PROCAS Time
Approver Instructions

v10.00

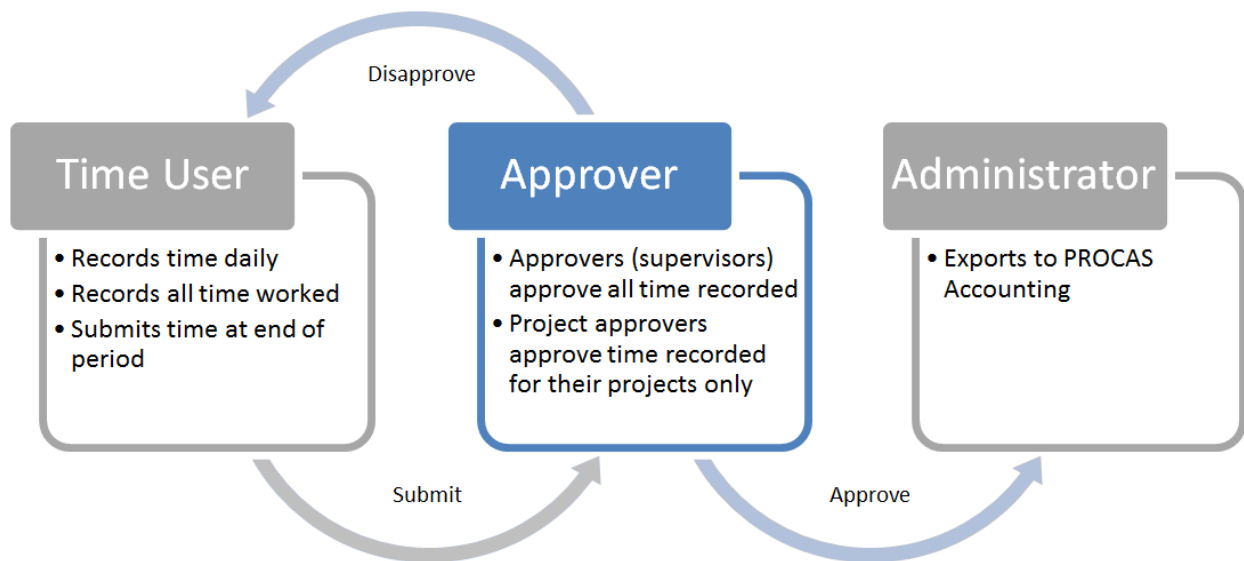# TABLE OF CONTENTS

INTRODUCTION

The Timekeeping Workflow in PROCAS Time

PROCAS Time is a timekeeping system that you access using a web browser. Your administrator will send you an invitation to establish your credentials to access your information.

The *PROCAS Time Approver Instructions* are intended to provide guidance on the use of PROCAS software for those who are responsible for the approval of timesheets, i.e., supervisors. This document assumes that the owners and/or management of the company have collaborated with a PROCAS consultant to complete the initial setup of the system and that the system is currently in operation. It is not within the scope of these instructions to teach accounting or government contracting. It is within the scope of these instructions to document what steps must be taken in the software to approve recorded time.

The federal government requires that each employee has a supervisor that reviews and approves their timesheets. An approver in PROCAS Time is a designated supervisor of one or more company employees (time users) for the purpose of approving the timesheets for those users. As an approver, you have the responsibility of reviewing and approving all of the time information recorded on your employees' timesheets each period.

If you disapprove timesheets, it is your responsibility to ensure the time users correct the errors found and then resubmit their timesheets for approval.

Notes and tips have been added throughout these instructions. Notes provide additional information about system operation. Tips provide helpful, but not essential, suggestions for system use. Reading the notes and tips is recommended for a more complete understanding of system operation.

CHAPTER 1
PROCAS TIME BASICS

When accessing PROCAS Time, there are options available to change your login password and the appearance of your timesheets.

These instructions are designed for those that have been assigned as either a primary or alternate approver within PROCAS Time. Alternate approvers have the same access to timesheet data and to performing approvals, but only primary approvers receive email notifications from the system.

Topics covered in this chapter:

- Log In
- Change Settings
    - o Changing Your Password
    - o Changing Your Theme
- Resources
- Notification Hyperlinks
- Sign Out

LOG IN

Before you can log in for the first time, you must first accept an invitation that has been sent from an accounting system security administrator. The administrator will establish your access to PROCAS and send you an invitation. Instructions for establishing your username and password are provided in the invitation and on the logon setup screen.

