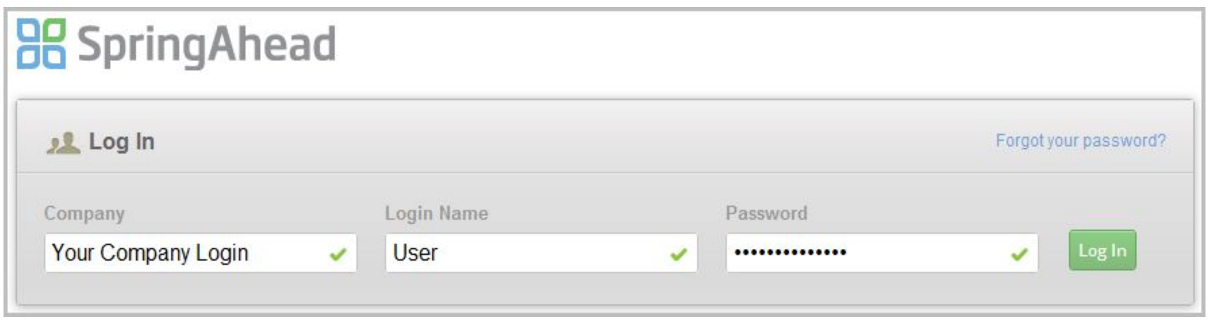
Getting Started Guide for Approvers

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

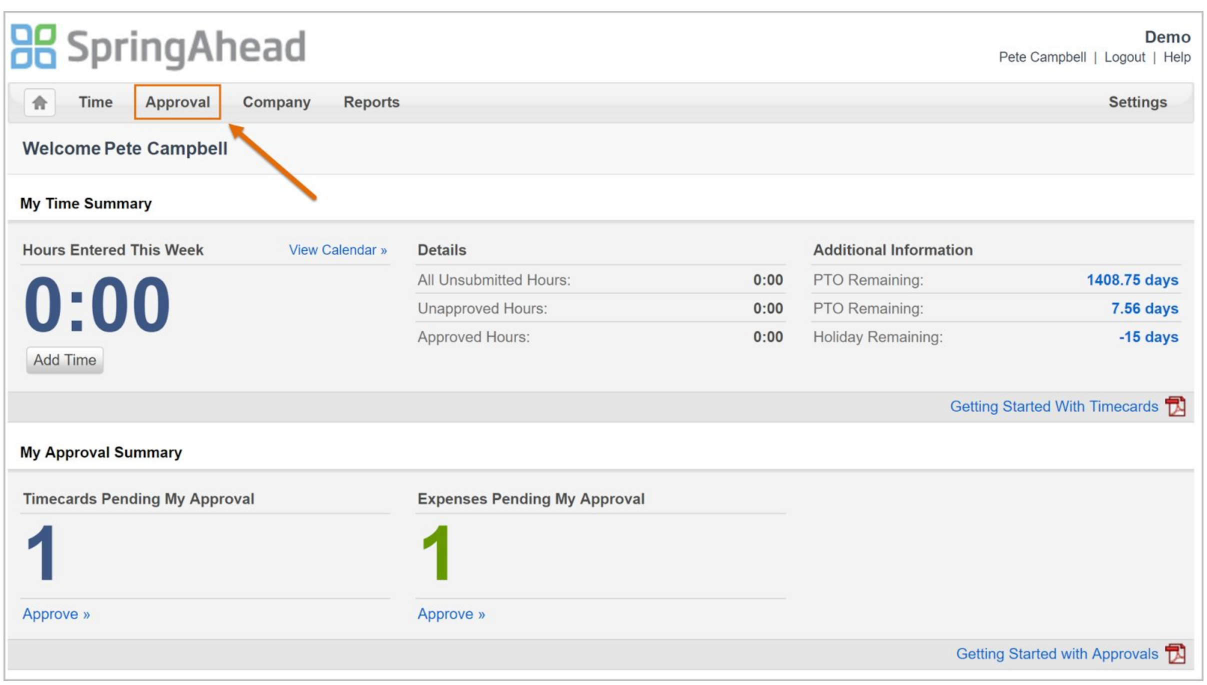
- Approving Timecards and Expense Reports
- Running Reports

