



Employee Expense System  
**Employee and Admin User Guide**

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Enterprise  
Time, Attendance and  
Workforce Management

## Notices

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# Employee Expense System Overview

You can track employee expenses in TreeRing Time including when they relate to specific job codes.

Going paperless is the right move for your business and the environment. We are here to tell you about leveraging TreeRing Time for expense reimbursement.

Collecting reports, tracking employee hours, all of those manual administrative tasks are being made easier by software. Expense reimbursement is no different. Managing remote employees and their expenses is particularly challenging because of the natural strain on communication. Software lessens that strain and will solve your problems, sometimes before they present themselves. Expense report tracking software that tracks all outgoing spend from a single place including travel expenses.



**Note:** Employees log expense claims via intuitive mobile (TreeRing Time Employee Application) or desktop (eTimeClock) applications. Managers can approve or deny employees expense claims via TreeRing Time's web or mobile application.

## Admin Setup for Expense Tracking

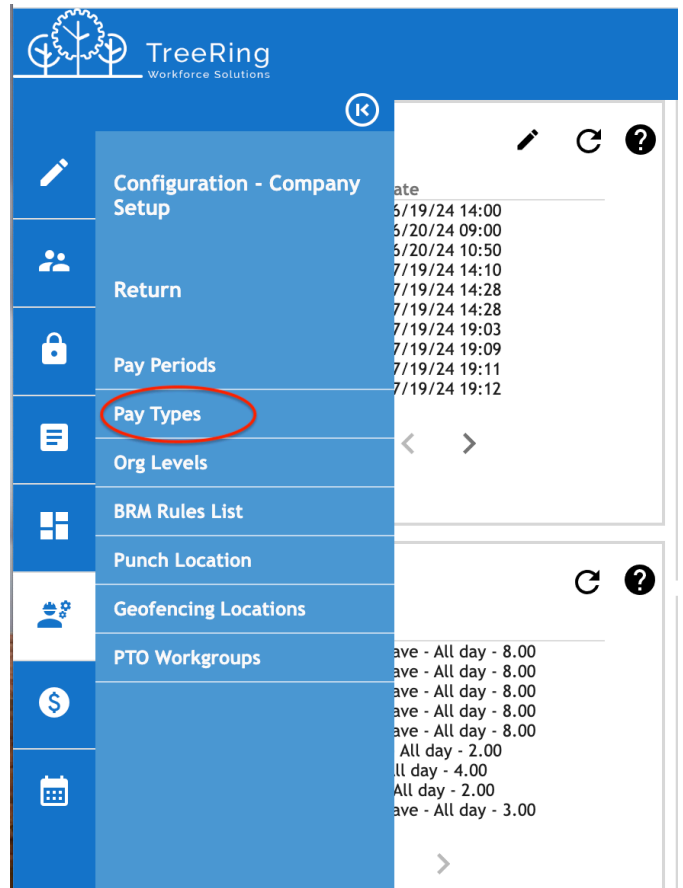
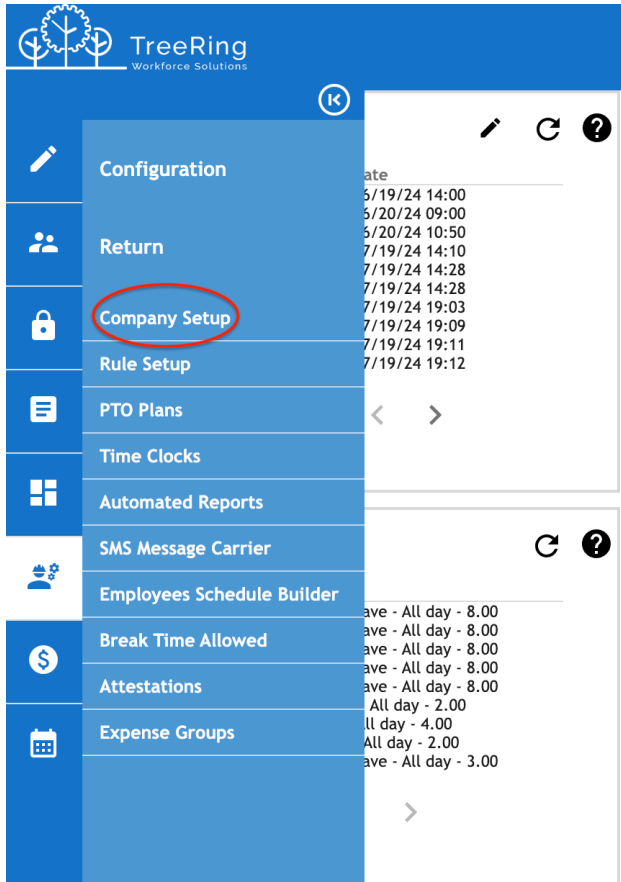
To use the Expense Tracking feature, you need to set up pay types and expense groups, and assign employees to the appropriate expense groups.