These instructions assume that you have successfully accepted the invitation and created your logon credentials.

Here's how to log into PROCAS:

1. Open a web browser, e.g., **Firefox**.
2. Type the web address https://accounting.procas.com/ProcasACT.

> TIP: Save this web address as a favorite.

3. Type your user name in the **Username** field.
4. Type your password in the **Password** field.
5. Click **Log In**.

> NOTE: If you have access to more than one company, select the company from the dropdown list and click **Ok**.

> TIP: If you have access to more than one company, you can opt to select **the Set as my default company** checkbox to establish a default company.

CHANGE SETTINGS

You can access the Change My Password and Themes options from the **Settings** menu.

You can use the Themes option to change the general appearance of your session. The Themes option is saved on a user by user basis and can be changed as often as you like.

Changing Your Password

1. Click the **Settings** link in the right-hand corner of the screen.
2. Click **Change My Password**.
3. Type your current password in the **Current Password** field.
4. Type your new password in the **New Password** field.
5. Type your new password again in the **Confirm Password** field.
6. Click **Save**.

Changing Your Theme

1. Click **Settings**.
2. Click **Themes**.
3. Click on the desired theme. Clicking on a theme automatically saves your selection.

RESOURCES

You can download PROCAS system instructions and other helpful documents from the Resources submenu on any of the main menus. The documents can be downloaded and saved.

Here's how to download the documents:

1. On any main menu, click **Resources**.
2. Click the topic (e.g., T&E Admin) to display the list of documents available.
3. Click the document link name.
4. Open or save the document.

NOTIFICATION HYPERLINKS

When you have pending tasks, notification hyperlinks will be displayed in the upper-right side of the screen header. For example, if you have a disapproved timesheet, the notification will be displayed as **Disapproved: Timesheet** where **Timesheet** is a hyperlink that will take you directly to the timesheet that requires review.

SIGN OUT

The **Sign Out** hyperlink is in the upper right-hand corner of the window. Use this to end your session to prevent unauthorized users from accessing your data. Your session will time out automatically after twenty minutes of inactivity.

Here's how to sign out of PROCAS:

1. Click the **Sign Out** hyperlink in the upper right-hand corner of the screen.

CHAPTER 2

APPROVE TIME

This chapter describes the common tasks you will perform in order to approve a timesheet. All of these functions will also be available to you if you are assigned as an alternate approver.

Topics covered in this chapter:

- Alternate Approvers
- View the Timesheet Status Summary
    - o Send Email Reminders to Begin a Timesheet
    - o Send Email Reminders to Submit Open Timesheets
    - o Send Email Reminders to Project Managers to Approve Timesheets
    - o View Approved Timesheets
- Approve/Disapprove Submitted Timesheets
- Undo Timesheet Approvals
- Undo Timesheet Disapprovals

ALTERNATE APPROVERS

One supervisor must be established for each approval group as a primary approver by the administrator. Alternate approvers may also be established for the group(s) if desired. The primary approver will receive automatic email notifications when employees submit, retrieve or delete their timesheets. Alternate approvers will have the same access and approval rights of the employee timesheet information but do not receive the automatic email notifications.

By default, menu options selected from the Approvals menu will display results for your primary approval. If you are an alternate approver, a hyperlink will be displayed in the top section of the screen. Clicking on the hyperlink will display results for you as an alternate approver. A new hyperlink will be displayed that can be used to toggle back to the results for you as a primary approver.

The **Alternate Approver** hyperlink will be found on the following screens:

- Timesheet Status Summary
  - o   Not Started
  - o   Open – Not Submitted
  - o   Submitted – Incomplete Approvals
  - o   Approved
- Approve Timesheets
- View Timesheets by Person
- View Timesheets by Period
- View Timesheets by Period – PDF
- Approve PTO Requests

An Alternate option is available from an Approval Group drop down list on the following reports:

- Floor Check
- Labor Hours Summary
- Labor Utilization
- Work Authorization Details
- Time Detail Export
- Audit Trail Detail Export
- PTO Authorization & Balances
- PTO Requests

VIEW THE TIMESHEET STATUS SUMMARY

You can use the Timesheet Status Summary to see how many timesheets are in the various stages of the approval process for a given timesheet period. The information displayed will be limited to the data that you have been authorized to access by your administrator. Emails can be sent to remind users and approvers to submit or approve timesheets. The Timesheet Status Summary is the default screen when clicking the Approvals menu

Here's how to view the timesheet status summary:

1. Click the **Approvals** menu. **Timesheet Status Summary – Primary** for the current timesheet period is displayed by default.

