



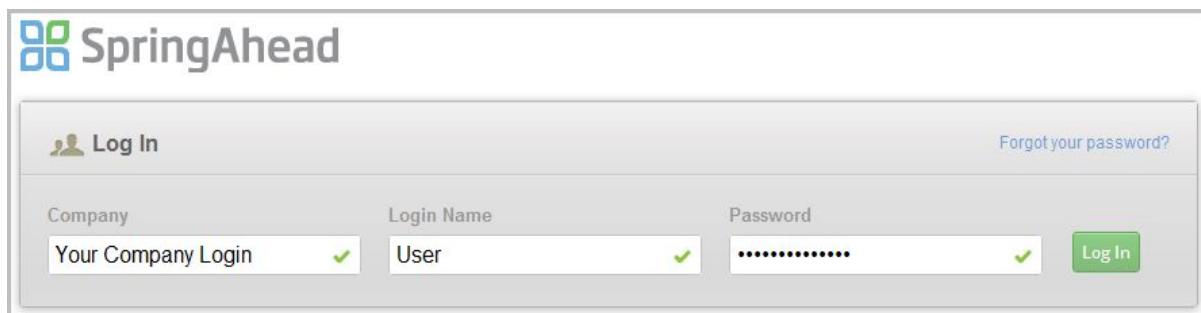
Getting Started Guide for Approvers

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

- Approving Timecards and Expense Reports
- Running Reports

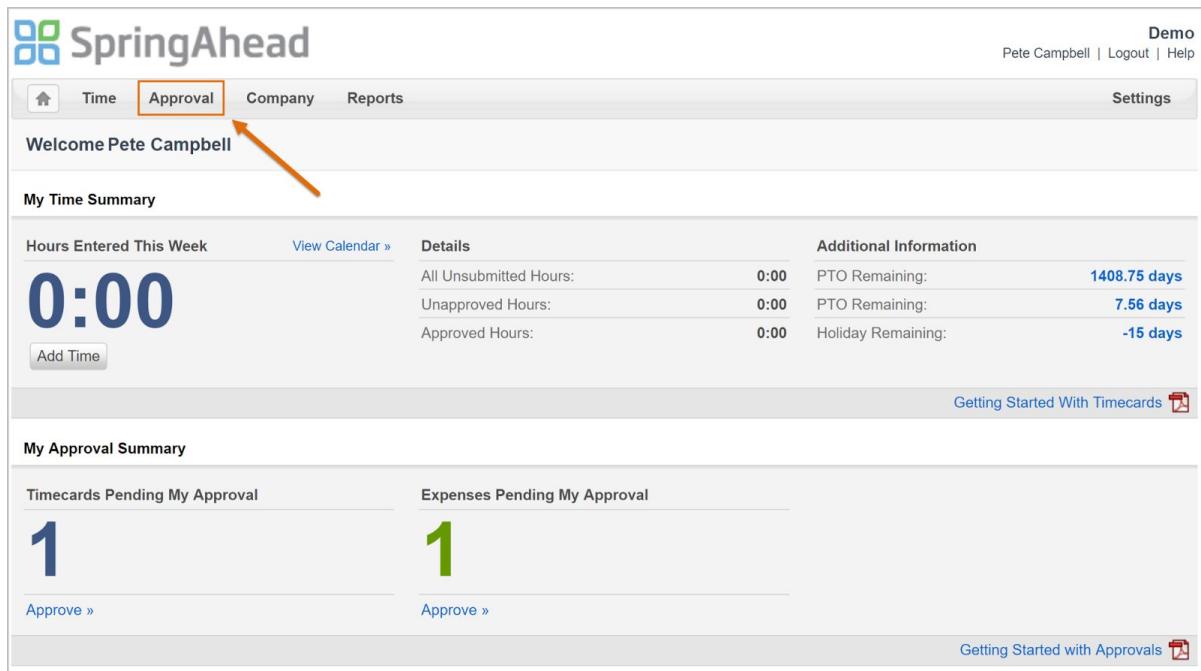
APPROVING TIMECARDS AND EXPENSE REPORTS

Log into SpringAhead using the login instructions provided by your administrator



The screenshot shows the SpringAhead login page. At the top is the SpringAhead logo. Below it is a 'Log In' form with fields for 'Company' (set to 'Your Company Login'), 'Login Name' (set to 'User'), and 'Password' (represented by a series of dots). To the right of the password field is a green checkmark icon. A green 'Log In' button is on the far right. Above the 'Log In' button is a link 'Forgot your password?'. On the left side of the form is a small user icon.

