



# AWR Guide

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## How to implement AWR on Etz

**Etz Support Team**

**March 2012**

This document explains how to enable the new AWR functions and ensure your Etz Timesheet Solution system is compliant with Agency Workers Regulations from 1st October 2011.

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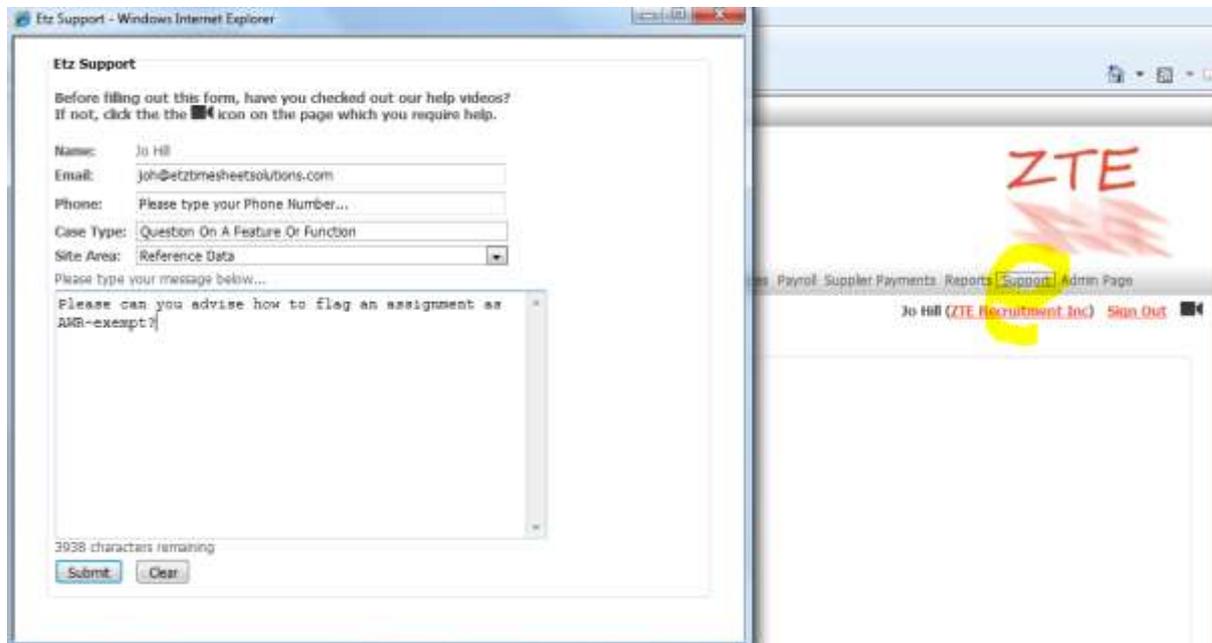
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## Introduction

This guide is designed to provide existing customers with instructions on how to enable the new AWR-compliant features within Etz.

Please note that if you wish to use these functions within your system there are a number of settings you must check yourself as we cannot enable them automatically on your behalf, therefore it is your responsibility to ensure these are in place and set correctly.

We advise the following sections of this guide are read carefully and if you have any further queries on implementing the AWR options on your system then please contact our Support Team, preferably by logging your query via the 'Support' option on your system (this drops into our central system which is constantly monitored by a support technician) and your query will be dealt with promptly:



The screenshot shows a web browser window titled 'Etz Support - Windows Internet Explorer'. The main content is a support form with the following fields:

- Name: Jo Hill
- Email: joh@etztimesheetsolutions.com
- Phone: Please type your Phone Number...
- Case Type: Question On A Feature Or Function
- Site Area: Reference Data

A message box is overlaid on the form, containing the text: 'Please can you advise how to flag an assignment as AWR-exempt?'. At the bottom of the form, there is a 'Submit' button and a 'Clear' button. The background of the browser shows a navigation menu with links for 'Payroll', 'Supplier Payments', 'Reports', 'Support', and 'Admin Page'. The user's name 'Jo Hill (ZTE Recruitment Inc)' and a 'Sign Out' link are visible in the top right corner. A yellow circle highlights the 'Support' link in the navigation menu.