> NOTE: Click the **View Timesheets – Alternate** hyperlink to view a timesheet status summary where you are an alternate approver.

2. Click **Select Another Period** to view a different timesheet period if necessary.

Send Email Reminders to Begin a Timesheet

The Timesheet Status Summary report will display the number of employees in your approval group who have not started their timesheets for a given timesheet period. You can send an email to these employees to remind them to start their timesheets. The email will be sent to the email address set up by your administrator.

Here's how to send an email reminder to begin a timesheet:

1. Click the **Approvals** menu. **The Timesheet Status Summary** screen is displayed by default.
2. Click **View** next to **Not Started**.
3. Click the checkbox next to each employee who should receive an email reminder.

> TIP: Click **Select All** to select all employees. Individual employees may then be included or excluded from selection as necessary by clicking individual checkboxes.

4. Click **Send Email**.
5. Click **Cancel** to return to **Timesheet Status Summary**.

Send Email Reminders to Submit Open Timesheets

The Timesheet Status Summary report will display the number of employees who have not submitted their timesheets for a given timesheet period. You can send an email to these employees to remind them to submit their timesheets. The email will be sent to the email address set up by your administrator.

Here's how to send an email reminder to submit open timesheets:

1. Click the **Approvals** menu. The **Timesheet Status Summary** screen is displayed by default.
2. Click **View** next to **Open – Not Submitted**.

> TIP: Click **View** next to a person's name to view their timesheet. Click the person's name to open their timesheet comments in a new tab or window.

3. Click the checkbox next to each employee who should receive an email reminder.

> TIP: Click **Select All** to select all employees. Individual employees may then be included or excluded from selection as necessary by clicking individual checkboxes.

4. Click **Send Email**.
5. Click **Cancel** to return to **Timesheet Status Summary**.

Send Email Reminders to Project Managers to Approve Timesheets

You do not need to approve timesheets in a specific order relative to project manager(s). However, both you and project manager(s) must approve timesheets before your administrator creates financial transactions in PROCAS Accounting.

You can monitor the progress of the project approvals and send primary project managers requests to approve submitted timesheets using the **Timesheet Status Summary** menu option.

Here's how to send an email reminder to primary project managers to approve submitted timesheets:

1. Click the **Approvals** menu. The **Timesheet Status Summary** screen is displayed by default.
2. Click **View** next to **Submitted – Incomplete Approvals**.

> NOTE: If you are a primary approver and have not approved timesheets, you will be listed in this screen as a supervisor who has not approved timesheets.

3. Click the checkbox next to each project manager who should receive an email reminder.

> TIP: Click **View Personnel** to display a list of the personnel who have timesheets that have not been approved.

> TIP: Click **Select All** to select all listed project managers. Individual project managers may then be included or excluded from selection as necessary by clicking individual checkboxes.

4.   Click **Send Email**.

View Approved Timesheets

The Timesheet Status Summary report will display the number of timesheets that have been approved for a given timesheet period.

Here's how to view approved timesheets:

1.   Click the **Approvals** menu. The **Timesheet Status Summary** screen is displayed by default.
2.   From the **Timesheet Status Summary** screen, click **View** next to **Approved**.

> TIP: Click **View** next to the employee name to view the timesheet for that employee.

APPROVE/DISAPPROVE SUBMITTED TIMESHEETS

You will not be able to approve or disapprove a timesheet until it has been submitted. To view the status of your users' timesheets, see *View the Timesheet Status Summary* earlier in this chapter.

When an employee submits his/her timesheet, you will receive an email notification only if you are the employee's primary supervisor. Both primary and alternate approvers can approve or disapprove timesheets.

Here's how to approve/disapprove submitted timesheets:

1. Click the **Time** hyperlink next to "Approve:" in the upper right-hand corner of the screen. A list of all timesheets waiting for your approval will be displayed, regardless of the timesheet end date.

   > NOTE: Click the **Alternate Approvals** hyperlink if you are an alternate approver.

   > TIP: If you are an alternate approver, the Approve Timesheets screen can be accessed from the **Approvals** menu, within the **Timesheets** submenu, by clicking **Approvals**, and then clicking **Approve Timesheets**.

