

## Overview

This Job Aid defines the steps to follow to Review and Approve Timesheets.

There are two (2) independent actions associated with working with Timesheets as a Timesheet Manager.

1. Review and Approve Timesheets
2. Act as a Timesheet Delegate

## Review and Approve Timesheets



Timesheet Manager



Resources – Timesheet Approvals

### 1. REVIEW AND APPROVE TIMESHEETS

- a. Ensure you are in the **Resources** area, click **Timesheet Approvals** in the **Resources** section.
- b. Select the **Timesheet** you wish to **approve** from the list.

Name	Start Date (TL)	Finish Date (TL)	Bookable Resource	Timesheet Manager (Boo)	Total Actual	Total Project Hours	Total Non Project Hours	Timesheet Status	Timesheet Period
Steve Casalely - 2022 - Timesheet Period - 1	1/2/2022	1/8/2022	Steve Casalely	Steve Casalely	14.00	14.00	0.00	Submitted	2022 - Timesheet Period - 1
Joe Gibbs - 2021 - Timesheet Period - 5	12/19/2021	12/25/2021	Joe Gibbs	Steve Casalely	0.00	0.00	0.00	Submitted	2021 - Timesheet Period - 5

- c. Review the **timesheet** and select **Approve** or **Reject**.

General Related

Search

Period: Sunday, January 2, 2022 - Saturday, January 8, 2022

This timesheet is currently submitted and awaiting manager approval.

Project/Task	Total	1/2/2022	1/3/2022	1/4/2022	1/5/2022	1/6/2022	1/7/2022	1/8/2022
Totals	14.0	0.0	5.0	3.0	3.0	3.0		
Non Project Time	0.0							
Training	0.0							
Vacation	0.0							
Employee Satisfaction Survey	0.0							
Analyze Survey Responses	0.0							
Conduct Employee Survey	0.0							
Resource Management Implementation	2.0			2.0				
Closing Phase activities	2.0			2.0				
Warehouse Modernization Phase 1	12.0	0.0	5.0	1.0	3.0	3.0		
Align budget request with business go...	5.0			1.0	1.0	3.0		
Align budget request with infrastruc...	2.0				2.0			
Align long/short term infrastructure de...	0.0							
Communicate impact to community	0.0							

Recall Time C Approve Reject

- d. If you **reject a Timesheet**, you will also need to provide comments to **indicate why it was rejected** and to identify the corrective actions required.

**Reject Timesheet**

Provide a reason for rejecting the timesheet?

OK Cancel

- e. You can also **Approve or Reject multiple timesheets** by selecting them from the list.
- f. Use the **Approve or Reject button on the ribbon**.
- g. If you reject multiple timesheets this way, **you cannot provide individual rejection messages**.

My Timesheets Requiring Approval

Approve Reject

senseiqlearning.crm.dynamics.com says

Provide a reason for rejecting the 2 selected timesheets pending approval. Note: the reason will be applied to all selected timesheets.

OK Cancel

Name	Start Date (T...	Finish Date (T...	Start Date (T...	Finish Date (T...	Total Project Hours	Total Non Project Hours	Timesheet Status	Timesheet Period
Steve Caseley - 2022 - Timesheet Period 1/2/2022	1/8/2022	Steve Caseley	Steve Caseley	14.00	14.00	0.00	Submitted	2022 - Timesheet Period - 1
Joe Gibbs - 2021 - Timesheet Period - 5 12/19/2021	12/25/2021	Joe Gibbs	Steve Caseley	0.00	0.00	0.00	Submitted	2021 - Timesheet Period - 5

# Act as a Timesheet Delegate



Timesheet Manager



Resources and Work

## 1. APPROVE SUBMITTED TIMESHEETS AS A DELEGATE

- Ensure you are in the **Resources area**, click **Timesheet Approvals** in the **Resources** section.
- Click the **Filter** icon.

Name	Start Date (TL)	Finish Date (TL)	Bookable Resource	Timesheet Manager (Book)	Total Actual	Total Project Hours	Total Non Project Hours	Timesheet Status	Timesheet Period
Steve Caseley - 2022 - Timesheet Period - 1/2/2022	1/8/2022		Steve Caseley	Steve Caseley	14.00	14.00	0.00	Submitted	2022 - Timesheet Period - 1.
Joe Gibbs - 2021 - Timesheet Period - 5 12/19/2021	12/25/2021		Joe Gibbs	Steve Caseley	0.00	0.00	0.00	Submitted	2021 - Timesheet Period - 5'

- Change the **filter** criteria for the **Timesheet Manager**.
- To **Equals**.
- The **name of the person** for whom you need to approve Timesheets.
- Click **Apply**.

**Advanced filters**

Reset to default

AND

- ☐ Timesheet Status  Submitted
- ☐ Status  Active
- ☐ Bookable Resource (Bo...) 
  - AND
  - ☐ Timesheet Manager    -
- ☐ Timesheet Period (Time...) 
  - AND
  - ☐ Status  Active
  -
- 

g. Follow standard processes for reviewing and approving Timesheets.

