

# Getting Started: Processing and Exporting Data

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## 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

Items per Page: 25 Date: 9/19/2011  Previous Week  Next Week  All Projects Required  Check Single Day

Unsubmitted Timecards					1 - 7 of 7	
<input checked="" type="checkbox"/>	Start Date	Week	User	Type		
<input checked="" type="checkbox"/>	09/19/2011	38	Adler, Alan	Hourly	<input type="button" value="*"/>	
<input checked="" type="checkbox"/>	09/19/2011	38	Admin		<input type="button" value="*"/>	
<input checked="" type="checkbox"/>	09/19/2011	38	Dauberman, Danielle	Salary	<input type="button" value="*"/>	
<input checked="" type="checkbox"/>	09/19/2011	38	Doe, John	Hourly	<input type="button" value="*"/>	
<input checked="" type="checkbox"/>	09/19/2011	38	Jimenez, Deborah		<input type="button" value="*"/>	
<input checked="" type="checkbox"/>	09/19/2011	38	Trebek, Alex	Hourly	<input type="button" value="*"/>	
<input checked="" type="checkbox"/>	09/19/2011	38	White, Vanna	Hourly	<input type="button" value="*"/>	

Send Timecard Reminders

- 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

Timecards		Hours	Approval
User	Comments		
<input checked="" type="checkbox"/>	Week 20: May 16 - May 22, 2011		
<input checked="" type="checkbox"/>	Dauberman, Danielle	40.00	Pending
<input checked="" type="checkbox"/>	Week 21: May 23 - May 29, 2011		
<input checked="" type="checkbox"/>	White, Vanna <small>Hours &gt; 40</small>	80.00	Pending
<input type="checkbox"/>	Week 35: Aug 29 - Sep 04, 2011		
	Adler, Alan	23.00	Pending
<input checked="" type="checkbox"/> Send Approval Reminders		<b>Total:</b>	<b>143.00</b>

- Click **Send Approval Reminders**

Managers for these users will 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

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Timecards 1 - 2 of 2

<input checked="" type="checkbox"/>	User	Comments	Hours	Approval	
<input checked="" type="checkbox"/>	Week 20: May 16 - May 22, 2011				
<input checked="" type="checkbox"/>	Dauberman, Danielle		40.00	Approved	<input type="button" value="*"/>
<input checked="" type="checkbox"/>	Week 26: Jun 27 - Jul 03, 2011				
<input checked="" type="checkbox"/>	White, Vanna		8.00	Approved	<input type="button" value="*"/>
<b>Total:</b>			<b>48.00</b>		

Expenses  
None

1. Confirm Selection		2. Review Selected	
Approved Time	Selected All of 2	Approved Expense	Selected 0 of 0
Unapproved Time	Selected 0 of 2	Unapproved Expense	Selected 0 of 1

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

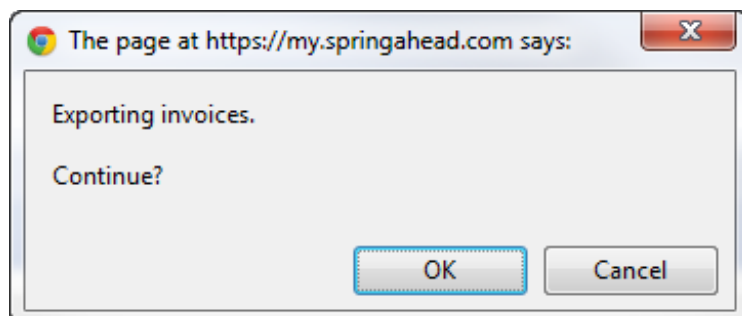
All of the selected data will now be located in the Invoices and Payables tabs for final review, ready for export.

### Exporting Invoices

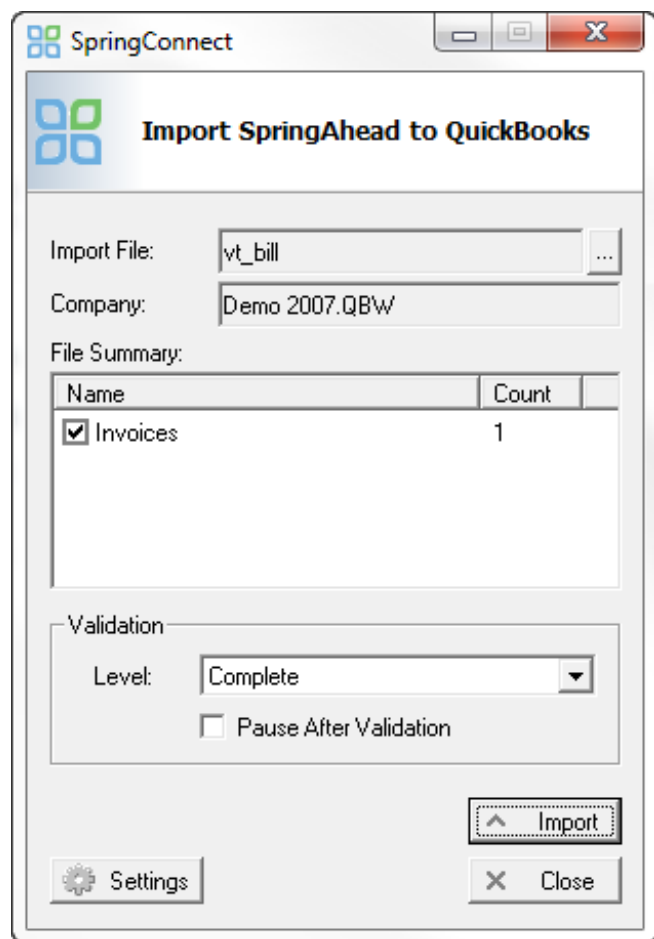
- Click on **Invoices**
- To review rates and invoice line-item descriptions that will be sent to the accounting system, ensure the **Detail Level** is set to **Detailed**