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



The screenshot shows the SpringAhead dashboard after logging in. The navigation bar at the top has tabs for 'Time', 'Approval' (which is highlighted with an orange box and has an orange arrow pointing to it), 'Company', and 'Reports'. On the right of the navigation bar are links for 'Demo', 'Pete Campbell | Logout | Help', and 'Settings'. Below the navigation bar, a welcome message 'Welcome Pete Campbell' is displayed. The main area is divided into several sections: 'My Time Summary' (showing 'Hours Entered This Week' as 0:00 and a large '0:00' button with an 'Add Time' link), 'Details' (listing 'All Unsubmitted Hours: 0:00', 'Unapproved Hours: 0:00', and 'Approved Hours: 0:00'), 'Additional Information' (listing 'PTO Remaining: 1408.75 days', 'PTO Remaining: 7.56 days', and 'Holiday Remaining: -15 days'), and 'Getting Started With Timecards' with a red 'Get Started' button. At the bottom, there are two summary sections: 'My Approval Summary' (showing 'Timecards Pending My Approval' as 1 and a large '1' button with an 'Approve »' link) and 'Expenses Pending My Approval' (showing 'Expenses Pending My Approval' as 1 and a large '1' button with an 'Approve »' link). At the very bottom right is a link 'Getting Started with Approvals' with a red 'Get Started' button.

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

This screenshot shows the SpringAhead web application interface for approval. At the top, there's a header with the SpringAhead logo, user name 'Vita Demo' (Pete Campbell), and links for Logout and Help. Below the header is a navigation bar with links for Home, Time, Approval (which is selected and highlighted in blue), Company, Reports, and Settings.

The main content area is titled 'Approval for Pete Campbell'. It includes two search/filter sections: 'Approval Level: By User' and 'Items per Page: 250'. Below these are two summary sections: 'Summary' (Timecards: 1, Expenses: 1) and 'Timecards'.

The 'Timecards' section displays a table with columns: User, Comments, Approved, Unapproved, and Total. A single entry is shown: 'Week 5: Jan 31 - Feb 06, 2017' for 'Clarke, Gizmo' with a total of 10.50 hours. The 'Total:' row also shows 10.50.

Below the Timecards is another summary section 'Expenses' with a table showing one entry for 'Draper, Don' on Jun 03, 2015, with a total amount due of \$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

This screenshot shows the same SpringAhead approval interface, but the focus is on the 'Approval Level' dropdown menu. The menu is open, showing four options: 'By User' (selected and highlighted in blue), 'By User', 'By Project', and 'Detailed'.

The rest of the interface remains the same, with the 'Approval for Pete Campbell' title, search filters, and summary sections visible.

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
Week 5: Jan 31 - Feb 06, 2017		0.00	24.00	24.00
Clarke, Gizmo		0.00	24.00	24.00
Total:		0.00	24.00	24.00

The complete timesheet details will appear

Date	Project	Task	Type	Hours	Status
Feb 01, 2017	ABC Company:Project 1	Conference	Regular	8.00	Pending Approval
	Subtotal: 8.00				
Feb 02, 2017	ABC Company:Project 1	Account Management	Regular	8.00	Pending Approval
	Subtotal: 8.00				
Feb 03, 2017	ABC Company:Project 1	Account Management	Regular	8.00	Pending Approval
	Subtotal: 8.00				
Feb 04, 2017				0.00	
Feb 05, 2017				0.00	

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**

The screenshot shows the SpringAhead Timecard Approval interface. At the top, there are dropdown menus for 'Approval Level' (set to 'Detailed') and 'Items per Page' (set to '250'). Below this is a 'Summary' section showing 'Timecards: 1' and 'Expenses: 0'. The main area is titled 'Timecards' and contains a table with three rows. The first row is a header with columns: User, Project, Tue, Wed, Thu, Fri, Sat, Sun, Mon, Total. The second row is for 'Week 5: Jan 31 - Feb 06, 2017' with user 'Clarke, Gizmo' and project 'ABC Company:Project 1'. The third row is a summary row with totals: 8:00, 8:00, 8:00, and a total of 24. An orange arrow points to the checkbox in the first column of the second row. At the bottom of the page, there is a '3 Step Approval Process': 1. Confirm Selection (Time: Selected All of 3, Expense: Selected 0 of 0), 2. Select Operation (dropdown menu with options: Approve, Approve, Reject, Forward, where 'Approve' is selected and highlighted in blue), and 3. Approve Selected (button labeled 'Submit' with an orange arrow pointing to it). A note says 'Timecard Approval Legal Terms appear here'.