APPROVING TIMECARDS AND EXPENSE REPORTS

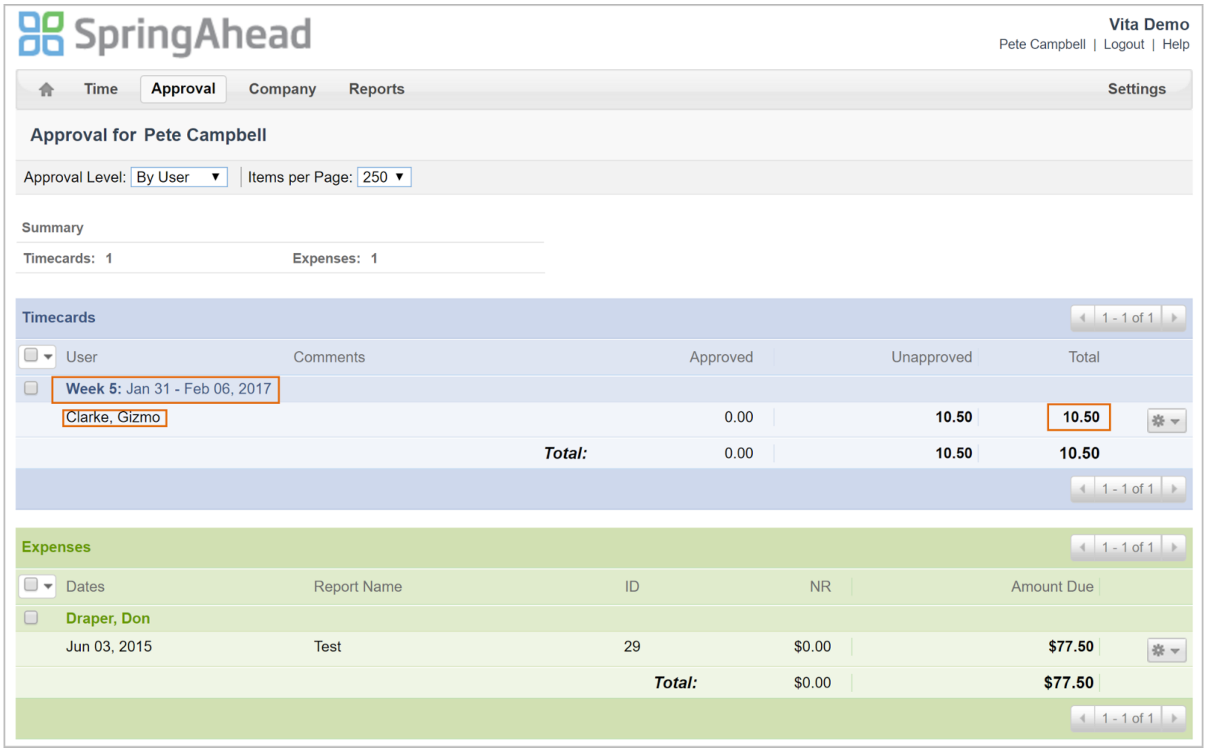
Log into SpringAhead using the login instructions provided by your administrator



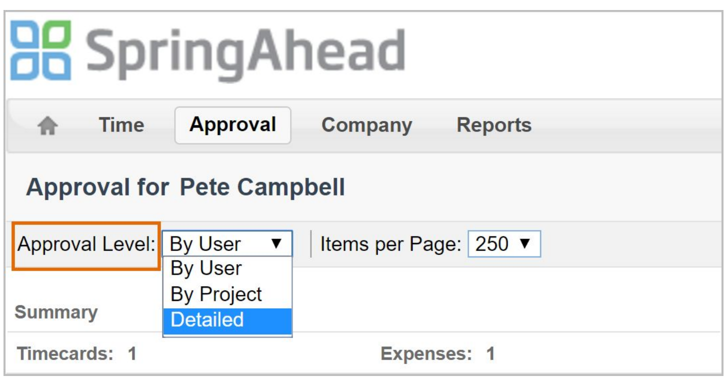
Click **Approval** on the navigation bar to view all timecards and expense reports pending your review



