the calculation, tick this box and enter the current percentage of 10.17%.

Note: The default preference, including the percentage can be set via the 'Maintenance Menu'.

Employers NI:
Similarly to 'holiday pay', if the user wished to include employers NI contributions in the calculation, this box should be ticked and the percentage entered at 12.8%.

Please note this calculation does not take into consideration the 'free pay' element where National Insurance is not applicable to the first portion of an employees' wage. The reason being that this allowance may have already been applied to a candidate's wage paid elsewhere and is therefore not applicable.

Note: The default preference can be set via the 'Maintenance Menu'.

Enter All Figures Manually:
Ticking this box allows the manual entry of figures in 'section two' when calculating rates.

Note: The default preference can be set via the 'Maintenance Menu'.

Section Two: Rates:

In this section, up to ten pay rates can be set for the contract. For example standard rate, overtime rate, day rate, night rate etc. By entering the known values as outlined above, Eclipse will automatically calculate the remaining fields in the grid.
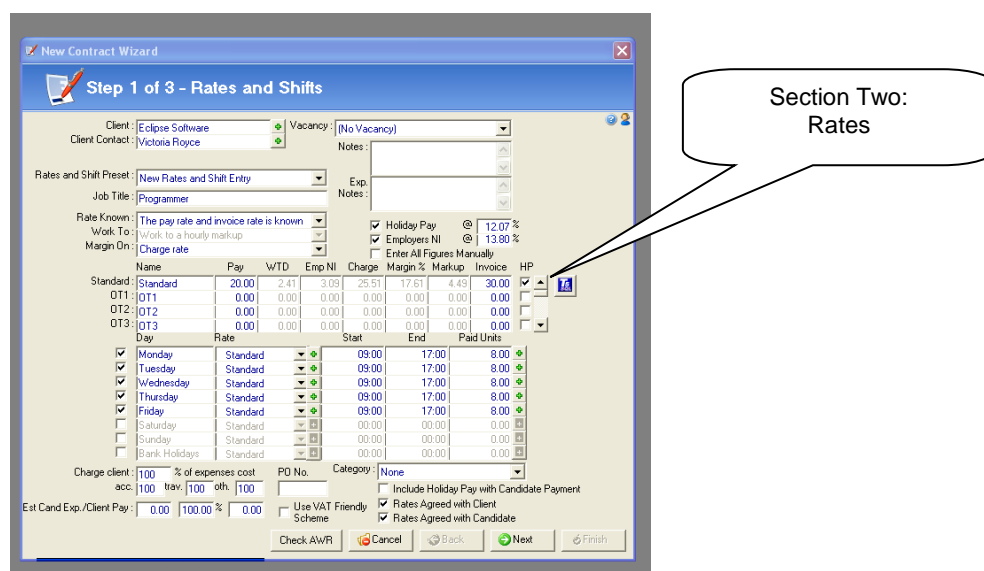
Name:
On the left of the grid each row is labelled E.g. 'Standard', 'OT1', 'OT2' etc. to indicate the various pay rates associated with the booking. The same labels appear in the first column of the grid itself. These labels can be changed as required E.g. 'Day Rate', 'Night Rate', 'Overtime Rate' etc. It is possible to set up to 10 pay rates per contract.

Pay:
The 'Pay column indicates the amount the candidate will receive per unit of work. The unit can be either hourly, daily or by shift.

WTD:
The amount of 'Working Time Directive', otherwise known as 'holiday pay', is automatically calculated assuming the 'Holiday Pay' box is ticked and the percentage indicated in the section above. The holiday pay is only calculated for those rates where the 'HP' box is ticked. (See 'HP' description below)

Employers National Insurance:
This is the value of 'Employers National Insurance' contribution payable assuming the box is ticked in the section above and the percentage value indicated.

Charge:
The 'Charge' is the cost of the booking to the agency per unit worked.
For example, for PAYE candidates: Charge = Pay + WTD + Employers National Insurance

Margin %:
The Margin is the % profit earned. As indicated above, the margin can be calculated on several values: the pay rate only, the pay rate + WTD, the charge rate or the invoice rate. The mark-up value will alter dependent upon what the margin % is calculated on.

Mark-Up:
The 'mark-up' is the profit per unit of pay to the agency after deductions.

Invoice:
This invoice rate is the amount invoiced or charged to the client.

HP:
This tick box includes or excludes 'holiday pay' in the individual rate calculations.
Note: Holiday pay is not usually included in overtime payments.

Note: Holiday Pay is also known As WTR (Working time Regulation) or WTD (Working Time Directive) and is labelled as WTD in the rates section.

Section Three: Shift Pattern:

The final section of 'step one' specifies the shift pattern for the booking. Specify which days of the week the candidate may be required to work and at what pay rate. If the hours of work are known, the start and end times can also be entered

To indicate that a particular day of the week may appear in the shift pattern, tick the corresponding box on the far left of the grid. These are not to be confused with the 'actual' requirement days, rather the 'typical' shift pattern. Select the desired pay rate from the drop down menu. Be aware that Eclipse automatically defaults to the 'standard' pay rate unless otherwise specified. There is the option to create a 'Custom' pay rate within this section which allows the input of multiple rates on the same day e.g. 'Standard' rate for the first 4 hours and then OT1 thereafter. Selecting the 'Custom' option displays the following window:

In the example above 'Standard' rate of pay will be paid up to 8 hours. Between 8 and 10 hours the 'OT1' rate will be paid. Anything over 10 hours will be paid at 'OT2' rate. In terms of related timesheets, Eclipse will populate the 'OT' fields accordingly.

Back in the main screen, if known, enter the working day start and end times. If the vacancy advocates flexible working hours it is not necessary to specify these values, however this will have an effect on the availability of the candidate.

Finally, enter the number of paid units per day. If the rates in section two were calculated on an hourly basis, the number of paid units will be the number of hours worked per day. If the pay rate calculated above was a daily rate, the number of paid units will be one.

If the pay rate and shift pattern is consistent throughout the week, there is no need to repeatedly enter the details, simply click the [+] on the right of the first line and the details will be copied down the grid to the other days selected by a [Tick] on the left.

Charge Client 100% of Expenses Cost:
This box indicates the percentage of candidate expenses passed on to the client where appropriate. For example, where a financing company is employed, the additional handling cost may be added to the candidate expenses and passed onto the client. This default value can be set in the 'Maintenance Menu' in 'Eclipse Default Preferences'.

The extension of this feature allows what percentage of certain types of expenses can be passed onto the client for example, accommodation, travel and other fees.

Estimated Candidate Expenses / Client Pay:
Here, the candidates estimated expenses can be added and the percentage to be passed onto the client. These are taken into consideration when calculating the total, predicted, actual and lost values of the contract. Also the pending timesheets are populated with the estimated expenses based on the number of days booked for the timesheet.

PO Number:
If a 'Purchase Order' number is known, it can be indicated here. This will be copied through to the contract record in Eclipse and the associated invoice line for that timesheet.

Use VAT Friendly Scheme:
This box indicates whether the VAT friendly scheme applies to the specific contract. Ticking the box will charge VAT only on the mark-up only portion of an invoice.

Category:
This field is not mandatory and is purely for analysis purposes. This allows for the grouping of contracts of a certain type or nature. The list of options is configured in the 'Maintenance Menu' under 'Contract Category'.

Include Holiday Pay with Candidate Payment:
This option relates to the export of information to Sage Payroll. Where this box is ticked the holiday pay value will be exported to Sage. If not ticked then no holiday pay value is exported. This is the master setting however this can be changed on a per contract basis.

Rates Agreed with Client:
This tick box indicates that the rates have been agreed with the client. This must be ticked before any associated timesheets can be processed, authorised and invoiced.
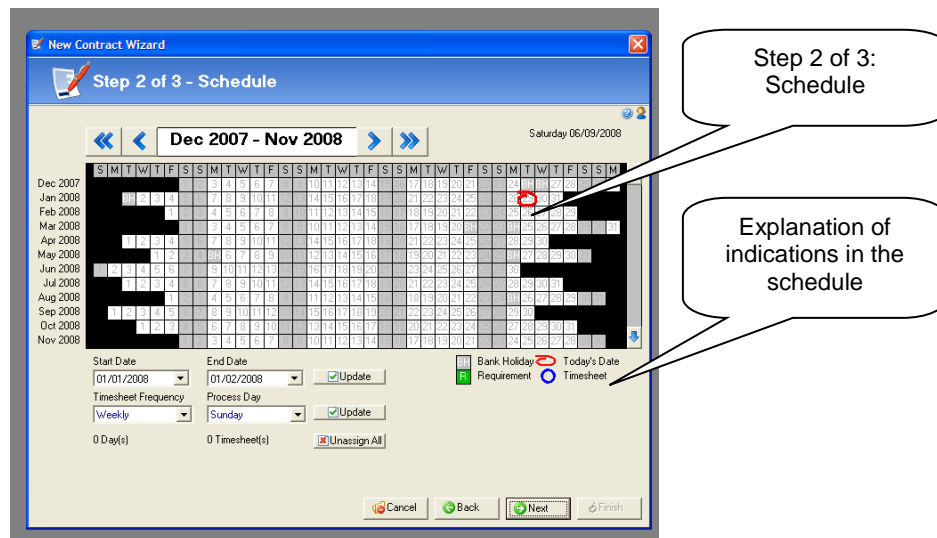
Rates Agreed with Candidate:
This tick box indicates that the rate of pay has been agreed with the candidate.

Once 'Step One' is complete, select 'Next'.

9.4.2 Step 2 of 3 – Schedule:

'Step Two' creates a 'schedule' or 'work pattern' for the contract. Once a candidate is assigned to the contract, a similar schedule will appear in the candidate record.


There are two ways to assign days to the schedule:

1) Enter the start and end dates in the boxes provided. If the start and end dates were specified in the associated vacancy record, as with this example, they are carried through e.g. Start date: 01/01/08, End date: 01/02/08. Select 'Update' and the schedule will update and assign the selected dates as requirements based on the shift pattern from Step 1.

2) Manually select and assign each day in turn on the schedule by right clicking the mouse and selecting 'Assign as Requirement'

OR Select a range of dates by clicking on the first date, then, whilst holding down the 'shift' key, click on the last date. Once all the dates are highlighted, right click and select 'Assign as Requirement'. Please note, only the days of the week included in the shift pattern will be assigned as requirements within the schedule. For example, if the shift pattern included only week days, the schedule will update to only indicate Monday through to Friday as requirements, Saturdays and Sundays will remain blank in the schedule.
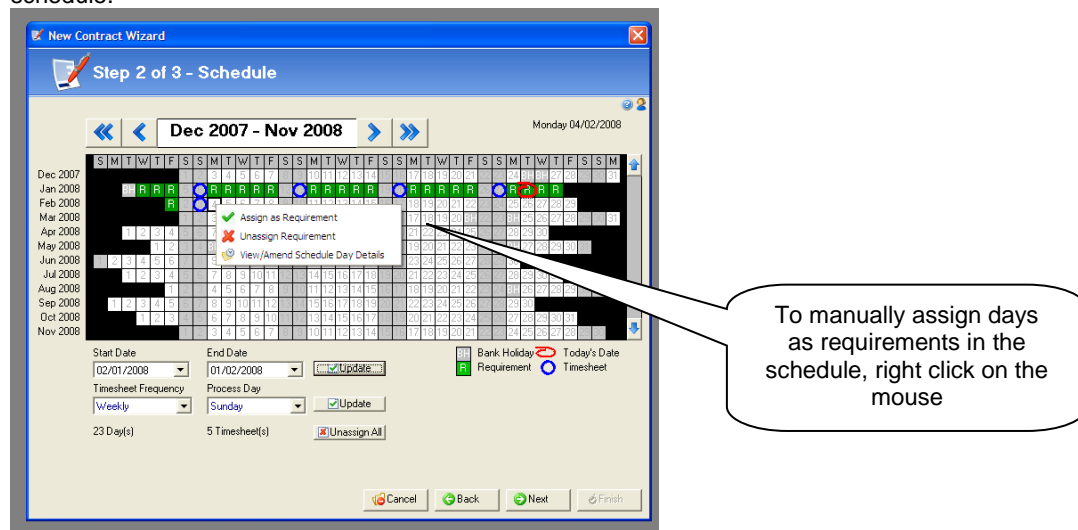

Where requirement start and end dates are specified using the calendar, or timesheet frequency or due dates are amended, selecting the 'Update' button will update the schedule mirroring the shift pattern set up in step one. To view the date and assigned start and end dates simply roll the mouse over a day in the schedule. The day, date and shift pattern are displayed above the schedule to the right as indicated below.
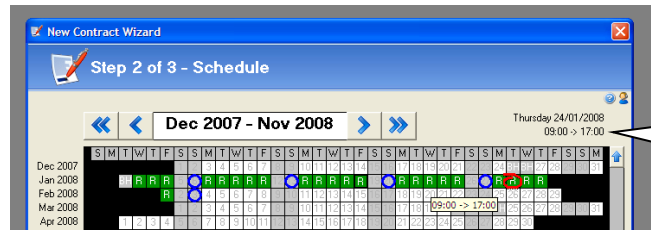
Roll the mouse over any day in the schedule to view the day, date and shift start and end times

It is possible to assign multiple shift patterns for the same booking for different weeks but not on the same day. To amend the pay rate or shift start and end times on a requirement day, double click on the specific day in the schedule to open the following window:
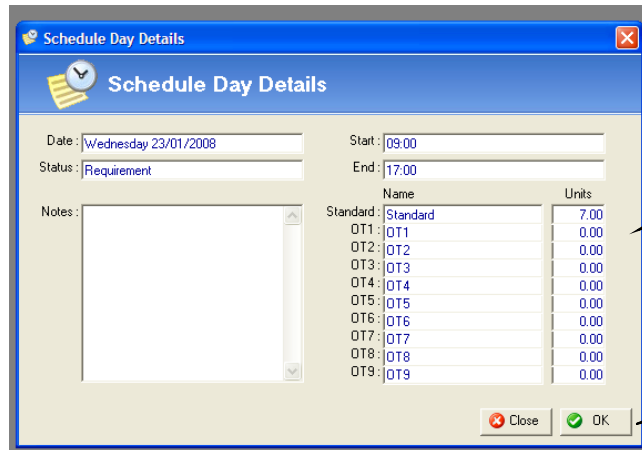
Amend the pay rate or shift start and end times in this window

When all alterations are complete, select 'OK' to close the window

Finally, in step 2 of the contract wizard, the information beneath the schedule indicates the timesheet frequency and the 'process day' which is the day of the week timesheets are due.
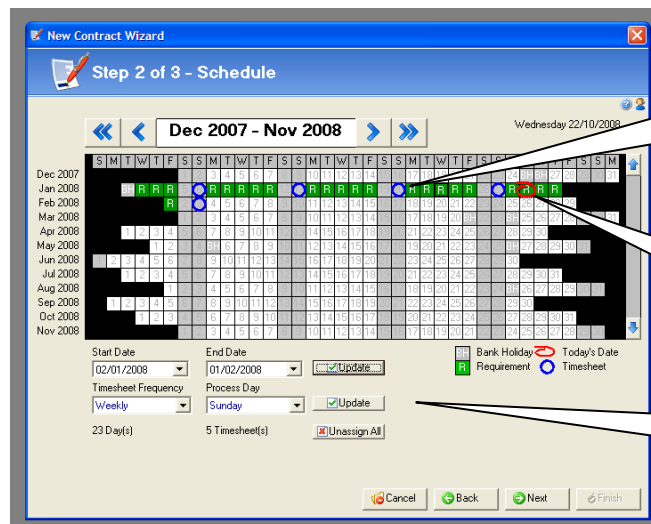
Due timesheets are indicated in the schedule by a blue circle.

Today's date is indicated by a red circle

Select the timesheet frequency and process day

The timesheet frequency can be; weekly, fortnightly, 4 weekly or monthly and is indicated in the schedule by a blue circle. The process day can be any day of the week. The default settings for both of these values can be specified in the 'Maintenance Menu' in 'Eclipse Default Preferences'. Based on this information, the 'Timesheet Wizard' indicates the number of requirement days and the number of timesheets required for the duration of the contract.

Eclipse will automatically create a timesheet record for each time period detailing an assumed' total of hours based on the units of work specified within the contract. Once 'Step Two' is complete, select 'Next'.

9.4.3 Step 3 of 3 – Assign Candidate(s):

The final step in the 'Temp Contract Wizard' specifies the number of requirements for the contract and either completes the contract wizard without assigning candidates or with candidates assigned to the booking.
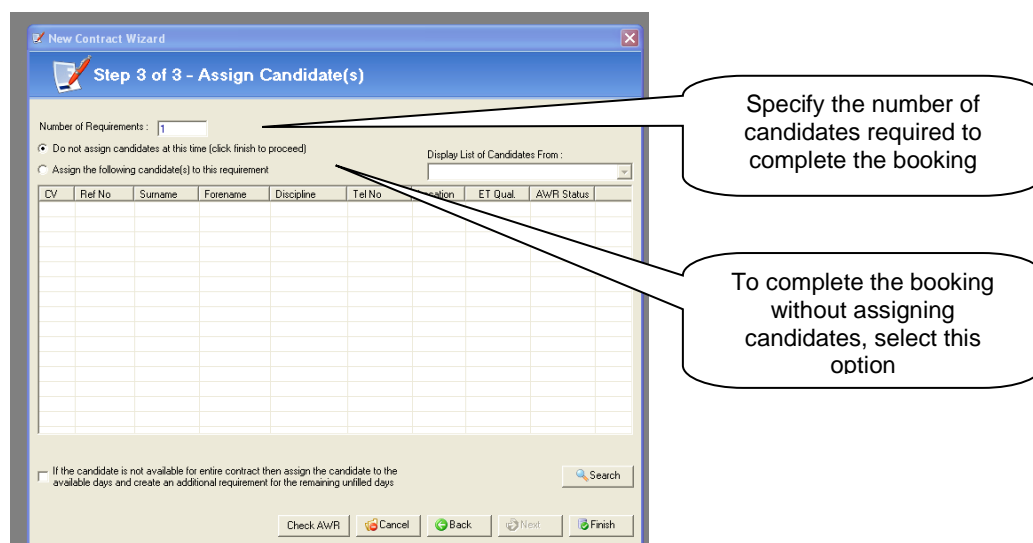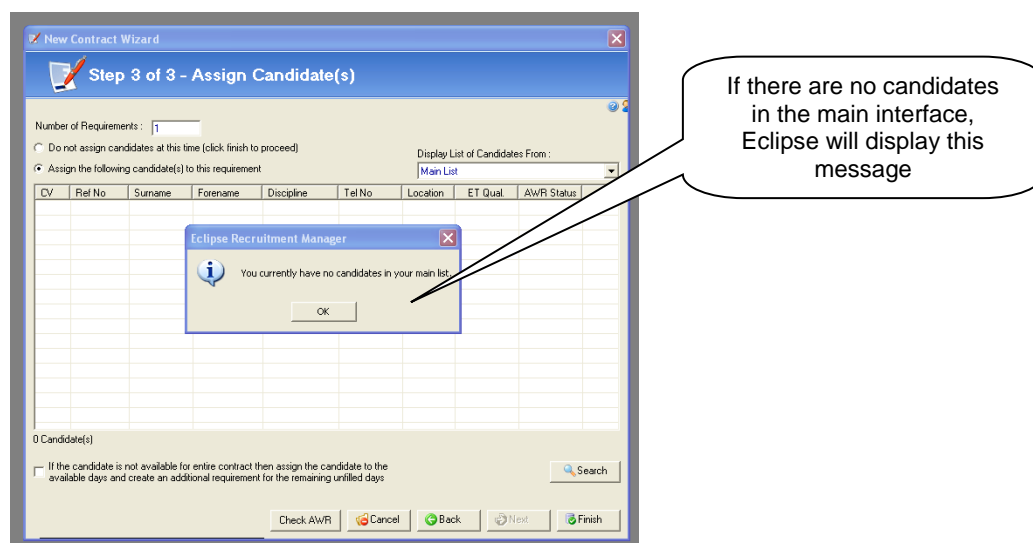

Number of Requirements:
This is the number of candidates required to complete the booking. If more than one candidate is required, Eclipse will create an identical contract for each booking. Once the 'Finish' button on the contract wizard is selected, any amendments to these contracts would need to be made individually.

Do Not Assign Candidates at This Time (Click Finish to Proceed):
Selecting this box completes the booking without assigning a candidate(s) and saves it as a 'Requirement'. A candidate(s) can be assigned where required at a later date. These contracts will show as green in the main contract list and will have the status of 'unassigned'.

Assign the Following Candidate(s) to This Requirement:
Selecting this option will automatically populate the blank list with the candidates currently appearing in the main candidate tab in Eclipse. If there are no candidates in the main interface at the time, the message box displayed in the following screen shot will appear.


However, at this point, it is possible to return to the main interface, search for suitable candidates then re-visit the above window. Refreshing the list by selecting 'Main List' option from the 'Display List of Candidates From' drop-down will then show any candidates in the main candidate window.

Note:
If suitable candidates are known prior to creating the booking, it is worth ensuring that they appear in the main list at the time of creating the contract.

Display List of Candidates From:
From this drop-down list is it possible to select candidates based on other criteria including: candidates who have previously worked for the client, candidates short-listed against the associated vacancy record in Eclipse, exact match and general match candidates or finally the entire list of candidates in the Eclipse database.
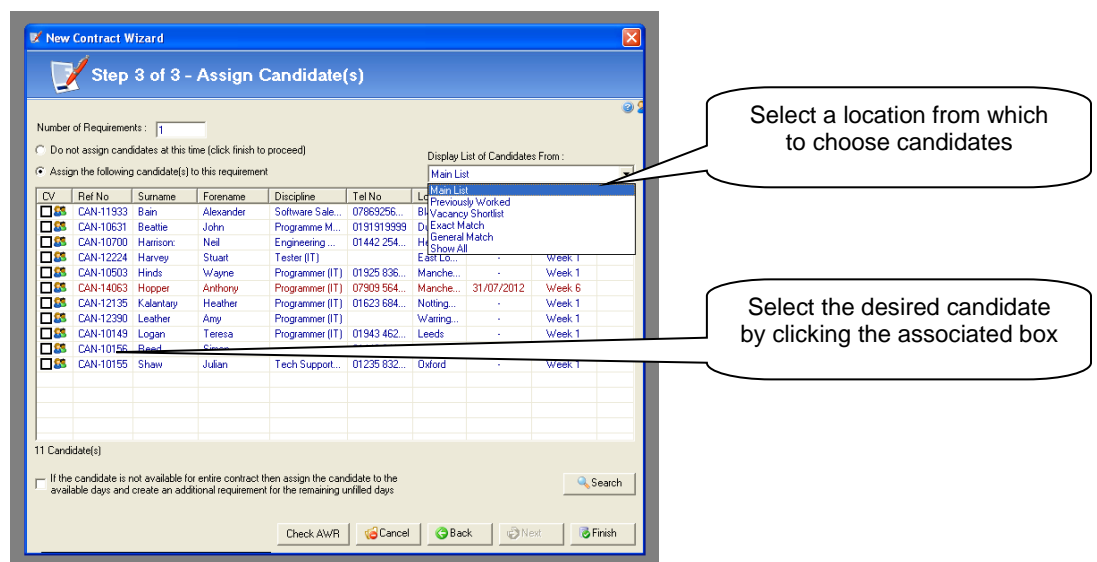
To assign a candidate, click the box to the left of the candidate's name. Depending on the number of requirements specified, the same number of candidates can be selected from the list.

