

Quick Topic - Procedures for Manager Approval

Title: Procedures for Manager Approval

Brief description:

This Quick Topic provides an overview of approving a timesheet and expense report. A description of the approval process and timesheet statuses is also provided.

What's covered in this document:

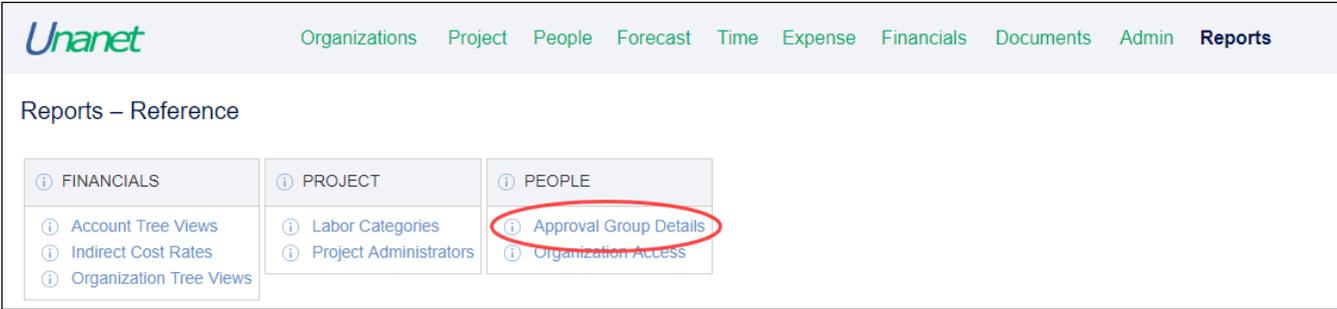
- [Manager Approval process](#)
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Manager Approval process

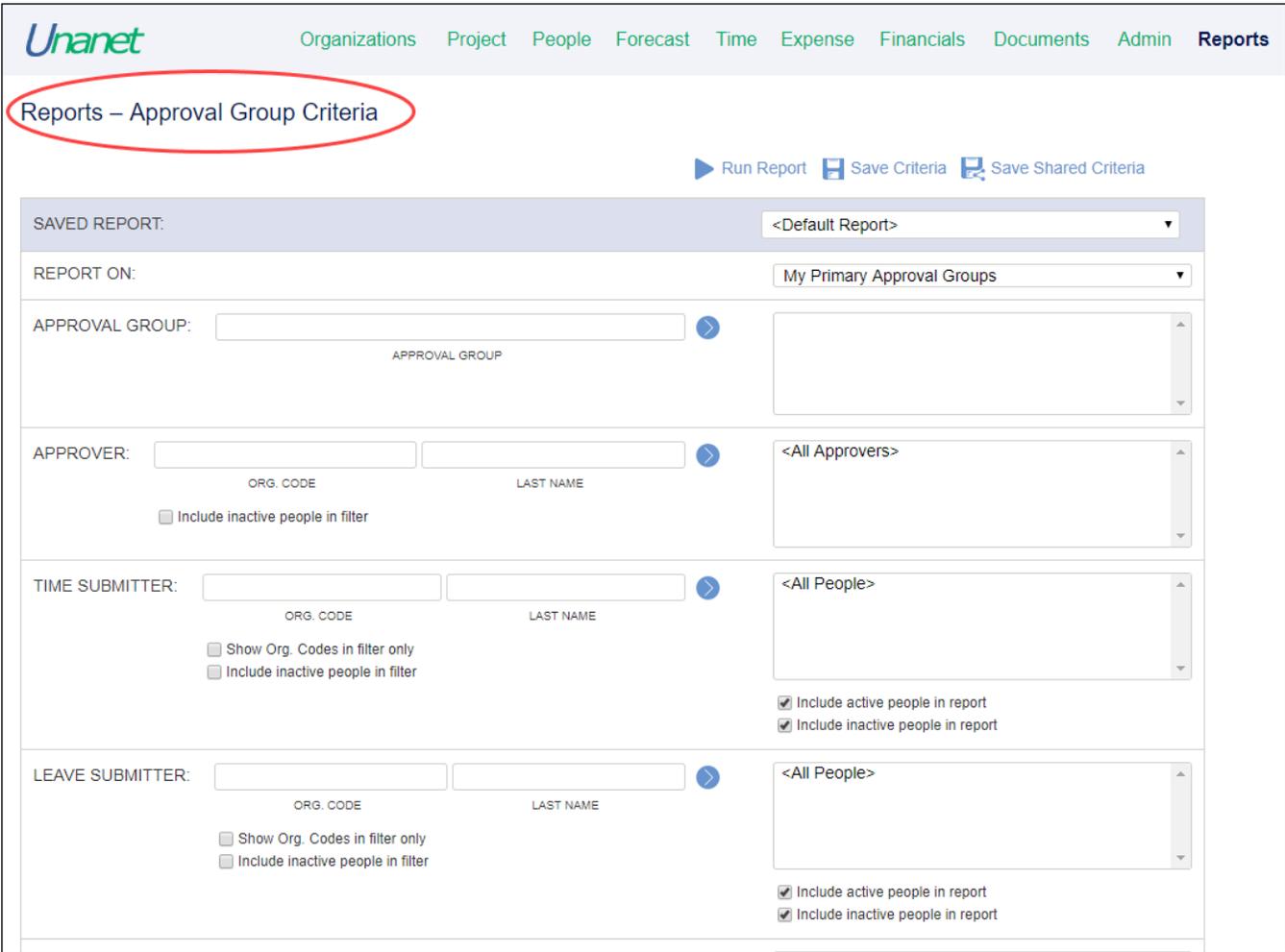
Approval Groups are used to help manage the Approval process for Timesheets, Leave Requests, Expense Reports and Expense Requests. These groups contain lists of Approvers and Submitters, and help control who should approve each user's entries and in what sequence a series of approvals may occur.