2. Click **View Details**. If hours are recorded outside of the authorized date range for a charge code, the work date will be displayed in red. If hours are recorded in excess of the budgeted hours for a charge code, the remaining hours will be displayed in red.

   > NOTE: Timekeeping users must be allowed to record time outside of authorized date ranges and/or in excess of budgeted hours since Federal Acquisition Regulations require personnel to record all work performed whether or not the work is authorized.

   > **WARNING: The remaining hours balance will always reflect the total budgeted hours less ALL hours ever recorded in real time for the charge code regardless of the timesheet period chosen.**

3. Click **View** next to the employee name to view the timesheet for that employee.

   > TIP: To go directly to the timesheet comments, click on the employee's name hyperlink.

4. Review timesheet, as per company policy.
5. Click **Select Another Personnel** to return to the Approve Timesheets screen.
6. Repeat Steps 3 through 5 for each timesheet that must be reviewed.
7. Click the **Approve** or **Disapprove** checkbox next to each timesheet. When disapproving a timesheet, a disapproval comment is required.

TIP: Click **Select All** under the Approve or Disapprove columns to select all timesheets for approval or disapproval. The status of individual timesheets may then be changed as necessary by clicking the individual checkboxes.

8. Click **Submit Selected**. Your electronic signature will be recorded as the approver of the timesheet(s). The status displayed at the bottom of the timesheet(s) will reflect this. The employee will receive an email notification of the approval or disapproval.

UNDO TIMESHEET APPROVALS

If a timesheet has been approved in error, you can undo the approval as long as it has not been exported and locked by your administrator. You can only undo the approvals that you have made. After an approval has been undone, you will need to either reapprove or disapprove the timesheet.

Here's how to undo timesheet approvals:

1. On the **Approvals** menu, click **Undo Timesheet Approvals**.

    NOTE: Only timesheets that you have approved but have not been locked by the administrator will be displayed.

2. Click the **Undo Approval** checkbox(es) to the left of the individual timesheets.

    TIP: Click **Select All** at the bottom of the screen to select all of the timesheets. Individual timesheets may then be included or excluded from selection as necessary by clicking individual checkboxes.

3. Click **Undo Selected**. The personnel will receive an email notification of the status change. When an approval is undone, the timesheet must be reapproved, disapproved, or retrieved by the employee and resubmitted.

UNDO TIMESHEET DISAPPROVALS

If a timesheet has been disapproved in error, you can undo it at any time. You can only undo the disapprovals that you have made. After a disapproval has been undone, you will need to either approve or disapprove the timesheet again.

Here's how to undo timesheet disapprovals:

1. On the **Approvals** menu, click **Undo Timesheet Disapprovals**.
2. Click the **Undo Disapproval** checkbox(es) to the left of the individual timesheets.

    TIP: Click **Select All** at the bottom of the screen to select all of the timesheets. Individual timesheets may then be included or excluded from selection as necessary by clicking individual checkboxes.

3. Click **Undo Selected**. The personnel will receive an email notification of the status change. When a disapproval is undone, the timesheet must be approved, re-disapproved, or retrieved by the employee and resubmitted.

CHAPTER 3
APPROVER REPORTS

You can view or export the time information that has been recorded in PROCAS Time. The information displayed will be limited to the data that you have been authorized to access by your administrator.

Topics covered in this chapter:

- Timesheet Viewing Options
    - Show/Hide Audit Trail
    - Show Comments
    - PDF
- View Timesheets (by Person)
- View Timesheets (by Period)
- View Timesheets (by Period) – PDF
- Floor Check
- Labor Hours Summary
- Labor Utilization
- Work Authorization Details
- Timesheet Detail Export
- Audit Trail Detail Export

TIMESHEET VIEWING OPTIONS

Several of the processes explained in this chapter involve the timesheet screen. When viewing timesheets as an approver, various options will be available to display or print additional information.

Show/Hide Audit Trail

You will see a **Show Audit Trail** button below a timesheet. The audit trail will display live entries and audit entries and who recorded the entry. The audit trail will also be displayed if an open timesheet has been deactivated (deleted).

- Clicking **Show Audit Trail** will display the Audit Trail of Changes information. Clicking the PDF link with the Show Audit Trail open will include the audit trail information on the PDF.

