Two-step approval of time registrations

Quality assurance of time registration to boost profitability

Approving hours

Get off to a good start with two-step approval of time registrations

This document describes how TimeLog Project supports the approval of employee timesheets at the levels of Head of Department and project manager, so both parties can approve the time trackings from either perspective.

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1 Introduction

This document describes how TimeLog Project supports the approval of employee timesheets at the levels of Head of Department and project manager. The predominant focus of this document is how the function **Approve time reports** should be applied.

This document is particularly for use by project managers, Head of Departments and systems administrators with TimeLog Project Business Edition and TimeLog Project Enterprise Edition with a desire to gain insight into the approval process.

Please note that this guide takes its point of departure in the add-on module TimeLog Departments.

2 The Approval Flow at a glance

When a project employee has closed his/her timesheet, the timesheet is to be approved.
Approval of timesheets in TimeLog Project may take place in the following three ways:

- Automatic approval when closed by the project employee

- Approval is required by the Head of Department

- Approval is initially required by the project manager and subsequently by the Head of Department

Set-up and choice of selected approach for approval are made at this stage: **System administration > Approval processes**, see Figure 1 on the next page.

Figure 1

System administration states the approach for the approval of timesheets

2.1   Approval of timesheets

This guidance is based on the assumption that timesheets are to be approved both by the project manager and the Head of Department, i.e. in two steps as shown in Figure 2 on the next page.

Figure 2

Scenarios for approval of timesheets in two different steps
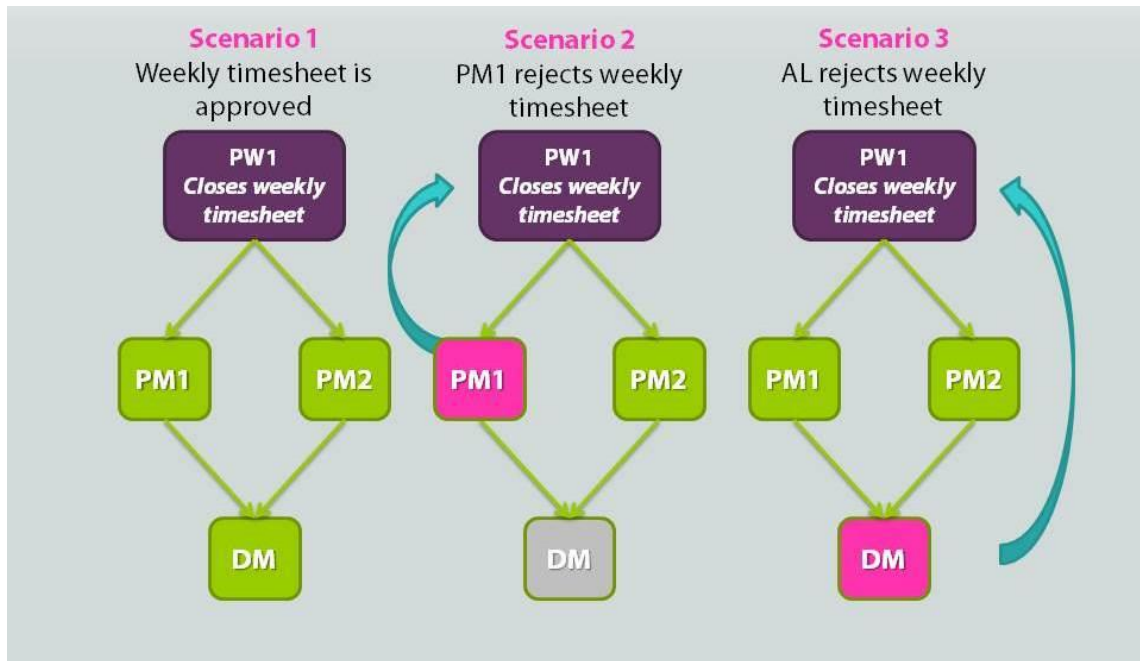
The figure illustrates that there are typically three situations which may arise from two-step approval of timesheets.

