Approval Groups

Introduction

Approval Groups allow your organization to have supervisors/managers/approvers approve timesheets, expense reports, expense requests, leave requests, vendor invoices, purchase requisitions, and purchase orders.

The routing of these items from the submitter to the approver is established via Approval Groups. Unanet Administrators are responsible for the continued maintenance of Approval Groups.

Most organizations have at least one level of supervisor approvals. Some organizations have an approval chain that consists of more than one approver in a specific order. In other words, the direct supervisor might approve first, followed by other approvals up the chain of command. We often see this approval chain with expense reports where a person in the Finance department will do a final approval of the expense. How does your organization support approvals for time and expense?

Approval Groups are configured in **Admin > Setup > Approval Groups**. The Approval Group contains a list of submitters (employees that create and submit their timesheet or expense report, for example) and approvers (employees that approve timesheets and expense reports). Submitters may be designated either in the person profile *Time* and *Expense* tabs, or in **Admin > Setup > Approval Groups**.

Approval Group setup does not include any project level approvals that may be required for time and/or expenses. Project level approvals are identified in each individual project's Project Administrators area.

The Approval Group Details report in the **Reports > Reference** area is very helpful for looking at a birds' eye view of the setup of your approvers and submitters (screenshot below).

Best Practices:

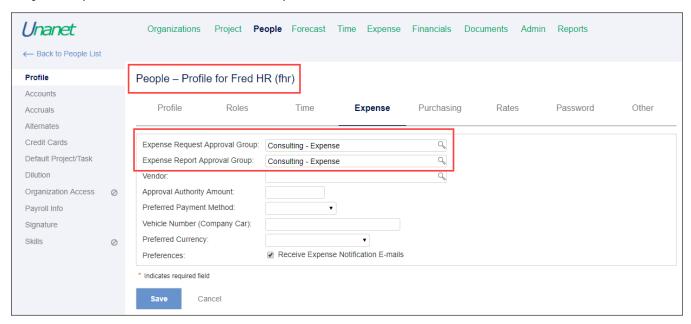
- If you have a different approval chain for expense than from time (a final expense approver, for example), then each supervisor (manager) should
 have two approval groups: one for the routing of timesheets and one for the routing of expense reports. Timesheets are routed to the manager for
 approval. Expense reports are often first routed to the manager for approval, then to an individual in Finance & Accounting as the second level of
 approval.
- Decide on Approval Group names; consider using the same names as internal organizations.
- · Determine who should approve timesheets in each department, office or organizational unit.
- Determine who should approve expense reports in each department, office or organizational unit.
- Determine the order of approvers for each department, office or organizational unit. This may be loosely tied to the organization chart.
- Determine if Accounting or Payroll is responsible for the final approval of all timesheets?
- Determine if AP is responsible for the final approval of all expense reports in Unanet?
- Decide on Alternate Approvers for each primary approver (this is set in the person profile Alternates area).
- Customize email templates for approval events.

Below is an example of editing an Approval Group for Expenses.

Note that Approval Group setup for Purchasing and Accounts Payable/Vendor Invoices works similarly. For details on which roles can be submitters and approvers, please consult the Help Doc links below.

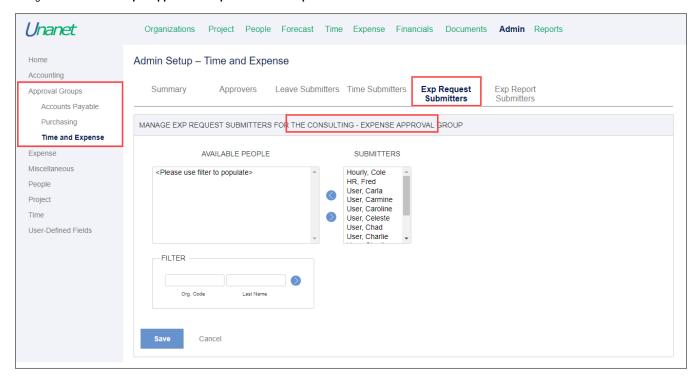
Person Profile Approval Group setup for Expense:

Navigate to People > List > List tab > Edit Pencil Icon > Expense.



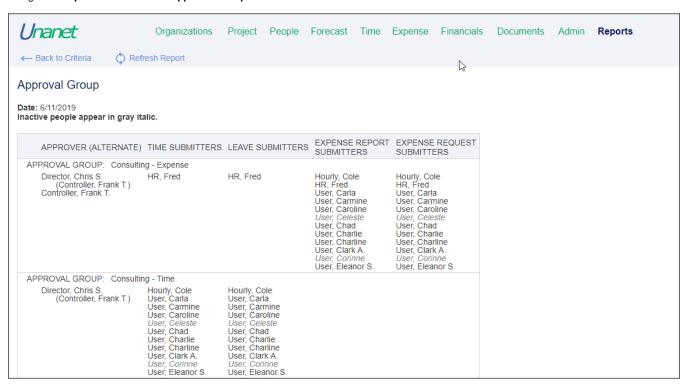
Admin Setup Approval Groups:

Navigate to Admin > Setup > Approval Groups > Time and Expense > Listtab > Edit Pencil Icon.



Approval Group Details report:

Navigate to Reports > Reference > Approval Group Details.



Additional Information

Help Docs - Setup Time and Expense Approval Groups

Help Docs - Setup Purchasing Approval Groups

Help Docs - Setup Accounts Payable/Vendor Invoice Approval Groups

KC - Project Administrators/Approvers