



## 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**.

**SpringAhead** Vita Demo  
Pete Campbell | Logout | Help

Time **Approval** Company Reports Settings

Approval for Pete Campbell

Approval Level: **By User** | Items per Page: 250

Summary  
Timecards: 1 | Expenses: 1

User	Comments	Approved	Unapproved	Total
<b>Week 5: Jan 31 - Feb 06, 2017</b>				
Clarke, Gizmo		0.00	10.50	10.50
<b>Total:</b>		0.00	10.50	10.50

Dates	Report Name	ID	NR	Amount Due
Draper, Don				
Jun 03, 2015	Test	29	\$0.00	\$77.50
<b>Total:</b>			\$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

**SpringAhead**

Time **Approval** Company Reports

Approval for Pete Campbell

Approval Level: **By User** | Items per Page: 250

Summary  
Timecards: 1 | Expenses: 1

- By User
- By Project
- Detailed**

**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

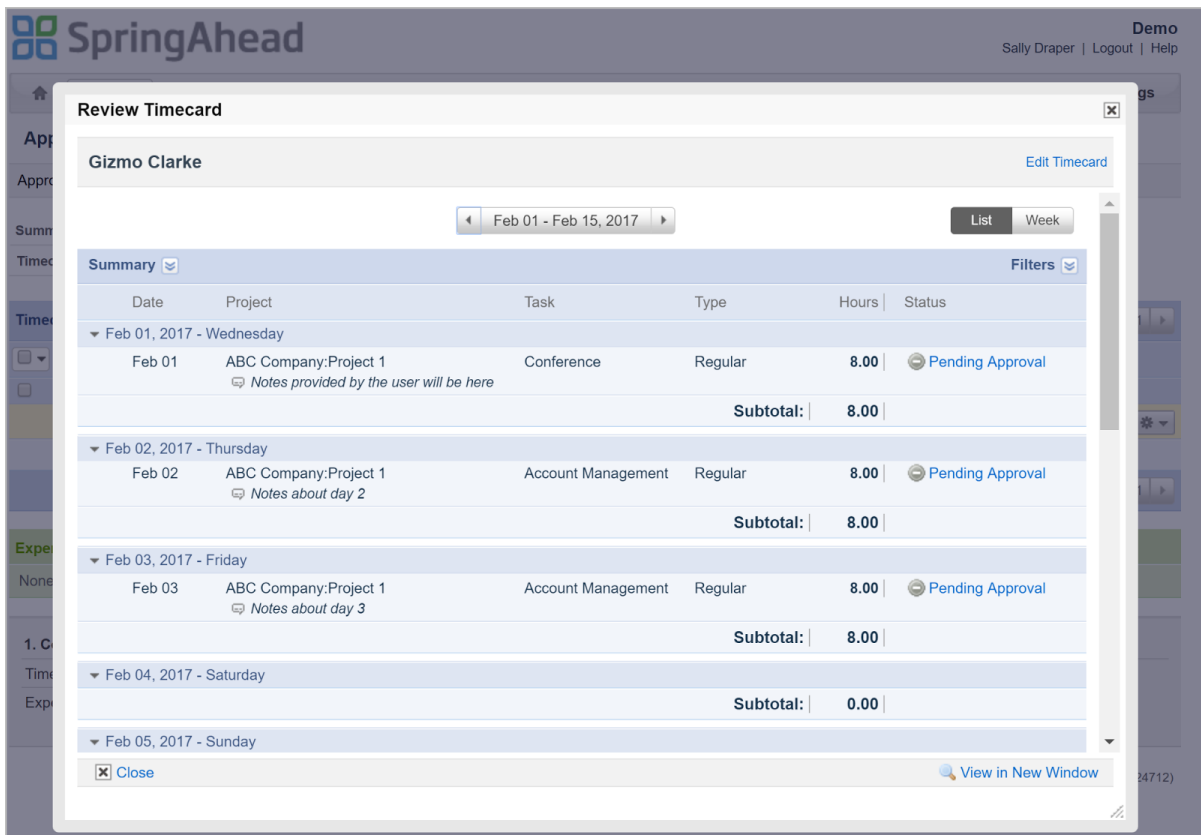
**Detailed:** This option will include the Week, User, Project(s) worked on, Day-by-Day Hours, and Total Number of Hours

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**.



User	Comments	Approved	Unapproved	Total	
<b>Week 5: Jan 31 - Feb 06, 2017</b>					
Clarke, Gizmo		0.00	24.00	24.00	
<b>Total:</b>		0.00	24.00	24.00	<a href="#">View</a>

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
<b>Summary</b> <span>Filters</span>					
▼ Feb 01, 2017 - Wednesday					
Feb 01	ABC Company:Project 1	Conference	Regular	8.00	 Pending Approval
				<b>Subtotal:</b>	8.00
▼ Feb 02, 2017 - Thursday					
Feb 02	ABC Company:Project 1	Account Management	Regular	8.00	 Pending Approval
				<b>Subtotal:</b>	8.00
▼ Feb 03, 2017 - Friday					
Feb 03	ABC Company:Project 1	Account Management	Regular	8.00	 Pending Approval
				<b>Subtotal:</b>	8.00
▼ Feb 04, 2017 - Saturday					
				<b>Subtotal:</b>	0.00
▼ Feb 05, 2017 - Sunday					

[Close](#) [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
<b>Week 5: Jan 31 - Feb 06, 2017</b>									
<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
<b>Total:</b>									<b>24</b>

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:

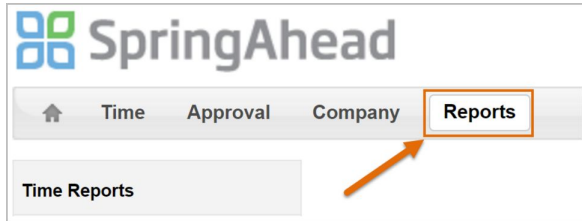
**Reject:** Select Reject > enter a reason for the rejection > click Submit > this will send the data back to the user so they can adjust and resubmit for approval

**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.

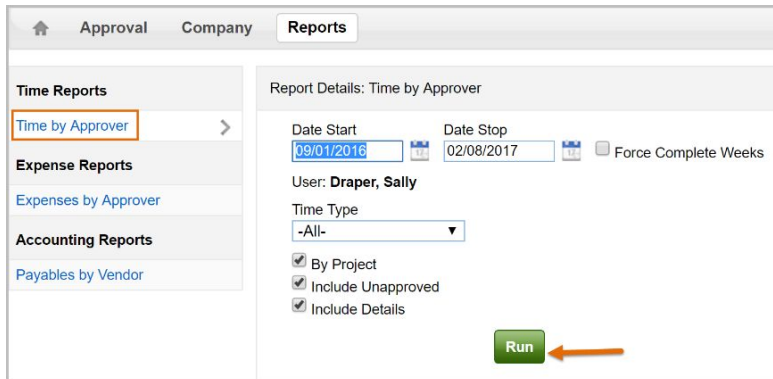
**Expense Reports:** The functions outlined above for viewing and approving timecards are also available for expense reports submitted for approval.

## 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.