Scenario 1: Approval of timesheets without any problems

1. Project employee 1 (PE1) closes his/her timesheet

2. Project manager 1 (PM1) and project manager 2 (PM2) approve their relevant projects on PE1's timesheet

3. The Head of Department (HD) subsequently approves PE1's timesheet in its entirety

Scenario 2: Timesheet rejected by PM1

1. Project employee 1 (PE1) closes his/her timesheet

2. Project manager 1 (PM1) rejects the timesheet

3. The timesheet is reopened, and this is communicated to PE1 by e-mail. When the timesheet is closed the next time, the approval process must be performed all over again

Scenario 3: Timesheet rejected by HD

1. Project employee 1 (PE1) closes his/her timesheet

2. Project manager 1 (PM1) and project manager 2 (PM2) approve their relevant projects on PE1's timesheet

3. Subsequently, the Head of Department (HD) rejects the timesheet

4. Time timesheet is reopened, and this is communicated to PE1 by e-mail. When the timesheet is closed the next time, the approval process must be performed all over again

2.2 Rejection of timesheets

If a project manager or a Head of Department are unable to approve the hours recorded by an employee on a given timesheet, they may reject the timesheet and state their grounds for this action. These grounds are saved on the timesheet and communicated to the project employee by e-mail.

When a timesheet is rejected, all approvals on the timesheet are cancelled, and the timesheet is reopened to allow the employee to make the required changes.

When the employee has closed his/her timesheet the next time, the time registrations will be submitted for renewed approval by project managers and Head of Department.

2.3 Approval on behalf of others

During holidays and periods of illness, it may be necessary to approve timesheets of behalf of colleagues, allowing a given timesheet to be closed and finally approved without awaiting any action by the proper employee.

To approve projects on behalf of others in TimeLog Project, you must be granted rights as **Coordinator**, where you can track time and expenses for employees (this is activated in the **System administration -> Employees -> User roles and rights management -> Coordinator –> Registrations -> User role privileges**). You may either add this to an existing role or create a specific role (as shown in Figure 3), and there after activate it on the employee under **Employees -> Search employees**. Hereafter, you choose the employee, and click the small pencil on the top right corner of the employee card. Then the role can be assigned in the menu to the right.

The approvers on a given timesheet are always logged.

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Figure 3

Activate roles on employees – here the Coordinator role

3 Review of the page Approve time reports

When there is two-step approval of timesheets in TimeLog Project (as described above), approval is made as follows: **Employees -> Approve time reports**. This page is used by both project managers and Head of Departments. To gain access to the page, you must as a minimum be granted rights as project manager.

Figure 4
Approve time reports - find it under **Employees**
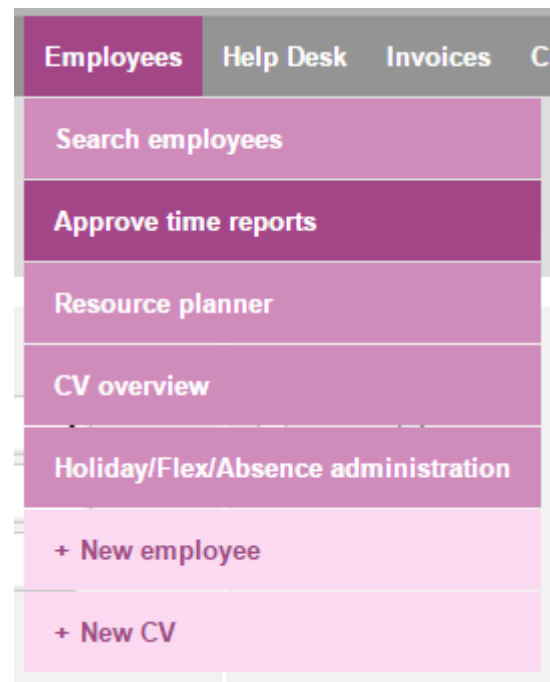
3.1 The sheets Projects for approval and Timesheets for approval

The page Approve time reports (see Figure 5 on the next page) contains two sheets:

- Projects for approval
- Timesheets for approval

However, **Approve time reports** will only be clickable if the user serves as **Head of Department** of a department in TimeLog Departments or if the user has been granted rights as **Coordinator**.