If you should require further information on the Agency Workers Regulations please refer to the Department for Business Innovation and Skills (BIS) guidance on the following link as we are unable to provide advice:

<http://www.bis.gov.uk/assets/biscore/employment-matters/docs/a/11-949-agency-workers-regulations-guidance>

## AWR Settings and Configuration

### Agency Details, Agency Info Page

The first item to check on your system is the 'AWR Rule' held within the Agency Info Page (Reference Data, Agency Details):

Remittance Contact	Contractor Payments	Remittance Phone	020 9999 9999
From Email	joh@etztimesheetsolutions.com	Post Email	joh@etztimesheetsolutions.com
Open Accounts:		Payroll No	
Environment		AWR Rule	Client
Company No	9999		

The AWR Rule determines if the functions are to be used at all and if so, how they are applied. The options within this setting are as follows:

- **Not Applicable** – select this option if you DO NOT wish to apply AWR to your system
- **Client** – select this option if you wish the AWR grouping to be by client, i.e. if a candidate has worked several assignments for the same client these will be grouped for the purposes of AWR
- **Sales Ledger Code** – select this option if you wish grouping to be applied by client but you have several individual records for the same client that share the same sales ledger code (so if a candidate has worked assignments for both 'Matthews Trust' clients below these would be grouped together for the purposes of AWR):

#### Client Entry

Active Items Only  A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

SL Code	Factor Code	Client	Billing Contact	Address1	Email
APR00987	0574952	APT Charity	Mark Elbon	Old Tudor House	mark.elbon@etztme.com
BRA0802	0820543	Bradwell Brown Ltd	Sheila Dixon	12 High Street	sheila.dixon@etztme.com
EAS0293	0548478	East Endway Hospital Trust	Jane Horton	Nightingale House	
EURO001		Euro Client	Accounts Payable	No 1	
MT0001		Matthews Trust	James Brown	1	
MT0001		Matthews Trust	Jan Smith	1	
TRUST0		NHS Trust		Trust House	
NOR0034	058641	Norton Jones Ltd	Julia Smith	30-38 West Way	
SM0876		Smith Technologies	Angela Brown	Smith House	
SYS0706	0578623	System Holdings	Bill Highworth	Real Trading Estate	
ZTE0001	878784	ZTE Training Solutions	P Brown	ZTE House	joh@etztimesheetsolutions.com

- **Parent Company** – this is a new high-level grouping category that we have introduced to the system (not specifically for AWR). It allows the grouping of individual client records, for example you have several client records for the same client and wish to reflect they belong to the same Parent Company group. Please note more information is provided in Appendix A to this guide.
- **Agency** – if this option is selected then AWR grouping will not be dependent on clients but will be applied per candidate, for example a candidate has 3 assignments, 1 for Client A and 2 for Client B and these 3 assignments will be categorised as one group for the purposes of AWR.

**Important: Please log out and log back in again for these changes to take effect.**

### AWR Grouping Sequencing

Also on the Agency Details, Agency Info page you will note a new sequencing for AWR:

System Name	Timesheet Manager	URL	http://www.timesheetz.net																		
Branded URL	https://dev.timesheetz.net/EtzWeb/Login/Default.aspx?AgencyId=33&Hash=0ghKP%Kkdc01u7bs16zQ%3d%3d																				
Setup Mode	<input type="checkbox"/>	Auto Send Invoices	<input type="checkbox"/>																		
SMS Enabled	<input checked="" type="checkbox"/>	Queue Email Address	33																		
Invoice Stylesheet	InvoiceNewStyleVatPerLine	Agency Mode	Agency																		
Permanent Invoice Stylesheet	InvoiceNewStylePerm	Case Management Id	001200000YxZlv																		
Base Currency	GBP	<table border="1"> <thead> <tr> <th colspan="3">Sequence Numbers</th> </tr> <tr> <th>Type</th> <th>Next Sequence Number</th> <th>Change</th> </tr> </thead> <tbody> <tr> <td>Bill Invoice Number</td> <td>100115</td> <td><a href="#">Overwrite</a></td> </tr> <tr> <td>Pay Invoice Number</td> <td>100027</td> <td><a href="#">Overwrite</a></td> </tr> <tr> <td>Candidate Sequence</td> <td>1016</td> <td><a href="#">Overwrite</a></td> </tr> <tr> <td>AWR Grouping Number</td> <td>4</td> <td><a href="#">Overwrite</a></td> </tr> </tbody> </table>		Sequence Numbers			Type	Next Sequence Number	Change	Bill Invoice Number	100115	<a href="#">Overwrite</a>	Pay Invoice Number	100027	<a href="#">Overwrite</a>	Candidate Sequence	1016	<a href="#">Overwrite</a>	AWR Grouping Number	4	<a href="#">Overwrite</a>
Sequence Numbers																					
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Candidate Sequence	1016	<a href="#">Overwrite</a>																			
AWR Grouping Number	4	<a href="#">Overwrite</a>																			
Timesheet Fax No	+44 (0)870 928 9843																				

[Update](#)

This does not need to be altered as it will be set to begin at '1' and is simply a unique identifier the system utilizes to number groups for AWR reporting and audit purposes .

