



Getting Started Guide for Approvers

Approving time and expenses in SpringAhead is simple and straightforward. Below are the details for:

- Approving Timecards and Expense Reports
- Running Reports

APPROVING TIMECARDS AND EXPENSE REPORTS

Log into SpringAhead using the login instructions provided by your administrator

The login form features the SpringAhead logo at the top left. Below it is a 'Log In' button with a person icon and a 'Forgot your password?' link. The form contains three input fields: 'Company' with the value 'Your Company Login' and a green checkmark, 'Login Name' with the value 'User' and a green checkmark, and 'Password' with masked characters and a green checkmark. A green 'Log In' button is positioned to the right of the password field.

Click **Approval** on the navigation bar to view all timecards and expense reports pending your review

The dashboard screenshot shows the SpringAhead interface for user Pete Campbell. The navigation bar includes 'Time', 'Approval' (highlighted with an orange box and arrow), 'Company', and 'Reports'. A 'Settings' button is located on the right. The main content area is titled 'Welcome Pete Campbell' and includes a 'My Time Summary' section with a large '0:00' display and an 'Add Time' button. To the right of the time summary is a 'Details' table with three rows: 'All Unsubmitted Hours: 0:00', 'Unapproved Hours: 0:00', and 'Approved Hours: 0:00'. Further right is an 'Additional Information' table with three rows: 'PTO Remaining: 1408.75 days', 'PTO Remaining: 7.56 days', and 'Holiday Remaining: -15 days'. Below this is a 'Getting Started With Timecards' link. The 'My Approval Summary' section shows 'Timecards Pending My Approval: 1' and 'Expenses Pending My Approval: 1', each with an 'Approve »' link. At the bottom right is a 'Getting Started with Approvals' link.

The default presentation of the timecard data will be sorted **By User** and will include the **Week, User, and Total Number of Hours**.

The screenshot shows the SpringAhead interface for Pete Campbell's approval. The 'Approval Level' is set to 'By User' and 'Items per Page' is 250. The summary shows 1 timecard and 1 expense. The timecard table shows 10.50 hours unapproved for user Clarke, Gizmo. The expense table shows \$77.50 due for a report named 'Test'.

Week	User	Approved	Unapproved	Total
Week 5: Jan 31 - Feb 06, 2017	Clarke, Gizmo	0.00	10.50	10.50
Total:		0.00	10.50	10.50

Dates	Report Name	ID	NR	Amount Due
Jun 03, 2015	Test	29	\$0.00	\$77.50
Total:			\$0.00	\$77.50

If you wish to view further information about the time submitted, you can start by adjusting the **Approval Level** on the top left of the page

The screenshot shows the 'Approval Level' dropdown menu open, with options: 'By User', 'By User', 'By Project', and 'Detailed'. The 'Detailed' option is highlighted in blue.

By User: Default format when viewing the time submission for the first time. It'll include the Week, User, and Total Number of Hours

By Project: This option will include the Week, User, Project(s) worked on, and Total Number of Hours

Detailed: This option will include the Week, User, Project(s) worked on, Day-by-Day Hours, and Total Number of Hours

The time entry **notes** and **tasks** provided by the user are not available on the Approval display, however, you are able to expand the timesheet to view this information. To expand the timecard, click on the **gear** icon to the right of the entry line and select **View**.

Timecards				
User	Comments	Approved	Unapproved	Total
Week 5: Jan 31 - Feb 06, 2017				
Clarke, Gizmo		0.00	24.00	24.00
Total:		0.00	24.00	24.00

The complete timesheet details will appear

SpringAhead Demo
Sally Draper | Logout | Help

Review Timecard Gizmo Clarke [Edit Timecard](#)

Feb 01 - Feb 15, 2017 List Week

Date	Project	Task	Type	Hours	Status
Summary Filters					
▼ Feb 01, 2017 - Wednesday					
Feb 01	ABC Company:Project 1	Conference	Regular	8.00	Pending Approval
				Notes provided by the user will be here	
Subtotal:				8.00	
▼ Feb 02, 2017 - Thursday					
Feb 02	ABC Company:Project 1	Account Management	Regular	8.00	Pending Approval
				Notes about day 2	
Subtotal:				8.00	
▼ Feb 03, 2017 - Friday					
Feb 03	ABC Company:Project 1	Account Management	Regular	8.00	Pending Approval
				Notes about day 3	
Subtotal:				8.00	
▼ Feb 04, 2017 - Saturday					
Subtotal:				0.00	
▼ Feb 05, 2017 - Sunday					

[View in New Window](#)

To approve any or all items, check the boxes in the first column, navigate to the bottom of the page to set the status to **Approve** and click **Submit**

Approval Level: Detailed | Items per Page: 250

Summary

Timecards: 1 Expenses: 0

Timecards

User	Project	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Total
Week 5: Jan 31 - Feb 06, 2017									
<input checked="" type="checkbox"/>	Clarke, Gizmo	ABC Company:Project 1	-	8	-	-	-	-	8:00
<input checked="" type="checkbox"/>			-	-	8	-	-	-	8:00
<input checked="" type="checkbox"/>			-	-	-	8	-	-	8:00
Total:									24

Expenses

None

1. Confirm Selection

Time Selected All of 3

Expense Selected 0 of 0

2. Select Operation

Approve

Approve

Reject

Forward

3. Approve Selected

Timecard Approval Legal Terms appear here

Submit

You also have the option to reject or forward timecard data if need be:

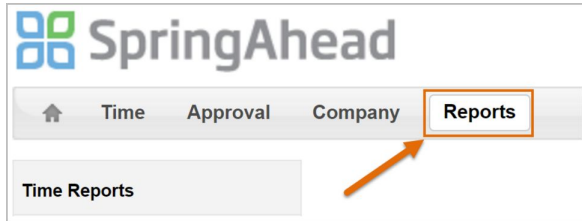
Reject: Select Reject > enter a reason for the rejection > click Submit > this will send the data back to the user so they can adjust and resubmit for approval

Forward: If you are a user setup in SpringAhead as Hourly, Salaried, Contractor, Corp-to-Corp, or Internal you are also able to forward a submitted timecard or expense report to another person at your company that has the permission to approve time and expense. This will not mark the entry as approved by you, but rather will allow you to pass the entry over to another manager should the entry require their review instead.

