Getting Started: Processing and Exporting Data

— Generated at October 11th 2012 1:51 p.m.

Getting Started: Processing and Exporting Time and Expenses

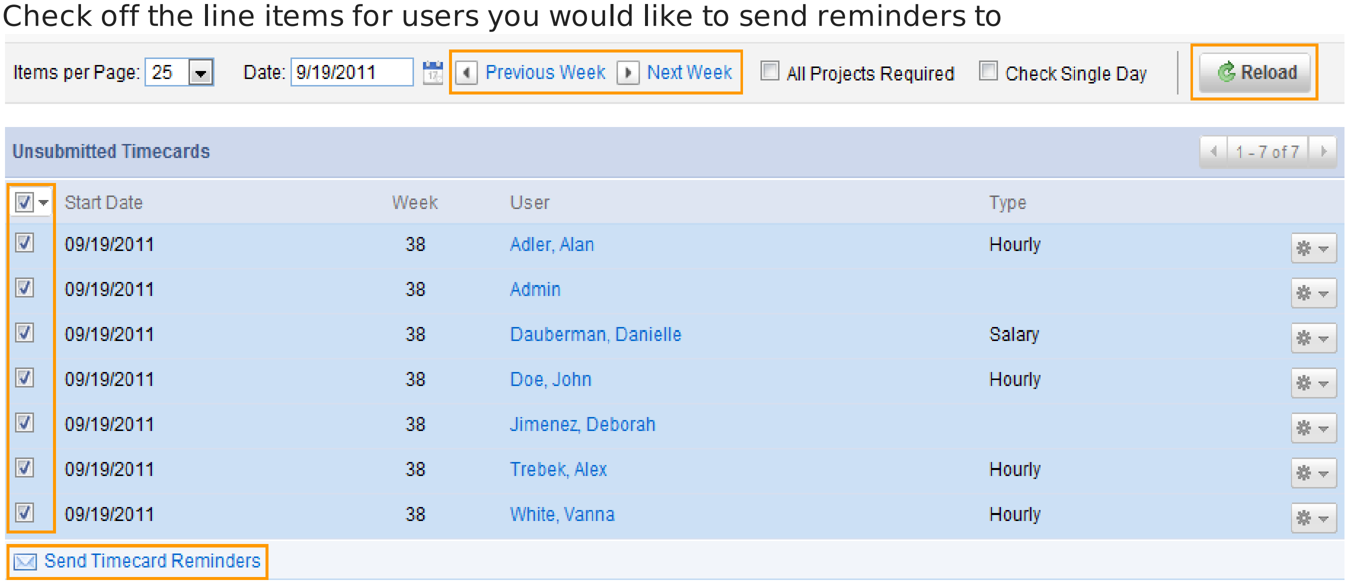
Administrators can process and export time and expenses, which may involve the following:

- Sending Timecard Reminders
- Sending Approval Reminders
- Approving for Accounting
- Exporting Invoices
- Exporting Payables

Sending Timecard Reminders

If there are unsubmitted timecards, you may choose to send timecard reminders that will alert users to submit their saved time. To do so:

- Click on the **Review** tab
- Click on **Unsubmitted Timecards** and click **Reload.** You may also toggle to previous weeks
- Check off the line items for users you would like to send reminders to