### Setup Pay Types

In TreeRing Time top level menu, go to **Configuration** tab, select **Company Setup**, and then select **Pay Types**. A list of pay types displays.

The screenshot shows the TreeRing Time interface. At the top, there is a blue header with the TreeRing logo and 'Workforce Solutions' text. Below the header, there is a navigation bar with a hamburger menu icon circled in red. The main content area displays a 'Punch Exceptions' table with 10 / 136 items. The table has columns for Name, Type, and Date. To the right of the table, there are icons for edit, refresh, and help, and a 'We're over' notification with a 'Minimum work' value of 32.

Name	Type	Date
Bennet, Elizabeth	Missed Out	06/19/24 14:00
saju, Sam	Missed Out	06/20/24 09:00
Angstrom, Harry J	Missed Out	06/20/24 10:50
Andino, Cristian	Missed Out	07/19/24 14:10



TreeRing Workforce Solutions

Edits Employees Security Reports

## Pay Types

**+ Add New Pay Type**

		Punch	Pay Type	Description
<a href="#">Delete</a>	<a href="#">Edit</a>	AB	TEST	TEST
	<a href="#">Edit</a>	B	A-Reg	ACDS Reg Hours
	<a href="#">Edit</a>	B	DC	Direct Care
	<a href="#">Edit</a>	B	EXTHR	Extra Hours for Lunch

Click Add New Pay Type

**New Pay Type** [X]

Code:

Accrue To OT:

Description:

Punch Type: **Advance Entry** [v] Include In Threshold:

Multiplier:

PT Protect:

OT Multiplier:

InclnBlendedOT:

Map To HR:

Standard Punch Type:

Map To Payroll:

Is Active:

**Save**

Enter Code, Description, Select Other Entry for Punch Type and check active

**Update Pay Type** [X]

Code:  ✓

Accrue To OT:

Description:

Punch Type: **Other Entry** [v] Include In Threshold:

Multiplier:

PT Protect:

OT Multiplier:

InclnBlendedOT:

Map To HR:

Standard Punch Type:

Map To Payroll:

Is Active:

**Save**



**Note:** Typical expense related punch types can be the following: Hotel, Car Rental, Parking, Mileage, Meals, Air Tickets, etc.

# Setup Expense Group and Assign Employee to Expense Group

In TreeRing Time top level menu, go to **Configuration** tab, select **Expense Groups**. A list of expense groups displays.

**Expense Group List** +

Search...

Expense Code	Expense Description			
Travel_Expenses	Travel Expenses			
Meals_entertainment	Meals and entertainment			
Mileage	Mileage			
Office_expenses	Office expenses			

Click plus to add a new expense group

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Admin, TC ? ⚙️

### Expense Group List

Q Search...

- Expense Code
- Travel\_Expenses
- Meals\_entertainment
- Mileage
- Office\_expenses

#### Expense Group

Code \*

---

Description \*

---

#### Expense Codes

Included	Pay Type	Description	Calculated	Unit	Rate per Unit
<input type="checkbox"/>	Mileage	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	Meals	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	Hotel	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	Cellular	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	HI	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	RP	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	Supplies	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	CarRent	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	AirTick	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	Parking	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	HarPayQty	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	Birth	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>
<input type="checkbox"/>	DASD	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text" value="0"/>

#### Required Levels

Included	Description	Prompt EN	Prompt ES
<input type="checkbox"/>	Area	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Departments	<input type="text"/>	<input type="text"/>



Enter Code, Description, select appropriate Expense Codes from list and select required levels from list