Figure 5

The page **Approve time reports**: Select how the result is to be presented using the filter with the three different options

Approve time reports

View

Department, employees:	Afdeling 1 ▼
Employees:	Select employee ▼
From week:	Week 19 ▼ 2015 ▼
to week (including)::	Week 20 ▼ 2015 ▼

Show

View options

☑ Show employees I should approve only
☐ Show closed timesheets only
☐ Highlight projects without comments

Projects for approval (1) | **Timesheets for approval (1)**

	Employee	Department	Head of Dep
	Allan S	Afdeling 1	gha
	Week 19, 04-05-2015 - 10-05-2015		
	Week 20, 11-05-2015 - 17-05-2015		

3.2   Filter

The filter contains three groups: **View**, **View options** and **Approval**.

3.2.1   View

As a starting point, the page shows all timesheets which the relevant user is to approve this or the coming week. Under the group **View**, it is, however, possible to adjust the number of registrations shown by filtering on:

- Department

- Employee

- Shown weeks

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3.2.2 View options

The following options are available under the group **View options**.

Show employees I should approve only (always ticked off)

If this option has been activated, you are only shown the employees requiring your approval. If this option has been deselected, all employees with timesheets for approval – approvals both at the level of project manager and Head of Department – are shown.

This option is activated if you have been granted rights in the system as coordinator and wants to approve timesheets of others.

Show closed timesheets only

If this option has been activated, you are only shown timesheets which have been closed by the employee. Please note that if you have been granted rights as a coordinator, it will also be possible to close the employee's timesheets using the sheet **Timesheets for approval** at the top.

Highlight projects without comments

If this option has been activated, all time totals for which no comments have been submitted are highlighted in pink. Accordingly, it will be easier to identify any unsatisfactory quality of time registrations.

3.2.3 Project approval

This group contains settings which are only relevant at project level and which, therefore, only are visible on the sheet **Projects for approval**. The group contains the following options:

Show projects I should approve only

If this option has been activated, you are only shown the projects requiring your approval on timesheets. For instance, if an employee has registered hours on four projects in a week where the relevant user only serves as project manager on one of these projects, only the hours related to this project will be shown for approval.

If this option has been deactivated, all four projects will be shown in the above-mentioned case (and in case of absence). However, it will still only be one of the four projects requiring approval by the relevant user. As standard, this option is deactivated, allowing all projects to be shown and thereby gaining a better overview of the week of an employee for the approval of his/her hours.

View project no. and Customer no.

If these options have been activated, the project number and the customer number for the hours on projects requiring approval are shown.

3.3 Contents (approval module)

Under Contents hours, projects and employees from the predefined choices under filter are shown.

3.3.1 The sheet **Projects for approval**

Figure 6

The tab **Projects for approval** show the registrations ready for approval on projects

	Project name	PM	Customer	Hours	Actual (DKK)	Status	☐	
	Allan S (Allan Simonsen - Afdeling 1)							☰
✔	Allan S, Week 19, 04-05-2015 - 10-05-2015			12,00	9.060,00	Timesheet Closed		☰
	DP - Konsulentopgave	gha	DHL A/S	12,00	9.060,00		☐	☰
	gha (Gilli Haraldsen - Afdeling 1)							☰
	gha, Week 19, 04-05-2015 - 10-05-2015			2,30	1.795,83	Timesheet open		☰
	DP - Konsulentopgave	gha	DHL A/S	2,30	1.795,83		☐	
	gha, Week 20, 11-05-2015 - 17-05-2015			9,04	5.531,04	Timesheet open		☰
	Adm. opgaver (internt)	gha	Internt	3,00	0,00		☐	
	DP - Konsulentopgave	gha	DHL A/S	6,04	5.531,04		☐	
	Total			**23,34**	**16.386,88**			

Projects for approval (1) | Timesheets for approval (1) | Approve

The most important columns in this section are (seen from the left to the right):

- The status column farthest to the left contains a tick mark in front of projects and timesheets approved

- **Project name** contains the name of the project

- **Customer** contains the name of the customer to which the project belongs

- **Hours** show the total number of registered hours (on a week). Click on the number of hours or the small arrow for a distribution of hours.