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



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



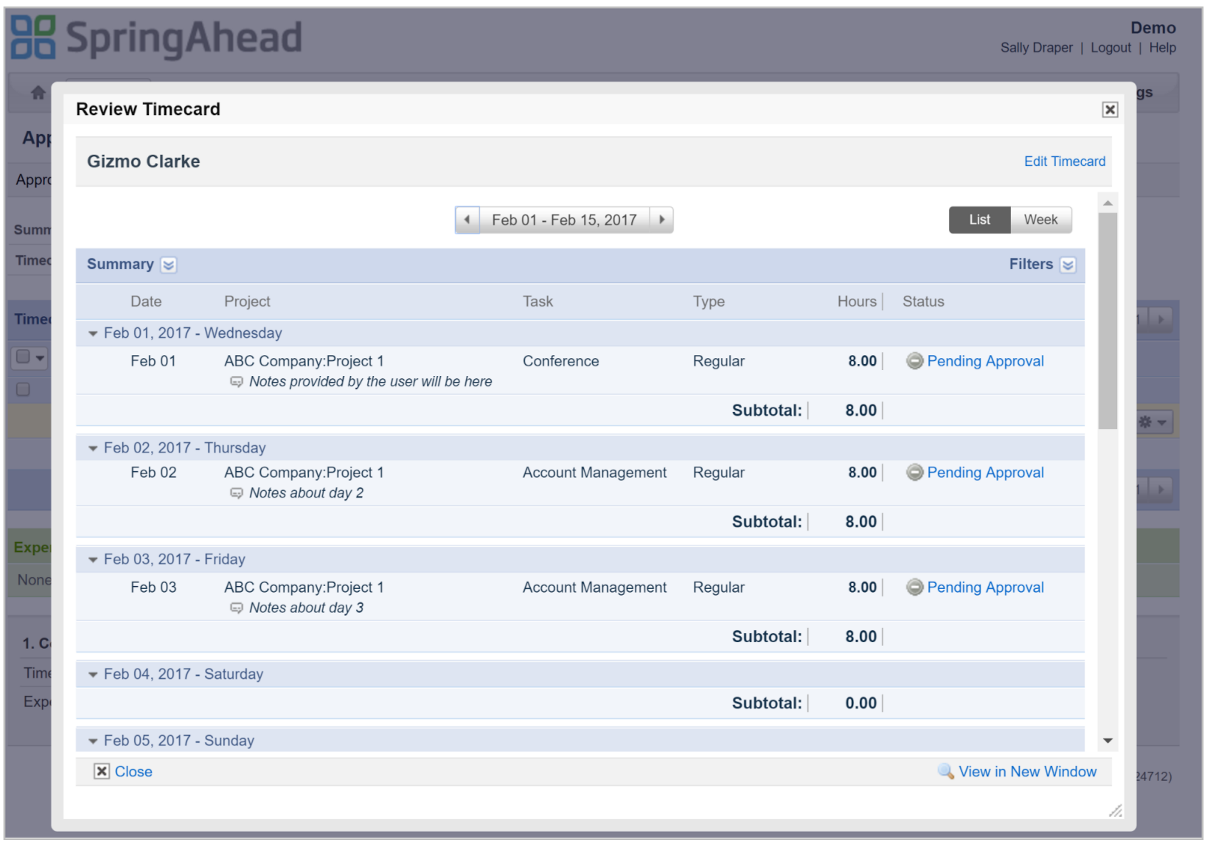
By User: Default format when viewing the time submission for the first time. It'll include the Week, User, and Total Number of Hours