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

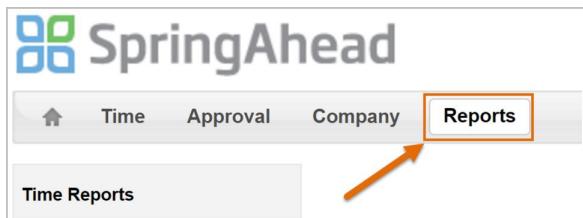
Reject: Select Reject > enter a reason for the rejection > click Submit > this will send the data back to the user so they can adjust and resubmit for approval

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.

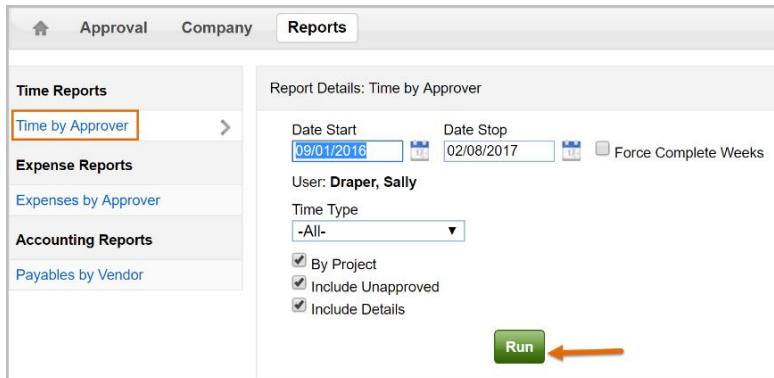
Expense Reports: The functions outlined above for viewing and approving timecards are also available for expense reports submitted for approval.

RUNNING REPORTS

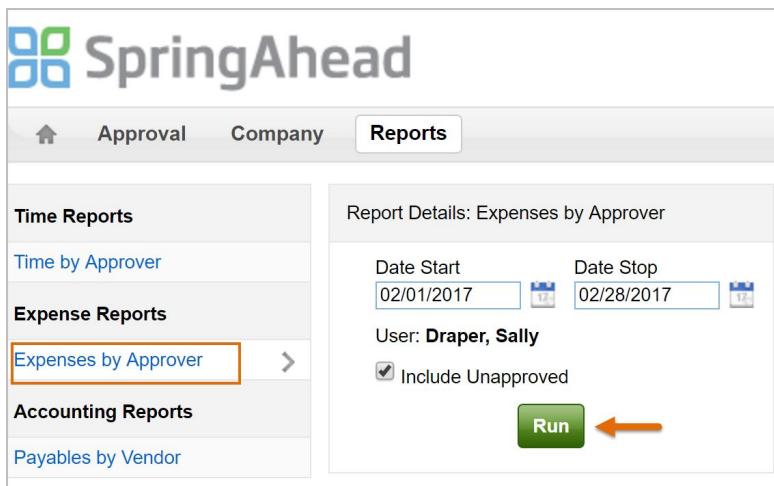
Click on the **Reports** tab on the top navigation bar to run reports related to the time and expense that you've approved.



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.

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 SpringAhead demo	
	8		Pending		Clarke, Gizmo C	01/31/17	11225 - Conference	Reg	0	8	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 Notes about day 2	
	8		Pending		Clarke, Gizmo C	01/31/17	11224 - Account Management	Reg	0	0	0	8	0	0	0	0 Notes about day 3	
<i>Subtotal</i>	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.

The screenshot shows the SpringAhead application interface. At the top, there's a navigation bar with links for Home, Time, Approval, Company (which is highlighted with an orange box), Reports, and Settings. The main content area has a header 'Timecards'. Below it, there's a section for 'Timecards for Active Projects' and another for 'Timecards for Active Employees'. Both sections show tables with columns like Number, Project, User, Hours, Approved, Processed, and Comments. An arrow points to the 'Company' tab in the navigation bar.

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	