    - Description – Charge code description
    - Charge Code – Charge code for the record
    - Work Date – Date used to record the time worked
    - Hours – Hours recorded
    - Reason for Change – The reason typed by the recorder when a timesheet entry was changed
    - Recorded By – The person that recorded the entry
    - Status – Either Live for live timesheet entries, or Audit for entries that have been changed

- Clicking **Hide Audit Trail** will hide the Audit Trail of Changes information.

Show Comments

A **Show Comments** hyperlink is displayed below the timesheet. You can view any internal or external comments on timesheets.

- Clicking the **Show Comments** hyperlink will open the Timesheet Detail information in a new tab or window, which is a list of timesheet entries and comments that have been saved for the timesheet period.

    - o Work Date – Date used to record the time worked
    - o Description – Charge code description
    - o Charge Code – Charge code
    - o Hours – Hours worked
    - o External/Internal Comment – Comment recorded

- Clicking **Sort by Date** will sort the timesheet entries by work date in chronological order. This is the default sort order.
- Clicking **Sort by Charge Code** will sort the timesheet entries by charge code in ascending order.
- Click **View Internal/External Comments** to toggle between external and internal comments.

PDF

A **PDF** hyperlink is displayed below the timesheet.

1. Click the **PDF** hyperlink.
2. Open or save the file.

The PDF file generated will include the following information:

- Company name
- Personnel name
- Personnel code
- Timesheet period
- Timesheet
- Timesheet status
- If the Audit Trail of Changes information was open when clicking the hyperlink, that information will also be displayed

VIEW TIMESHEETS (BY PERSON)

The **View Timesheets (by Person)** option allows you to review timesheets for one person by scrolling through timesheet periods. You can view timesheets regardless of the status. Timesheets are displayed one period at a time.

Here's how to view timesheets by person:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **View Timesheets (by Person)**.

> NOTE: Search criteria are optional. Clicking **Search** without specifying criteria will display information for all active employees by default.

2. Modify any desired search criteria.
3. Click **Search**.
4. Click an **Employee Code** or **Employee Name** hyperlink.
5. Click the appropriate timesheet period.
6. Click **Select** to view the timesheet.

> TIP: Click the **Left Arrow** `<<`, **Select Another Period**, or **Right Arrow** `>>` buttons at the top of the Timesheet screen to view timesheets for another period. Click **Select Another Personnel** at the bottom of the Timesheet screen to view timesheets for another person.

VIEW TIMESHEETS (BY PERIOD)

The **View Timesheets (by Period)** option allows you to review timesheets for one person at a time, and one timesheet period at a time. You can view timesheets regardless of the status. A list of timesheets and hours is displayed, and complete individual timesheets can be viewed one at a time.

Here's how to view timesheets by period:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **View Timesheets (by Period)**.
2. Click the appropriate timesheet period.
3. Click **Select**.

> TIP: Click **View** next to the employee name to view the timesheet for that employee. Click the employee's name to open their timesheet comments in a new tab or window.

> TIP: Click **Select Another Period** at the bottom of the View Timesheets screen to view timesheets from a different timesheet period.

View Details

Click **View Details** in the upper left-hand corner of the screen to view the hours summarized by charge code for each person. If hours are recorded outside of the authorized date range for a charge code, the work date will be displayed in red. If hours are recorded in excess of the budgeted hours for a charge code, the remaining hours will be displayed in red.

> **WARNING: The remaining hours balance will always reflect the total budgeted hours less ALL hours ever recorded for the charge code regardless of the timesheet period chosen.**

Timekeeping users must be allowed to record time outside of authorized date ranges and/or in excess of budgeted hours since Federal Acquisition Regulations require personnel to record all work performed whether or not the work is authorized.

VIEW TIMESHEETS (BY PERIOD) – PDF

The **View Timesheets (by Period) – PDF** option allows you to create a PDF file that includes timesheets for everyone for a particular timesheet period. Options are available to limit the timesheet information displayed, and the requested timesheets will be compiled in a single PDF file. You can view timesheets regardless of the status.

Here's how to view timesheets by period in PDF format:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **View Timesheets (by Period) – PDF**.
2. Click the appropriate timesheet period.

> NOTE: The remaining search criteria are optional. Clicking **OK** without specifying criteria will display all submitted timesheets for the period by default.

3. Modify any desired search criteria.

> NOTE: Select **Display complete timesheets for the selected tasks** to view timesheets that include charges to the selected tasks only. All hours recorded will be displayed on these timesheets regardless of the charge code used.