At this point a series of warnings will appear if the candidate is not suitable for the position. For example if the candidate does not have the right to work check, if the candidate has been listed as unsuitable, if the candidate has been marked as unavailable in their schedule or if they are booked onto another contract with conflicting hours of work.
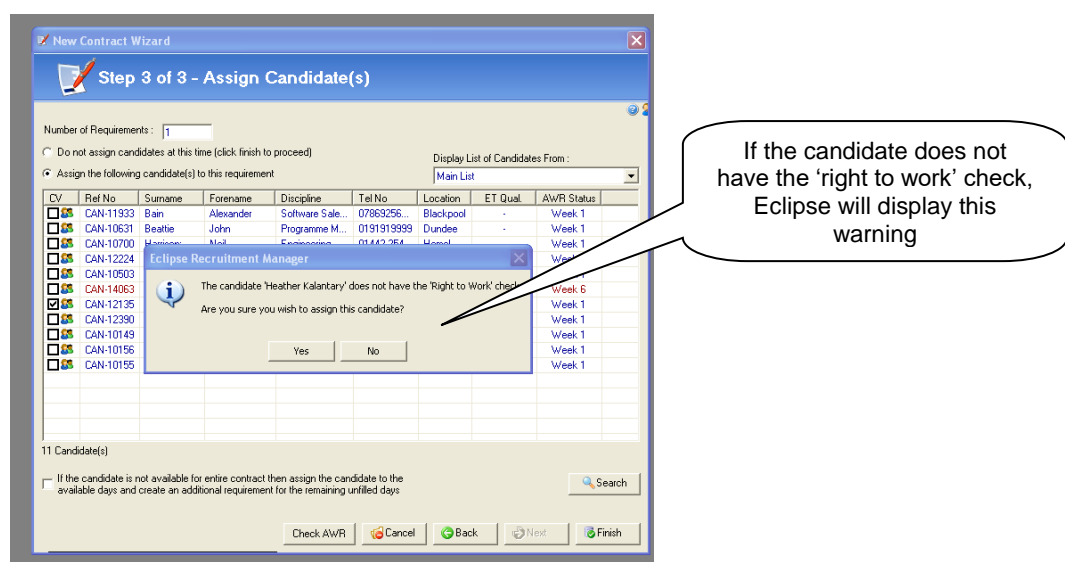
In terms of the candidate right to work check, depending on the individual user permissions granted, even if a candidate does not have the 'right to work' check, Eclipse will still allow the user to assign the candidate to the booking. To complete the candidate's right to work, return to the candidate record by double clicking on the candidate in the list and complete the relevant information.

To assign the candidate to the booking and create the temp contract, select 'Finish'.

9.5 Creating a Temp Contract Using via the Contracts by Week Feature:

There is also the opportunity to add new temp contracts via the contracts by week screen. This can be activated by selecting the 'Contracts by Week' button on the left side of the Temp Contract interface.

Select 'New Contract' at the bottom of the contracts by week screen
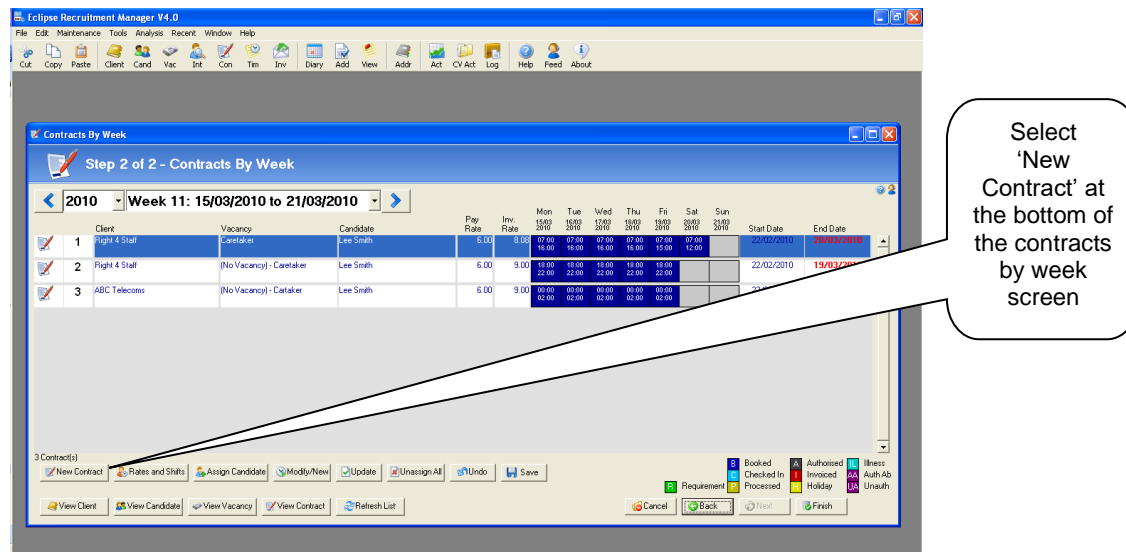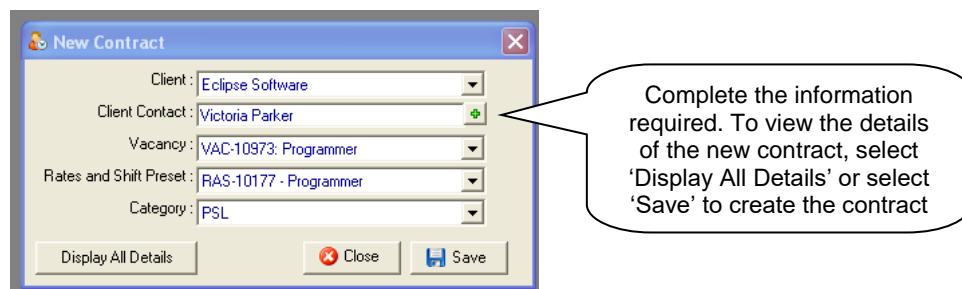
Selecting the 'New Contract' button towards the bottom left hand side of the screen will open the 'New Contract' window shown below: Within this screen select the client and subsequently the client contact. Where there are related vacancy records and pre-set rates they can also be selected at this point.

Complete the information required. To view the details of the new contract, select 'Display All Details' or select 'Save' to create the contract

To display the full details of the new contract click 'Display All Details'

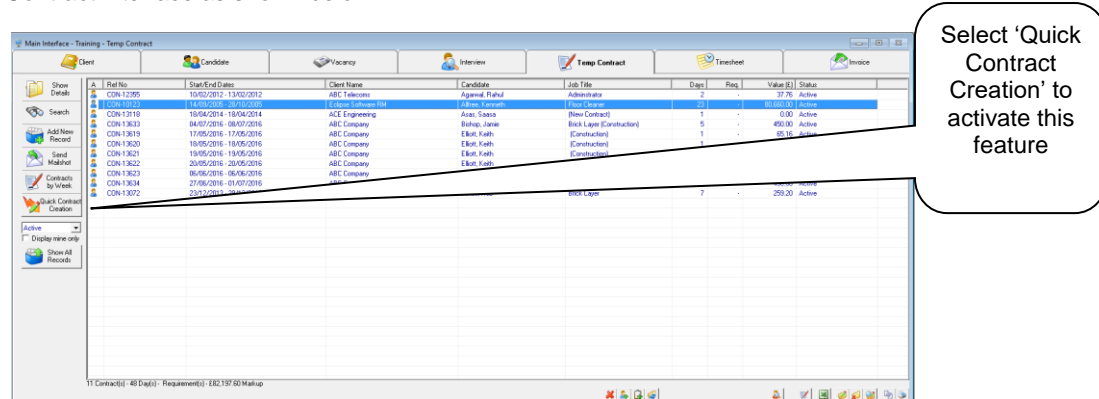Check the details of the new contract are correct and select 'Save'
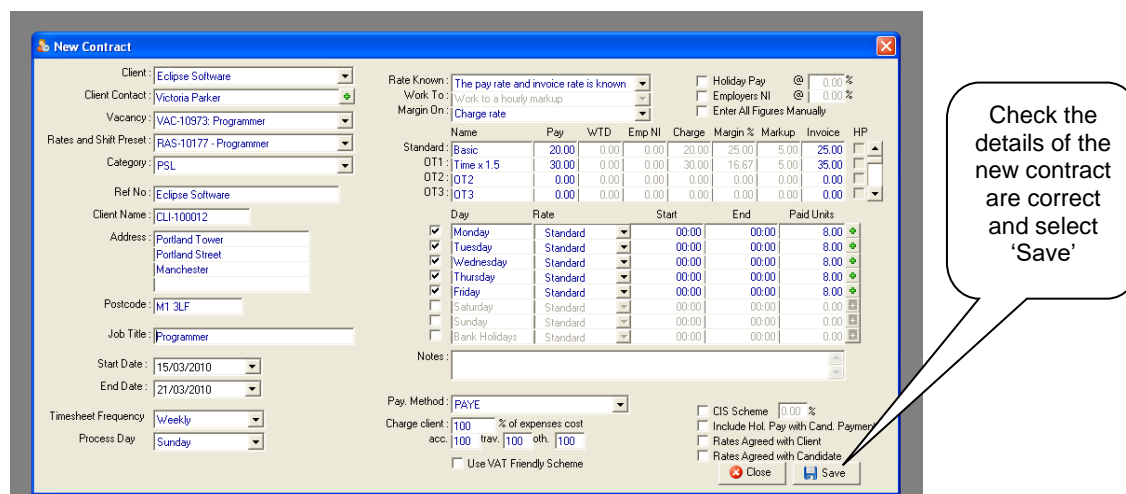
This screen now displays all the information relating the new temp contract incorporating the vacancy details and rate and shift template. Make any amendments where necessary and select 'Save'. This will create the temp contract record linking it back to the vacancy and the client.
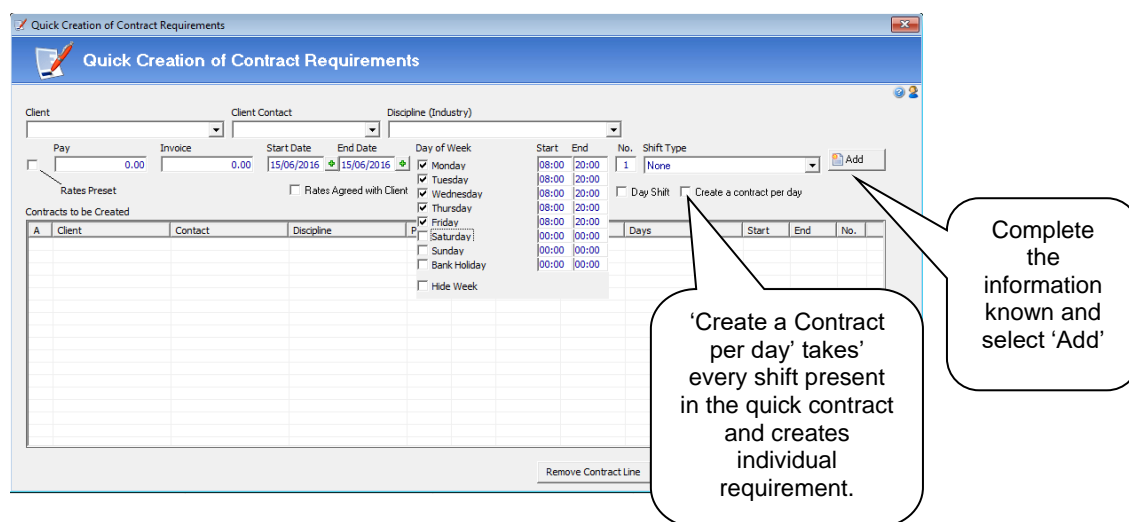
9.6 Creating a Temp Contract Using the Quick Contract Creator:

The final method of creating a temp contract in Eclipse is via the 'Quick Contract Creator'. This feature allows the creation of a temp contract and vacancy from one screen, populating much of the information required and links both records back to the desired client.

To active the Quick Contract Creator, select the 'Quick Contract Creation' button on the left of the Temp Contract interface as shown below:

Select 'Quick Contract Creation' to activate this feature

The following shows the quick Contract Creator Screen:

Complete the information known and select 'Add'

'Create a Contract per day' takes' every shift present in the quick contract and creates individual requirement.

Client:
This field displays a list of clients in the database. Select the desired client from the drop down menu or start to type the name of the client in the field

Client Contact:
Once a client is selected, this field will display all the contacts within that client record. Choose the desired contact from the list.

Discipline (Industry):
This field displays a list of all potential disciplines (job titles). Either select from the drop down list or start to type the job title in the field

Rates Preset:
To choose from default or client specific preset rates, select the 'Rates Preset' tick box. This will display a drop down list of system default rates and client specific default rates.

Pay:
Where there are no preset rates, manually enter the candidate pay rate.

Invoice:
Where there are no preset rates, manually enter the client invoice rate.

Start Date:
This is the start date of the contract. Use the green '+' button to open the calendar.

End Date:
This is the end date of the contract. Use the green '+' button to open the calendar.

Rates Agreed With Client:
To indicate that the invoice rate has been agreed with the client, place a tick in the box

Days of the Week:
Select the days of the week that the contract relates to by placing ticks in the relevant boxes.

Start:
This is the candidate's expected start time.

End:
This is the candidate's expected finish time.

Note: To view the week as a whole and amend the start and end dates, select 'Display Week'.

No:
This is the number of contracts required E.g. in the example above, the number of Programmers required.

Shift Type:
Select an option from the drop down menu. This list is configured in the 'Candidate Shift Availability' section of the Eclipse Maintenance Menu.

Day Shift
Ticking the day shift tick box will treat the candidate pay rate as a day rate rather than an hourly rate

Create a contract per day
Ticking the 'Create a contract per day' will treat every shift included in the Quick Contract Creator as a separate booking, Note this will create a separate timesheet for every shift present.

Add:
To add the details into the Quick Contract Creator, select 'Add'

Remove Contract Line:
If a mistake occurs, to remove the contract from the list, simply highlight and select 'Remove Contract Line'

Duplicate Contract Line:
To duplicate a contract for example if another programmer is require, highlight in the list and select 'Duplicate Contract Line'

Cancel:
This button cancels all that has been entered at this stage and will close the feature returning to the Main Interface

Finish:
To commit the contract details to Eclipse and create the individual temp contracts, select 'Finish' Eclipse will display the following message to confirm the action was successful

New contracts created in this way are now displayed in the Temp Contract tab of the Main Interface. Much of the information in the Contract Details tab is completed, the Rates and Shifts' tab shows the candidate pay rate and client invoice rate and finally the 'Schedule' tab shows the scheduled but yet unassigned days that the contract relates to. Alterations to the temp contract can be made at this point, e.g. the addition of additional pay rates etc.

The Quick Contract Creator creates the temp contract record and pre-populates much of the information required

Select 'View Related Records' to open the associated Vacancy record created by the Quick Contract Creator

Select the 'View Related Records' button to the bottom left of the temp contract record to open the associated Vacancy record created by the Quick Contract Creator. This is shown below:

The Quick Contract Creator creates automatically creates a vacancy record and completes some of the information required

Additions such as qualifications can be added to the vacancy record

This Vacancy record now acts as a job description. Alterations and additions can be made here for example, qualifications can be added to the list of requirements and a job description entered. From here the match and shortlist features are available.

10 Temp Contract Records:

Continuing with the same example as above, selecting 'OK' transfers the user to the temp contract record as displayed below. As with every other tab in Eclipse, the record can be opened from the main interface simply by double clicking or selecting the 'Show Record' button on the left.

A temp contract record is made up of three tabs, 'Contract Details', Rates and Shifts' and 'Schedule'. This section will explain the information held in each tab.

10.1 Contract Details:

The screen shot below, displays the front page of a temp contract record named 'Contract Details'. This page contains information about the client and candidate assigned to the booking.

Ref Number:
As with all other records in Eclipse this is a system generated reference number. A temp contract reference number always begins with 'CON' however this can be overwritten completely by the user.

Client:
This is the name of the client that the temp contract relates to

Address and Postcode:
This is the address and post code of the client named above and therefore this is the location of the temporary contract

Vacancy Ref Number:
If there is an associated vacancy record, the relevant reference number appears in the temp contract record for reference.

Job Title:
This is the job title associated with the temp contract

Client Contact, Client Tel Number, Client Mob No, Client E-Mail:
These fields indicate the contact for the contract and that person's contact details. Selecting the green '|+' button against the client contact name will display a list of contacts for the client in question.

Location / Department and Location Telephone Number:
Where required, manually enter the location or department of the contract. Additionally, enter a telephone number.

PO Number:
If required, the purchase order number is copied through from the new contract wizard. It can also be entered at this stage.

Notes:
This is a free notes box which allows for the addition of any information that is not catered for elsewhere within the temp contract record.

Use VAT Friendly Scheme:
This tick box indicates that the VAT friendly scheme is employed for this particular contract.

Requirement:
Where the status of a booking is 'Unassigned' or 'Unassigned Requirement' (where there are still requirement days left in the schedule), a tick will appear in this box.

Lock Contract Record:
As with all other records in Eclipse it is possible to lock a temp contract record for editing by other users by placing a tick in this box. This ensures that the 'Consultant' assigned to the record cannot be changed by other users apart from those with the permission to override record locking. This permission is granted in the 'Records' tab of the 'User Administration' section of the 'Maintenance Menu'.

AWR Status:
This shows which qualifying week the Candidate is at for this Contract. This is based on the processed timesheets related to the associated Clock. If no Clock is linked to the Contract, it will simply have a value of 'No Clock Found'

Note:
If the value in this field does not match the value stored against the Candidate, then the Contract will be included amongst the Contract Alerts when logging in. (or by pressing CTRL-F3).

It is possible to manually change the value in this field up until the first timesheet is processed (after 1st October 2011). Once a timesheet has been processed, the value is 'locked in' to the Contract and the only way to change it would be to 'split' the Contract.

Pred Qual Date:
This field is found beneath the 'AWR Status' field. Where a candidate is due to reach the 12 week qualifying period within this contract, the date at which Equal Treatment is applicable is displayed in this box.

No AWR Alert:
This box, if ticked, will eliminate the contract record from appearing on the 'Contract Alerts' form. This field is also searchable on the 'Search Contract' form and can also be batch updated using the 'Batch Contract Update' form.

Date Registered:
Whenever a new record is created in Eclipse, it is allocated a system generated reference number. This applies to every single record type. Each temp contract reference number begins 'CON'. If a record is deleted, the reference number is deleted with it and will not be re-used. The reference number can be over-typed and a manual one entered were required. In the 'Edit' mode, a green '+' button appears next to the reference number field, to re-allocate a system generated number to the record, select this button.

Candidate:
When a candidate is assigned to the temp contract, this field displays the candidate's name. Until a candidate is assigned the field indicates that the temp contract is as yet 'Unassigned'

Address and Postcode:
Once a candidate is assigned to the temp contract these fields will display the candidate's address and post code.

Status:
This field indicates the status of the booking as either: active, requirement, unassigned, completed or terminated

Charge Client 100% of Expenses:
This value is copied through from the information provided in the 'new contract wizard' and indicates the percentage of candidate expenses charged to the client. The extension of this feature indicates what percentage of accommodation, travel and other expenses will be passed onto the client where necessary.

Include in Batch Invoicing:
This information is copied through from the associated client record and indicates whether the invoices relating to the client are to be included in the batch invoicing process.

Type:
This value is copied through from the 'Branches / Financial' tab of a client record and indicates the type of invoice selected for the client. The options here are 'Invoice per Timesheet' and 'Consolidated Invoicing'. Consolidated invoicing batches together all timesheets for the same client onto one invoice rather than creating individual invoices for each and every timesheet.

FAO, E-mail and Invoice Address:
These fields indicate who any associated invoices will be addressed to, their e-mail address and the invoicing address. This information is pulled through from the client record. To change who the invoice should be addressed to, select the green '+' button. This will show a list of alternative contacts at the client in question.

Invoice Address Authorised:
This tick box indicates that the client's invoicing details have been authorised. Again, this information is pulled through from the client record.

Consultant and Division:
By default, the 'Consultant' will be the person who created the record and the 'Division' the area of the company they belong to. However, these values can be changed where required simply by selecting the required consultant and division from the drop down lists.

Terminated and Reason:
Where a contract has been included in a batch termination, the 'Terminated' box will be ticked and a reason specified. To terminate the contract within the record itself, 'tick' the 'Terminated' box. The following window will appear:

The 'Tick' box labelled 'Terminate all booked and requirement days' is checked automatically. To terminate the contract from a specified date un-tick the box and choose the desired date. Finally select a reason for termination from the drop down menu.

Note:
Where a contract has been terminated, its status will only become 'Terminated' if all timesheets are terminated in the contract. If there are any unassigned, pending, processed, authorised or invoiced timesheets then the status will be automatically determined as with the standard contracts.

Terminated by and Termination Date:
Where a contract has been terminated, these fields indicate which user terminated the contract and the date it took place. These are also searchable on the contract search form.

SMS Sent:
Where the auto SMS feature is activated, this tick box indicates that the SMS has been sent to the assigned candidate.

PO Number Required:
This tick box indicates that a purchase order number is required.

10.2 Rates and Shift:

This 'Rates and Shifts' tab of a contract record contains the information set up in the New Contract Wizard', hence its similarity to step one of the new contract process. However, there are several additional information fields at the foot of the window, explained below:

Estimated Cand Expenses / Client Pay:
Here, the candidates estimated expenses can be added and the percentage to be passed onto the client. These are taken into consideration when calculating the total, predicted, actual and lost values of the contract. Also the pending timesheets are populated with the estimated expenses based on the number of days booked for the timesheet.

Payment Method:
The information in this field is copied through from the associated candidate record in Eclipse. The field will indicate whether the candidate is PAYE, self-employed or to be paid via a composite / umbrella company.

Contractor Status:
The default setting here is 'AWR Applicable but will be changed accordingly once a candidate is assigned to the contract.

Category:
The category list is configured in the Eclipse maintenance menu. This is an additional searchable field and can be used to search for types of contracts e.g. PSL.

CIS Scheme:
This indicates whether the candidate contributes to the 'Construction Industry Scheme' at what percentage of their pay is contributed.

Include Holiday Pay With Candidate Payment:
This box does exactly as it says and includes holiday pay on top of the candidate payment.

Rates Agreed With Client:
This box indicates that the rates have been agreed with the client. Timesheets cannot be processed unless this box is ticked.
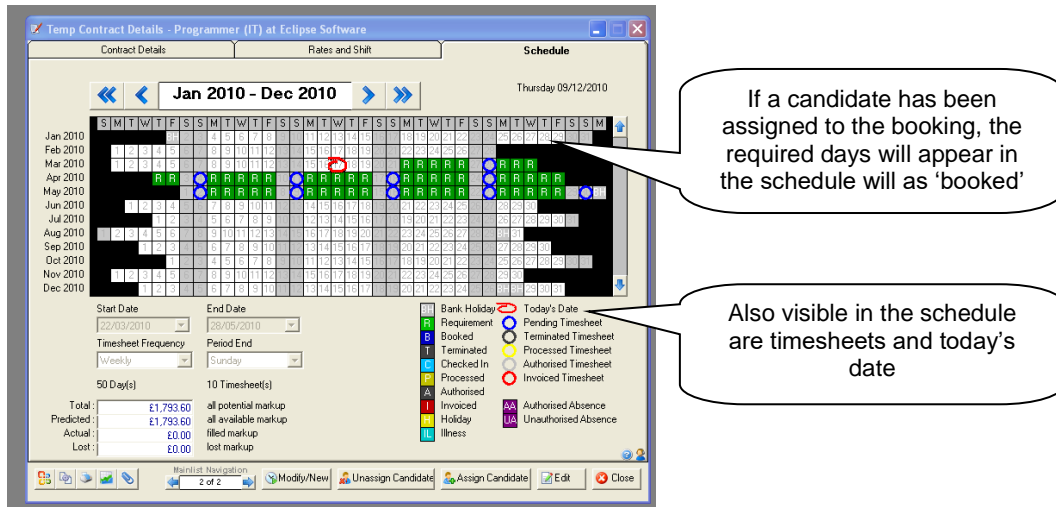
Rates Agreed With Candidate:
This box indicates that the rates have been agreed with the client. Timesheets cannot be processed unless this box is ticked.

AWR Equal Treatment Equivalent Rates:
This box will be ticked automatically if a rate and shift template has been used to create the temp contract and the box was ticked in the template itself. Otherwise, the box can be ticked manually to indicate that the rates are equivalent to equal treatment.
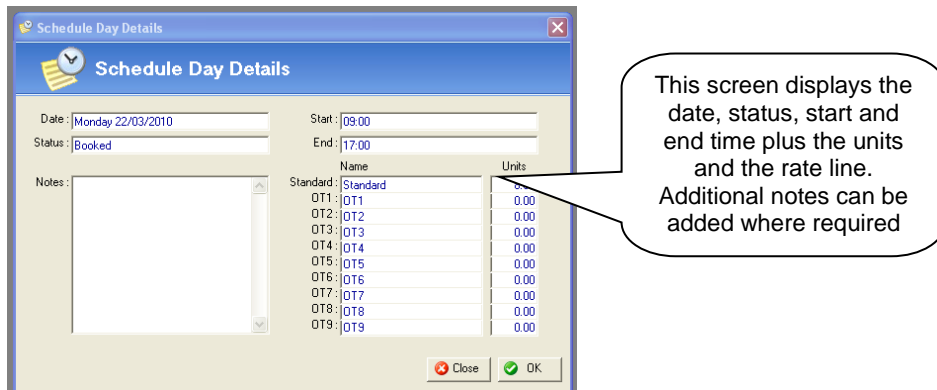
10.3 Schedule:

This final tab to make up the contract record is the 'Schedule'. This is almost identical to Step Two of the 'New Contract Wizard'. A similar screen also appears in the corresponding candidate record.