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

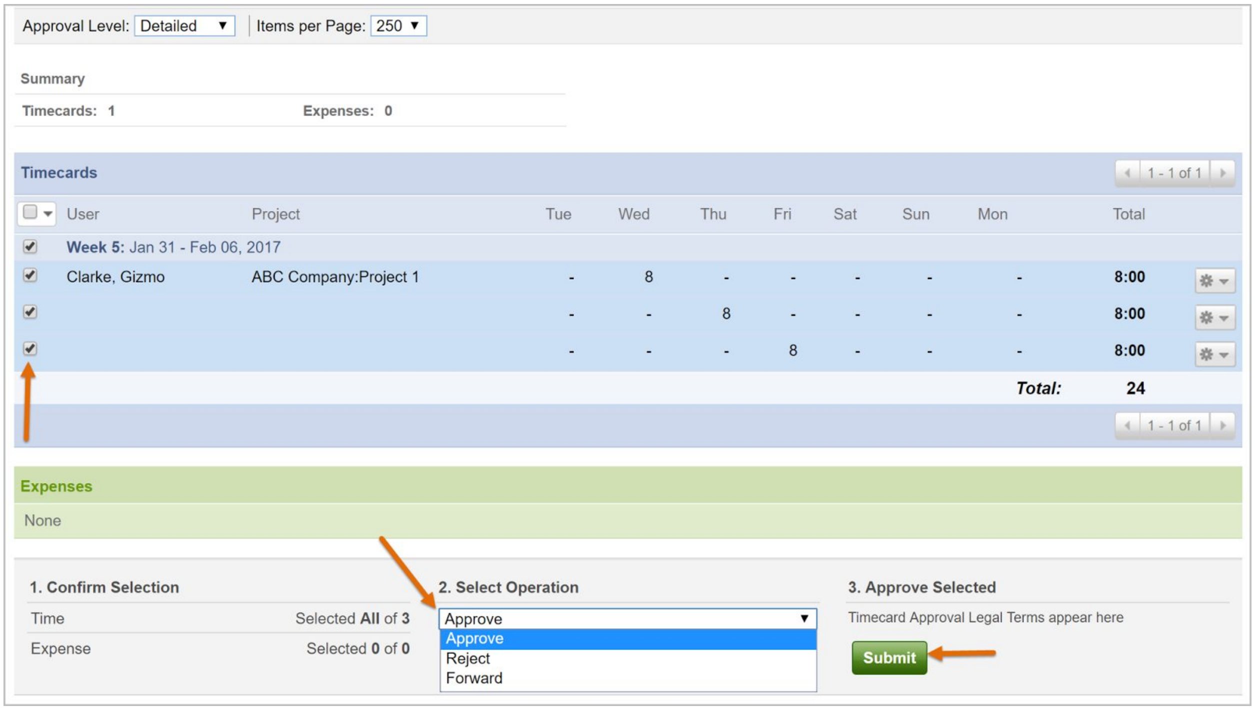
Detailed: This option will include the Week, User, Project(s) worked on, Day-by-Day Hours, and Total Number of Hours

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**.

The complete timesheet details will appear



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**



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

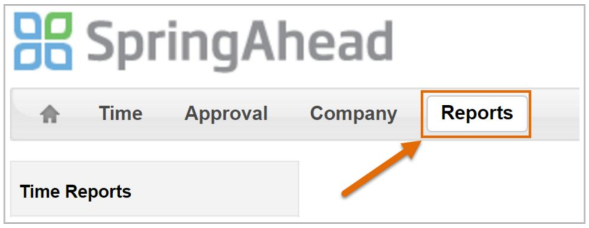
Reject: Select Reject > enter a reason for the rejection > click Submit > this will send the data back to the user so they can adjust and resubmit for approval

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.

