

# 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 > Edit Pencil Icon > Expense.**

The screenshot shows the Unanet interface for editing a person's profile. The breadcrumb trail is "People > List > List > Edit Pencil Icon > Expense". The page title is "People – Profile for Fred HR (fhr)". The "Expense" tab is selected. Two dropdown menus for "Expense Request Approval Group" and "Expense Report Approval Group" are both set to "Consulting - Expense". Other fields include "Vendor", "Approval Authority Amount", "Preferred Payment Method", "Vehicle Number (Company Car)", "Preferred Currency", and a checked checkbox for "Receive Expense Notification E-mails". A "Save" button is visible at the bottom left.

**Admin Setup Approval Groups:**

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

The screenshot shows the "Admin Setup – Time and Expense" page. The breadcrumb trail is "Admin > Setup > Approval Groups > Time and Expense > List > Edit Pencil Icon". The "Exp Request Submitters" tab is selected. The page title is "MANAGE EXP REQUEST SUBMITTERS FOR THE CONSULTING - EXPENSE APPROVAL GROUP". There are two columns: "AVAILABLE PEOPLE" (currently empty with a filter prompt) and "SUBMITTERS" (listing users like "Hourly, Cole HR, Fred", "User, Carla", etc.). A "FILTER" section at the bottom has input fields for "Org. Code" and "Last Name". A "Save" button is at the bottom left.

**Approval Group Details report:**

Navigate to **Reports > Reference > Approval Group Details**.

Unanet				
Organizations Project People Forecast Time Expense Financials Documents Admin Reports				
← Back to Criteria Refresh Report				
<b>Approval Group</b>				
<b>Date:</b> 6/11/2019				
<b>Inactive people appear in gray italic.</b>				
APPROVER (ALTERNATE)	TIME SUBMITTERS	LEAVE SUBMITTERS	EXPENSE REPORT SUBMITTERS	EXPENSE REQUEST SUBMITTERS
APPROVAL GROUP: Consulting - Expense				
Director, Chris S. (Controller, Frank T.) Controller, Frank T.	HR, Fred	HR, Fred	Hourly, Cole HR, Fred User, Carla User, Carmine User, Caroline <i>User, Celeste</i> User, Chad User, Charlie User, Charline User, Clark A. <i>User, Corinne</i> User, Eleanor S.	Hourly, Cole HR, Fred User, Carla User, Carmine User, Caroline <i>User, Celeste</i> User, Chad User, Charlie User, Charline User, Clark A. <i>User, Corinne</i> User, Eleanor S.
APPROVAL GROUP: Consulting - Time				
Director, Chris S. (Controller, Frank T.)	Hourly, Cole User, Carla User, Carmine User, Caroline <i>User, Celeste</i> User, Chad User, Charlie User, Charline User, Clark A. <i>User, Corinne</i> User, Eleanor S.	Hourly, Cole User, Carla User, Carmine User, Caroline <i>User, Celeste</i> User, Chad User, Charlie User, Charline User, Clark A. <i>User, Corinne</i> User, Eleanor S.		

## 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](#)