If a candidate has been assigned to the booking, the required days will appear in the schedule will as 'booked'

Also visible in the schedule are timesheets and today's date

In this example, a candidate has not been assigned to the booking therefore the required dates in the schedule appear as 'requirements'. If a candidate has been assigned, the required days would appear as 'booked'. Visible in the schedule are the timesheets due dates indicated with a blue circle and today's date highlighted with a red circle.
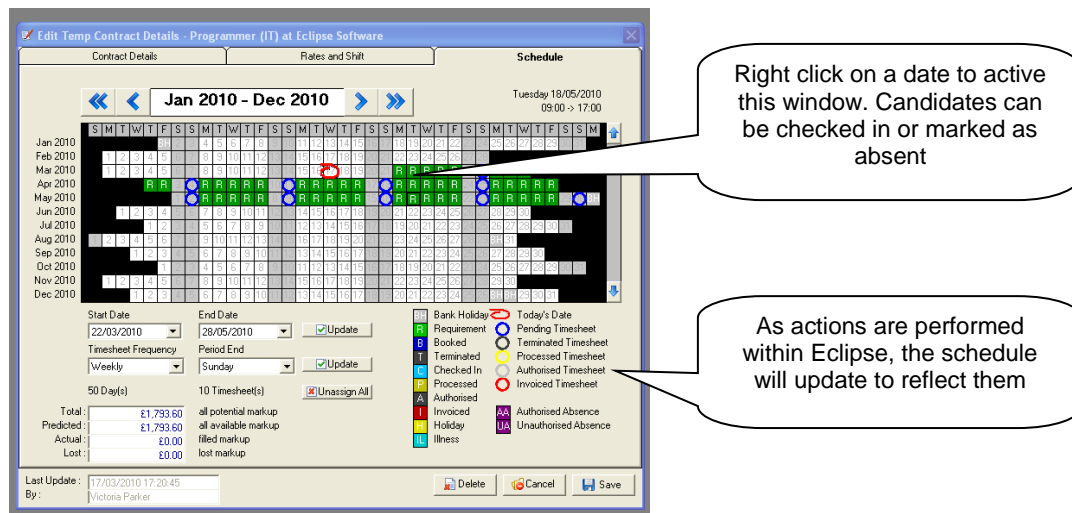
To view one day in the schedule in more detail, simply double click. The following screen is displayed:

This screen displays the date, status, start and end time plus the units and the rate line. Additional notes can be added where required

This screen displays the date, status, start and end time plus the units and the rate line. The same action can be performed for multiple days in the schedule for example where changes need to be made for multiple days. Highlight the days to undergo the alteration and whilst still holding down the 'Shift' key 'double-click' the mouse. The following screen is displayed:

This screen displays all of the highlighted dates. Any changes made here will apply to all of the dates listed on the left
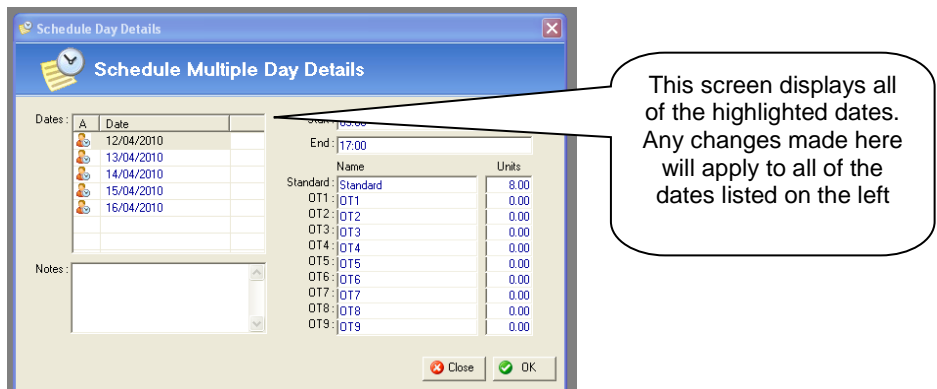
Where a candidate has been assigned to the temp contract they can be 'checked in' or marked as 'absent' in this screen. First, select 'Edit' at the bottom of the window to take the screen out of read only format. Right click on the desired date and select the required option from the dropdown menu. The date in the schedule will change colour accordingly. Again, this action can be performed for multiple dates by first highlighting continuous days in the schedule. Select the first date then holding down the shift key, select the final date. Finally, still holding down the shift key, right click and assign as 'checked in'.

Right click on a date to active this window. Candidates can be checked in or marked as absent

As actions are performed within Eclipse, the schedule will update to reflect them

As actions are performed within Eclipse, the schedule will be updated to reflect them. For example, as timesheets are processed, authorised and invoiced, the required days and the circles indicating timesheets will change colour. Pay particular attention to the 'key on the right for more information. Additionally, there is a mark-up calculator on the bottom left of the window indicating total, predicted, actual and lost mark-up. The figures are calculated as follows:

- Total:
  Total contract mark-up on un-assigned, pending, processed, authorised and invoiced timesheets + lost mark-up (if any)

- Predicted:
  Total value of all mark-up on pending, processed, authorised and invoiced timesheets

- Actual:
  Total value of all mark-up on processed, authorised and invoiced timesheets.

- Lost:
  This field is populated only when a contract is terminated and is the total value of the mark-up for all unassigned and pending timesheets which are set to 'terminated'. The mark-up of these timesheets is set to zero as part of the termination process.

## 10.4 Assigning Candidates to Unfilled Temp Contracts:

As discussed previously, the new contract wizard allows the creation of a new booking without assigning a candidate. If a contract is 'unassigned' the temp contract record will indicate this both in the main interface and in the contract details tab as pictured below. The 'candidate' field is populated with 'unassigned' with the address field remaining blank.
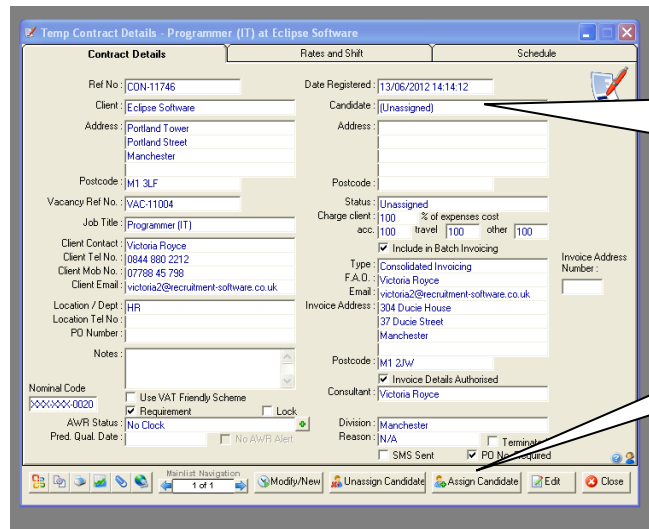
The 'Contract Details' tab of the 'Temp Contract' will indicate if a candidate is assigned to the booking

To assign a candidate select 'Assign Candidate'

To assign a candidate to the booking, simply select 'Assign Candidate' from the toolbar at the foot of the window. The following window will appear:
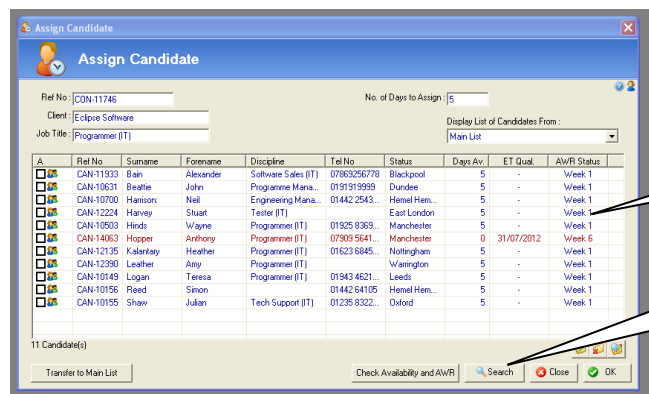
The candidates listed are those currently in the candidate tab of the main interface

To search the database for a candidate, select 'Search'

Note:
The 'Days Avail' column shows the number of days of the contract that each candidate is available to work.

ET Qual:
This is the estimated date that the Candidate would be eligible for Equal Treatment based on the most recent clock for that Candidate & Legal Hirer and only on the assumption that Equal Treatment status would be achieved within the duration of this Contract.

AWR Status:
This field is an estimation based on the most recent existing clock for that Candidate & Legal Hirer and assumes that all 'Pending' timesheets already related to that Clock will be submitted as worked. This value shows the AWR Qualifying Week that would be applicable to the Candidate on the first day of the Contract. These fields don't apply to 'AWR - N/A' candidates and this will be reflected in the 'AWR Status'. Candidates are shown in red if they are going to reach Equal Treatment status during the duration of that Contract.

When selecting a Candidate, if the Candidate has the Contractor Status 'AWR N/A – Derogated Contract' then a warning is displayed so the candidate's status can be checked e.g. confirm that the Candidate is still within a Derogated Contract.

The window above is similar to step 3 of 3 in the 'New Contract Wizard'. The 'temp contract reference number', 'client', 'job title' and 'number of days to assign appear at the top'. Similarly to the wizard the initial list of candidates that appear are those currently in the main interface of Eclipse.

As with the contract wizard select 'Display List of Candidate From:' to list candidates from various sources including the main list, candidates previously worked at the client, the associated vacancy shortlist, exact match and general match candidates and finally all the candidates in the database.

Note:
If assigning candidates at this point it is worth ensuring that the desired candidates appear in either the associated vacancy shortlist or the candidate tab in the main interface. However, the candidate search screen can be activated simply by clicking 'Search' at the foot of the window. The following 'candidate search' screen is activated.
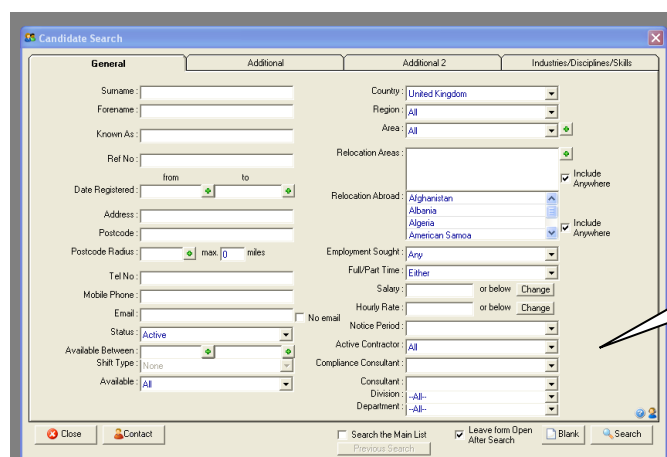
The results of any search will automatically appear in the main interface in the candidate tab. Therefore, when returning to the 'Assign Candidate' screen, refresh the list by choosing 'Main List' from the 'Display List of Candidates from' drop down menu.

Select the required candidate(s) by clicking the corresponding boxes on the left of the window. Again, if the candidate(s) do not have the 'right to work' check, Eclipse will provide a warning as detailed below.
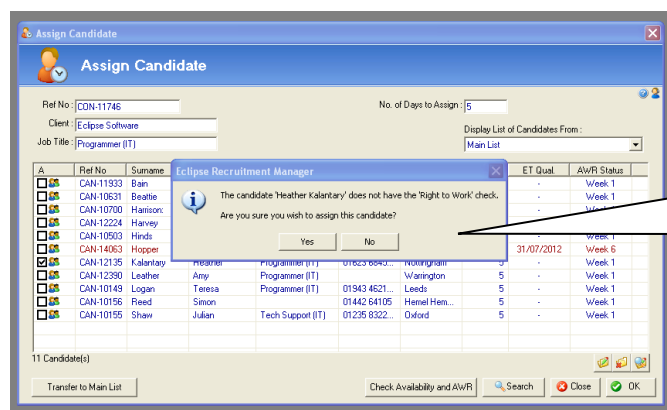
To assign the candidate to the booking, select 'Ok'. Eclipse will return to the 'Temp Contract' record where the details of the candidate will be available.

Batch Assigning candidates to multiple contracts.
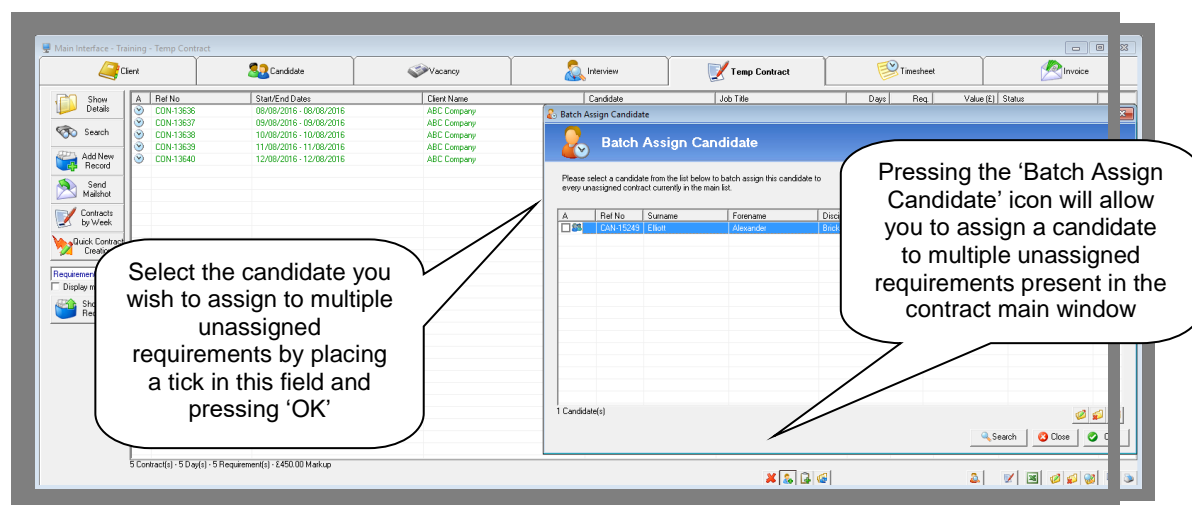
The batch assign feature allows you to assign a candidate to multiple unassigned contracts present in the main window of the contract section. Depending on how you have set the permissions regarding 'Right to Work' Eclipse will either provide you with a warning asking you 'Are you sure you wish to assign the candidate?' or 'You cannot book this candidate onto this contract. On both occasions it will ask you if you 'Would like to view the candidates right to work checklist?'

Note: If the payment method of the candidate doesn't match the payment method of the contract then you will not be able to assign the candidate to the multiple requirements**.**

10.5 Creating Contract Confirmations Using the Mail Merge Feature:

Once a candidate has been assigned to a temp contract in Eclipse it is possible to use the 'Output' feature to create contract confirmations for both the client and the candidate. Firstly, ensure that the confirmation templates are configured in the Maintenance Menu. For more information on creating document templates, please refer to the 'Document Administration' user guide.

In the example below, the document templates have been configured for both the client and candidate contract confirmations. Select the 'Output Letter, Email, SMS' button on the bottom left hand side:
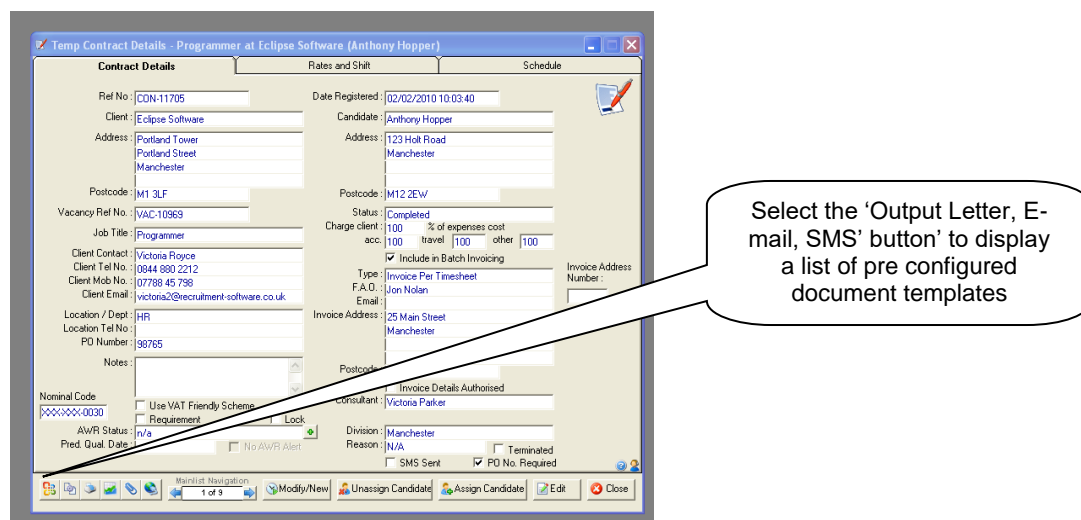
A list of pre-configured document templates is displayed. In the example below there are separate contract confirmation documents both candidates and clients.
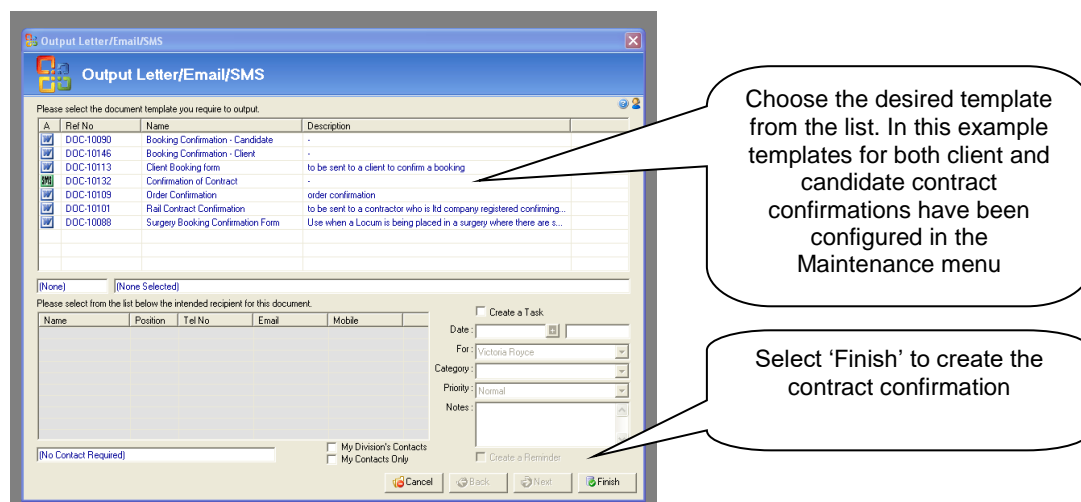
Choose the desired template from the list. In this example templates for both client and candidate contract confirmations have been configured in the Maintenance menu

Select 'Finish' to create the contract confirmation

Choose the desired template from the list and select 'Output'. The word document will open after which the information can be merged into a completed contract, saved and then either e-mailed or sent by post to the client and the candidate.

10.6 Attaching Signed Contracts to Temp Contract Records:

To attach a signed copy of a contract to a temp contract record in Eclipse, first select the blue paperclip icon from the foot of the desired temp contract record. This will open the attachments screen. Select 'Add New' to open the following window.

Browse the Windows file manager for the document to attach and provide a brief description of the document. Please note that this is a mandatory field and the document cannot be saved unless this field is completed.

Finally, place a tick in the box: 'This attachment is the signed copy of the contract' as indicated below. The facility to search for signed contracts is available in both the contract and timesheets search forms.
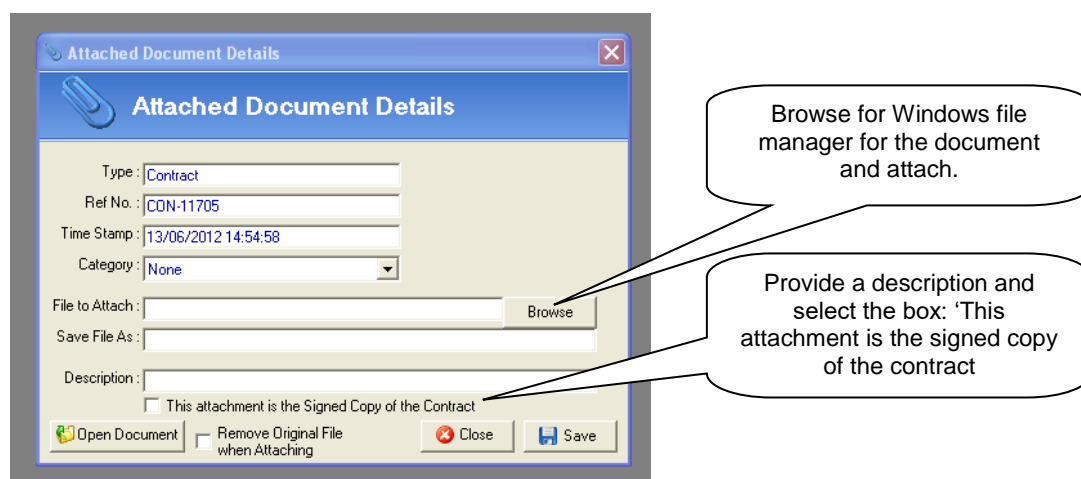

Browse for Windows file manager for the document and attach.

Provide a description and select the box: 'This attachment is the signed copy of the contract

10.7 Agreeing Client Invoice Rates:

Before Eclipse allows timesheets to be processed, Eclipse must recognise that the rates have been agreed with both the client and the candidate. Ensure to indicate this by placing a tick in the 'Rates Agreed with Client' and 'Rates Agreed with Candidate' boxes in the associated temp/contract record as indicated below.
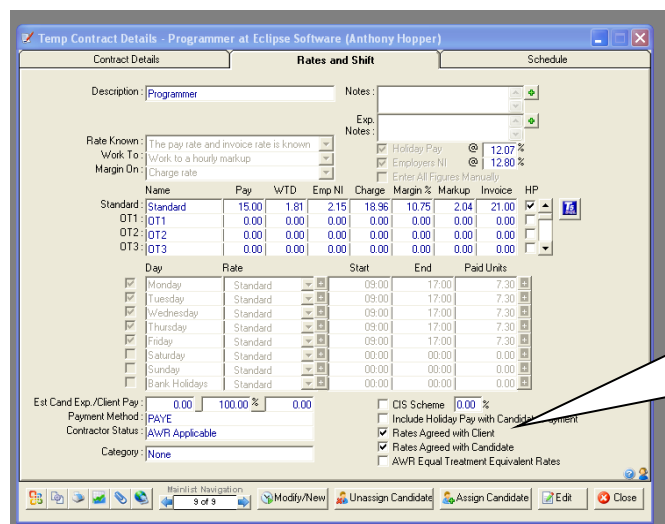
Before processing timesheets, ensure to indicate that the rates have been agreed with both the client and candidate by ticking these boxes.

Once these boxes have been checked, it is now possible to process, authorise and invoice an associated timesheet.

Note:
Timesheets can only be processed on or after the final day that the timesheet relates to. However, where the user permission 'Allow Early Processing of Timesheets' is granted the timesheet can be processed on any day that the timesheet relates to.