## Configuration

The following settings will be applied by default to your system configuration:

<b>Agency Worker Regulations Awr Cut Off Period Time Weeks</b>	12
<b>Awr Lapse Time Weeks</b>	6
<b>Awr Start Date</b>	01/10/2011 00:00:00
<b>Awr Timesheet Status Id CSV</b>	1,2,3,5,6
<b>Awr Warning Period Weeks</b>	10

### AWR Cut Off

This is the number of weeks a candidate must work in order to qualify under the AWR regulations. Please note that the number of units worked in any given week is not relevant, therefore if a candidate only works 1 hour in a week this still counts.

### AWR Lapse Time

This is the period in weeks that is used to link assignments, therefore if a candidate's assignment ends on 28<sup>th</sup> October and they begin another one on the 25<sup>th</sup> November these two assignments will be linked for the purposes of AWR.

### AWR Start Date

This is the date when AWR will begin on your system, therefore if a candidate's assignment started on 1<sup>st</sup> September and is due to end on 31<sup>st</sup> December, timesheets from 1<sup>st</sup> October will be used for the purposes of AWR.

### AWT Timesheet Status

These codes represent timesheet status on the system and determine which timesheets are used for the purposes of AWR. The key to these status codes is as follows:

0 = Open	4 = Cancelled
1 = Awaiting Image	5 = Awaiting Authorisation
2 = Timesheet Received	6 = Rejected
3 = Awaiting Approval	

### AWR Warning Weeks

This parameter determines when the system will warn you to any assignments coming up to the AWR non-compliant period. As default with AWR in place, all assignments will be compliant by default unless specifically marked as 'exempt' and the system will highlight those coming up to the cut off period.

**If you wish to make any changes to these settings please notify the Support Team who will be happy to assist.**

## Applying AWR

### Candidate Entry

#### AWR Flag

The Candidate Entry list now includes an AWR warning flag:

Home Change Agency Context Change Password Reference Data Document Management Timesheet Sales Invoices Payroll

### Candidate Entry

Active Items Only  [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [ALL](#)

Payroll No	NI	Candidate	User Name	Email	Mobile No	AWR	
NBACK		Back, Neil	neilb22	JOH@etztimesheetsolutions.com	+447970254172		
		Booth , John	johnb6	joh@etztimesheetsolutions.com	+447914402571		
00000009		Carter, David	davidc70	joh@etztimesheetsolutions.com			
		Cooper, Mark	markc68	timesheetz@hotmail.co.uk	+447914402571		
HIL098		Hill , Joanne	joanneh2	joh@etztimesheetsolutions.com	+447914402571		
		Knight, Michael	michaelk23	joh@etztimesheetsolutions.com			
1006		Murray, Lorraine	lorrainem6	joh@etztimesheetsolutions.com	+447914402571		
MYE0876		Myers , Gill	gillm4	timesheetz@hotmail.co.uk	+447914402571		

- **Green ticks** indicate the candidate’s live assignments are all AWR Compliant
- **Amber hazards** indicate the candidate has one or more live assignments that are approaching the AWR qualifying period (this is defaulted to warn you after the 10 week mark)
- **Red hazards** indicate the candidate has one or more live assignments that are non-AWR compliant, i.e have gone over the cut off period and have not been marked as AWR-compliant.

These statuses are also reflected on the AWR reporting which is covered later in this guide.

**AWR Grouping**

You will note the new AWR tab within the Candidate Entry screen:

**Candidate Entry**

Main Details | Document Management | New Starter | **AWR Grouping**

User Name: **joanneh2**  
 Unique ID: **1001**  
 Agency Ref:   
 Payroll No:   
 Title:   
 First Name:   
 Last Name:   
 Date of Birth:   
 Email:   
 Mobile No:  e.g. +447973123456  
 NI:   
 Preferred Supplier:   
 Login Allowed:

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The AWR Grouping tab will detail all assignments for the candidate and will look like this example below initially after enabling the AWR settings:

**Candidate Entry**

Main Details | Document Management | New Starter | **AWR Grouping**

**Ungrouped Assignments**

If any items are ungrouped, they will be automatically grouped the next time the assignment is updated.

