Configure Clients to Approve Time

Some organizations require that project time first be approved by the client before it can be billed. This process likely involves a mountain of paperwork with timesheets being printed out, signed, and filed away. Rather than killing all those trees, instead consider letting Projector handle all this data processing instead. With our audit trails, reports, and history features - we'll keep track of all that paperwork for you.

This help page will:

- Show you how to configure Projector for time/expense approval by clients

Configure Projector

Configure Projector for client-based time approvals.

Create a Client User

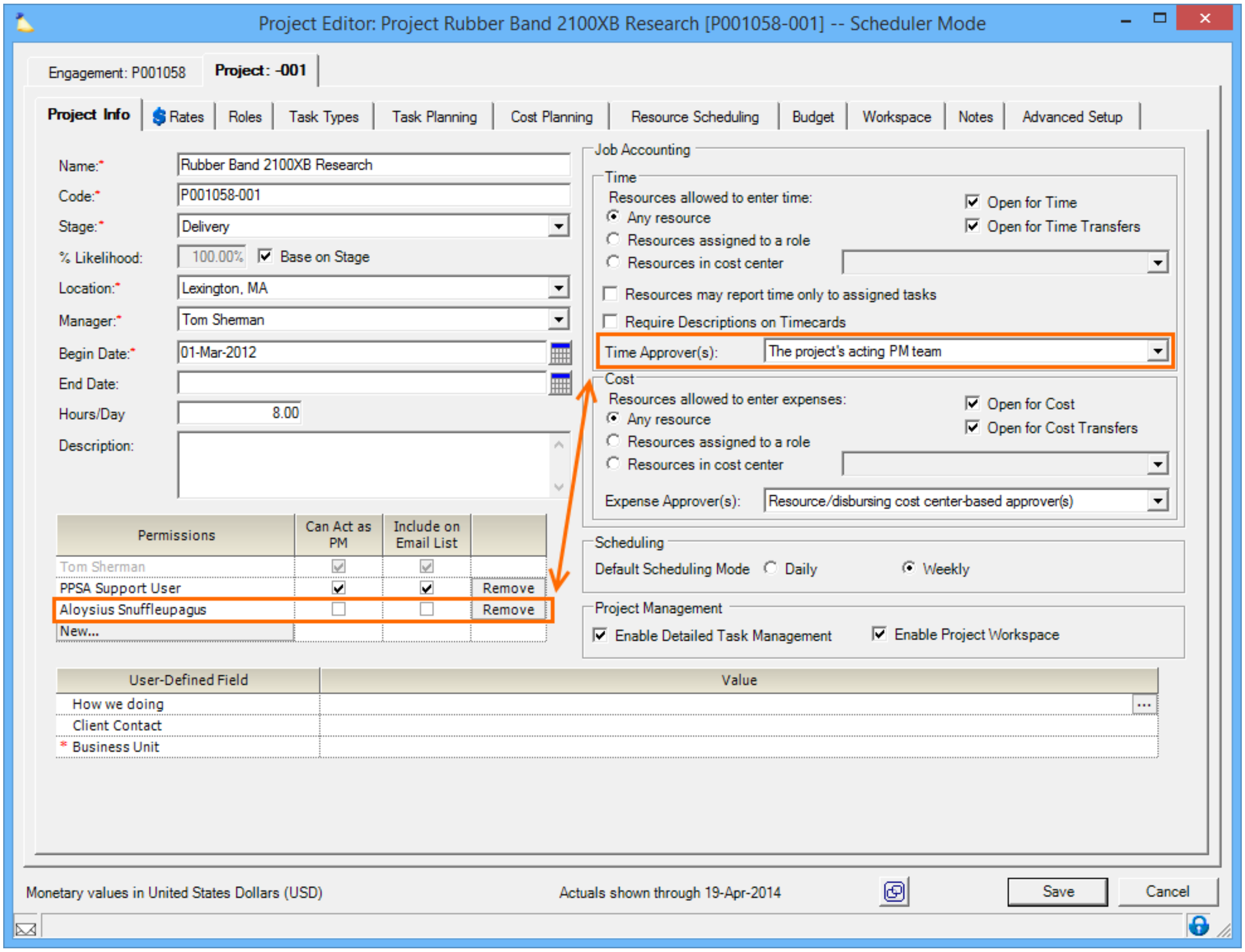
See Client Users for instructions on creation.

Make Client an Approver

As you should recall, time approvers are determined on a per-project basis. Visit each project and make sure that the client user is a time approver according to your rules. Here is a quick rundown of the time approval methods we allow and what you should take into consideration.

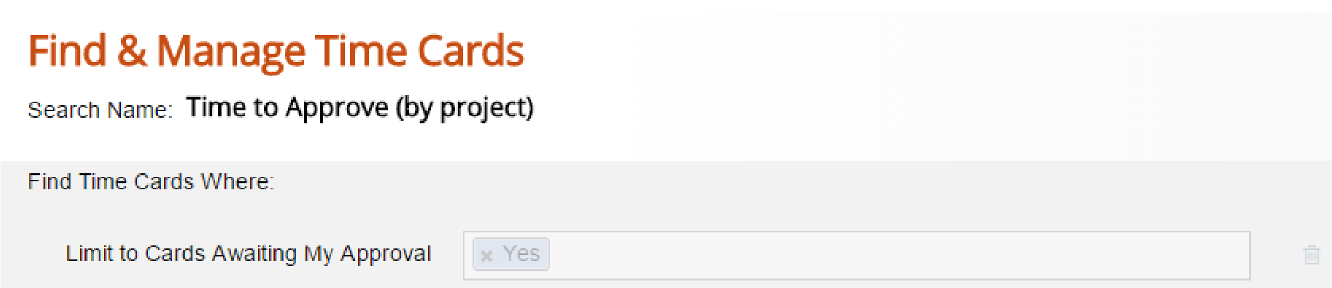
- **The project's acting PM team** - this is a good choice so that both the client and your project managers can approve time
- **Engagement Manager** - doesn't work well with client-based time approval since you should have a 'real' EM
- **Project Manager** - doesn't work well with client-based time approval since you should have a 'real' PM
- **Project Manager for team, Engagement Manager for PM** - doesn't work well with client-based time approval since you should have a 'real' EM /PM
- **Designated time approver for resource or cost center** - this is an okay choice if you can easily limit time by cost center. But be careful here or your clients could end up seeing and approving time for projects outside their purview
- **Find Approver** - good choice if a single client user does the approvals

If you are worried about a client user logging into Management Portal and mucking around - don't be. Client users can't log into Management Portal. They are limited to Projector Web.



Save a Search

To help your clients out, save a public search that makes finding time cards to approve easy. In my search below, I look for all time cards awaiting approval for the current month.



Educate Your Clients

You'll need to teach your clients how to do time approvals. Please point them to our help page dedicated to this purpose.

Client Time Approval Tutorial