10.8 Modifying Temp Contracts:

It is possible to make several quick and easy modifications to an existing temp contract, or create a new temp contract based on an existing booking, in two simple steps. This section explains the process behind these modifications. Firstly, open the temp contract to be amended and select the 'Modify / New' button from the toolbar at the foot of the window:
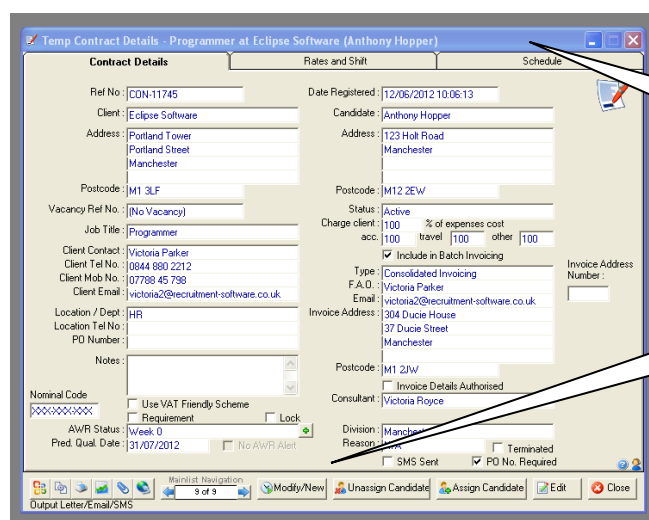
Open the existing temp contract to be modified

Select 'Modify / New' from the toolbar

The following 'Modify / New Contract window will appear displaying the 5 modification options. Step one asks the use to select the type of modification required:
.
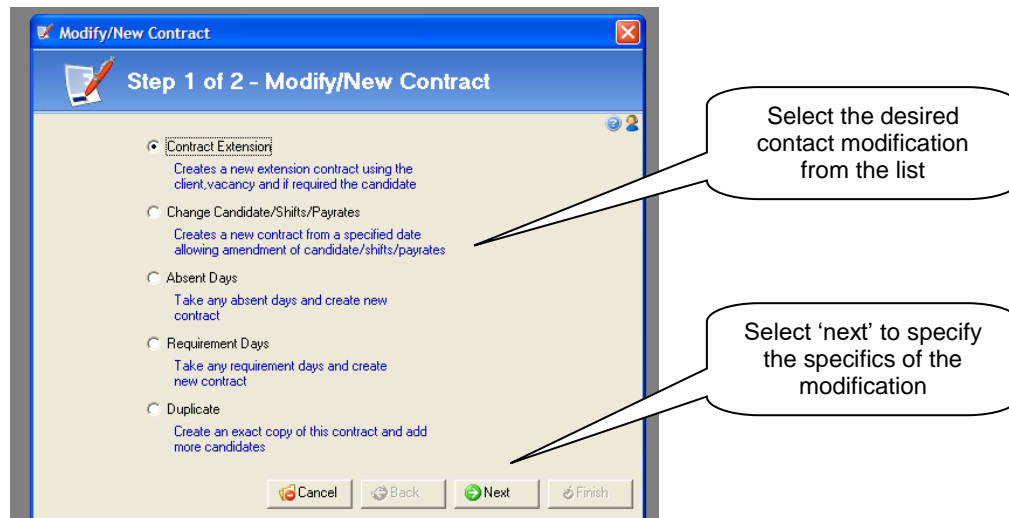
1)   Contract Extension:
      Creates a new extension contract using the client, vacancy and if required the candidate

2)   Change Candidates / Shifts / Pay Rates:
      Creates a new contract from a specified date allowing amendment of candidate/shifts/pay rates

3)   Absent Days:
      Take any absent dates and create new contract

4)   Requirement Days:
      Take any requirement days and create new contract

5)   Duplicate:
      Create an exact copy of this contract and add more candidates

Select the desired modification from the list and click 'Next'. Step two of each of modification process is explained below:
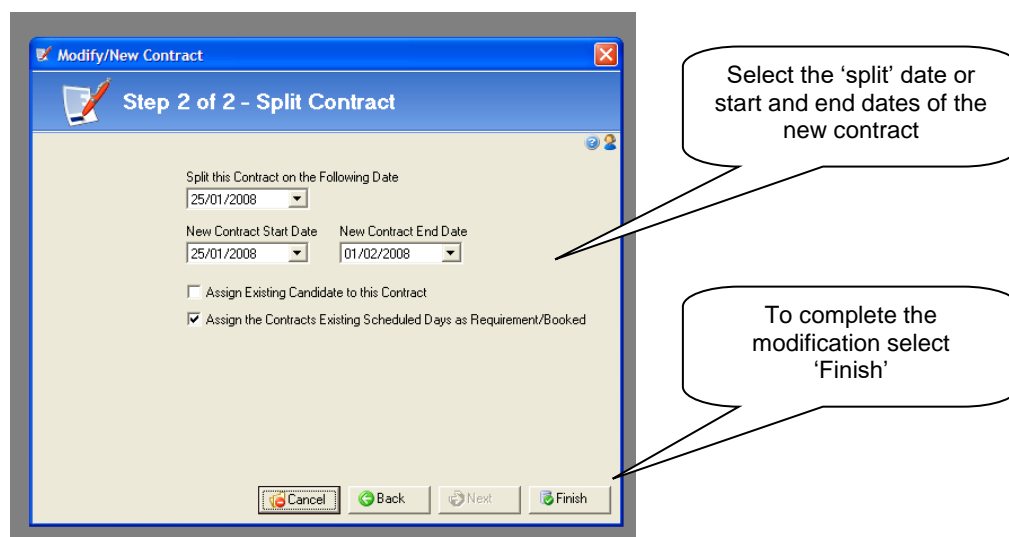
10.8.1 Contract Extension:

Step two of a contract extension is explained here. Firstly select how long or until what date the contract is to be extended to using the drop down menus or the calendars below. Assign the existing candidate to the new contract using the tick box. If a new candidate is required, the box should be left blank in which case once the contract extension is complete, a candidate can be assigned to the booking as described earlier. Finally, specify whether the existing shift pattern should be assigned as either 'booked' or 'requirement' in the new contract schedule. If this box is left blank the shift pattern should be manually assigned.
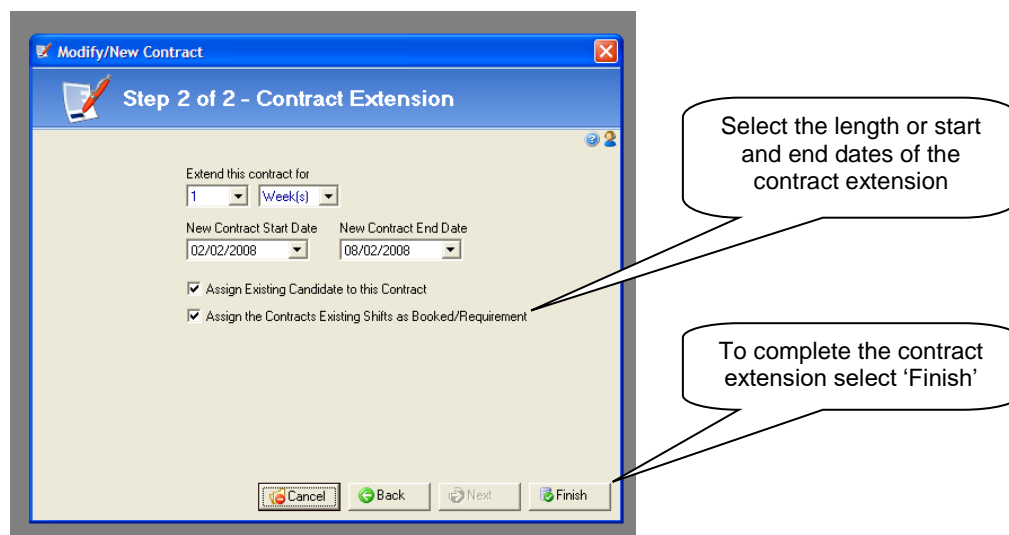
To complete the contract modification, select 'Finish'. The new contract record will appear.

10.8.2 Change Candidates / Shifts / Pay Rates:

It is possible to change the candidate, shift or pay rate of a temp contract booking by selecting the 'change candidates / shifts / pay rates' option. The following screen will appear:


The screen is almost identical to the 'contract extension' feature. Specify the date from which the contract is to be split and the start and end dates of the new contract. Select the remaining options as required. To complete the contract modification, select 'Finish'. The new contract record will appear. The old contract will be ended on the last booked day prior to the 'split' date.

Note:
When splitting a contract Eclipse will take the original number of days on the contract and reapportion the estimated expenses accordingly using the number of days of the new contracts

10.8.3 Absent Days:

This modification identifies absent days in an existing contract and creates a new contract for that period. Specify the new contract start and end dates a required. The new requirement days will default to those specified in the original contract
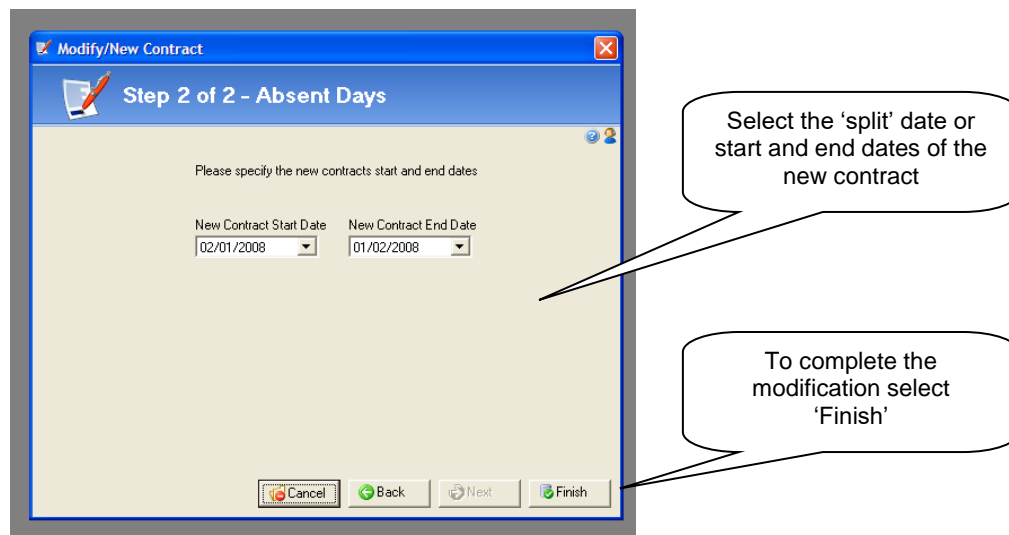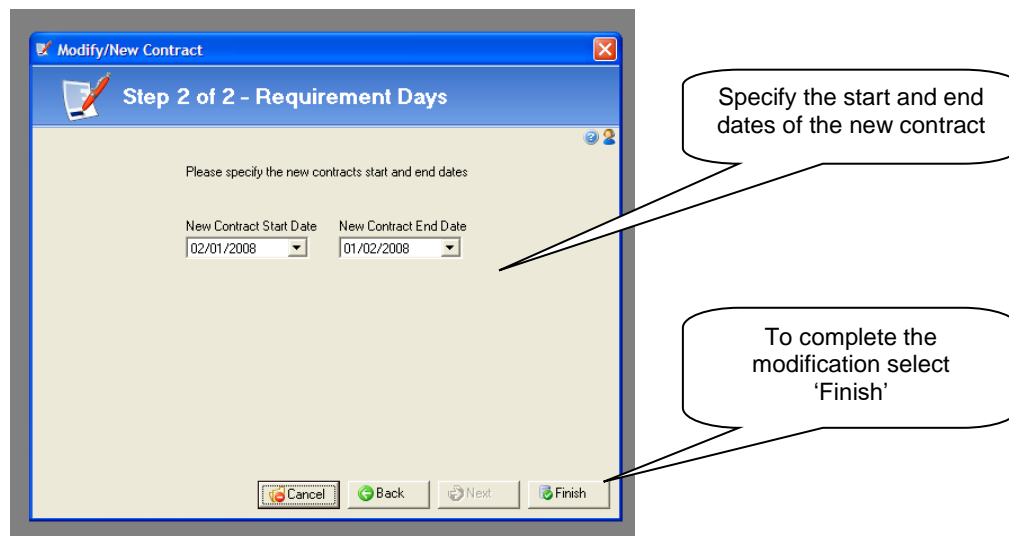
To complete the contract modification, select 'Finish'. The new contract record will appear.

Note:
When splitting a contract Eclipse will take the original number of days on the contract and reapportion the estimated expenses accordingly using the number of days of the new contracts

10.8.4 Requirement Days:

The fourth modification takes any requirement days from an existing temp contact and creates a new booking. For example, if an existing contract was extended but the candidate has since been booked elsewhere, leaving requirement days. Specify the new start and end dates as required.

To complete the contract modification, select 'Finish'. The new contract record will appear.

Note:
When splitting a contract Eclipse will take the original number of days on the contract and reapportion the estimated expenses accordingly using the number of days of the new contracts

10.8.5 Duplicate:

Finally, it is possible to quickly create an exact duplicate contract. This is useful if a client requests additional staff for an existing booking. Simply specify the number of duplicate contracts required.
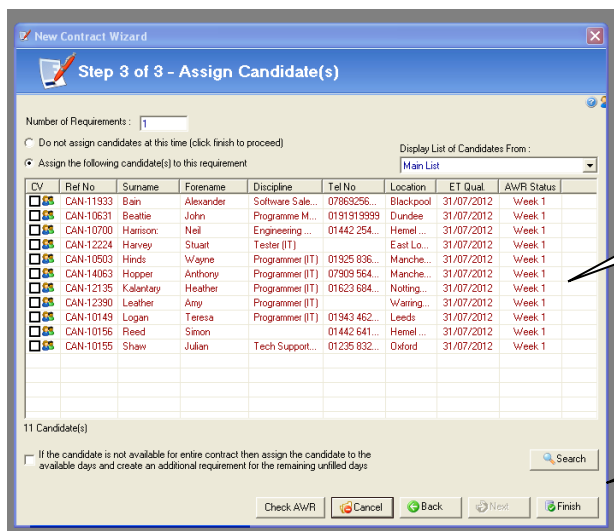
To complete the contract modification, select 'Finish'. The 'Assign Candidate(s)' screen will automatically appear as pictured below.

As with any other temp contract, either complete the booking without assigning a candidate at this time, or select a candidate for the contract. Click 'Finish' to complete the action:


The new contract will now appear.

11 Contract Alerts:

The contract alert feature is a permission based tool that alerts users to certain types of temp contracts in Eclipse that may require attention. Permission can be granted to view the contract alerts based on user only records, user division only records or all relevant records in the database. Please refer to the User Administration section of this guide for more information on user permissions. The contract alert window will appear automatically upon log in as shown below:
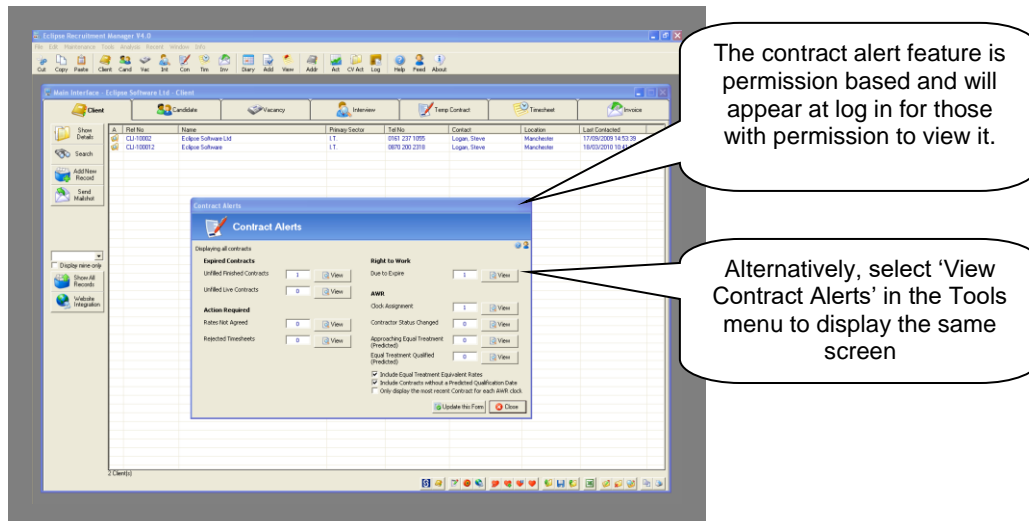
The contract alerts feature displays four pieces of information:
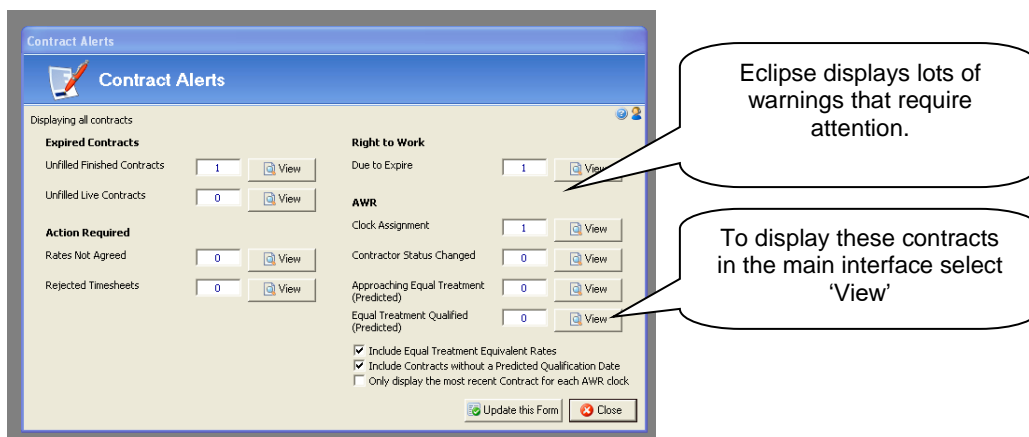
Expired Contracts - Unfilled Finished Contracts:
These are unfilled temp contracts in Eclipse where the last scheduled day has now passed

Expired Contracts - Unfilled Live Contracts:
These are unfilled temp contracts in Eclipse where there are still unfilled scheduled days that have the potential to be filled

Action Required - Rates NOT Agreed:
These are contracts in the database where the client rates have not been agreed and have timesheets ready to be processed

Action Required – Rejected Timesheets:
These are timesheets that have been rejected within Eclipse and require attention. The rejected flag is also searchable on the timesheet search screen.

Selecting 'View' to the right of any of these fields will display the list of records in the main temp contract interface. This feature can be used in conjunction with the batch update contracts button found at the foot of the main temp contract interface whereby unfilled finished contracts that are now lost opportunities can be terminated and any related timesheets set to the same status. Using both of these tools will ensure that the data in Eclipse is as accurate as possible and it not cluttered with irrelevant temp contracts that are no longer useful.

Right to Work – Due to Expire:
This field indicates the number of documents that are due to expire. This information is based on the default document settings configured within the 'Right to Work section of the Maintenance Menu and the information entered into the individual candidate's records. Selecting 'View' opens the following window:

This screen displays lots of useful information such as the candidate's name, the name of the document that is due to expire, the expiry date and how many days away from the expiry date the document is.

The list can also be transferred to the main candidate window for ease of management

This screen displays lots of useful information such as the candidate's name, the name of the document that is due to expire, the expiry date and how many days away from the expiry date the document is. The list can also be transferred to the main candidate window for ease of management.

Clock Assignment:
Clicking on the 'View' button will show the AWR Clock Assignment screen.


Eclipse will scan through the list of 'Clock-less' contracts and present a list of candidates that have Temp Contracts in Eclipse which are not assigned to a Clock.

Eclipse will scan through the list of 'Clock-less' contracts and present a list of candidates that have Temp Contracts in Eclipse which are not assigned to a Clock. The reasons for this could be as follows:

• The Client for the Contract has no Legal Hirer value set and the Contract was created by a user that did not have permission to set this.

• There is an existing Clock already active for this Candidate / Legal Hirer which may or may not be for a similar employment type so requires a manual decision on whether to create a new clock or add to the existing one.

Clicking on the Candidate's name will present a list of Legal Hirers / Proposed Legal Hirers in the second list. If the Status within the Legal Hirer list is set to Unconfirmed, it is possible to select the Client and set the Legal Hirer at the foot of the list.

Once the client's status is changed from 'Unconfirmed' to one of the confirmed statuses, Eclipse will again re-scan and automatically create any Clocks that it can.

If there are any left in the list, clicking on the legal hirer in the middle list will present a list of applicable Temp Contracts that are not assigned to a Clock. Choose one of the contracts in the list and click the 'Create AWR Clock' button. The 'Clock Assignment' screen will be presented. The process from here is identical to that explained earlier.
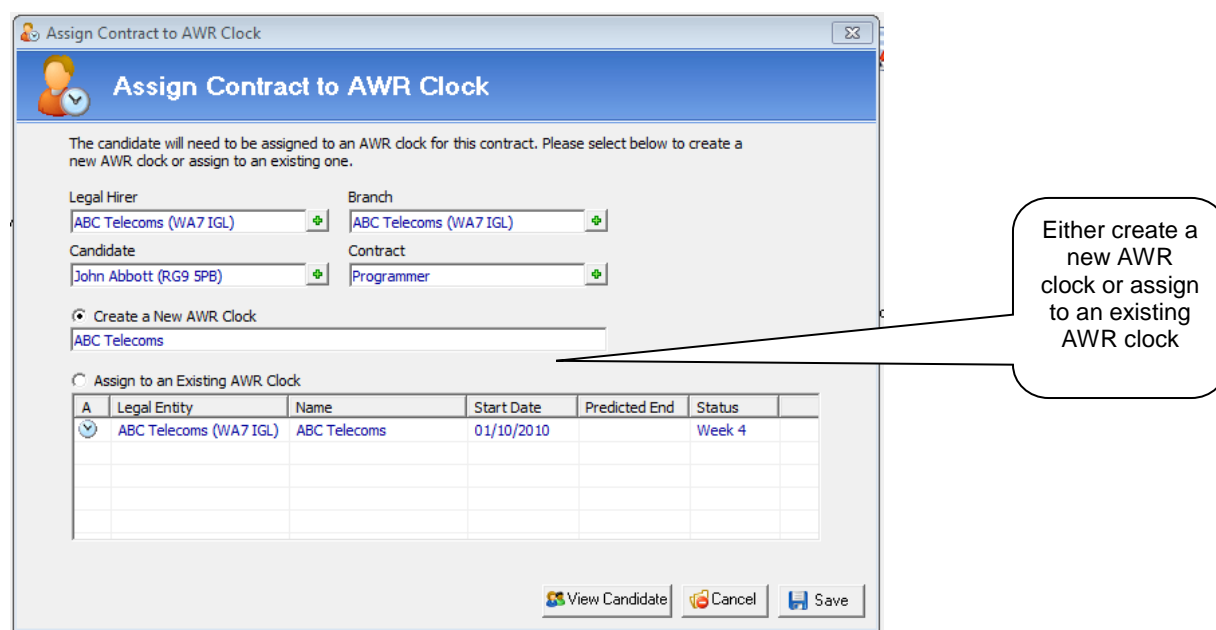
Contractor Status Changed:
This is a warning list of any Temp Contracts where the Candidate's Contractor Status e.g. 'AWR N/A – Derogated Contract' does not match that of a Contract that is live and Active. This will typically occur if the Status of a Candidate has changed after the creation of the Contract.

Approaching Equal Treatment (Predicted):
This is a list of all Contracts that are approaching the Equal Treatment 12 week qualifying period based on the current date. The default warning period is 7 weeks or above. This is based on the 'Predicted AWR Status' rather than the actual which also includes Pending Timesheets rather than just Processed Timesheets.

Equal Treatment Qualified (Predicted)
This is a list of all Active Contracts that have now exceeded the 12 week qualification period for Equal Treatment and should now be considered as such. Please note that this is also based on Pending Timesheets rather than the 'Actual figure' based on Pending Timesheets. It does also include Contracts where the pay rates that the Contract is based on are already deemed to be 'Equal Treatment Equivalent'.

Include Equal Treatment Equivalent Rates [Tick Box]:
This tick box will include contracts in the alert numbers where rates have been confirmed as 'AWR Equal Treatment Equivalent Rates'

**Include Contracts Without a Predicted Qualification Date [Tick Box]:**
This tick box provides the capability of only displaying contracts that actually have a predicted qualification date present.