> NOTE: Select **Display only selected tasks** to view timesheets that include charges to the selected tasks only. Only charges for the selected tasks will be displayed on these timesheets.

4. Click **OK**.
5. Open or save the file.

FLOOR CHECK

You can run a floor check report to see which employees did not fill in their timesheets for a specific date. This report is especially helpful to ensure employees are completing their timesheets on a daily basis per FAR requirements.

Report Features:

- Shows date and time the report was run
- Shows a list of personnel that have no hours recorded on the date you specified
- Identifies personnel with PTO that has been approved, or is pending approval
- Option to send emails requesting employees to fill out their timesheets
- Option to export in a CSV format

Here's how to view the floor check report:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **Floor Check**.
2. Type the appropriate date in the **Date** field. The default date will be today's date. The **Date** field is required.

> NOTE: The remaining search criteria are optional. Clicking **View Report** without specifying criteria will display information for all employees by default.

3. Modify any desired search criteria.
4. Click **View Report**.
5. Click the checkbox next to each employee who should receive an email reminder.

> TIP: Click **Select All** to select all employees. Individual employees may then be included or excluded from selection as necessary by clicking individual checkboxes.

6. Click **Send Email**.

> TIP: To export the floor check report as a CSV file, click **Download**. Open or save the file.

LABOR HOURS SUMMARY

The purpose of the report is to allow you to see a list of personnel that have exceeded an hour's threshold for a specified date range. The date range can cross timesheet periods and months, as long as it doesn't exceed 90 days total. It can be viewed in summary, summary by charge code, or with full daily details.

By default, the hours threshold is set to 0 so you can see each person's total hours. When you use a threshold, the report will only show you those people that have gone over the limit. You can easily export it in CSV format to perform any further analysis.

Here's how to view the labor hours summary report:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **Labor Hours Summary**.
2. Type the beginning date in the **Date From** field. The default date will be the current timesheet period beginning date. The **Date From** field is required. The date range cannot exceed 90 days.
3. Type the ending date in the **Date To** field. The default date will be the current timesheet period ending date. The **Date To** field is required. The date range cannot exceed 90 days.

> NOTE: The remaining search criteria are optional. Clicking **View Report** without specifying criteria will display information for all employees by default.

4. Modify any desired search criteria.
5. Type the number of hours in the **Hours Threshold** field. The default value is **0**.
6. Click **View Report**.

> TIP: To export the labor hours summary report as a CSV file, click **Download.** Open or save the file**.**

View All Details

Click **View All Details** to view the daily hours recorded for each person. The work date is included in the report.

View Details by Charge Codes

Click **View Details by Charge Code** to view the hours summarized by charge code for each person.

LABOR UTILIZATION

You can generate a real-time labor utilization report for all personnel using PROCAS Time. The information can be displayed for any date range and can be filtered by task range, account number range, employee number range, and/or approval group. By default, the report will calculate a utilization percentage by employee of direct hours divided by total hours recorded for the date range selected. You can choose to define the number of base hours.

Here's how to view the labor utilization report:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **Labor Utilization**.
2. Type the beginning date in the **Date From** field. The default date will be the current timesheet period beginning date. The **Date From** field is required.
3. Type the ending date in the **Date To** field. The default date will be the current timesheet period ending date. The **Date To** field is required.

> NOTE: The remaining search criteria are optional. Clicking **View Report** without specifying criteria will display information for all employees by default.

4. Modify any desired search criteria.
5. If calculating using **User defined base hours**, type the number of base hours in the field next to the radio button. The default value is **2080**.
6. Click **View Report**.

> TIP: To export the labor utilization report as a CSV file, click **Download**. Open or save the file.

WORK AUTHORIZATION DETAILS

You can view timesheet work authorization details as of any date you specify. The full charge code information is displayed by person, grouped by approval group. The report includes budgeted hours, hours used, and remaining hours as well as the authorized start and end dates for the charge code.

Here's how to view work authorization information:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **Work Authorization Details**.
2. Type the ending date in the **Date To** field. The default date will be today's date. The **Date To** field is required.

> NOTE: The remaining search criteria are optional. Clicking **View Report** without specifying criteria will display information for all active personnel by default.

3. Modify any desired search criteria.
4. Click **View Report**.

> TIP: To export the work authorization information as a CSV file, click **Download**. Open or save the file.