Id	Client Name	Start Date	End Date	First TS Start Date	Last TS End Date	AWR Status
94953	ZTE Training Solutions (ID: 15257)	01/08/2011	31/12/2011	01/08/2011	31/08/2011	Pre Awr
95896	ZTE Training Solutions (ID: 15257)	01/01/2012	01/02/2012			Pre Awr
95968	Bradwell Brown Ltd (ID: 14528)	01/09/2011	31/01/2012			Pre Awr

**Grouped Assignments**

No Grouped Assignments.

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The system will check all assignments and update the grouping automatically (this is scheduled to occur once per day) when any Ungrouped Assignments will then move to the Grouped Assignments area as follows (assignments will also move into the Grouped section if they are updated from their Assignment Entry screen):

**Candidate Entry**

The screenshot shows the 'Candidate Entry' interface with the 'AWR Grouping' tab selected. It displays two sections: 'Ungrouped Assignments' and 'Grouped Assignments'.

**Ungrouped Assignments**  
 If any items are ungrouped, they will be automatically grouped the next time the assignment is updated.  
 No Ungrouped Assignments.

**Grouped Assignments**

Ref	Client Name	Start Date	End Date	Time Elapsed (Weeks)	No. of Assignments	AWR	AWR Status
5	Bradwell Brown Ltd (SL Code: BRA0802)			0	1	✓	Pre Awr
6	ZTE Training Solutions (SL Code: ZTE0001)	01/08/2011	31/08/2011	0	2	✓	Pre Awr

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The Grouping therefore represents the combination of the candidate working for a particular client and is dependent on which AWR Rule has been selected for your system (see Page 3).

This example is based on an AWR Rule being set to 'Client' and we can see this candidate has two groups, one for 'Bradwell Brown Ltd' and the other for 'ZTE Training' with a total of three assignments (one for the first group and two in the second). If we click the link on 'No. of Assignments' we can view the following:

The screenshot shows the 'Assignment Details' pop-up window. It contains a table with the following data:

Ref	AWR Ref	Client Name	Start Date	End Date	Time Elapsed (Weeks)	AWR	Manual Entry
78054	6	ZTE Training Solutions (SL Code: ZTE0001)			5	✓	No [minus] [plus]
	6	ZTE Training Solutions (SL Code: ZTE0001)	01/08/2011	31/10/2011	5	✓	No [minus] [plus]

The number '5' in the 'Time Elapsed (Weeks)' column is highlighted with a yellow callout.

Below the pop-up, the 'Grouped Assignments' table is visible:

Ref	Client Name	Start Date	End Date	Time Elapsed (Weeks)	No. of Assignments	AWR	AWR Status
3	Bradwell Brown Ltd (SL Code: BRA0802)	01/09/2011	02/10/2011	0	1	✓	Pre Awr
6	ZTE Training Solutions (SL Code: ZTE0001)	01/08/2011	30/09/2011	5	2	✓	Pre Awr

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This shows the number of weeks from each assignment that have been attributed to AWR (above we see 5 weeks to reflect 5 weekly timesheets since the start date of AWR based on 01/10/2011, so even though the actual start date of the assignment shown was 01/08/2011 the system is only detailing those that fall after the AWR start date).

**Manually adjusting the number of weeks for AWR**

The red plus/minus can be used to manually adjust the number of weeks against each assignment within the assignment grouping and this can be useful, for example an assignment was added to Etz after the candidate had already worked several weeks with that particular client, therefore the number of weeks needs to be amended to reflect the actual weeks worked:



In the event of a manual adjustment the system will display this screen where a note must be entered for the audit log before the number of weeks can be adjusted:



## Assignment Entry

### AWR Indicator Flag

The Assignment Entry list also includes an AWR flag to indicate the status of each assignment:

### Assignment Entry

Filter  Candidate  Client  Temporary  Permanent **Active Items Only**  **A B C D E F G H I J K L M !**