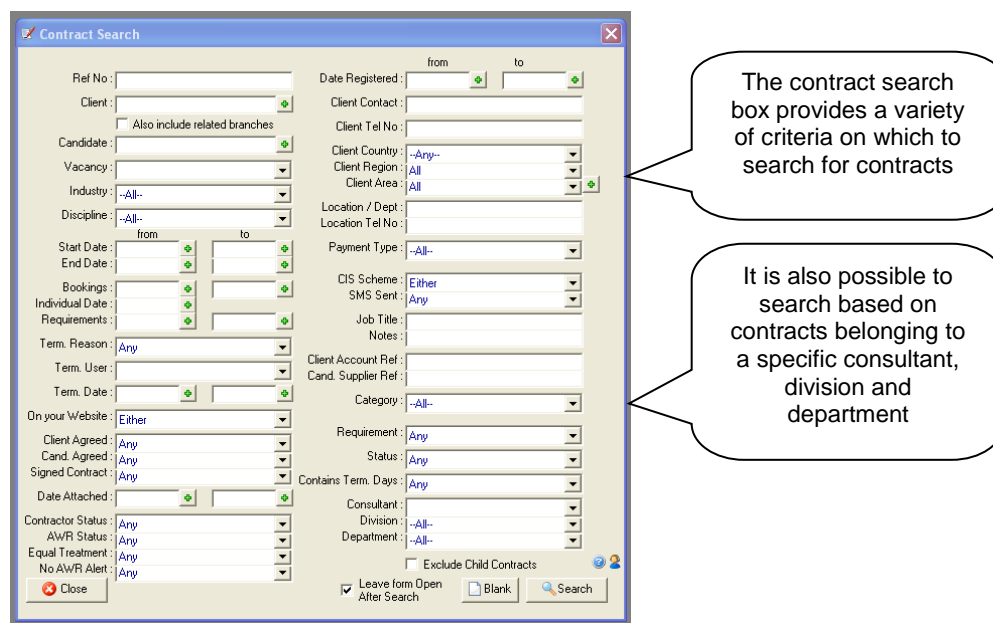**Only Display the Most Recent Contract for Each AWR Clock [Tick Box]:**
Ticking this box will only show the most recent AWR contract for each clock. For example where the candidate has multiple temp contracts for the same legal hirer, ticking this box will display only the most recent temp contract. This feature can also be accessed via a button at the bottom of the temp contract main interface.

12 Contract Search:

As with every other section of Eclipse, there is a search facility to search for contracts based on a variety of criteria. To open the contract search box, first ensure that the Temp / Contract tab is selected in the main interface. Now, select the 'Search' button on the left hand side as indicated below:

Select the 'Search' button on the left side of the main interface
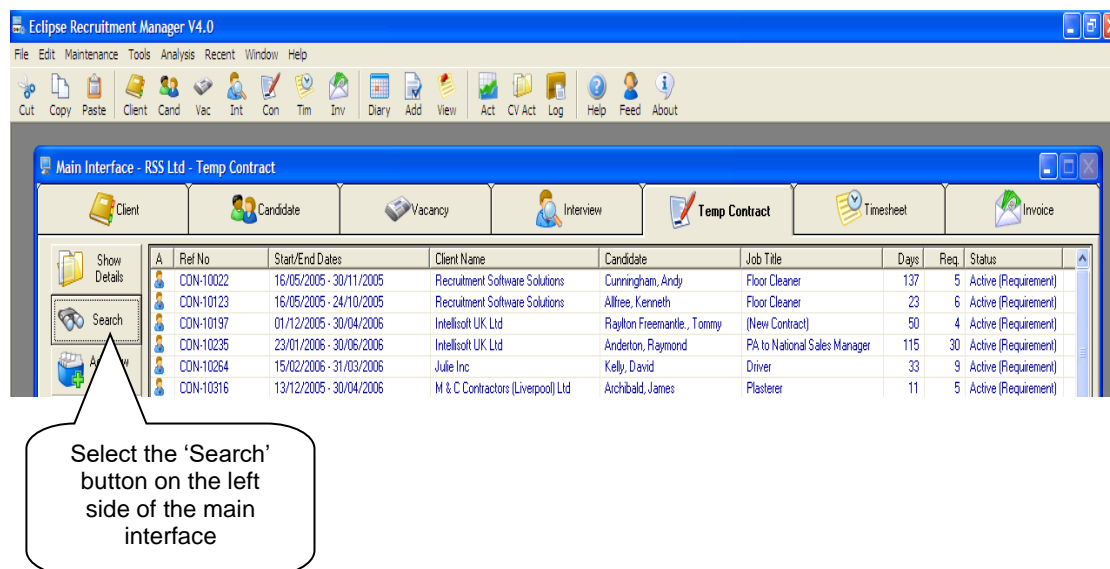
Once opened, the contract search box displays a variety of criteria for locating contracts of various types including client, candidate, vacancy and date ranges. It is also possible to search for contracts on status and by consultant.

The contract search box provides a variety of criteria on which to search for contracts

It is also possible to search based on contracts belonging to a specific consultant, division and department
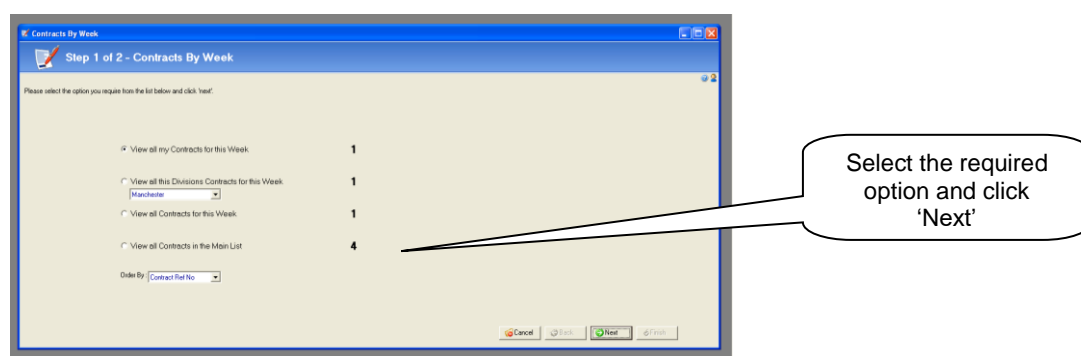
13 Contracts by Week:

The 'Contracts by Week' feature allows the manipulation of contracts using a convenient week view screen. This section is accessed either by selecting 'Contracts by Week' from the 'Tools' menu or simply clicking the icon on the left side of the contracts section in the main interface.


The 'Contracts by Week' feature can be accessed via the 'Tools' menu

Alternatively, select the 'Contracts by Week' icon on from the 'Temp Contract' tab
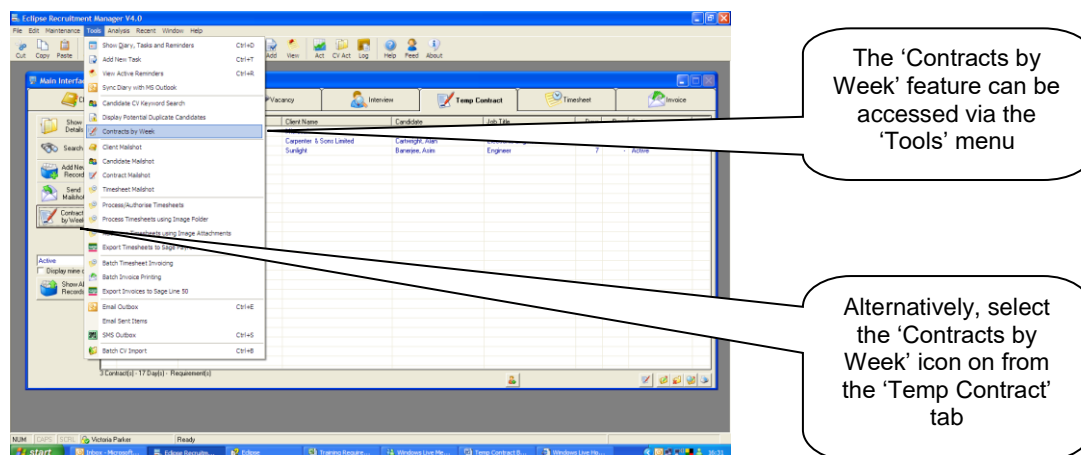
The following options are provided:

Select the required option and click 'Next'

1. View all my Contracts for this week:
   This will display all contracts that pass through the current week where the consultant is the user.

2. View all the Division's contracts for this week:
   This option displays all contracts that pass through this week based on Division. Choose the 'Division' from the drop down menu

3. View all Contracts for this week:
   The third option will display ALL contracts that pass through this week regardless of consultant or division.

4. View all Contracts in the main list:
   This option presents the most flexible method where the user can create a list of contracts in the main list using a search and then order them using the column headers. Therefore the list displayed in 'Contracts by Week' view will be an exact replica of the contracts in the main list.

5. Order by:
   This option allows the list of contracts to be ordered by reference number, client, vacancy, candidate, pay rate, invoice rate, start date or end date. The 'View all Contracts in the Main List' option does not use the 'order by' setting but retains the order the contracts are displayed in the main list.

Select the desired option from the list and click 'Next'. The 'Contracts by Week' screen is displayed containing the required information. For the purpose of this example, the 'Contracts by Week' to be viewed are those currently in the main list.
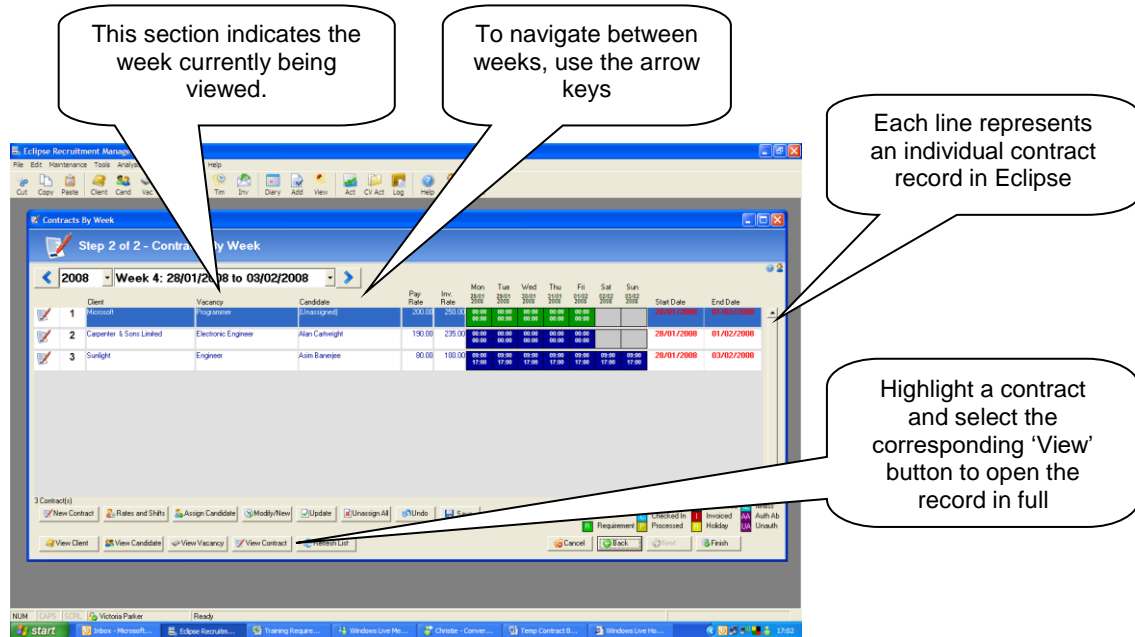
In effect, each line in this view is a contract record indicating either the booking (blue) or requirement (green). Scroll through the weeks using the controls provided at the top left hand side of the screen.

To view an actual record relating to a contract in the list, first highlight the record then either select the 'View' buttons to the foot of the form or double click on the vacancy, candidate etc. in the list

Within the 'Contracts by Week' view, days can be assigned and unassigned in exactly the same way as the schedule in a temp contract record. Right click on the specific day to activate the context menu pictured below. Candidates can also be 'Checked In' etc from this screen/ Simply right click to open the list of option shown below:
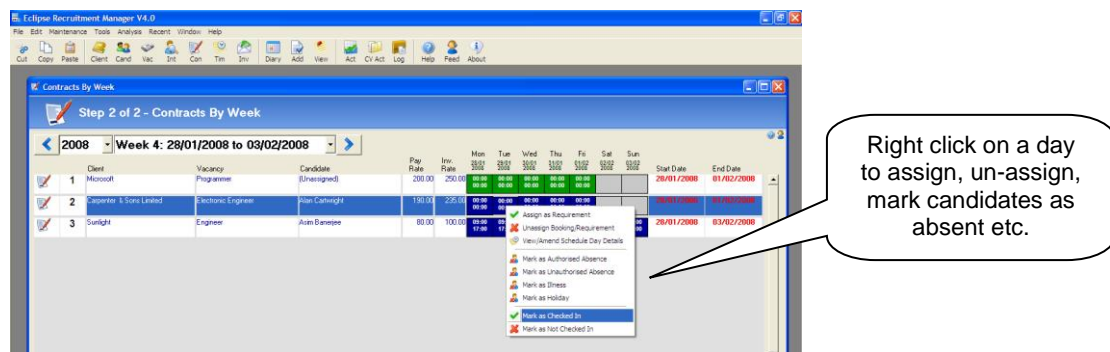

Double clicking on an individual day activates the following window. From here shift start and end times can be amended along with rates etc. Notes relating to the booking can also be added from here.
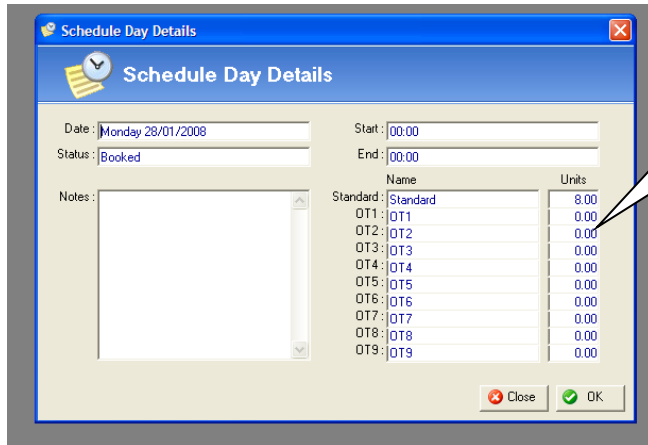
Double click on an individual day in the schedule to activate this window

The second selection of buttons (indicated below) performs the same actions as they do in a contract details record. For example, 'Assign Candidate', 'Modify / New' etc. Simply highlight the desired record and select the action required.
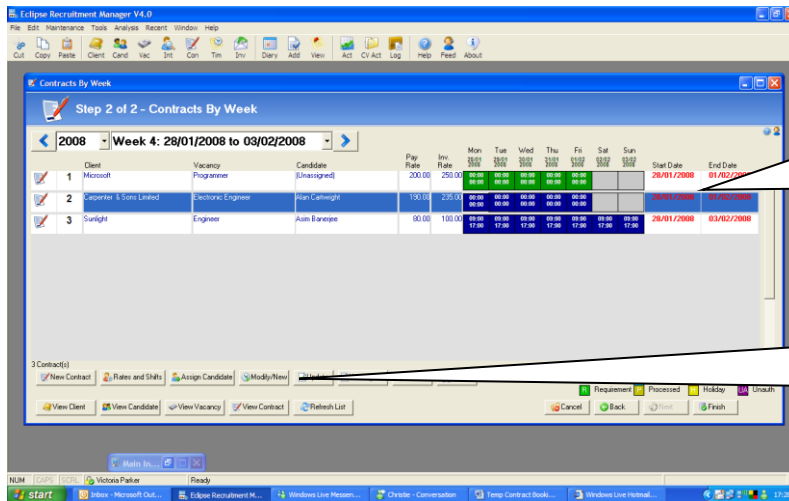
A date in red indicates the start or end date of the contract falls in the week being viewed

The user is able to assign candidates to bookings etc. from the 'Contracts by Week' view

The two columns on the far right indicate the start date and dates of the contracts in the list. If a date is displayed in red this signifies either the start or end of the contract falls in the current week being viewed.
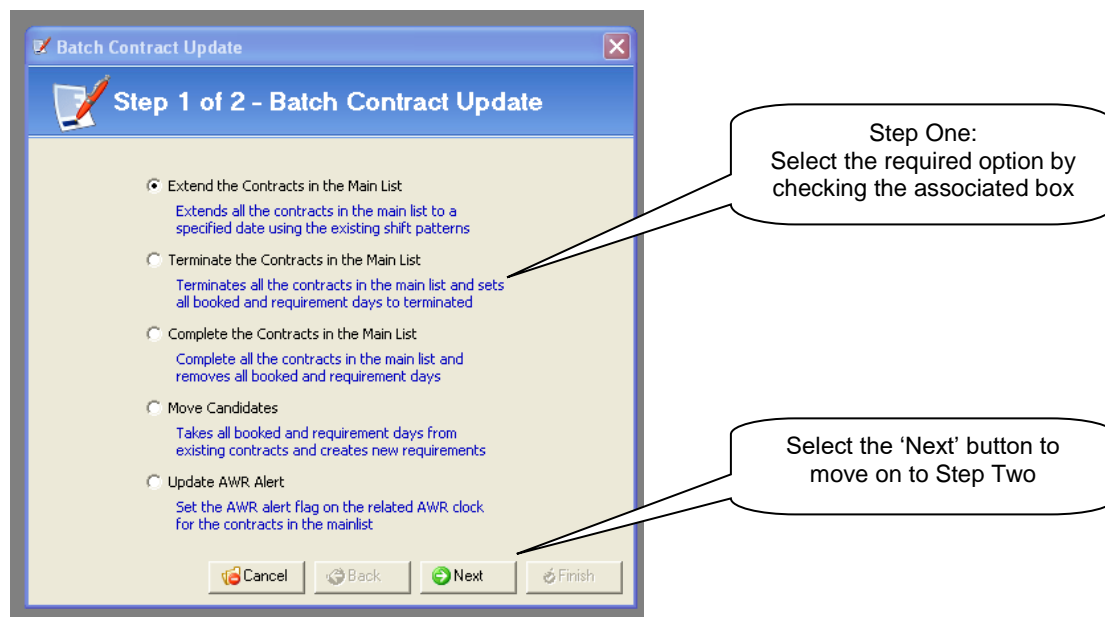
The 'Contracts by Week' screen is a useful tool for quickly assessing contract activity on any given week.

14 Batch Update Contracts:

The 'Batch Update' feature can be found at the foot of the 'temp contract' main interface as indicated below. This button allows the update of all the contracts in the main list by performing one of four actions. This feature is particularly useful where large numbers of contracts need to undergo the same amendment.

10 Contract(s) · 463 Day(s) · 226 Requirement(s) · £19,418.08 Markup

Select 'Batch Update Contracts'
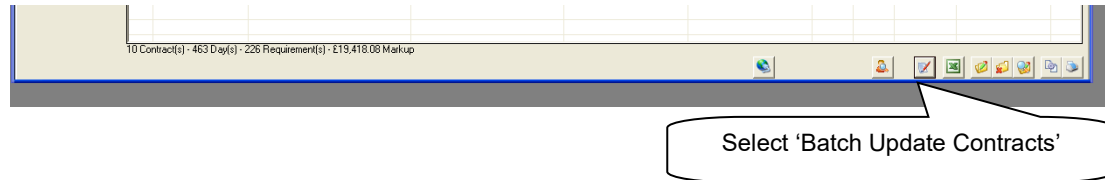
Firstly, ensure that only those contracts requiring the amendment appear in the main temp contract interface. Secondly, select the 'batch Update Contracts' button. The following window appears:
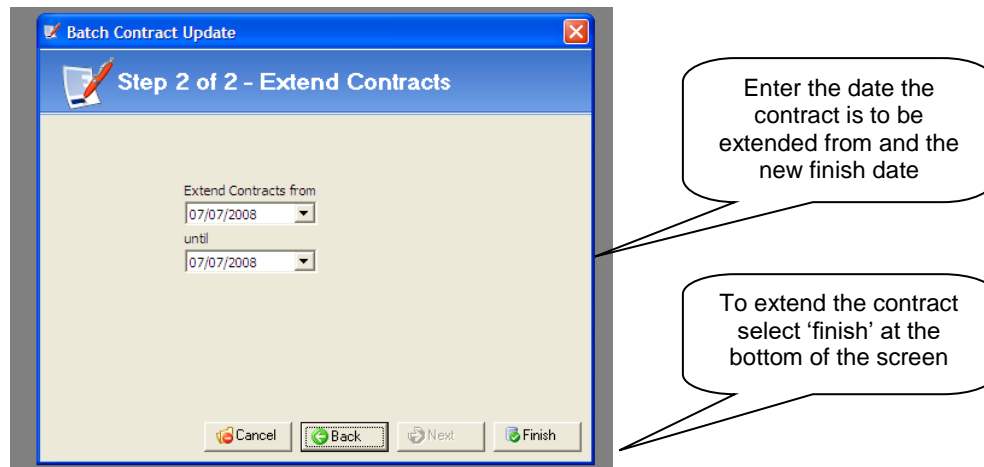
Step 1 of 2 – Batch Contract Update

⦿ Extend the Contracts in the Main List
Extends all the contracts in the main list to a specified date using the existing shift patterns

○ Terminate the Contracts in the Main List
Terminates all the contracts in the main list and sets all booked and requirement days to terminated

○ Complete the Contracts in the Main List
Complete all the contracts in the main list and removes all booked and requirement days

○ Move Candidates
Takes all booked and requirement days from existing contracts and creates new requirements

○ Update AWR Alert
Set the AWR alert flag on the related AWR clock for the contracts in the mainlist

[Cancel] [Back] [Next] [Finish]

Step One:
Select the required option by checking the associated box

Select the 'Next' button to move on to Step Two

The four available options are as follows:

1) Extend the Contracts in the Main List:
   Extends all the contracts in the main list to a specified date using the existing shift patterns

2) Terminate the Contracts in the Main List:
   Terminates all the contracts in the main list and removes all the booked and requirement days

3) Complete the Contracts in the Main List:
   Complete all the contracts in the main list and removes all booked and requirement days

4) Move Candidates:
   Takes all booked and requirements days from existing contracts and creates new requirements

5) Update AWR Alert:
   Allows for the 'AWR Alert' to be switched on or off

Select the desired modification from the list and click 'Next'. Step two of each of modification process is explained below:

14.1 Extend:

Extending contracts using the 'batch update' feature is very quick and simple. In Step 2, select the date to extend the contract from and enter a new contract end date. Once the new dates have been confirmed, select 'Finish'.


Enter the date the contract is to be extended from and the new finish date

To extend the contract select 'finish' at the bottom of the screen

Eclipse will display the following notification box before the extension is complete: The notification says:

"WARNING! This will extend the 1 contract(s) which are currently in the main list.
This process can only be reversed by individually amending each contract processed
Are you sure you wish to proceed?"

Selecting 'Yes' at this point will create a new contract for the extension which will be known as 'the child contract'. The original contract will be known as 'the parent contract'.

14.2 Terminate:

The second 'contract batch update' option allows for the termination of contracts in the main list. In the screen below the date from which the contract is to be terminated is specified. Secondly, a reason for termination is selected from the drop down menu.

Select the date from which the contract is to be terminated

Select a reason for the termination. This list can be administered via the Maintenance Menu
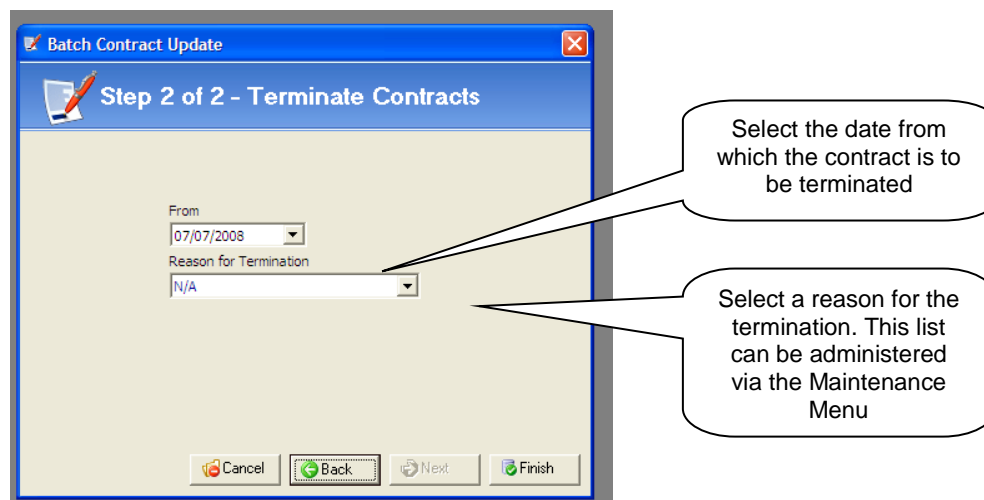
Eclipse provides a standard list of reasons for termination, however may be amended and added to via the Maintenance Menu under 'Contract Reason for Termination'. To complete the modification select 'Finish'. Eclipse will again provide a warning before the update is complete. All of the contracts in the main list will now be updated.