- **Actual (DKK)** shows the value of the hours

- **PM** shows the initials of the project manager who is to approve the hours

- **Status** of the progress of the timesheet in the approval flow. It may for instance be "Timesheet open" or "Approved by PM1"

- In the status column farthest to the right, projects which the given user may approve will contain a checkbox with a green background. For timesheets already approved, a checkbox is shown, which is locked and ticked. For projects unavailable for approval – e.g. because the timesheet is still open – a checkbox is shown, which is locked and unticked

- Farthest to the right of each timesheet, there are the following action links.

  o Send e-mail is used for sending e-mails to the employee. This function may be useful if the employee, for instance, has failed to approve his/her timesheet

  o Reject is applied for rejecting a timesheet. When you click on the link, a pop-up window is opened in which you may write and send a message to the employee stating the grounds for your rejection

  o Show Log contains a log of the actions of approval made on the timesheet

  o Close weekly timesheet closes the employee's timesheet, thereby allowing approval to be initiated

The button **Approve** is used for the approval of timesheets.

3.3.2   The sheet **Timesheets for approval**

Figure 7

The tab **Timesheets for approval**

Employee	Department	Head of Department	Hours	Actual (DKK)	Status	☐	
Allan S	Afdeling 1	gha					☰
Week 19, 04-05-2015 - 10-05-2015			12,00	9.060,00	Timesheet Closed - Pending approval from: gha	☐	☰
Week 20, 11-05-2015 - 17-05-2015			0,00	0,00	Timesheet open	☐	☰
bl	Afdeling 1	gha					☰
Week 19, 04-05-2015 - 10-05-2015			0,00	0,00	Timesheet open	☐	☰
Week 20, 11-05-2015 - 17-05-2015			0,00	0,00	Timesheet open	☐	☰
CHL	Afdeling 1	gha					☰
Week 19, 04-05-2015 - 10-05-2015			0,00	0,00	Timesheet open	☐	☰
Week 20, 11-05-2015 - 17-05-2015			0,00	0,00	Timesheet open	☐	☰

Projects for approval (1) | Timesheets for approval (1) | Approve

The most important columns in this section are (seen from the left to the right):

- The status column farthest to the left contains a tick mark   in front of approved projects and timesheets

- **Employee** contains the initials of the employee

- **Department** is the department of the relevant employee

- **Head of Department** shows the initials of the Head of Department who is to approve hours on the timesheet

- **Hours** show the total number of registered hours (on a week). Click on the number of hours or the small arrow for a distribution of hours

- **Actual (DKK)** shows the value of the hours

- **Status** of the progress of the timesheet in the approval flow. It may for instance be "Open timesheet" or "Approved by PM1"

- In the status column farthest to the right, timesheets for approval by the given user will contain a checkbox with a green background. For timesheets already approved, a checkbox is shown which is locked and ticked. For timesheets unavailable for approval – e.g. because the timesheet is still open – a checkbox is shown which is locked and unticked

- Farthest to the right of each timesheet, there are the following action links

  o Send e-mail is used for sending e-mails to the employee. This function may be useful if the employee, for instance, has failed to approve his/her timesheet

  o Reject is applied for rejecting a timesheet. When you click on the link, a pop-up window is opened in which you may write and send a message to the employee stating the grounds for your rejection

  o Show log contains a log of the actions of approval made on the timesheet

  o Close weekly timesheet closes the employee's timesheet, thereby allowing approval to be initiated

The button **Approve** is used for the approval of timesheets.

4 The Approval flow

Below we explain the different approval flows and how to reject closed timesheets.

4.1   Approval and rejection of timesheets – project manager

When the project employees have closed their timesheets, the project managers may approve the time registrations made by the project employees on the projects.

This is effected on the sheet **Projects for approval**. Projects are approved by ticking the checkboxes for the desired projects and clicking the button **Approve**.

4.1.1   Rejection of timesheets

If the project manager chooses to reject the time registrations for a project employee, the project manager must click the menu right to a registration and click Reject (see Figure 8 on the next page).

By this action, the below-mentioned screenshot is shown, in which you may give an account of the rejection (see Figure 8 on the next page). An example could be that a project employee has registered a higher number of hours than agreed, and therefore a comment is required. This is automatically communicated to the project employee by e-mail.

When the project employee has closed his/her timesheet the next time, the project managers may make a renewed approval of the timesheet. Projects already approved will remain "Approved by XXX".