TIMESHEET DETAIL EXPORT

You can export timesheet entry details across timesheet periods in comma-separated value (CSV) format for further analysis.

Here's how to export time detail information:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **Timesheet Detail Export**.
2. Type the beginning date in the **Date From** field. The default date will be **01/01/2001**. The **Date From** field is required.
3. Type the ending date in the **Date To** field. The default date will be today's date. The **Date To** field is required.

> NOTE: The remaining search criteria are optional. Clicking **Download** without specifying criteria will export information for all active employees by default.

4. Modify any desired search criteria.
5. Click **Download**.
6. Open or save the file.

AUDIT TRAIL DETAIL EXPORT

You can export timesheet audit trail detail information in comma-separated value (CSV) format for further analysis.

Here's how to export audit trail detail information:

1. On the **Approvals** menu within the Timesheets submenu, click **Reports**, and then click **Audit Trail Detail Export**.
2. Click the appropriate timesheet period.

> NOTE: The remaining search criteria are optional. Clicking **OK** without specifying criteria will display information for all active timesheets by default.

3. Modify the desired search criteria.
4. Click **OK**.
5. Open or save the file.

PAID TIME OFF (PTO) REQUEST APPROVALS

This chapter describes the tasks you will perform in order to approve a PTO request for your employees. All of these functions will also be available to you if you are assigned as an alternate approver.

Topics covered in this chapter:

- Approve/Disapprove PTO Requests
- Undo PTO Request Approvals
- Undo PTO Request Disapprovals
- PTO Authorization
- PTO Requests

APPROVE/DISAPPROVE PTO REQUESTS

When an employee submits his/her PTO request, you will receive an email notification only if you are the employee's primary supervisor. The employee will receive an email notification when you have approved or disapproved the PTO request. If you have disapproved the PTO request, the email notification will include your disapproval comments.

Here's how to approve/disapprove submitted PTO requests:

1. On the **Approvals** menu within the Paid Time Off (PTO) Requests submenu, click **Approvals**, and then click **Approve PTO Requests**.
2. Review the PTO request, as per company policy.
3. Click the **Approve** or **Disapprove** checkbox next to each request. When disapproving a request, a disapproval comment is required.

> TIP: Click **Select All** under the Approve or Disapprove columns to select all requests for approval or disapproval. The status of individual requests may then be changed as necessary by clicking the individual checkboxes.

4. Click **Submit Selected**. Your electronic signature will be recorded as the approver of the request(s). The status displayed in the PTO Request Report will reflect this.

UNDO PTO REQUEST APPROVALS

If a PTO request has been approved in error, you can undo the approval. You can only undo the approvals that you have made. After an approval has been undone, you will need to either reapprove or disapprove the request.

Here's how to undo PTO request approvals:

1. On the **Approvals** menu within the Paid Time Off (PTO) Requests submenu, click **Approvals**, and then click **Undo PTO Request Approvals**.

    > NOTE: Click the **Alternate PTO Approvals** hyperlink to view a list of approved PTO requests where you are an alternate approver.

    > NOTE: Only requests that you have approved will be displayed.

2. Click the **Undo Approvals** checkbox(es) to the left of the individual PTO requests.

    > TIP: Click **Select All** at the bottom of the screen to select all of the requests. Individual requests may then be included or excluded from selection as necessary by clicking individual checkboxes.

3. Click **Undo Selected**.

UNDO PTO REQUEST DISAPPROVALS

If a PTO request has been disapproved in error, you can undo it at any time. You can only undo the disapprovals that you have made. After a disapproval has been undone, you will need to either approve or disapprove the request again.

Here's how to undo PTO request disapprovals:

1. On the **Approvals** menu within the Paid Time Off (PTO) Requests submenu, click **Approvals**, and then click **Undo PTO Request Disapprovals**.

    > NOTE: Click the **Alternate PTO Approvals** hyperlink to view a list of disapproved PTO requests where you are an alternate approver.

    > NOTE: Only requests that you have disapproved will be displayed.

2. Click the **Undo Disapprovals** checkbox(es) to the left of the individual PTO requests.

    > TIP: Click **Select All** at the bottom of the screen to select all of the requests. Individual requests may then be included or excluded from selection as necessary by clicking individual checkboxes.

3. Click **Undo Selected**.

PTO AUTHORIZATION & BALANCES

You can run a real-time PTO Authorization Report for all personnel using PROCAS Time. The report will calculate PTO hours remaining by employee as of the date selected. The information displayed will be limited to the data that you have been authorized to access by your administrator.