Note:
When terminating a contract Eclipse will reapportion the estimated expenses accordingly.

Note:

When a contract is terminated, its status will only become 'Terminated' if all timesheets ate terminated in the contract. If there are unassigned, pending, processed, authorised or invoiced timesheets then the status will be automatically determined as with standard contracts. However, these contracts will still display the termination details e.g. by who and when.
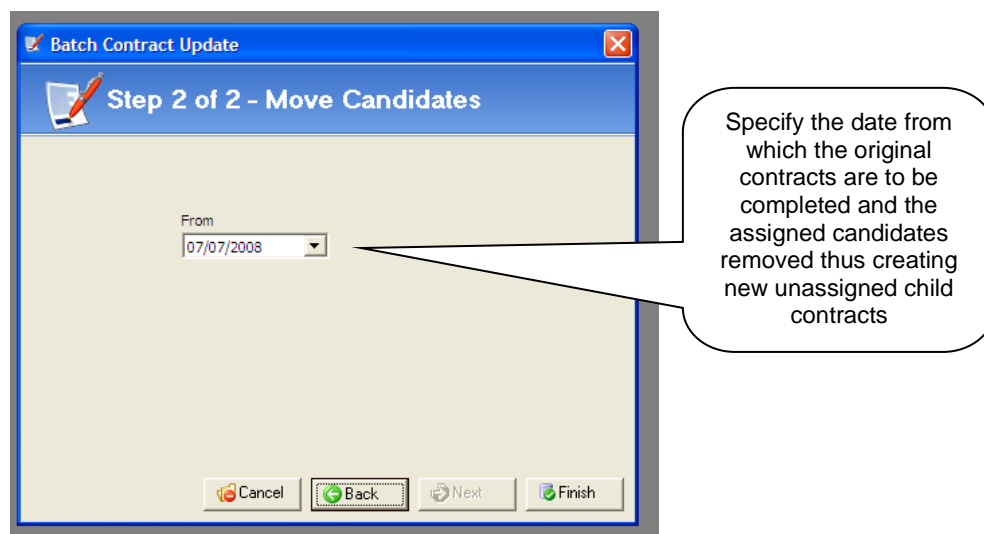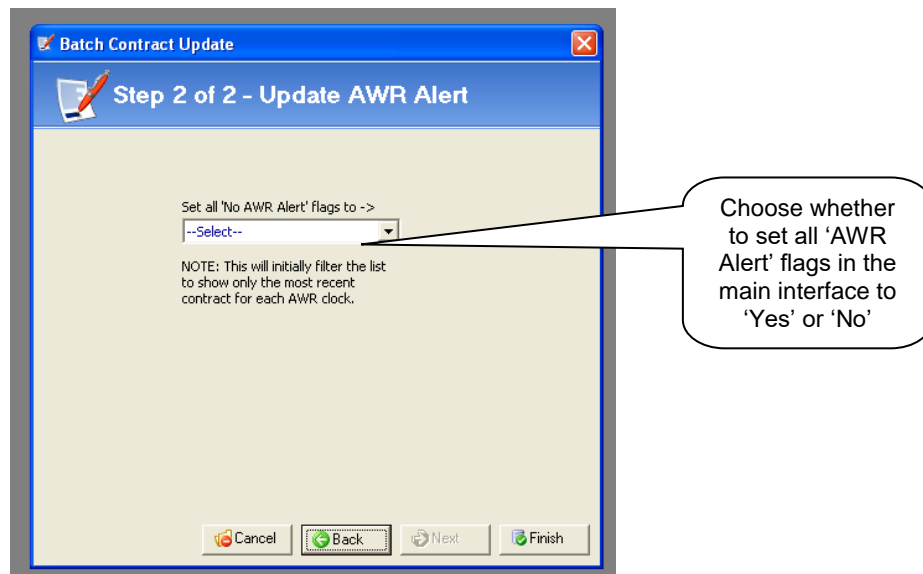
14.3 Complete:

The third 'batch contract update' allows for the completion of contracts in the main list. This will remove any future booked or requirement days from the specified date and complete the contracts.
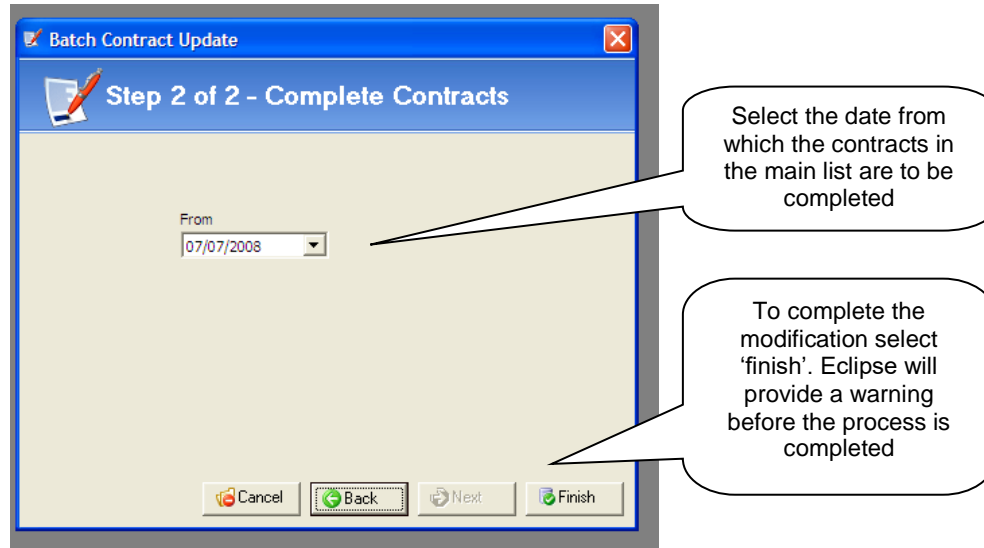
To complete the modification select 'Finish'. Eclipse will again provide a warning before the update is complete. All of the contracts in the main list will now be completed.

14.4 Move Candidates:

The 'move candidates' batch contract update moves candidates from the contracts in the main list. Eclipse completes the original contracts from the specified date and creates a new contract for the remainder of the original contract length but leaves the new contracts 'unassigned'.

To complete the modification select 'Finish'. The contracts in the main list will now be updated. The original part of the contract is now known as the 'parent contract' whereas the new contract is known as the 'child contract'.

14.5 Update AWR Alert:

The final batch contract update relates to the AWR functionality and switches the 'AWR Alert' on or off within temp contract records.
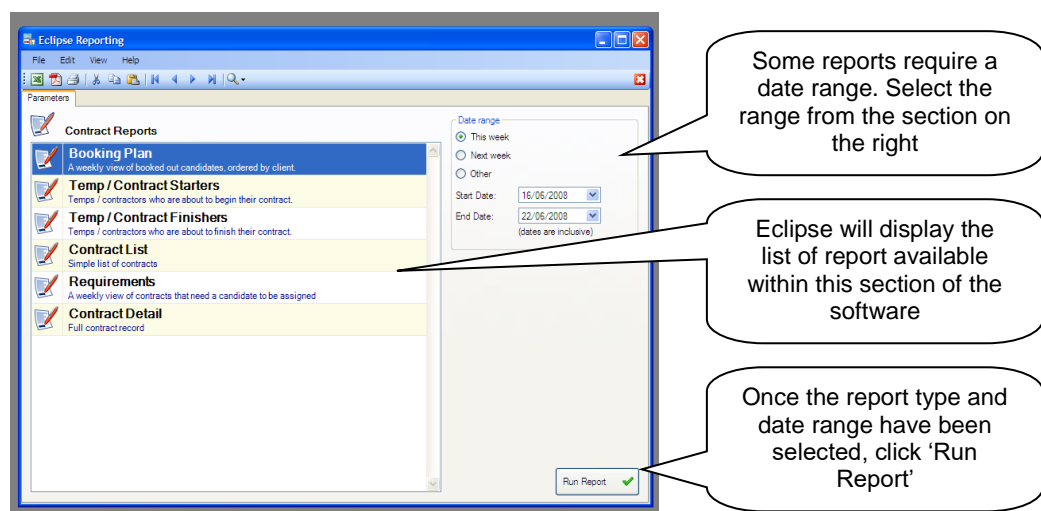

To complete the modification select 'Finish'. The contracts in the main list will now be updated.

15 Contract Reporting:

Finally, Eclipse can also produce reports on the temp contract information in Eclipse. To access the Temp Contract reports, first ensure the Temp Contract section is selected in the main interface. Select the 'Eclipse Reporting' button on the bottom right hand side of the main interface. The icon looks similar to that of the 'print' icon.

Select the 'Eclipse Reporting' button at the bottom of the main interface
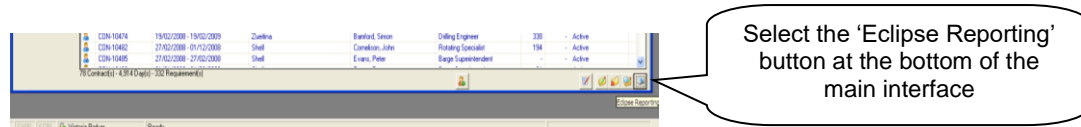
The following 'Eclipse Reporting' screen will be activated. This screen lists the reports that are available from this section of Eclipse and provides a brief description of the report.

Some reports require a date range. Select the range from the section on the right

Eclipse will display the list of report available within this section of the software

Once the report type and date range have been selected, click 'Run Report'

Highlight the desired report in the list and where required select a 'date range' from the section on the right hand side. Selecting 'Run Report' on the bottom right hand side will create the report and display the desired information.

16 Processing, Authorising and Invoicing Timesheets:

There are 3 methods of processing, authorising and invoicing timesheets:

- One at a time, manually from within the timesheet record
- Using the 'Process/Authorise' button in the timesheet tab and 'Batch Invoicing' button in tools menu
- Using the image folder.

17 Manually Processing Authorising and Invoicing Timesheets:

Manual processing, authorising and invoicing of timesheets is carried out within the timesheet record:

17.1 Manually Processing Timesheets:

The following screen shows a timesheet that is ready to be processed. On the left hand side the timesheet shows the number of hours the candidate is expected to have worked during that week at each of the 10 pay rates. In the example below, that number is 37.5 hours at 'Standard' rate based on a 7.5 hour, 5 day working week.

To view the schedule for that week, select the 'Schedule' tab for a breakdown. Check that the number of hours worked is correct, if not select the 'Edit' button and enter the correct value.

Once the 'Edit' button has been selected, a green '+' button appears against the 'Units Worked' field. If selected, the following window appears:


By entering the number of hours a candidate has worked each day, Eclipse will calculate the total for the week. Additional hours at overtime rates should be entered manually on the Timesheet Details tab.

To process the timesheet select the 'Process' button at the foot of the window.

17.2 Manually Authorising Timesheets:

Once the timesheet has been processed, those with permission to authorise timesheets will see the 'Authorise' button in its place as shown below. Check the timesheet values are correct. Making changes at this point will update the candidate payment and client invoicing values on the right of the screen.

Check the number of hours worked corresponds with the candidate's actual timesheet and amend where necessary

Once the details have been verified, to process the timesheet, simply select 'Authorise'

Once the 'Edit' button has been selected, the green '+' button appears against the 'Units Worked' field. If selected, the following window appears:

Enter the number of hours the candidate has worked each day and Eclipse will calculate the total for the week.

Once any amendments have been made, select the 'Authorise' button at the bottom of the record.

17.3 Manually Invoicing Timesheets:

Once a timesheet has been 'Authorised', the 'Invoice' button appears in its place as shown below:
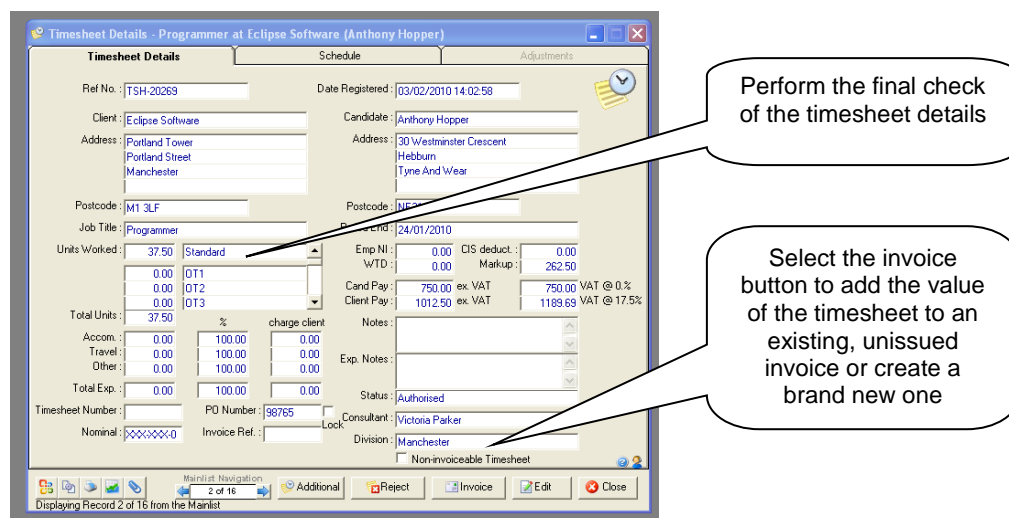

Finally, to complete the process and invoice the timesheet, select the 'Invoice' button at the foot of the screen. There are now two possible scenarios:

1. There **ARE NO** outstanding invoices for this client that have not already been issued
2. There **ARE** outstanding invoices for the client that have not yet been issued
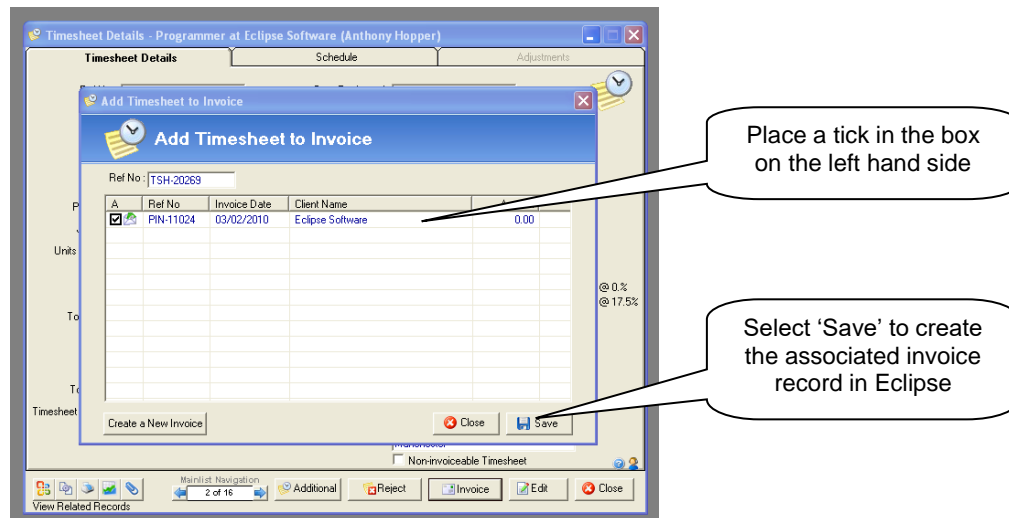
Scenario One – NO outstanding Invoices:

Where there are no outstanding, unissued invoices for the client in Eclipse, the following confirmation message appears:

"This client does not have any invoices that have not already been issued. Would you like to create a new invoice for this client?"
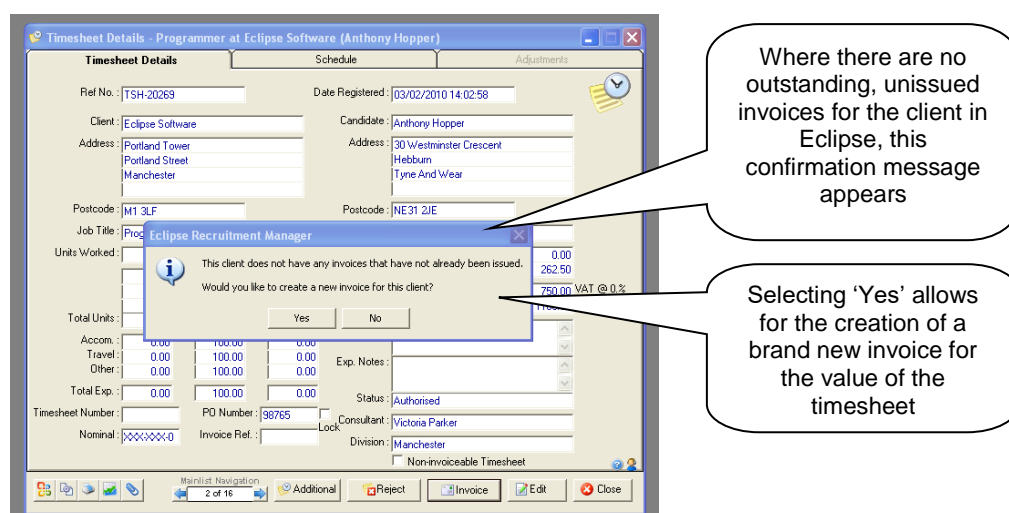

Selecting 'Yes' will open the following window from where a brand new invoice for the value of the timesheet is created. Place a tick in the box on the left hand side and select 'Save'. The associated invoice record will be created.

Place a tick in the box on the left hand side

Select 'Save' to create the associated invoice record in Eclipse

Scenario Two – Outstanding Invoices:

Where there are outstanding invoices for the client that have not yet been issued, Eclipse gives the option to add the new invoice amount to the outstanding invoice value. To combine the records, place a tick in the box to the left of the invoice details line. To create a brand new, separate invoice, select 'create a new invoice' at the bottom of the window.

Where there are outstanding invoices, Eclipse gives the option to add the new amount to an outstanding invoice

To combine the records, place a tick in the box to the left of the invoice details line

To create a brand new, separate invoice, select 'create a new invoice'
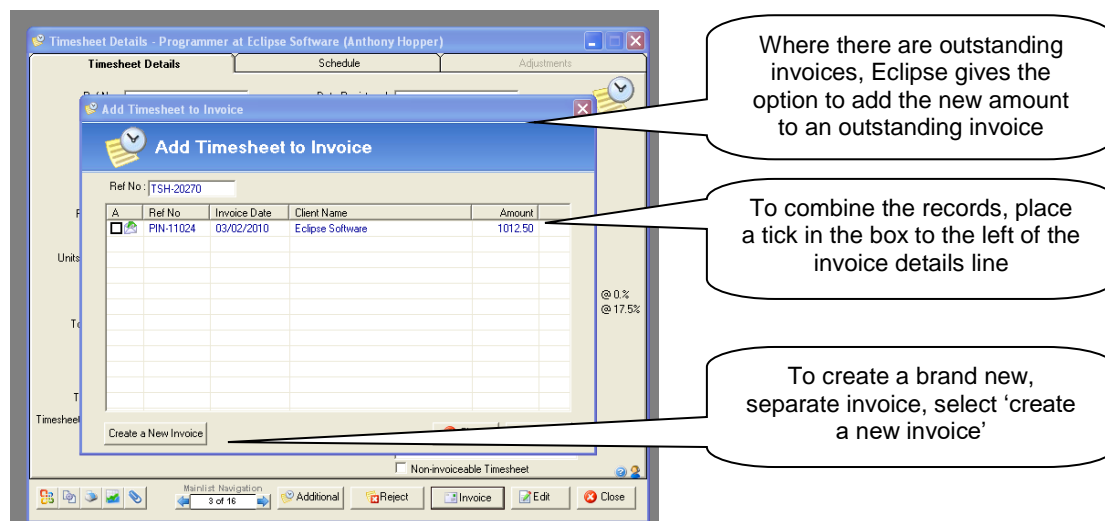
Selecting 'Save' will now perform the desired action. Further to this, where there are additional timesheets relating to the same client that have not yet been processed, Eclipse will display the following message:

"There are 4 other timesheets for this client that has not yet been invoiced. Would you like these timesheets to be displayed for you to invoice?"
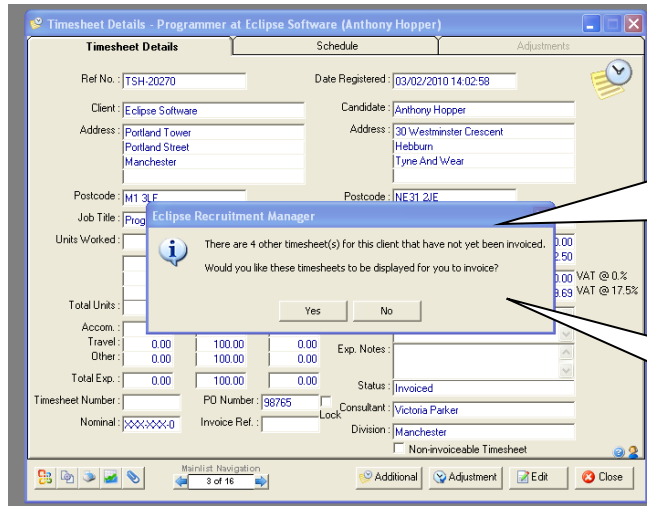
Where there are additional timesheets for the client in Eclipse that are yet to be processed Eclipse will display this message

Selecting 'Yes' will list all other timesheets that have yet to be invoiced in Eclipse

Selecting 'Yes' will list the 4 other timesheets for this client that have yet to be invoiced, this includes timesheets that have not yet been processed and authorised. Select the additional timesheets to be added to the invoice. Use the 'Select All' and 'Deselect All' buttons where necessary.
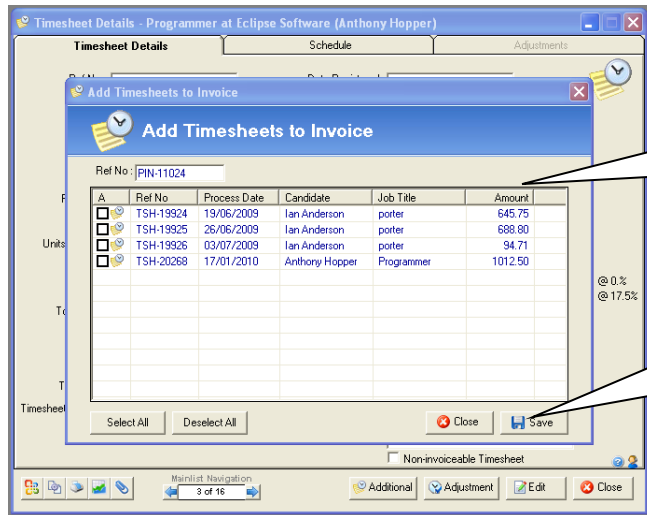
This list includes timesheets that have not yet been processed, authorised or invoiced

To add the timesheet value to the invoice, place a tick in the box on the left and select 'Save'

The 'Schedule' tab of the timesheet record is shown below. This section confirms when the timesheet record was processed, authorised and invoiced and who by. This is a system generated feature and cannot be amended.
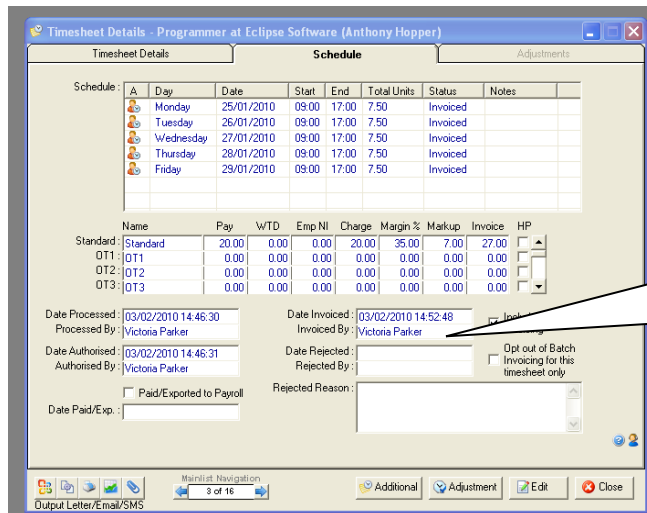

Details of when and who processed, authorised and invoiced timesheets can be viewed on the 'Schedule' tab within the timesheet record

18 Batch Processing and Authorising of Timesheets:

In addition to processing and authorising timesheets individually, both of these actions can be performed in a batch. Select the 'Process / Authorise Timesheets' button on the left of the main interface in the timesheet tab or select 'Process / Authorise Timesheets' from the Tools menu.