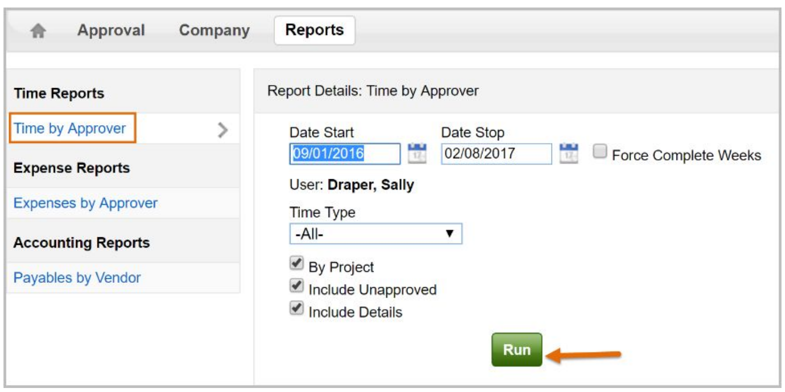
Expense Reports: The functions outlined above for viewing and approving timecards are also available for expense reports submitted for approval.

RUNNING REPORTS

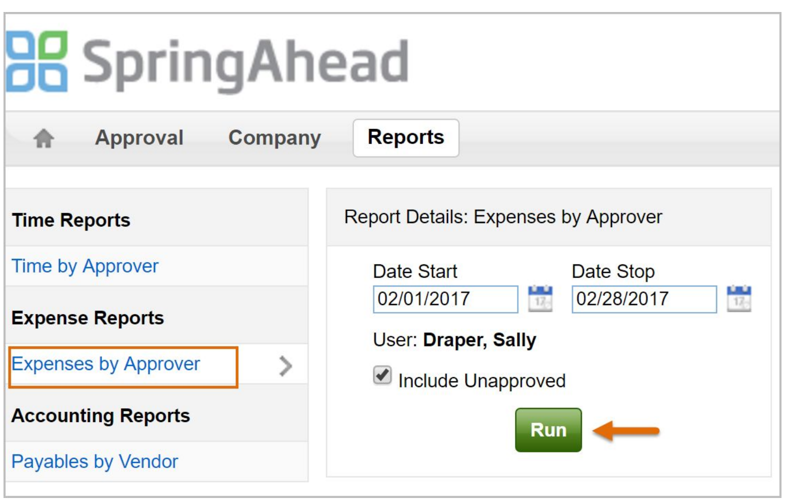
Click on the **Reports** tab on the top navigation bar to run reports related to the time and expense that you've approved.



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 able 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).

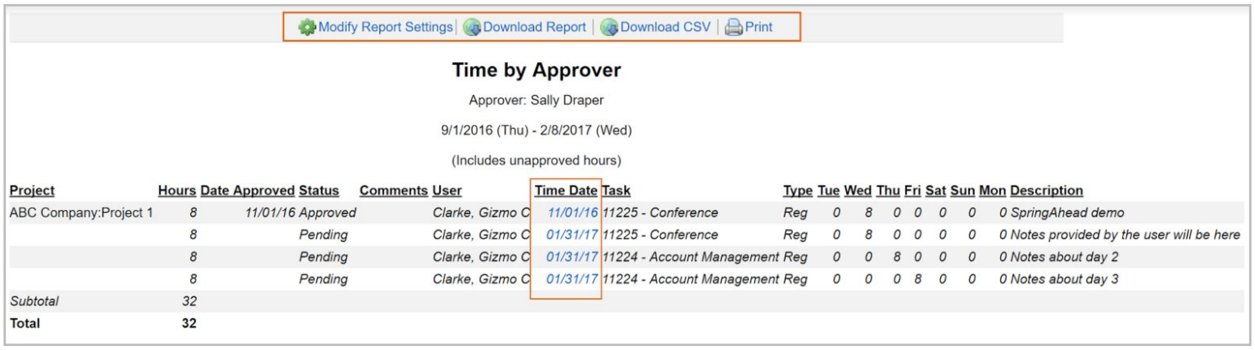


Expense by Approver: Similar options are also available for expense reporting.



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.



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.