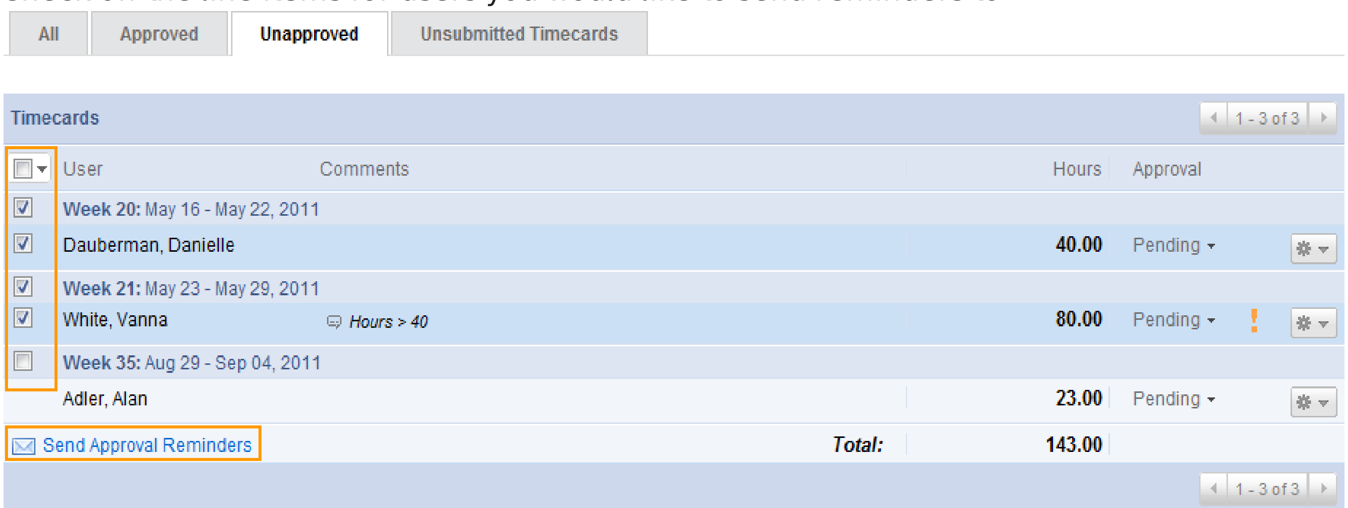
- Click **Send Timecard Reminders**

These people will now receive emails reminding them that they have not submitted timecards for the week.

Sending Approval Reminders

If there are unapproved timecards, you may choose to send approval reminders that will alert managers to log in and approve timesheets. To do so:

- Click on the **Review** tab
- Scroll down to the Unapproved section or click on **Unapproved**
- Check off the line items for users you would like to send reminders to



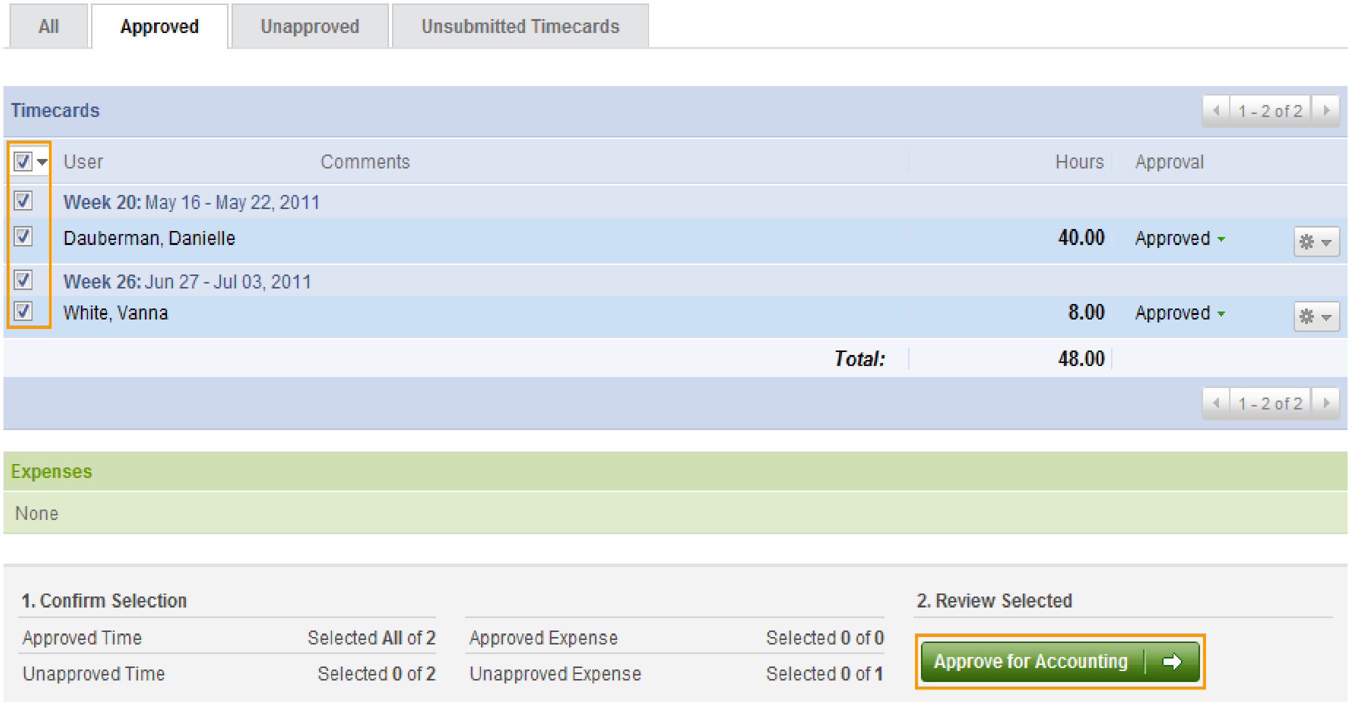
- Click **Send Approval Reminders**

Managers for these users will get now receive emails reminding them that they have timecards in their queue, ready for approval.