Detail Level: 
 Cycle: 
 Items per Page:

- 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

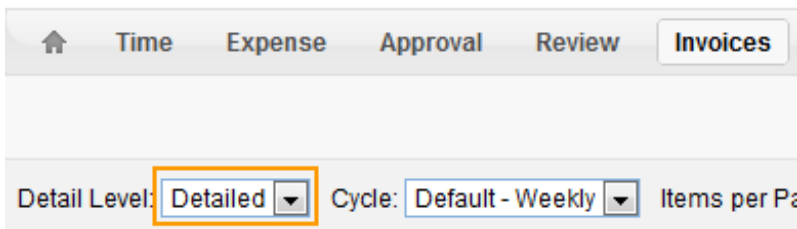


- Click **Import**
- SpringConnect will validate the data to be exported
- If no warnings are generated, Click **OK**
- Click **OK** after all data has been imported
- Check the data in QuickBooks

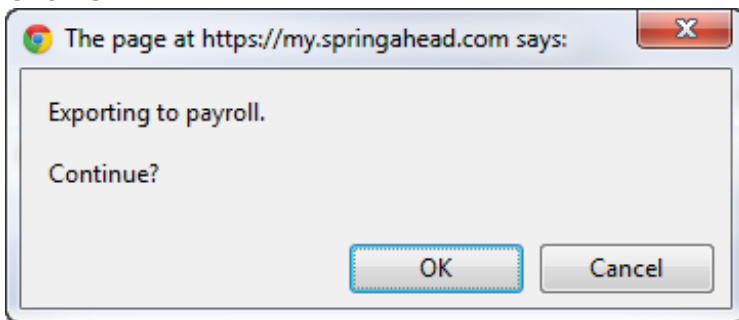
\*\* Note: The items checked in the **Confirm Export Settings** section are global settings (**Settings / My Company**). Although each setting may be overridden here, they are best set globally and not overridden at each export.

## Exporting Payables

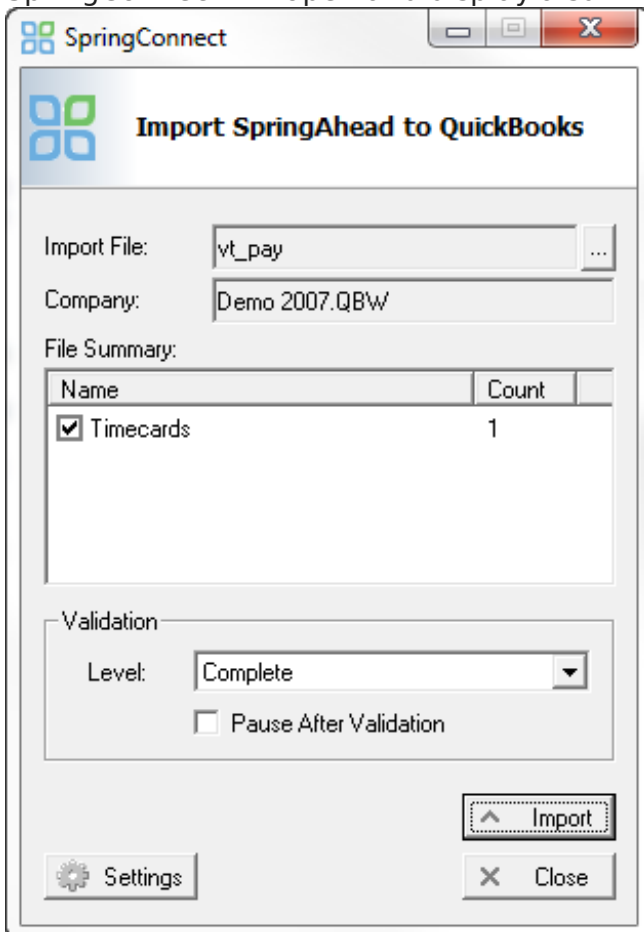
- Click on **Payables**
- To review pay rates for all hours worked, ensure the **Detail Level** is set to **Detailed**



- 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**
- 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.