> In addition to processing and authorising timesheets individually, this action can be performed in a batch

> Select the 'Process / Authorise Timesheets' button on the left of the main interface in the timesheet tab
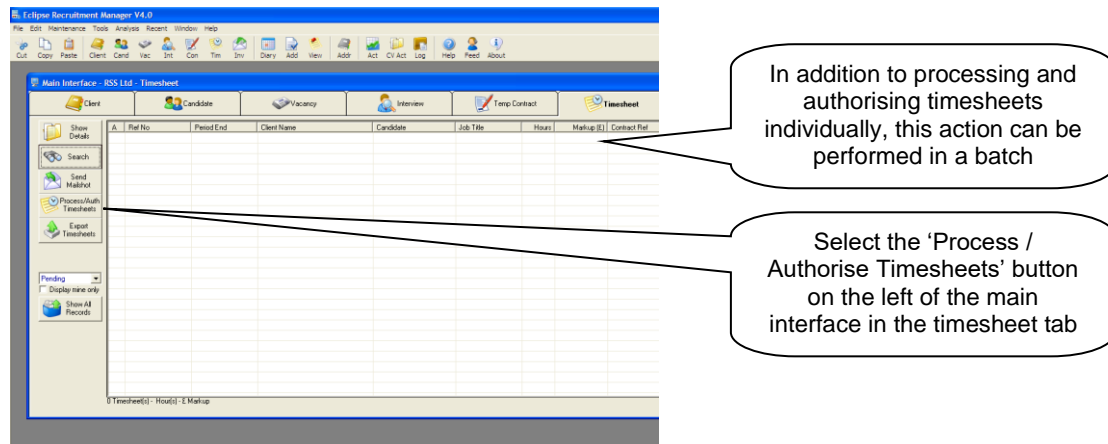
Selecting the 'Process / Authorise' button activates the following window:
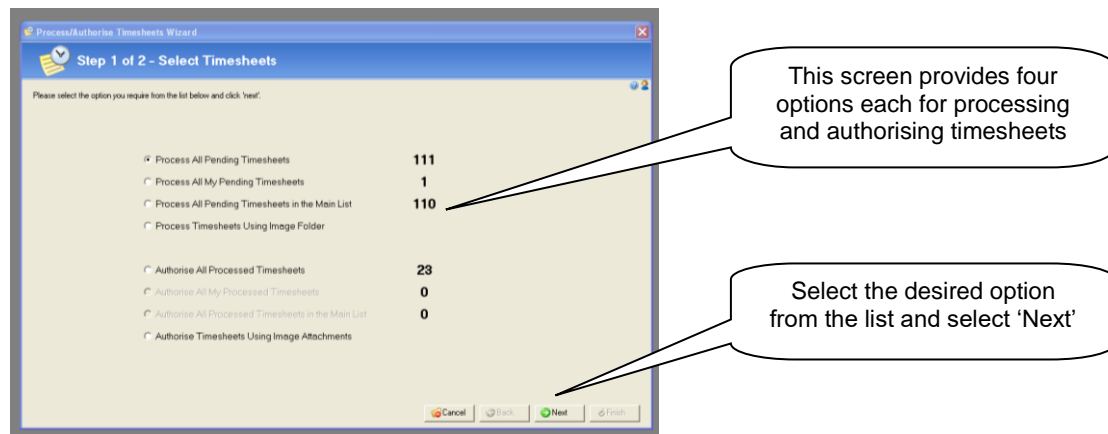
> This screen provides four options each for processing and authorising timesheets

> Select the desired option from the list and select 'Next'

This screen provides four options each for 'processing' and 'authorising' timesheets, these are:

- Process All Pending Timesheets
- Process All My Pending Timesheets
- Process All Pending Timesheets in the Main List
- Process Timesheets Using Image Folder

- Authorise All Processed Timesheets
- Authorise All My Processed Timesheets
- Authorise All Processed Timesheets in the Main List
- Authorise Timesheets Using Image Attachments

Note:
This method of processing / authorising timesheets will ignore all future timesheets

The following section addresses the batch processing and authorisation of timesheets without the image folder and attachments feature. These will be addressed separately later in this guide.

18.1 Batch Processing Timesheets:

There are three options for processing timesheets in this screen, these are:

- Process **ALL** pending timesheets:
  This will display a list of all timesheets in the system, that are set to 'pending' and are due to be processed.

- Process **ALL MY** pending timesheets:
  This does that same as option one except only the timesheets logged against the consultant logged in will be processed.

- Process **ALL** pending timesheets in the **MAIN LIST:**
  This option allows a search to be performed first so that the main list displays exactly the timesheets to be processed.

Select the relevant option from the list and select next. For the purpose of this example, the first option 'Process All Pending Timesheets' was selected. The following screen displays the 36 timesheets in the database waiting to be processed:

Make amendments where required to the units worked and expenses fields.

To process the timesheet, ensure a tick is placed in the box on the right

Some basic details such as the client, candidate etc. are displayed along with the units worked and some financial information relating to the timesheet. It is possible to make amendments to the units worked and the expenses fields. Eclipse will recalculate the figures based on the amendments.

Finally, to process the timesheet, place a tick in the box on the far right hand side of the row. To select all of the timesheets in the list, press the 'Select All' button at the bottom of the window.

Note:
Where rates have not been agreed with the client or candidate in the corresponding temp contract record, Eclipse will not allow the 'Process' box to be ticked. Highlight the record and select the 'View Contract' button at the foot of the screen to view the contract and agree the rates.

To view details of other related records such as the clients, candidates, vacancies or timesheets, highlight the desired record in the list and select the corresponding button at the bottom of the window.

Select the 'Finish' button to process the timesheets.

18.2 Batch Authorising Timesheets:

The process for authorising timesheets in a batch is exactly the same as the processing option. Select the 'Process / Authorise' button from the left hand side of the timesheet tab. The activated window displays three options for authorising timesheets, these are:

- Authorise **ALL** processed timesheets:
  This will display a list of all timesheets in the system, that are set to 'processed' and are due to be authorised.

- Authorise **ALL MY** processed timesheets:
  This does that same as option one except only the timesheets logged against the consultant logged in will be authorised.

- Authorise **ALL** processed timesheets in the **MAIN LIST:**
  This option allows a search to be performed first so that the main list displays exactly the timesheets to be authorised.

In this example, the first option 'Authorise All Processed Timesheets' is selected. 'Step Two' shows details of the 36 timesheets that are ready to be authorised:

As with the Processing' of timesheets, check the information in the list and make amendments where required. Place a tick in the corresponding 'Authorise' box on the right hand side or alternatively use the 'Select All' button at the bottom of the screen.

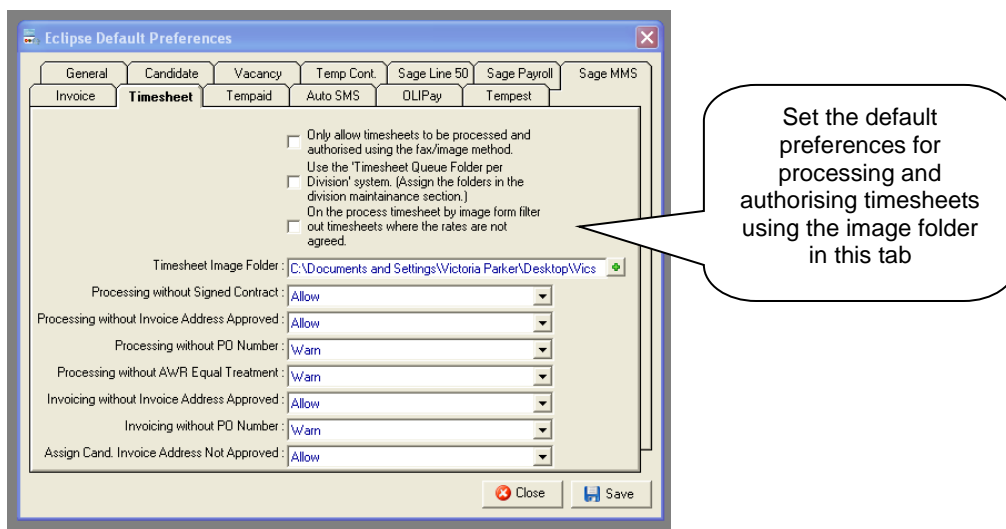To authorise the timesheets select the 'Finish' button.

19 Processing and Authorising Timesheets Using the Image Folder:

The final method of processing and authorising timesheets in Eclipse incorporates a faxed image of the timesheet itself. This is only possible where timesheets are received as faxed images. If this is the case they can be saved into specific folders which Eclipse can view. Eclipse can then display the images which can be matched with the timesheet records in Eclipse.

In order for this method of processing and authorising to work, firstly, there must already be a system in place where faxes are received as TIF files. The following Eclipse Default Preferences must also be considered.

19.1 Setting Eclipse Default Preferences for the Image Folder:

The following screen is found in the Eclipse Default Preferences section of the Maintenance Menu. An explanation of the three tick boxes at the top of the screen relating to the image folder can be found below:

Set the default preferences for processing and authorising timesheets using the image folder in this tab

Only allow timesheets to be processes and authorised using the fax/image method:
Placing a tick in this box prevents the processing and invoicing of timesheets using any method other than the fax / image feature.

Use the 'Timesheet Queue Folder per Division system:
Where users are assigned to a division and the fax / image method is employed to process and authorise timesheets, selecting this option will allow for a queuing system. For example, in the instance where are three divisions within a company, a timesheet folder per division can be configured. As the timesheets come in via the faxed image method they can then be saved into the relevant folder.

To assign a timesheet folder to a division, re-visit the user administration section of the maintenance menu and double click on a division. Locate the folder via the green '+' button which will open the Windows file manager.

On the process timesheet by image form, filter out timesheets where the rates are not agreed
As it suggests, selecting this option will only display timesheets records if their rates have been agreed with the client.

Timesheet Image Folder:
Where timesheets are to be processed and authorised using the fax / image method but NOT the timesheet queuing system, use the green '+' button to open the Windows file manager and locate the folder in which the timesheets will be saved.

Processing without Signed Contract:
This option is a control feature associated with signed contracts. Where a copy of a signed contract is not present in the temp contract record in Eclipse the preference can be set to simply 'Allow' the processing of associated timesheets, 'Warn' that a copy of the contract has not been attached but still allow the processing of timesheets or 'Prevent' the processing of any associated timesheets until the signed contract has been attached.

Processing Without Invoice Address Approved:
Where a client's invoice address has not been approved within the 'Branches / Financial' tab of the client record, this option will either 'Allow', 'Warn' or 'Prevent' the processing of any associated timesheets until it has been approved.

Processing Without PO Number:
Where it has been specified in the 'Branches / Financial' tab of a client record that a purchase order number is required on any associated invoices before they can be paid, this option will either 'Allow', 'Warn' or 'Prevent' the processing of any timesheets until the purchase order number has been entered into the associated temp contract record.

Processing without AWR equal treatment:
Every Contract that is created and eligible for AWR has a tick box which defines whether or not the rates associated with that Contract can be deemed to be equivalent to Equal Treatment Comparators.
Eclipse has a function that will allow the decision of whether to "Warn", "Block" or "Allow" when trying to process a timesheet that does not have this tick box ticked. The default value when the update is installed is "Warn" which will display a pop up warning to the user but give them the option to process the timesheet anyway.

Invoicing without Invoice Address Approved:
Where a client's invoice address has not been approved within the 'Branches / Financial' tab of the client record, this option will again 'Allow', 'Warn' or 'Prevent' the invoicing of any associated timesheets until it has been approved.

Invoicing without PO Number:
Where it has been specified in the 'Branches / Financial' tab of a client record that a purchase order number is required on any associated invoices before they can be paid, this option will again 'Allow', 'Warn' or 'Prevent' the invoicing of any associated timesheets until the purchase order number has been entered into the associated temp contract record.

Assign candidate where the client invoice address not approved:
Where a client's invoice address has not been approved and a candidate is assigned to a related temp contract, Eclipse gives the options to either 'Allow' the candidate to be assigned, 'Warn' that the client's invoice address has not yet been approved or 'Prevent' the candidate from being assigned. This is particularly useful in temporary and contract recruitment where it is imperative that the correct invoicing preferences have been configured as these preferences impact on timesheet and invoice management within Eclipse.

19.2 Processing Timesheets Using the Image Folder:

There are two ways to access this feature, firstly by selecting 'Process Timesheets Using the Image Folder' from the 'Tools' menu at the top of the screen and secondly via the 'Process / Authorise Timesheets' button on the left hand side of the Timesheet screen. Whichever method is employed, the following window will appear:

The faxed images in the selected folder will appear in the window on the left hand side

Where the timesheet queue feature is employed, select the appropriate queue

Search for the candidate named on the timesheet image using these fields

To scroll through the timesheets, use the timesheet navigation tool

Enter the actual number of hours worked and expenses

Select 'Process'

Note:
For the purpose of the example above, the Eclipse Default Preferences have been set to incorporate the timesheet queuing system. Therefore, the Division 'Manchester' has been chosen from the drop down menu at the top of the screen which has displayed timesheet images held in that queue only

This screen is split into two sections. The area on the left shows timesheet images as they appear by fax. The area on the right displays information from the actual timesheet record created in Eclipse. The first timesheet image in the folder will appear in the window. To scroll through the images use the timesheet navigation tool at the foot of the window.

The idea is to search for the related timesheet in Eclipse via the 'Timesheet Lookup' section in the top left of the form using either the timesheet reference number, candidate reference number or candidate name. A list of pending timesheets will be displayed in the list. Conducting a search with no criteria will list all pending current timesheets but excludes all future ones.
Select the corresponding timesheet to the one shown in the image window. Once located check the number of hours in the timesheet record in Eclipse and make any amendments where necessary. Add any expenses cost where required. This will re-calculate the client and candidate payments where applicable and allow the timesheet to be processed.

Selecting the 'Process' button will set the timesheet to 'processed' and attach the image to the processed timesheet record in Eclipse. Once complete, Eclipse will move onto the next timesheet image in the folder until all of the timesheets have been processed.

Note:
Where there are details of multiple candidates on one faxed image, select the 'Keep Image After Processing Button' towards the top of the screen. The image will remain while the next timesheet record in Eclipse is processed.

19.3 Authorising Timesheets Using the Image Folder:

Once a timesheet has been processed and the image of the timesheet attached, the second step is for it to be authorised. To authorise timesheets using the image folder select 'Authorise Timesheets Using the Image Attachments' option from the 'Tools' menu at the top of the screen or again using the 'Process / Authorise Timesheets' button on the left of the timesheet main interface. The process is very similar to that of processing timesheets using images as described above. The difference this time, it that the timesheet images are already attached to the corresponding timesheet record in Eclipse. Therefore all that needs to happen at this stage is the confirmation of the timesheet totals.

Each timesheet that has already been processed either manually, using the batch feature or using the faxed image method is listed at the top right hand side of the screen. Those which have been processed using the faxed image method display the blue paperclip icon on the left to indicate that the image is attached as per the example above.

Navigate through the images using the record selector at the foot of the form. Any amendments to the timesheet details can be made using the fields on the right. Once all the information is correct select the 'Authorise' button. This will set the status of the timesheet to 'Authorised'. Once a timesheet is authorised it is ready for invoicing.

Where 'rejecting' a timesheet, the following screen appears:
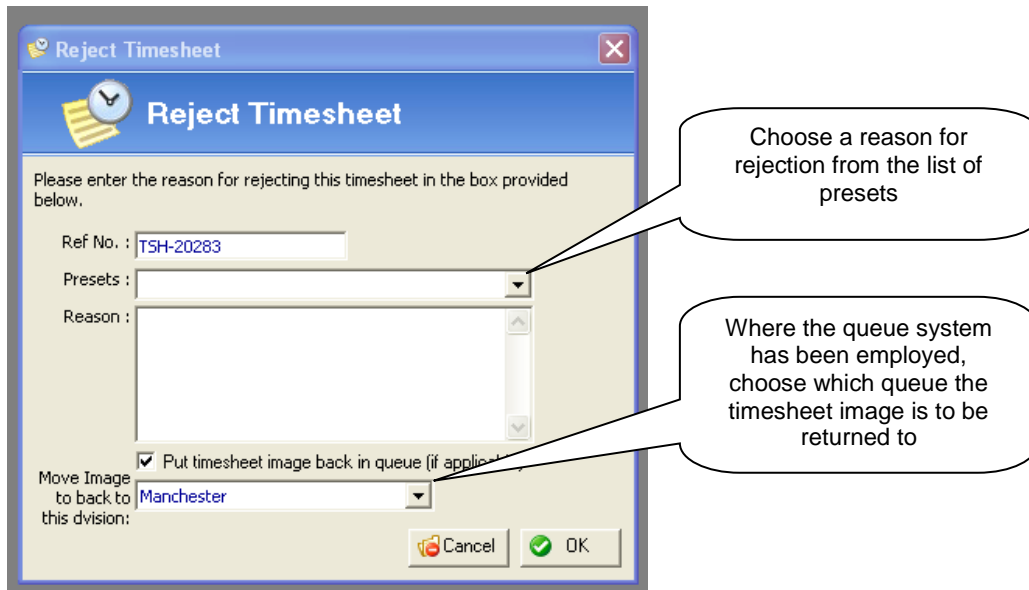
Choose a reason for rejecting the timesheet from the drop down menu. This list can be updated in the Eclipse Maintenance Menu.

If required, provide a more detailed reason for rejection in the 'Reason' box. If the timesheet is to go back into the queue, leave a tick in the box labelled 'Put timesheet back in queue (if applicable).
Where the 'queue' system has been employed, choose the relevant division.

Where a timesheet image is rejected, Eclipse will still attach the timesheet image to the relevant timesheet record in Eclipse and the timesheet will appear in the 'Contract Alerts' screen at log-in. Additionally, a reminder will be generated for the relevant Eclipse user.

20 Batch Timesheet Invoicing:

Batch timesheet invoicing provides the facility to invoice authorised timesheets in one click thus saving valuable time individually creating invoices. In order to batch invoice timesheets, there are certain settings that require configuration. These can be configured either in the associated client record or at the contract level. The following example shows the 'Branches / Financial' tab of a Client record.
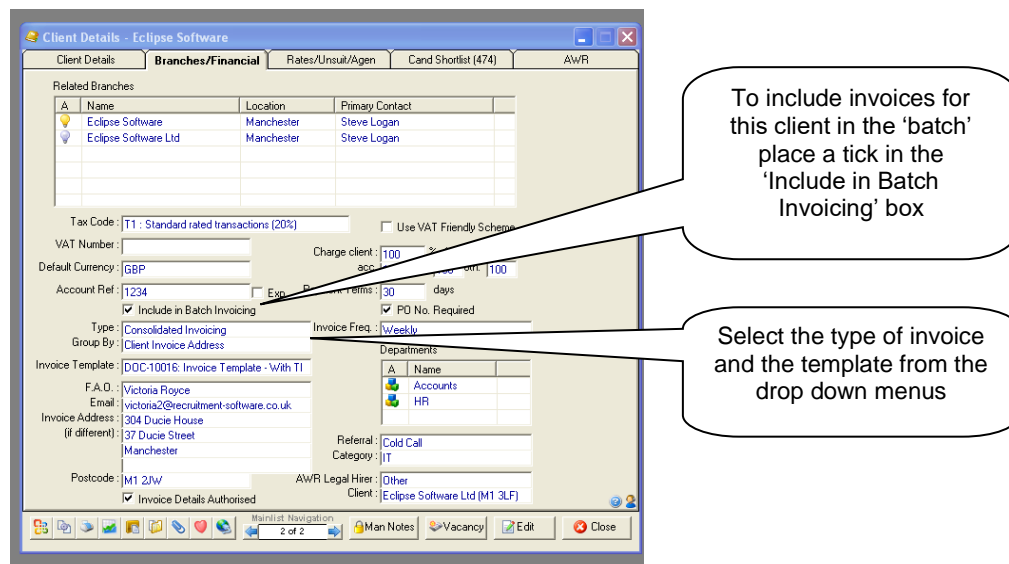
Include in Batch Invoicing:
Placing a tick in this box will include the client in the batch invoicing process where required.

Type:
This also relates to client invoices, more specifically where the invoices relate to candidate timesheet values rather than permanent placement fees. There are two options in the drop down list: 'Invoice per timesheet' which creates an individual invoice for each and every time sheet relating to the client, and secondly, 'Consolidated Invoicing', which takes all timesheet values for the client and creates one invoice.

Group By:
This is used in the batch invoice creation and gives the option to group by client invoice address, contract location, timesheet number, employee, period end or timesheet PO number.

Invoice Template:
The 'Invoice Template' drop-down, lists all the invoicing templates available. Eclipse is supplied with two standard templates however, additional templates can be configured in the 'Document Templates' section of the 'Maintenance Menu'. Selecting a template here will ensure that during the batch invoicing process, the selected template is used for this client automatically.

FAO and Invoice Address:
These fields indicate who invoices should be addressed to and to which address they should be sent to. Select the green '+' button next to 'FAO' to choose a contact. Select the green '+' button next to 'Invoice Address' to show a list of branches associated with the client record.

To include invoices in the batch from within the contract record, simply place a tick in the 'Include in Batch Invoicing' box as indicated below:

Invoices an also be set to 'batch' from within the contract record. Place a tick in the 'Include I Batch Invoicing' box and choose the invoicing type.

Note:
This is useful where the invoicing preferences were not configured within the client record before the temp contract was created, therefore retrospective invoicing preferences entered here will be carried through to the associated invoices.

To access the batch printing option select 'Batch Timesheet Invoicing' from the 'Tools' menu. The following window will appear:

The window displays the number of timesheets ready to be invoiced

This screen also indicates timesheets that are ready to be invoiced but have missing information

This window displays the number of timesheets that are ready to be invoiced and have the relevant permissions to be included in the batch. It also indicates the number of timesheets that are ready to be invoiced but can't be due to missing information such as purchase order numbers or approval of client invoicing details. Selecting 'View' against any of these fields will show the related timesheets in the main interface. Selecting 'OK' will cycle through the timesheets that are ready for invoicing and create the invoices pulling through the invoicing preferences. The newly created invoices will be displayed in the main list ready for 'Batch Invoice Printing'.

21 Invoice Printing and Issuing:

As with the processing, authorising and invoicing of timesheets in Eclipse, Invoices can be printed either individually or in a batch.

21.1 Individual Invoice Printing and Issuing:

To print an individual invoice, first open the invoice record in Eclipse.

Select the 'Output Letter / E-mail / SMS' button at the bottom left of the record. As with any other record in Eclipse, the document templates available from this section of the software are listed. Eclipse provides two invoice templates as standard:

- Invoice Template - No Timesheet Line Breakdown
- Invoice Template - With Timesheet Line Breakdown

Additional invoice templates can be created in the 'Document Templates' section of the 'Maintenance Menu'.
For more information on the creating of document templates, please see the 'Mail Merge' user guide:
www.recruitment-software.co.uk/download/guides/document_administration.pdf

Once the required template has been selected and the information merged into the document, the invoice is now ready to print.

Once the invoice has been printed, place a tick in the 'Issued' box in the invoice record. Eclipse will record the date automatically.