Approving for Accounting

Once you have approved timecards, you may push it into accounting where they will be ready to be exported as invoices and/or payables.

- Click on **Review**
- Scroll down to the Approved section or click on **Approved**
- Check off the line items that are ready to be pushed into the next phase

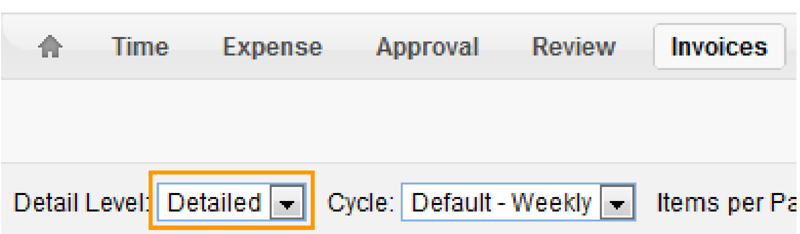


- Click **Approve for Accounting** at the bottom of the page

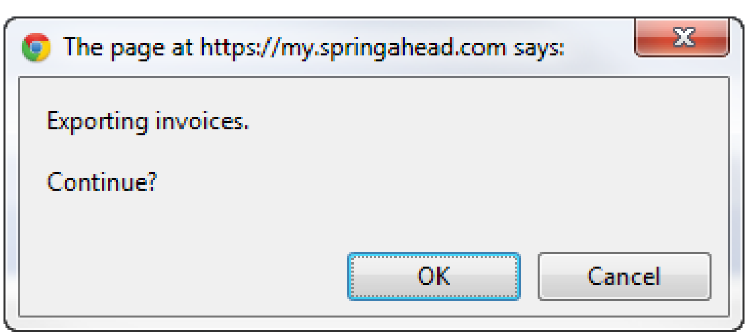
All of the selected data will now be located in the Invoices and Payables tabs for final review, ready for export.

Exporting Invoices

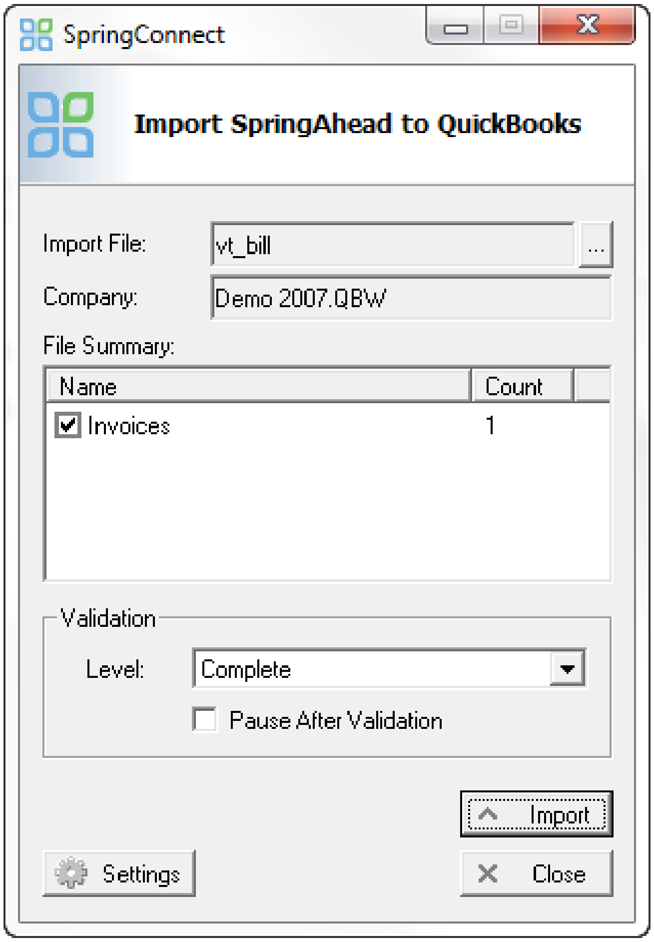
- Click on **Invoices**
- To review rates and invoice line-item descriptions that will be sent to the accounting system, ensure the **Detail Level** is set to **Detailed**



- Review information to be exported
- Uncheck any items that are not ready for export, as applicable
- Click **Export** **
- Click **OK**