	Agency Ref	Candidate	Client	Start Date	End Date	Live	Manual	AWR	
		Back, Neil	Matthews Trust	30 Jul 11	30 Aug 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Booth , John	Smith Technologies	01 Aug 11	31 Oct 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Carter, David	Norton Jones Ltd	01 Aug 11	30 Nov 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Carter, David	ZTE Training Solutions	18 Apr 11	26 Aug 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Carter, David	ZTE Training Solutions	27 Aug 11	28 Oct 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Cooper, Mark	Smith Technologies	01 Aug 11	31 Dec 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Hill , Joanne	Norton Jones Ltd	01 May 11	01 Oct 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Hill , Joanne	ZTE Training Solutions	01 Aug 11	31 Dec 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Knight, Michael	APT Charity	01 Oct 11	01 Nov 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Knight, Michael	APT Charity	01 Jul 11	30 Sep 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Murray, Lorraine	Norton Jones Ltd	01 Jun 11	26 Aug 11	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
		Myers , Gill	APT Charity	01 Sep 11	31 Dec 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
		Smith, John	System Holdings	01 Jul 11	31 Dec 11	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

- **Green ticks** indicate the assignment is AWR-compliant or AWR-exempt (assignments can be marked as 'exempt' from within the Main Details page of the assignment, see the next section of this guide)
- **Amber hazards** indicate the assignment is approaching the AWR cut-off period (this is defaulted to warn you after the 10 week mark)
- **Red hazards** indicate the assignment is non-AWR compliant, i.e have gone over the AWR cut-off period and have not been marked as AWR-compliant/exempt.

**Important - if an assignment becomes non-AWR compliant no further timesheets will be generated until the assignment's AWR Status flag is set to either AWR-exempt or AWR-compliant (unless set to 'Post AWR' - please see the following section on AWR Status).**

## AWR Status

On the Main Details page of the assignment you will note the AWR Status:

**Assignment Entry**  
John Booth - Smith Technologies [Assignment Live]

Main Details | Timesheet Authorisation | Categories | Document Management | Workflow | Costing | Commission | Timesheets

Id: 94940

Agency Ref No:

Export Ref No:

Job Title:

Client: Smith Technologies [5419676] (Angela Brown) - Smith House

Purchase Order: Select Purchase Order...

Candidate: Booth, John

Display to Candidate:  Pay Details

Payment to: Try Accounts Ltd (John Booth) Contractor?

Start Date: 01 August 2011

End Date: 31 October 2011 [Terminate Assignment](#)

**AWR Status**: Pre AWR

Assignment Length: 0.00 Estimated length in Days or Hours e.g 10.5

Timesheet Details

-> Start Date: 01 August 2011 The date that timesheets will be generated by the system

-> Start Day: Monday The start day for each and every timesheet generated by the system

-> Time Template: Weekly

-> Detailed?:

-> Expenses?: None

-> Site Address:

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The AWR Status is controlled by you and all assignments are marked as 'Pre AWR' by default. The status options are:

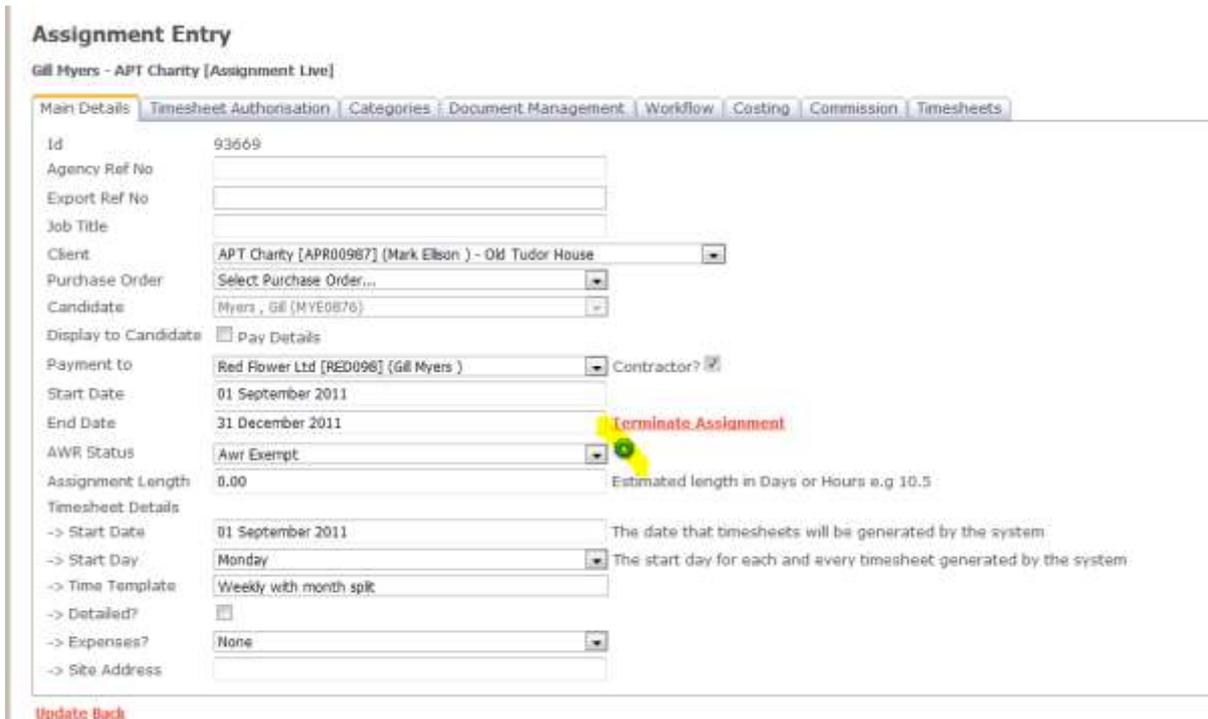
- Pre AWR – the assignment has not yet been marked
- AWR-Compliant - use this flag to set the assignment as AWR-Compliant
- AWR- Exempt – use this flag to set the assignment as AWR-Exempt
- Post AWR – use this flag when assignments have exceeded the cut-off period but have not yet been flagged as either Exempt or Compliant (this will allow the system to continue generating timesheets on an assignment)