View Approval Group Report

Managers can query and list their approval groups and the users for whom they approve time and expenses via the *Approval Group Details* report (**Reports > Reference > People**)



The *Approval Group Criteria* screen is displayed. Click **Run Report** to view the report.



Approval Queues

Items that have been submitted for approval are reviewed and managed through approval queues. E-mail notifications can be sent to managers when new items have been added to their approval queue with the E-mail options enabled.

Managers can get to their approval queues by going to their **Home Dashboard**. The *Approvals* section summarizes the Primary and Alternate approvals that are pending.

Approvals						
MANAGER APPROVALS	EXPENSE REPORT	EXPENSE REQUEST	LEAVE REQUEST	TIMESHEET		
Primary Approvals	1					
Alternate Approvals	5		3	15		
PROJECT APPROVALS	EXPENSE REPORT	EXPENSE REQUEST	PURCHASE ORDER	PURCHASE REQUISITION	TIMESHEET	VENDOR INVOICE
Alternate Approvals	1				2	
CUSTOMER APPROVALS	EXPENSE REPORT	EXPENSE REQUEST	PURCHASE ORDER	PURCHASE REQUISITION	TIMESHEET	VENDOR INVOICE
Alternate Approvals	2					

Pending approvals can also be accessed at **People > Approvals**. Click the links to see the full queue.

People – Approvals			
▼ MANAGER APPROVALS			
▼ Primary Approvals			
▼ Expense Report			
PERSON	EXPENSE #	EXPENSE	PURPOSE
User, Charlie (cuser4)	347	\$3,365.00	Sample Techsoft Expense Report
▼ MANAGER ALTERNATE APPROVALS			
▶ CFO, Fran M. (fcfo)			
▶ Director, Chris S. (cdirector)			
▶ Director, Grace (gdirector)			

Approval/Disapproval Steps

Leave Requests can be approved on the summary level without clicking into the detail page. Simply click on the **Approve** or **Disapprove** icon to complete.