- This will download a file vt_bill.vsf onto your computer. If it doesn't automatically run, click on it to do so
- SpringConnect will open and display a summary of data that will be exported

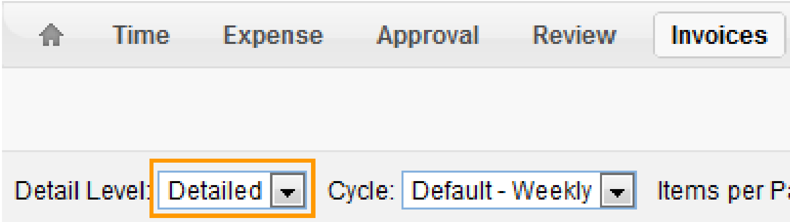


- Click **Import**
- SpringConnect will validate the data to be exported
- If no warnings are generated, Click **OK**
- Click **OK** after all data has been imported
- Check the data in QuickBooks

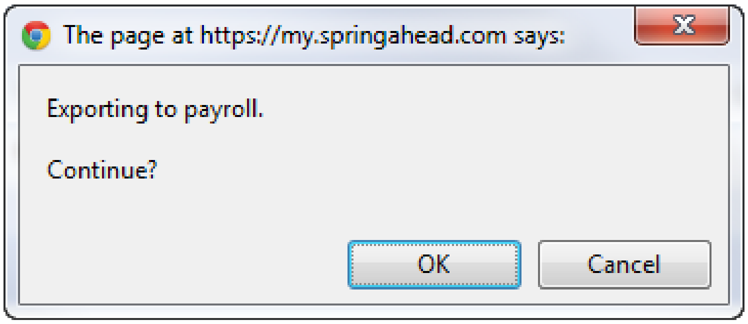
** Note: The items checked in the **Confirm Export Settings** section are global settings (**Settings** / **My Company**). Although each setting may be overridden here, they are best set globally and not overridden at each export.

Exporting Payables

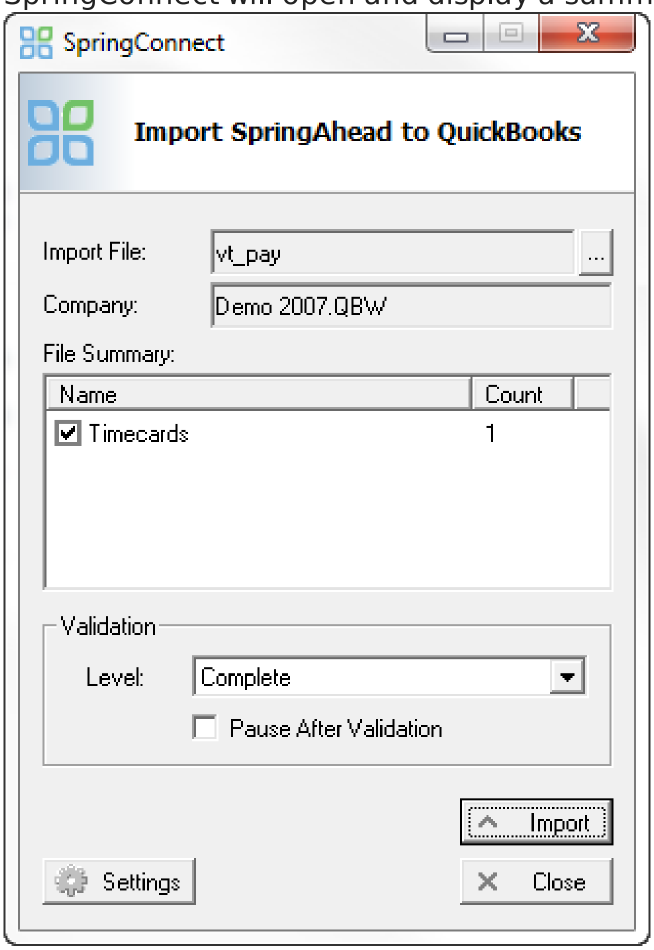
- Click on **Payables**
- To review pay rates for all hours worked, ensure the **Detail Level** is set to **Detailed**



- Review information to be exported
- Uncheck any items that are not ready for export, as applicable
- Click **Export** **
- Click **OK**



- This will download a file vt_pay.vsf onto your computer. If it doesn't automatically run, click on it to do so
- SpringConnect will open and display a summary of data that will be exported



- Click **Import**
- SpringConnect will validate the data to be imported

- If no warnings are generated, Click **OK**
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