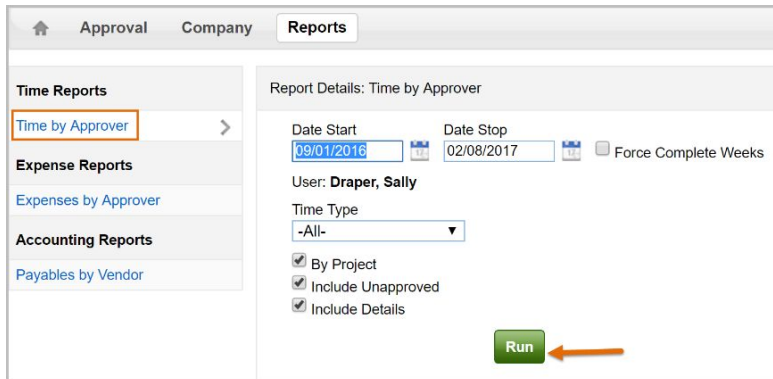
Expense Reports: The functions outlined above for viewing and approving timecards are also available for expense reports submitted for approval.

RUNNING REPORTS

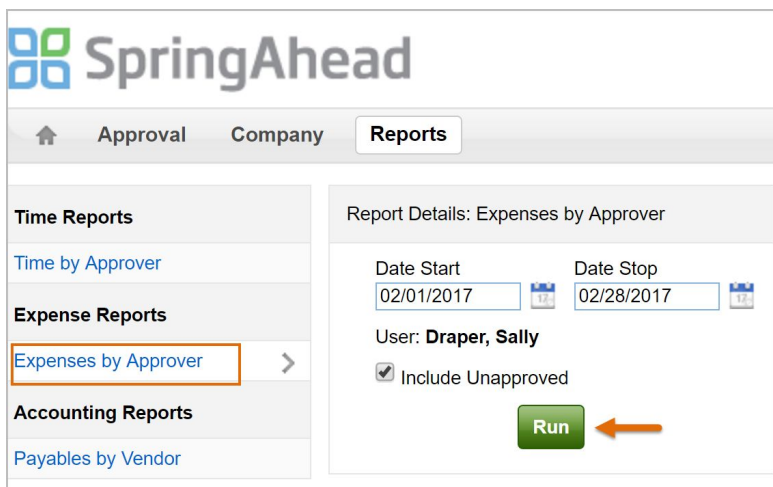
Click on the **Reports** tab on the top navigation bar to run reports related to the time and expense that you've approved.



Time by Approver: When you choose this reporting option you will be able to set your date parameters and select a time type. You can also enable additional settings like **By Project** (to sort the data by job), **Include Unapproved** (to include hours still pending approval), and **Include Details** (to view tasks, comments, and a day-by-day breakdown of the hours).



Expense by Approver: Similar options are also available for expense reporting.




Click **Run** to generate the report

From here you are also able to print a copy of the output or download a CSV. The CSV file will include some additional columns and details not available on the website layout.

Modify Report Settings Download Report Download CSV Print																			
Time by Approver																			
Approver: Sally Draper																			
9/1/2016 (Thu) - 2/8/2017 (Wed)																			
(Includes unapproved hours)																			
Project	Hours	Date	Approved	Status	Comments	User	Time	Date	Task	Type	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Description	
ABC Company:Project 1	8	11/01/16	Approved			Clarke, Gizmo C	11/01/16	11225 - Conference	Reg	0	8	0	0	0	0	0	0	0	SpringAhead demo
	8		Pending			Clarke, Gizmo C	01/31/17	11225 - Conference	Reg	0	8	0	0	0	0	0	0	0	Notes provided by the user will be here
	8		Pending			Clarke, Gizmo C	01/31/17	11224 - Account Management	Reg	0	0	8	0	0	0	0	0	0	Notes about day 2
	8		Pending			Clarke, Gizmo C	01/31/17	11224 - Account Management	Reg	0	0	0	8	0	0	0	0	0	Notes about day 3
Subtotal	32																		
Total	32																		

Approvers also have access to a **Company** tab where they're able to view a summary of the hours submitted, approved, and processed for the users and projects that they directly manage.


Demo
Pete Campbell | Logout | Help

[Home](#)
[Time](#)
[Approval](#)
Company
[Reports](#)
Settings

Company Name: **Demo**

Timecards

Date: [Previous Week](#) [Next Week](#) [View](#)

Timecards for Active Projects

Number	Project	User	Hours	Approved	Processed	Comments
1	AS2	Cramer, David				No time submitted
2		Dawg, Lainey				No time submitted

Timecards for Active Employees

Number	User	Project	Hours	Approved	Processed	Comments
1	Bear, Bill	FunTime Co.:Party	30	100% Me	0% No	

About v8.5 (r24712)