Leave						
PERSON	DATE RANGE	HOURS	STATUS	COMMENTS		
Lead, Gus (glead)	3/11/2019 — 3/15/2019	40.00	SUBMITTED	2/25/2019 12:10 PM	Going on a cruise	

A Manager can approve or disapprove all items in a section by using the small **Approve All** or **Disapprove All** icons at the top of the PERSON column.

Bulk approval of this nature is only an option for companies that do not have government contracts.

Bulk approval is enabled by setting the *Require Approvers To View Details* property to false (unchecked) in **Admin > Properties > Approval Process > General > Approvals**.

Unanet Organizations Project **People** Forecast Time Expense

People – Approvals

MANAGER APPROVALS

Primary Approvals

Expense Report

PERSON

Controller, Frank T. (fcontroller)

Time

	PERSON	TIME PERIOD
<input checked="" type="checkbox"/>	Director, Chris S. (cdirector)	4/16/2019 — 4/30/2019
<input checked="" type="checkbox"/>	User, David (duser1)	4/16/2019 — 4/30/2019
<input checked="" type="checkbox"/>	User, Dustin A. (duser2)	4/16/2019 — 4/30/2019

For **timesheets** and **expense reports**, the manager may be required to view each item before approval or disapproval. Click the **magnifying glass icon** next to each item to see the details and access the action buttons.

Timesheets can be approved or disapproved by clicking **Approve** or **Disapprove**.

Approve Time – Timesheet for Chris S. Director (7/16/2019 - 7/31/2019) - Salaried

PROJECT/TASK	LABOR CATEGORY	LOCATION	PROJECT TYPE	PAY CODE	TUE 16	WED 17	THU 18	FRI 19	SAT 20	SUN 21
CUSTOMER-1 10.10.7011.102										
1. Project Support	SWIFT-Program Manager (CS)		BILLABLE	RT						
CUSTOMER-1 10.STUDY-X										
3. Investigator ID & Selection	SWIFT-Program Manager (CS)		BILLABLE	RT						
10. Data Management	SWIFT-Program Manager (CS)		BILLABLE	RT			8.00			
CUSTOMER-2 BIG-DATA										
4. Test/QA	GSA-System Engineer 1		BILLABLE	RT				8.00		
MYCO ADMIN	*Administrator		ADMIN	RT					8.00	8.00
TOTALS:							8.00	8.00	8.00	8.00

Cell Details ▶

Approval History ▼

BY (FOR)	ROLE	PROJECT	STATUS	COMMENTS
Frank T. Controller (Chris S. Director)	Administrator		INUSE	7/19/2019 2:31 PM Time Import
Frank T. Controller (Chris S. Director)	Administrator		SUBMITTED	7/19/2019 2:31 PM Time Import
Frank T. Controller (Chris S. Director)	Manager		APPROVING	7/19/2019 2:36 PM

< Queue
Edit
Approve
Approve >
Disapprove
Skip >

Each of the buttons can be used to complete various functions as follows:

- **<Queue** - Do nothing with the timesheet and be routed back to the approval queue.
- **Edit** - Edit the timesheet or expense report. *Editing will require the item to be resubmitted and go through the approval process again.
- **Allocate** (Expense Reports only) - View allocated expense report details and project allocations.
- **Threshold** (Expense Reports only) - View expense types and their thresholds.
- **Approve** - Approve the timesheet and be routed back to the approval queue.
- **Approve>** - Approve the timesheet and display the next timesheet pending approval.
- **Disapprove** - Disapprove the timesheet and be routed back to the approval queue.
- **Skip>** - Do nothing with the timesheet and display the next timesheet pending approval.

Before completing the **Approve/Disapprove** action, the manager is provided with a screen where approval comments may be entered.

Note: The manager must enter comments if they **Disapprove** an item.

Approve Time – Timesheet for Chris S. Director (7/16/2019 - 7/31/2019) - Salaried

Approval Comments:

Approve

Cancel

You have selected to approve this Timesheet. You may optionally include comments with your approval.
To confirm and continue with the approval, click on the Approve button.
If you have reached this screen in error, simply click Cancel.