When changing the AWR Status flag from 'Pre AWR' the system will prompt you to enter a note for the audit log:



### Audit Log

The system retains an audit log which can be viewed from the Main Details page of the assignment itself, next to the AWR Status flag:



All AWR events and occurrences within each assignment are recorded here:

Log view for item : 93669

Status	Updated By	Signed By	Time Stamp	Notes
Awr Exempt	Jo Hill	N/A	29 Sep 11 13:09	Removing from AWR Group with Note: This candidate is exempt from AWR (Manual Group: False)
Pre Awr	Jo Hill	N/A	29 Sep 11 11:20	Updating AWR Group with Note: (Manual Group: False, Group Status: Compliant)
Pre Awr	Updated by workflow process	N/A	28 Sep 11 23:02	Updating AWR Group with Note: (Manual Group: False, Group Status: Compliant)

## AWR Reports

There are two dedicated AWR reports available, both of which are located under the Timesheet Reports category within the Reports menu.

### AWR Candidate Report

The AWR Candidate Report shows all current, live assignments and can be filtered to focus on assignments that may be 'Becoming not compliant', 'Compliant' or 'Not Compliant' as required (these status flags mirror the indicators shown on the Assignment Entry screen):



### AWR Previous Assignments

This report offers the same as above but allows a date range to be entered when older assignments can be reported on:



Please note that the Assignment Summary report (available in Margins and Forecasting Reports) also includes AWR Status and Elapsed Weeks information for each assignment.

## Appendix A – Parent Companies

As explained in this guide, the new Parent Company feature within Etz was not solely designed for AWR but is more a general enhancement to the system. If you have decided to apply AWR grouping to Parent Companies on your system, then you will need to firstly enter those Parent Companies in this new area within the Reference Data menu:

Home Change Agency Context Change Password Reference Data Document Management Timesheet

### Parent Company Entry

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL 

SL Code	Parent Company	Contact	Address1
SL0021	Big Company	Mr Big	Brighton

Any Parent Companies will then be available to attach to each client as appropriate from their Client Entry screen:

[Dev] JK

### Client Entry

Main Details		Document Management
Parent Company	None Set	
Agency Ref	ZTE0001	
Sales Ledger Code	ZTE0001	
Factor Code	878784	
Client Name	ZTE Training Solutions	
Billing Contact	P Brown	
Billing Contact Position		
Billing Contact Email	joh@etztimesheetsolutions.com	
Billing Contact Telephone No		e.g. +44208998888
Contact		
Contact Position		
Contact Email		
Contact Telephone No		e.g. +44208998888
Address	ZTE House Marsh Road	

This is simply a grouping tool and does not reflect anywhere within the system currently, but if AWR is set to this option then any assignments for the same candidate within a parent company group will be classified together for the purposes of AWR.