## 2. SUBMIT TIMESHEETS AS A DELEGATE

- Ensure you are in the **Work area**, click **Timesheets** in the **Work** section.
- Click the **Filter** icon.

Home

Recent

Pinned

Sense IQ

Home

Work

Insights

Deliverables

Tasks

Issues

Risks

Decisions

Changes

Lessons

**Timesheets**

My Timesheet

Knowledge

Training

What's New

Show Chart

New

Delete

Refresh

Email a Link

Flow

Run Report

Excel Templates

Export to Excel

Import from Excel

Create view

My Active Timesheets

B

Search this view

Name	Start Date (Timesheet Period)	Finish Date (Timesheet Period)	Timesheet Period	Total Actual	Timesheet Status
Steve Caseley - 2022 - Timesheet Period - 1/2/2022		1/8/2022	2022 - Timesheet Period - 1	14.00	Submitted
Steve Caseley - 2021 - Timesheet Period - 12/26/2021		1/1/2022	2021 - Timesheet Period - 52	19.00	Approved
Steve Caseley - 2022 - Timesheet Period - 1/9/2022		1/15/2022	2022 - Timesheet Period - 2	0.00	Draft

1 - 3 of 3

W Work

- Change the **filter** criteria for the **User**.
- To **Equals**.

- e. The **name of the person** for whom you need to submit a Timesheet.
- f. Click **Apply**.

**Advanced filters** [X]

Reset to default

AND

[ ] Status [ ] Equals [ ] Active [X] ...

[ ] Bookable Resource (Bo...) [ ] Contains data [ ] ...

AND

[C] User [D] Equals [ ] joe [E]

Joe DeMaegd (User)

Joe Gibbs (User)

Joe Project (User)

[+ Add]

[+ Add]

[F] **Apply** Cancel

- g. Follow standard processes for submitting a Timesheet.

### 3. CREATE A NEW TIMESHEET AS A DELEGATE

- a. Ensure you are in the **Work area**, click **Timesheets** in the **Work** section.
- b. Click **New** from the ribbon.

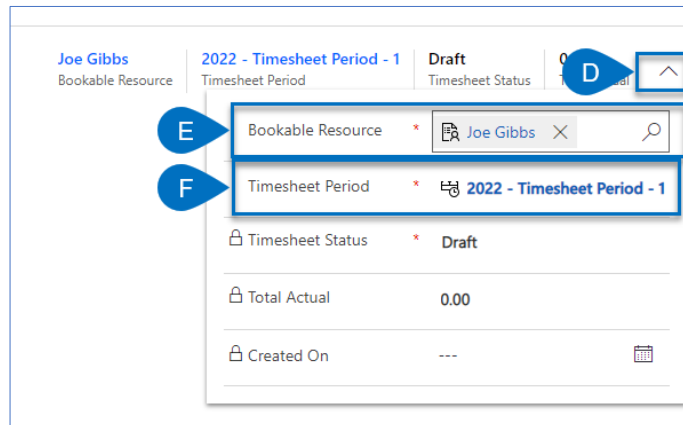
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SH [B] New Delete Refresh Email a Link Flow Run Report Excel Templates Export to Excel Import from Excel Create view

**My Active Timesheets**

Name	Start Date (Timesheet Period)	Finish Date (Timesheet Period)	Timesheet Period	Total Actual	Timesheet Status
Steve Caseley - 2022 - Timesheet Period - 1/2/2022	1/8/2022	2022 - Timesheet Period - 1	22.00	Submitted	
Steve Caseley - 2021 - Timesheet Period - 12/26/2021	1/1/2022	2021 - Timesheet Period - 52	19.00	Approved	
Steve Caseley - 2022 - Timesheet Period - 1/9/2022	1/15/2022	2022 - Timesheet Period - 2	0.00	Draft	

- h. From the **Header Dropdown**.
- i. Search for and **select the Resource** for whom you need to create a Timesheet.
- j. Search for and **select the appropriate Timesheet Period**.



The screenshot shows the Altus Timesheet interface. At the top, there are three tabs: "Joe Gibbs" (Bookable Resource), "2022 - Timesheet Period - 1" (Timesheet Period), and "Draft" (Timesheet Status). Below these tabs, there is a search bar for "Bookable Resource" with a dropdown menu showing "Joe Gibbs". To the right of the search bar, there is a "Timesheet Period" dropdown menu showing "2022 - Timesheet Period - 1". Below these dropdowns, there is a "Timesheet Status" dropdown menu showing "Draft". To the right of the "Draft" dropdown, there is a "Total Actual" field showing "0.00". Below the "Total Actual" field, there is a "Created On" field showing "---".

Callout E points to the "Bookable Resource" dropdown menu.

Callout F points to the "Timesheet Period" dropdown menu.

Callout D points to the "Draft" dropdown menu.

- k. Click **Save** and follow standard processes for submitting a Timesheet.