As items are approved or disapproved, they are removed from the manager's queue. If a manager is acting as an alternate for another manager, they can perform both their primary and alternate approvals using the same queue.

Timesheet Status Reports

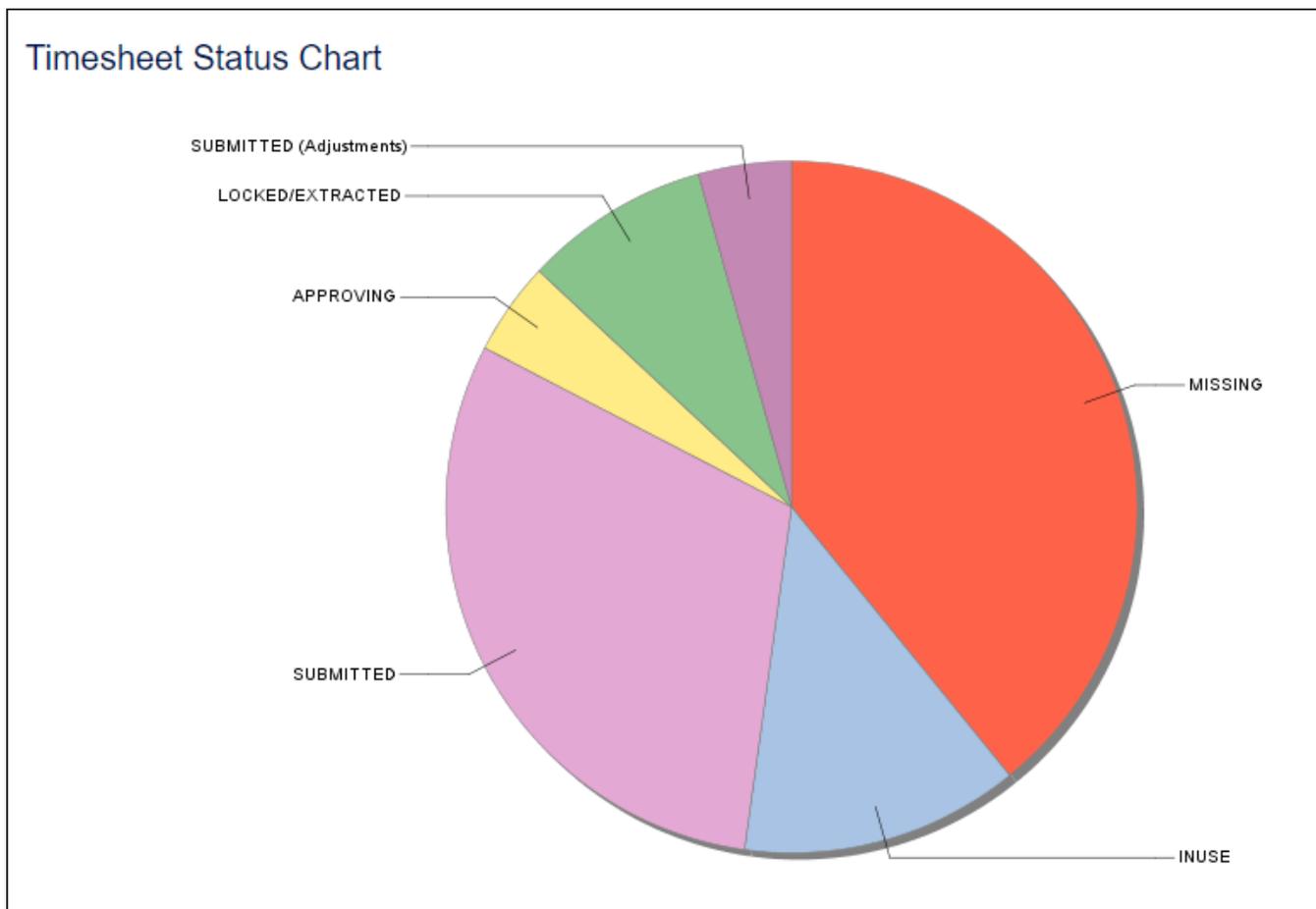
The *Timesheet Status Pie Chart* report is very useful for keeping track of their employee's timesheet status. (**Reports > Dashboard > People Reports > Status Reports**)

Select the report link and set the report criteria as desired, then click **Run Report**.