**Expense Group**

Code \*  
Travel\_Expenses

Description \*  
Travel Expenses

**Expense Codes**

Included	Pay Type	Description	Calculated	Unit	Rate per Unit
<input type="checkbox"/>	Mileage		<input type="checkbox"/>		0
<input type="checkbox"/>	Meals		<input type="checkbox"/>		0
<input checked="" type="checkbox"/>	Hotel	Hotel	<input type="checkbox"/>		0
<input type="checkbox"/>	Cellular		<input type="checkbox"/>		0
<input type="checkbox"/>	HI		<input type="checkbox"/>		0
<input type="checkbox"/>	RP		<input type="checkbox"/>		0
<input type="checkbox"/>	Supplies		<input type="checkbox"/>		0
<input checked="" type="checkbox"/>	CarRent	Car Rental	<input type="checkbox"/>		0
<input checked="" type="checkbox"/>	AirTick	Airline ticket	<input type="checkbox"/>		0
<input checked="" type="checkbox"/>	Parking	Parking	<input type="checkbox"/>		0
<input type="checkbox"/>	HarPayQty		<input type="checkbox"/>		0
<input type="checkbox"/>	Birth		<input type="checkbox"/>		0
<input type="checkbox"/>	DASD		<input type="checkbox"/>		0

**Required Levels**

Included	Description	Prompt EN	Prompt ES
<input type="checkbox"/>	Area		
<input type="checkbox"/>	Departments		

Click on human icon to assign employees

**Expense Group List**

Search...

Expense Code	Expense Description			
Travel_Expenses	Travel Expenses			
Meals_entertainment	Meals and entertainment			
Mileage	Mileage			
Office_expenses	Office expenses			

Either type if card id or click filter to see list of employees

**Assign Employees**

Card ID  Employee Name   Include Inactive

Level  Level Code  Level  Level Code  Level  Level Code

<input type="checkbox"/>	Card Id	Employee Name	Other Id
<input type="checkbox"/>	91264	Smith,John J	91264
<input type="checkbox"/>	91792	Donahue,Ryann D	91792
<input type="checkbox"/>	79527	Schonals,Diego	79527
<input type="checkbox"/>	17935	Romero,Claudio	

Select appropriate employees and click confirm

**Assign Employees**

Card ID  Employee Name   Include Inactive

Level  Level Code  Level  Level Code  Level  Level Code

<input type="checkbox"/>	Card Id	Employee Name	Other Id
<input checked="" type="checkbox"/>	91264	Smith,John J	91264
<input type="checkbox"/>	91792	Donahue,Ryann D	91792
<input checked="" type="checkbox"/>	79527	Schonals,Diego	79527

## Entering Expenses via eTimeClock

Employees log expense claims via intuitive mobile (TreeRing Time Employee Application) or desktop (eTimeClock) applications.

To enter expenses through eTimeClock, log into eTimeClock, click top hamburger menu, select Expense Tracking

TreeRing Workforce Solutions English Spanish

Welcome Gatsby, Jay  
OUT 04-25-2024 14:25

Start 12:42:54 Friday, Sep 6 2024 End

Lunch Leave Lunch Return Start Break End Break Transfer

PTO Request View Timesheets Log off

- PTO Request List
- PTO Banks
- View Scheduling
- Timesheet Entry
- View Timesheets
- Bulk Transactions
- Expense Tracking
- Log off

To add a new expense item click Add New Expense Request




TreeRing Workforce Solutions English Spanish

Expense Tracking

Add New Expense Request


Date	Pay Type	Description	Amount	Status	Actions
09/02/2024	Hotel	hotel	199	Pending	🔍 ✎ 🗑️


Fill expense form as required and click Save


 English Spanish  

### Add New Expense Request

---

Department \* 

Type \* 


Date \*   
MM/DD/YY

Description \*

Bill Client

Reimburse

Payment Method \*

No file selected yet 

## Add New Expense Request

Department \*

Client Support

Type \*

Mileage

Quantity

200

1

(Rate: \$ 0.670 per 1)