Figure 8

Here, you reject a registration

Actual (DKK)	Status	☐	
			☰
9.060,00	Timesheet Closed		☰
9.060,00		☐	☰
			▸ Reject
1.795,83	Timesheet open		
1.795,83		☐	

When rejecting a timesheet, an email is send to the project

Employee, who must close the timesheet again

ⓘ Note: When you reject the timesheet, the user will recieve an email and the timesheet will be re-opened.

Reason for rejection

OK   Cancel

4.2   Approval of timesheets – Head of Department

When all project managers have approved the hours of an employee at project level, the Head of Department may initiate approval of timesheets at his/her respective level. The Head of Department accesses the approval module and clicks the sheet **Timesheets for approval**.

In Figure 7, you see an example of timesheets ready for approval for the selected weeks.

The Head of Department checks the checkboxes ready for closing and clicks the button **Approve**.
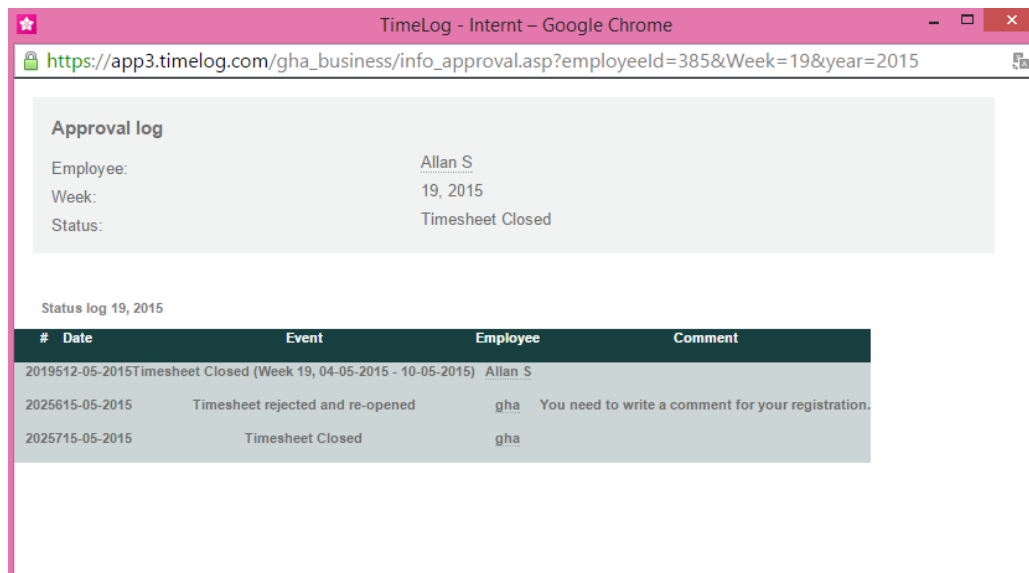
5 The Approval log

There is a menu to the right of each project and timesheet that provides access to a list of actions of approval made project-wise and on the timesheet.

When you click **Show log**, a pop-up window is shown, stating the actions made, when and by whom.

Figure 9

The **Show log** functionality shows all approval actions made on the project and weekly timesheet, respectively

6 The Approval flow

The report **Approval flow** is used to gain an overview of the progress of the employee's timesheet in the approval process. Especially, the company's coordinator may benefit from this report, allowing him/her to access the approval status of all departments and all employees to arrange for the approval of all timesheets.

The report is accessible from **Reports -> Salary and staff reports -> Approval flow**.

See Figure 10 on the next page

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Figure 10

In the report, you see the status for the weekly timesheet for each employee

Approval sequence

View

Department:	Afdeling 1 ▾
From:	19 ▾
	2015 ▾
To:	20 ▾
	2015 ▾

Show

View options

☐ Hide empty records
☑ Show approver

Shortcuts

▷ Approve Time Reports
▷ Time Report - Submit/Print
▷ Time Registrations (Enhanced)

Approval flow (04-05-2015 17-05-2015)

Employee / Weekly timesheet	Actual (h.)	Actual (DKK)	Approval		
			Closed	Project manager	
Week 19					
Allan S (Afdeling 1)	12	9.060	✔	✔	✉
bl (Afdeling 1)	-	-			✉
CHL (Afdeling 1)	-	-			✉
db (Afdeling 1)	-	-			✉
gha (Afdeling 1)	2,3	1.796	✔	✔	
nm (Afdeling 1)	-	-			✉
pa (Afdeling 1)	-	-	✔		✉