The manager can view the details of whose timesheets are missing, submitted or completed by clicking on the specific pie chart section.

People Reports (Time & Expense Only) ▾

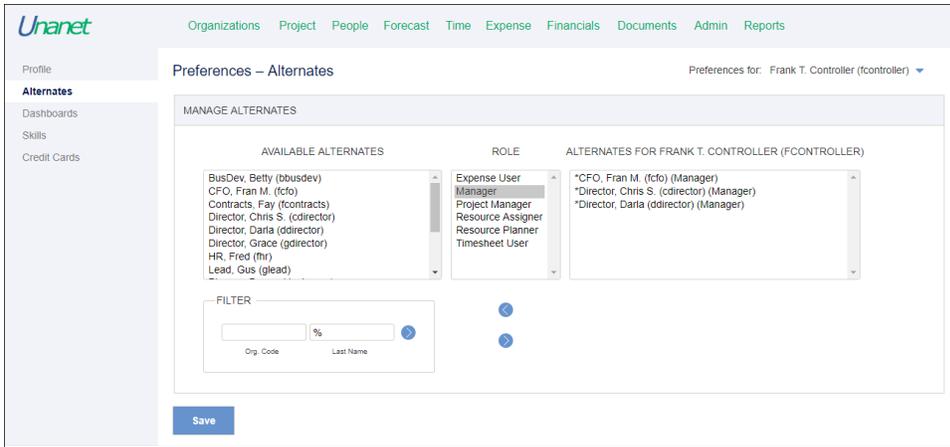
DETAIL REPORTS	PERIODIC REPORTS	SUMMARY REPORTS	STATUS REPORTS
<ul style="list-style-type: none"> Accrual Details Expense Details Schedule Calendar Schedule Details Skill Profile Time Details Project Time In/Out Daily Time In/Out 	<ul style="list-style-type: none"> Actuals Daily Actuals Forecast Forecast Bar Chart Forecast Comparative Bar Chart Headcount Headcount Bar Chart Leave Request Performance Performance Line & Bar Chart Resource Allocation Resource Allocation Bar Chart 	<ul style="list-style-type: none"> Accrual Summary Actuals Summary Actuals Pie Chart Margin (T&E) Margin (T&E) Line & Bar Chart Matrix Pay Code Summary Performance Performance Pie Chart 	<ul style="list-style-type: none"> Expense Report Status Leave Request Status Imported Credit Card Details Timesheet Status Timesheet Status Pie Chart



Set up Manager Alternates

- To set up manager alternates, the manager can simply click **Preferences (My Account > Preferences)** in the upper right corner of any Unanet screen, then click **Alternates** in the left menu.
- Enter criteria in the **FILTER** section to find the desired alternate and click the blue circle arrow. The names matching the **FILTER** criteria will display under **AVAILABLE ALTERNATES**.
- Choose the role to be assigned to the alternate(s), and click the blue circle arrow.

- Click **Save**.



When the alternate manager logs into his/her Unanet system, in the **Home Dashboard**, he/she is able to see the pending approval queues for the other manager, which are listed as *Alternate Approvals*.

Additional Information

- [KC - FAQ - Can I require that expenses be pre-approved?](#)
- [KC - FAQ - How do approvals and partial approvals work?](#)
- [KC - Quick Topic - Alternate Manager Approvers in Unanet](#)
- [KC - Quick Topic - Approval Order \(Project and Manager approvals\)](#)
- [KC - Video - Manager Approvals](#)
- [Help Docs - Time and Expense Approvals](#)