Total

Amount

\$

134.00

Date \*

9/2/2024



MM/DD/YY

Description \*

driving to client site

 Bill Client Reimburse

Payment Method \*

Visa

No file selected yet



Save

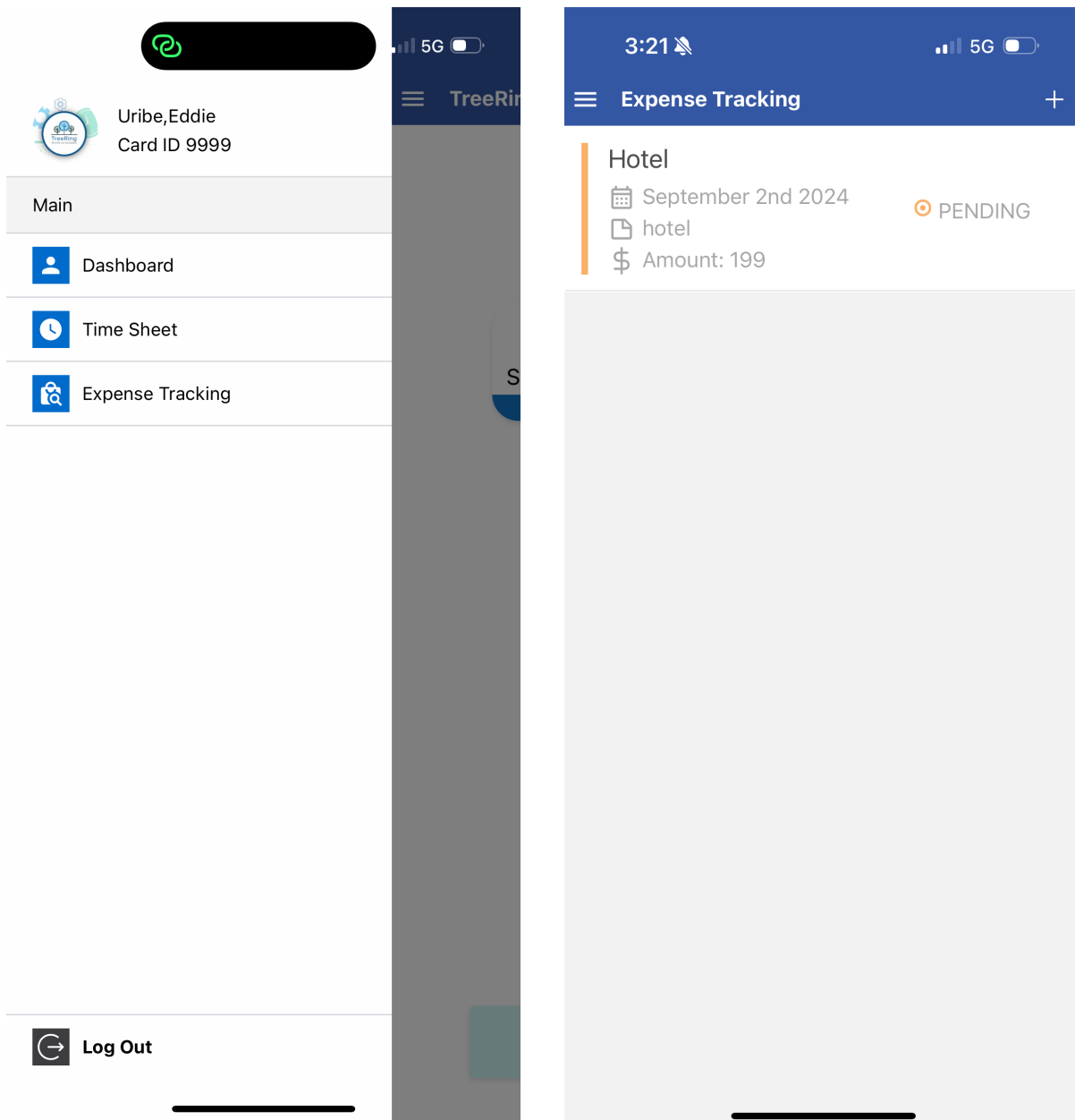
Cancel





**Note:** At this point a managers can approve or deny employees expense claims via TreeRing Time's web or mobile application.

## Entering Expenses via Employee Mobile Application

To enter expenses through Employee Mobile Application, log into Employee Mobile Application click top hamburger menu, select Expense Tracking. Click plus sign to add a new expense item




Fill expense form as required and click Save

 **Add Expense Tracking** 

Enter Departments \* Select

Pay Type \*

Date \*  

Description \*



Bill Client

Reimburse

Payment Method \*

**FILE UPLOADS.** [Add attachment +](#)


Press Add File button to upload new file

 **Add Expense Tracking** 

Enter Departments \* Select

Pay Type \*

Quantity \*   
(Rate: \$ 0.67 per 1)  
Total Amount \$ 134

Date \*  

Description \*

Bill Client

Reimburse

Payment Method \*

**FILE UPLOADS.** [Add attachment +](#)

Press Add File button to upload new file



**Note:** At this point a managers can approve or deny employees expense claims via TreeRing Time's web or mobile application.