21.2 Batch Invoice Update.
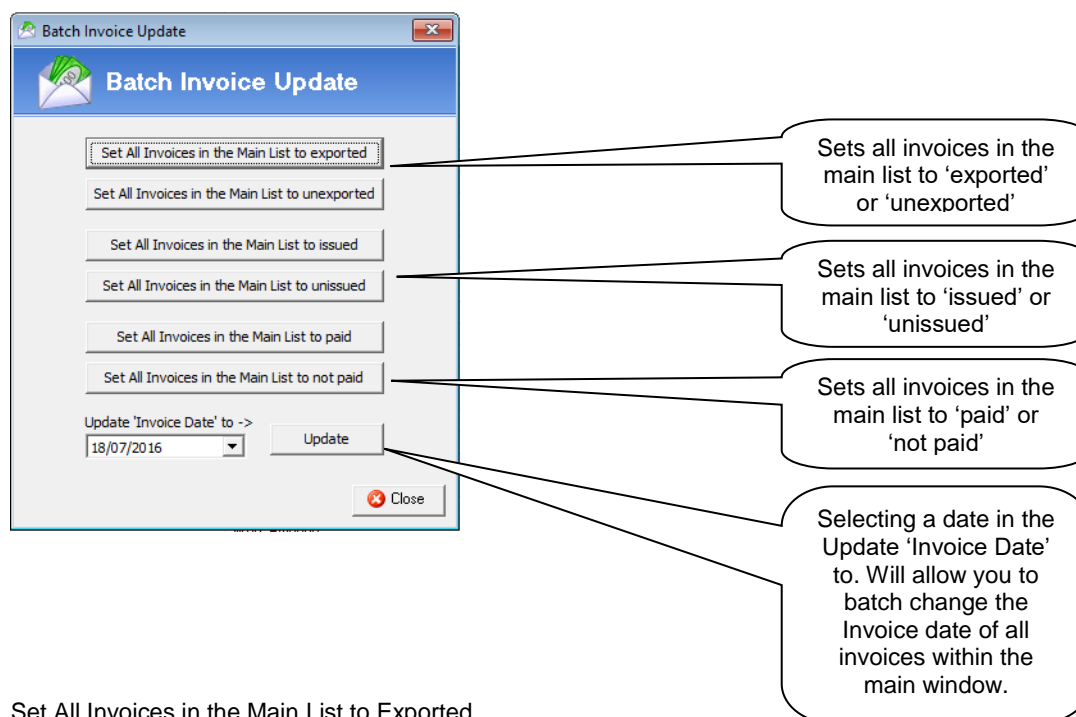
Set All Invoices in the Main List to Exported

By pressing the 'Set All Invoices In the Main List to Exported' will mark all the invoices in the main list to exported, any invoices that are marked as 'Exported' will not then be included in the next export to your accounts package.

Set All Invoices in the Main List to Unexported

By pressing the 'Set All Invoices in the Main List to 'Unexported' will mark all the invoices in the main list to Unexported, any invoices that are marked as 'Unexported' will then be included in the next export to your accounts package.

Set all Invoices in the Main List to Issued

By pressing the 'Set all Invoices in the Main List to Issued' marks all the invoices in the main list to Issued, this will mean that they won't be included in the batch print feature.

Set all Invoices in the Main List to Unissued

By pressing the 'Set all Invoices in the Main List to Unissued' marks all the invoices in the main list to Unissued, this will mean that they will be included in the batch print feature as the batch print looks for any Invoices that are set to unissued.

Set all Invoices in the Main List to Paid

By pressing the 'Set all Invoices in the Main List to Paid, will mark all the invoices present in the main list to be marked as paid.
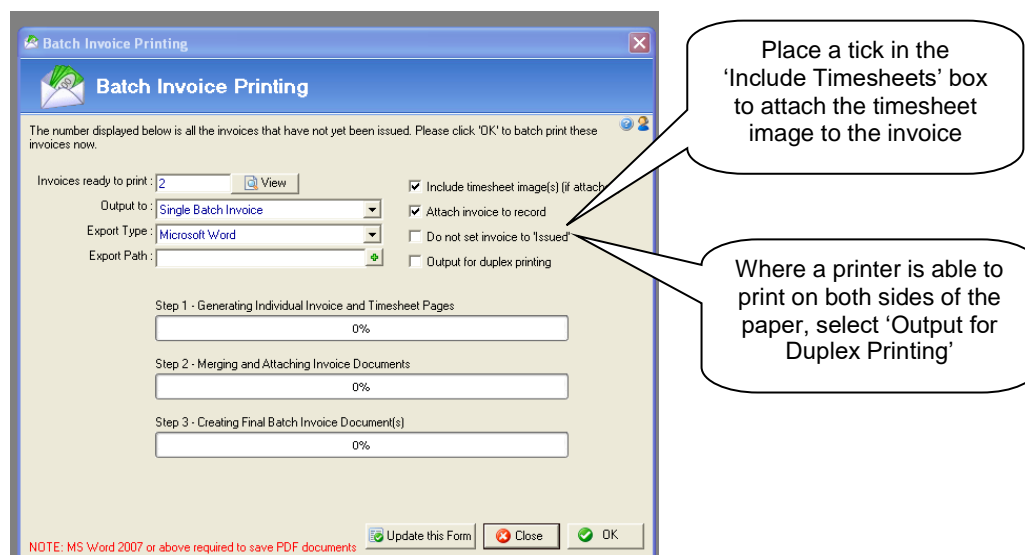
Set all Invoices in the Main List to Not Paid

By pressing the 'Set all Invoices in the Main List to Not Paid' will mark all the invoices present in the main list to be marked as not paid.

Update 'Invoice Date' to

By entering a date and pressing 'Update' will change all the Invoice dates for all the records present in the main list.

21.2 Batch Invoice Printing and Issuing:

Batch invoice printing allows the printing of multiple invoices. This can be accessed from the 'Tools' menu by selecting 'Batch Invoice Printing'.

Place a tick in the 'Include Timesheets' box to attach the timesheet image to the invoice

Where a printer is able to print on both sides of the paper, select 'Output for Duplex Printing'

Invoices Ready to Print:
This indicates the number of invoices that are ready to print. These are invoices that have not already been issued.

Output To:
There are three options available in the drop down menu:
Single Batch Invoice: This will save the invoices as a single document
Individual Invoices Only: This will save the invoices as individual documents
Batch and Individual Documents: This will save both a consolidated and individual documents

Export Type:
The options here are either 'Word' or 'PDF'. Please note that Microsoft Word 2007 is required to use the PDF feature

Export Path:
Select the folder in which the document(s) is to be saved

Include Timesheets (if attached):
Selecting this option will attach and print a copy of the timesheet image after the associated invoice

Attach Invoice to Record:
Selecting this option will attach a copy of the invoice to the invoice record in Eclipse. By default the box is left un-ticked and will therefore automatically attach a copy to the invoice record

Do not set Invoice to 'Issued':
By default this option is left un-ticked and will therefore set the status of the invoice to 'Issued'. To turn this feature off, tick the box.

Output for Duplex Printing:
Duplex printing allows for printing on both sides of a piece of paper. This option is only applicable where the printer can be configured in this way.

Select 'OK' to save and print the invoices. Eclipse will generate the individual invoice documents and attach them to the invoice records in Eclipse and then merge the entire document into an MS Word file as requested. The file will open ready for printing. Where Invoices are batch printed, Eclipse will automatically set them to 'Issued'.

22 Timesheet Amendments:

Amendments to timesheet values such as hours worked and expenses can be made even after a timesheet has been authorised. Simply select the 'Edit' button in the record and amend the figures where required.

Note:
Only those with the permission to make amendments to timesheets can perform this action.

23 Timesheet Adjustments:

Adjustments can be made to a timesheet even after it has been 'Invoiced'. However, adjustments can only be made by those with the relevant permission. To make an adjustment, select the 'Adjustment' button at the bottom of the timesheet record as indicated below.

Note:
This button will only be visible once the timesheet has been 'Invoiced'.

Selecting the 'Adjustment' button opens the following window:

Once all adjustments have been made in the 'Actual' column, select 'Save'. Eclipse will amend the timesheet record accordingly.

The timesheet record in Eclipse now displays the adjustment details on the front page. A clear, red note is also added to indicate an adjustment has taken place.

Details of the adjustment are shown on the front tab of the timesheet record

Where adjustments have taken place, Eclipse displays a clear red note
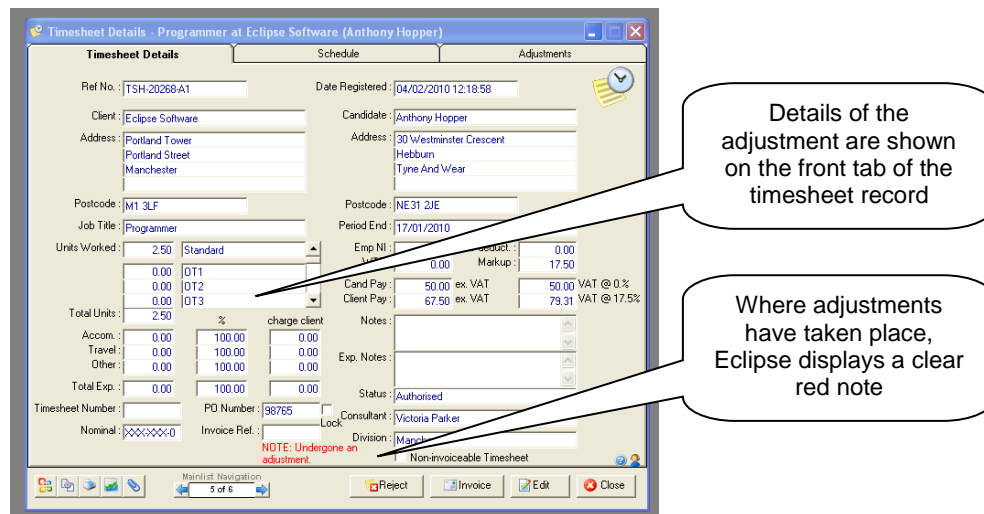
The details of the original timesheet, the adjustment and the new timesheet value can be viewed on the 'Adjustments' tab (as shown below) within the timesheet record. Until a timesheet undergoes an adjustment, this tab is locked for viewing.

Details of the original timesheet, the adjustment and the new timesheet value can be viewed on the 'Adjustments' tab within the timesheet record

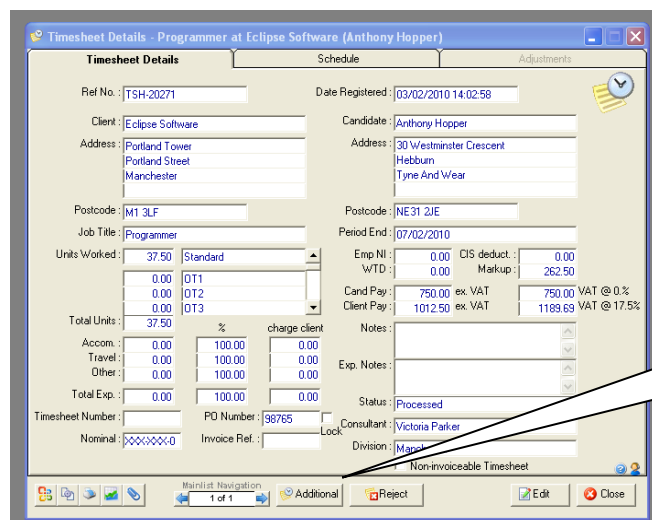Until a timesheet undergoes an adjustment, this tab is locked for viewing
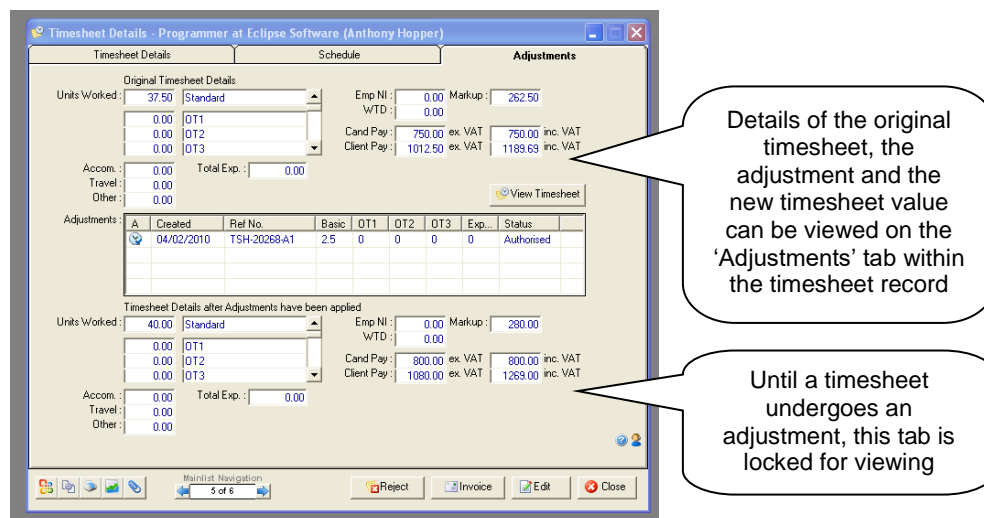
The timesheet must now be re-invoiced and the option is given to add the amendment to an existing invoice record for the same client as detailed earlier.
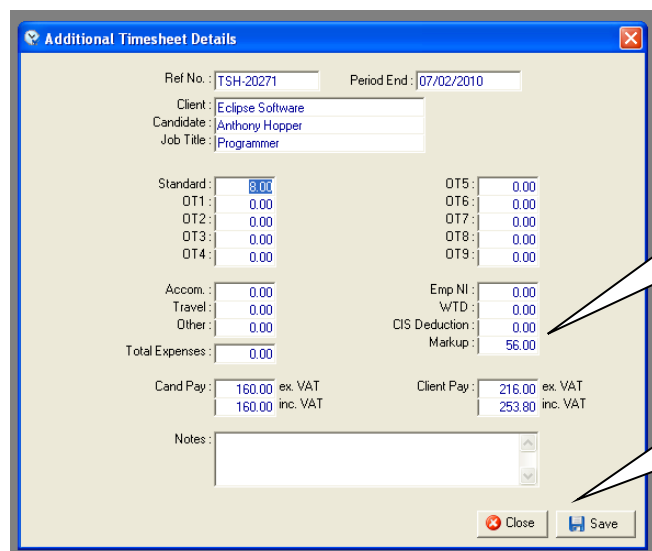
24 Additional Timesheets:

There is the facility in Eclipse to raise additional timesheets of the same period, candidate and client. For example, if a candidate was to work Monday and Tuesday and submit their timesheet believing their working week was over and then unexpectedly work for the same client again on Friday, thus submitting a second timesheet, this feature would allow the creation of an additional timesheet record in Eclipse for the same week and therefore the attachment of the faxed timesheet image to the new record.

The following example indicates that the candidate has initially worked 37.5 hours. Should the candidate then submit a further timesheet for an additional 8 hours, select the 'Additional' button

Enter the number of additional hours the candidate has worked and any expenses incurred during the new timesheet period.


Selecting 'Save' at this point will create a brand new timesheet for the adjustment. This timesheet has the same reference number as the original but has the suffix 'A1' indicating adjustment number one.

The 'Adjustment' tab in both the original timesheet and the adjusted timesheet records display both the original timesheet details and the adjusted timesheet details.
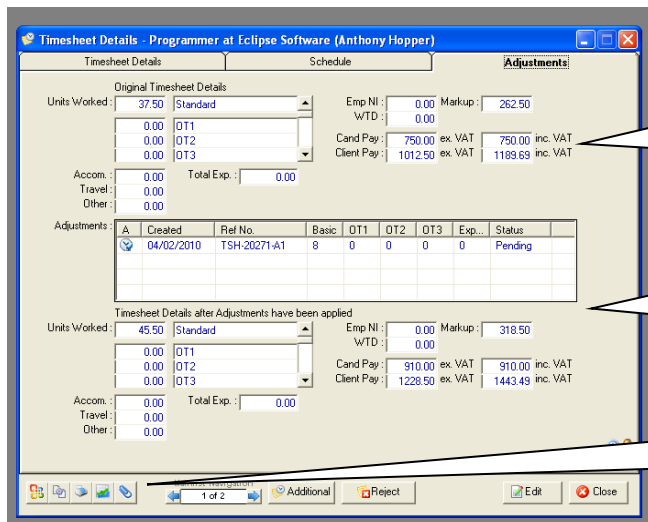
Both the original and additional timesheets display the changes in the 'Adjustments' tab

The original details are at the top of the screen and the adjusted information is at the bottom

Add the new timesheet image using the blue paperclip button

In the adjusted timesheet record, the faxed image of the second timesheet can be attached using the blue paperclip attachment button at the foot of the screen.

Note:
The original timesheet record will clearly show that an adjustment has taken place.
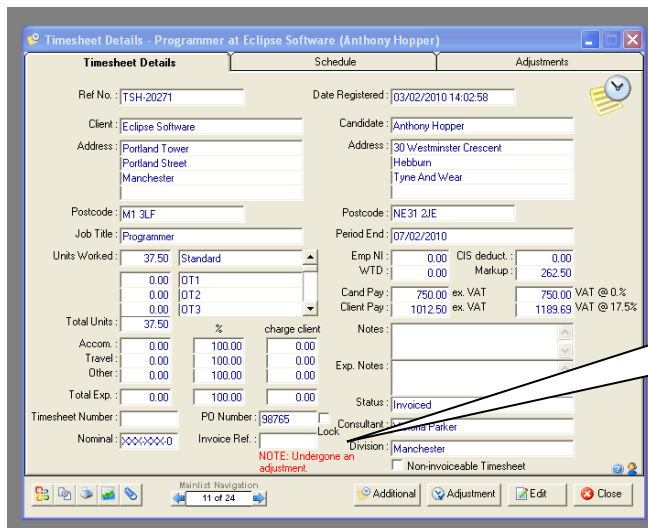

The original timesheet clearly indicates that an adjustment has taken place

25 Rejecting Timesheets:

Timesheets can be rejected in Eclipse. This can occur in either the timesheet record itself or within the faxed image screen. Timesheets could be rejected for reasons such as illegible writing etc.
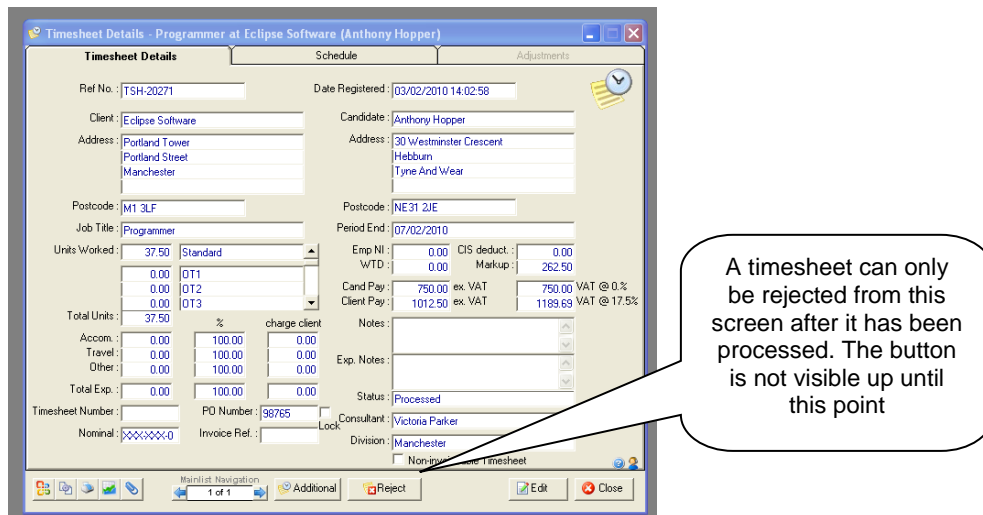
The screen shot below shows the 'Process timesheets using the image folder'. The 'Reject' button is found at the bottom of the screen. Timesheets can be rejected at the processing and authorising stage when using the faxed image method.

> Select 'Reject' either at the processing or authorisation stage using the image folder
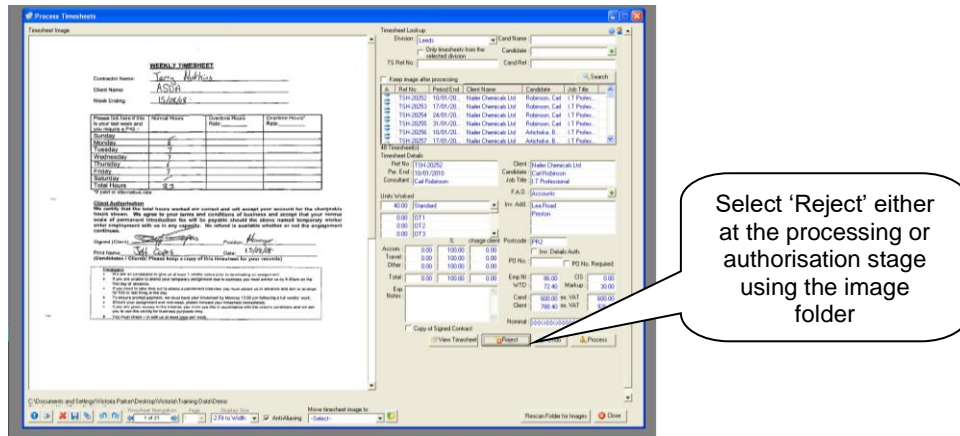
When rejecting a timesheet, the following screen appears. A list of preset reasons for termination is provided. Alternatively, use the 'Reason' box to add any additional notes as to why the timesheet has been rejected.

> A list of preset reasons for termination is provided. Alternatively, use the 'Reason' box to add any additional notes as to why the timesheet has been rejected
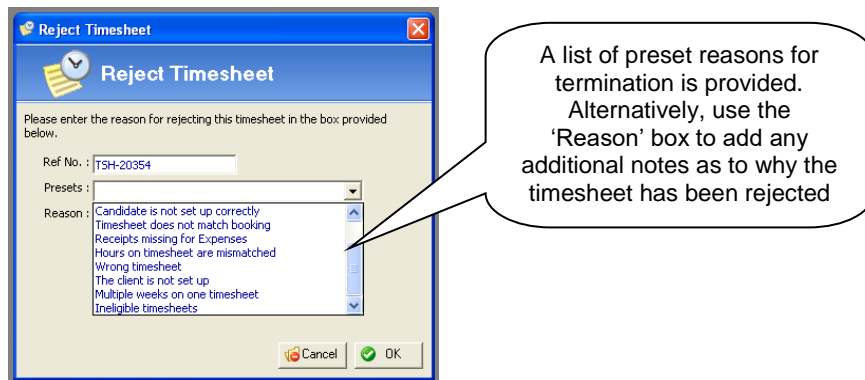
The following screen shows a timesheet record itself. Timesheets can be rejected from here only after they have been processed. Select the 'Reject' button at the foot of the screen:

> A timesheet can only be rejected from this screen after it has been processed. The button is not visible up until this point

Once a timesheet has been rejected the information is recorded in the schedule tab of the timesheet record itself. Eclipse records the date and who rejected it plus the reason for the rejection.
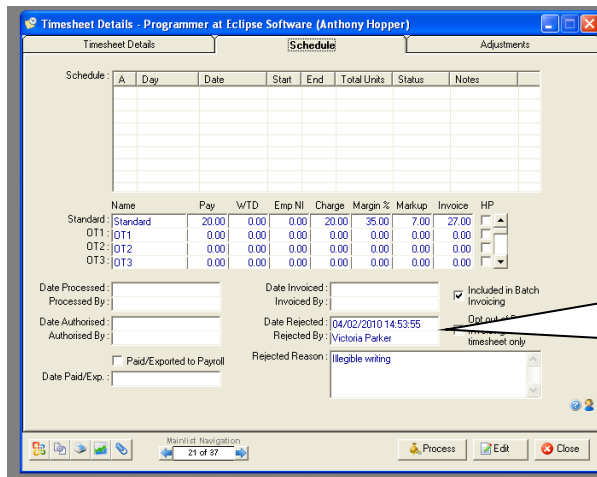
The 'Schedule' tab on the timesheet record sites the time, date, who the timesheet was rejected by and the reason

Finally, a task and reminder is created and assigned to the owner of the timesheet record in Eclipse.
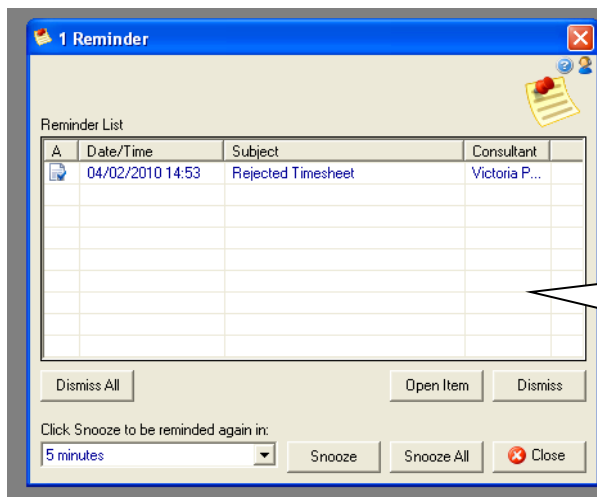
Finally, a task and a reminder is automatically generated for the owner of the timesheet record