Here's how to run a PTO Authorization & Balances report:

1. On the **Approvals** menu within the Paid Time Off (PTO) Requests submenu, click **Reports**, and then click **PTO Authorization & Balances**.
2. Type the ending date in the **Date To** field. The default date will be today's date. The **Date To** field is required.

> NOTE: The remaining search criteria are optional. Clicking **View Report** without specifying criteria will display all details for active employees where you are the primary approver for the specified date range by default.

3. Modify the desired search criteria.
4. Click **View Report**.

> TIP: To export the PTO Authorization Report as a CSV file, click **Download.** Open or save the file.

PTO REQUESTS

You can run a real-time PTO Request Report for all employees using PROCAS Time. The report will display the PTO requests regardless of their status. The report will display PTO requests for days off requested that are within the date range you specify. The information displayed will be limited to the data that you have been authorized to access by your administrator.

Here's how to run a PTO Requests report:

1. On the **Approvals** menu within the Paid Time Off (PTO) Requests submenu, click **Reports**, and then click **PTO Requests**.
2. Type the beginning date in the **PTO From** field. The default date will be one year before today's date. The **PTO From** field is required.
3. Type the ending date in the **PTO To** field. The default date will be one year after today's date. The **PTO To** field is required.

> NOTE: The remaining search criteria are optional. Clicking **View Report** without specifying criteria will display all details for active employees for the specified date range by default.

4. Modify the desired search criteria.
5. Click **View Report**.

> NOTE: The PTO Request Report displays information that may continue past the right edge of your browser window. Use the horizontal scroll bar of your browser to see the additional information, if necessary.

> TIP: To export the PTO Request Report as a CSV file, click **Download.** Open or save the file.

APPENDIX A

CHARGE CODES IN PROCAS TIME

A charge code in PROCAS Time is a combination of an account, task (if applicable), labor category and pay code. The task structure can vary from charge code to charge code based on how they are established within PROCAS Accounting.

Direct Labor Charge Codes

Here is a description of the charge code character string for a direct charge code:

USAF Phase II   5000100.00001.0001.0001.0001.0001.SE06.R

USAF Phase II	– Charge Code Description – If a charge code has an associated task, the description will be the user-defined task name
5000100	– Account Code – The direct expense account, e.g., **Direct Labor**
00001	– Project Code – Typically corresponds to a contract
0001	– WBS Level 2 Code – Can be up to 4 characters
0001	– WBS Level 3 Code – Can be up to 4 characters (optional level)
0001	– WBS Level 4 Code – Can be up to 4 characters (optional level)
0001	– WBS Level 5 Code – Can be up to 4 characters (optional level)
SE06	– Labor Category Code – A labor category defined by the contract, e.g., **Systems Engineer, Level 06**
R	– Pay Multiple Code – Payroll classification, e.g., **Regular Time**

<u>Unbillable Direct Labor Charge Codes</u>

Here is a description of the charge code character string for an unbillable direct charge code:

Operations Support   5000105U.10003.0001.0000.0000.0000.PM01U.R

Operations Support	–	Charge Code Description – If a charge code has an associated task, the description will be the user-defined task name
5000105U	–	Account Code – The unbillable direct labor expense account, e.g., **Direct Labor - Unbillable**
10003	–	Project Code – Typically corresponds to a contract
0001	–	WBS Level 2 Code – Can be up to 4 characters
0000	–	WBS Level 3 Code – Can be up to 4 characters (optional level)
0000	–	WBS Level 4 Code – Can be up to 4 characters (optional level)
0000	–	WBS Level 5 Code – Can be up to 4 characters (optional level
PM01U	–	Unbillable Labor Category Code – A labor category defined by the contract, e.g., **Project Manager, Level 01 – Unbillable**
R	–	Pay Multiple Code – Payroll classification, e.g., **Regular Time**

<u>Indirect Labor Charge Codes</u>

Here is a description of the charge code character string for an indirect charge code:

Holiday   6110000.SE06.H

Holiday	–	Charge Code Description – If a charge code does not have an associated task, the description will be the account description
6110000	–	Account Code – The indirect expense account, e.g., **Holiday**
SE06	–	Labor Category Code – The employee's labor category, e.g., **Systems Engineer, Level 06**
H	–	Pay Multiple Code – Payroll classification, e.g., **Holiday**