Employee Expense System
Employee and Admin User Guide

Enterprise

Time, Attendance and

Workforce Management

Notices

Contents

User and Administrator Manual - TreeRing Time® Employee Expense System

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.
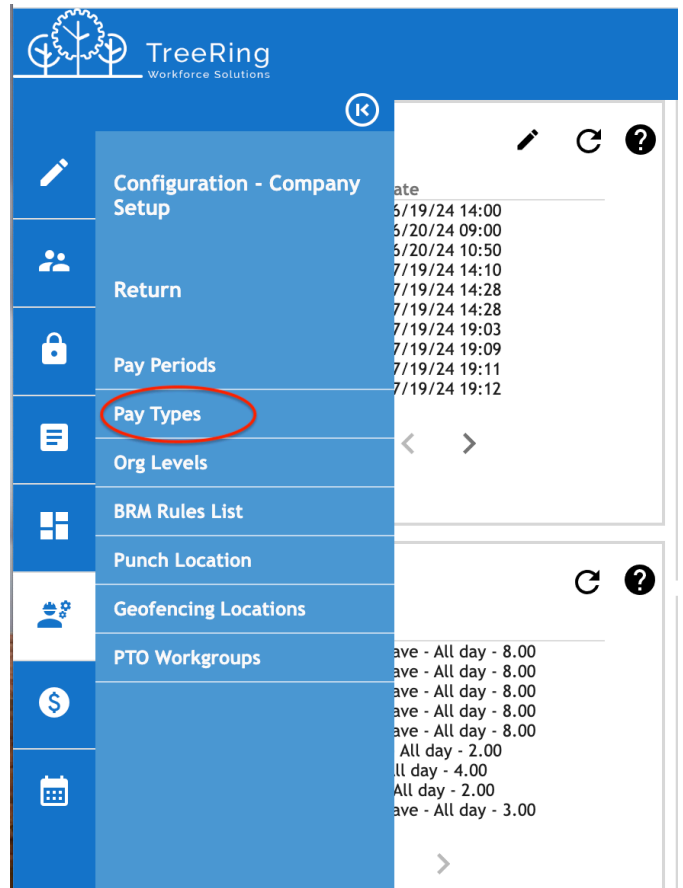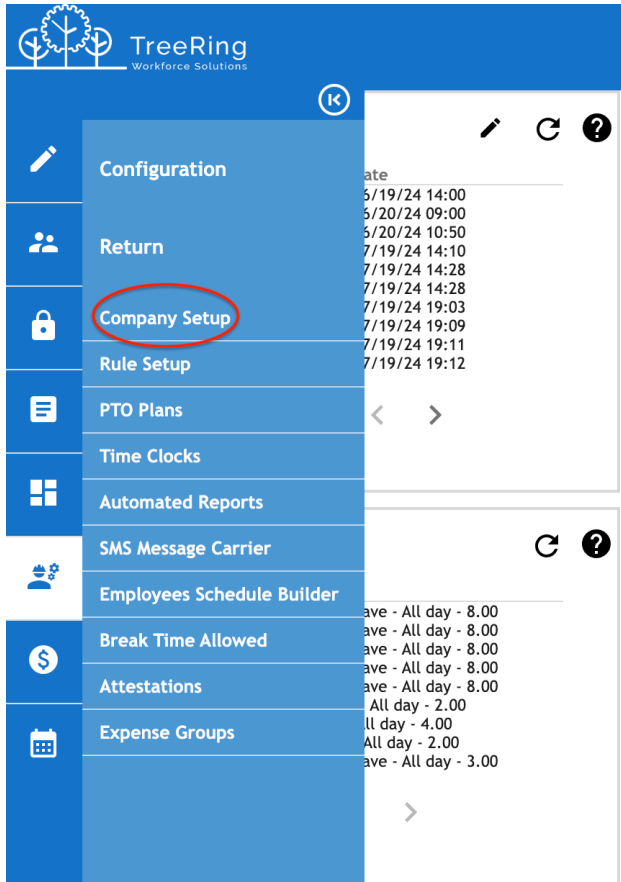
Admin Setup for Expense Tracking

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.

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Click Add New Pay Type

New Pay Type ✕

Code:		Accrue To OT:	☐	
Description:				
Punch Type:	Advance Entry ▼	Include In Threshold:	☐	
Multiplier:		PT Protect:	☐	
OT Multiplier:		IncInBlendedOT:	☐	
Map To HR:		Standard Punch Type:	☐	
Map To Payroll:		Is Active:	☐	

Save

Additional OT

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

Update Pay Type ✕

Code:	Hotel ✔	Accrue To OT:	☐	
Description:	Hotel			
Punch Type:	Other Entry ▼	Include In Threshold:	☐	
Multiplier:		PT Protect:	☐	
OT Multiplier:		IncInBlendedOT:	☐	
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.

Click plus to add a new expense group

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

Click on human icon to assign employees

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

Select appropriate employees and click confirm

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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

To add a new expense item click Add New Expense Request

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Fill expense form as required and click Save

TreeRing

English   Spanish

Add New Expense Request

Department *

Type *

Date *

MM/DD/YY

Description *

☐ Bill Client

☐ Reimburse

Payment Method *

No file selected yet

Save   Cancel

TreeRing
Workforce Solutions

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

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Fill expense form as required and click Save

Add Expense Tracking (Close / Save)

Enter Departments *   Select

Pay Type *   [⌄]

Date *   [   ] 📅

Description *   [   ]

☐ Bill Client

☐ Reimburse

Payment Method *   [   ]

FILE UPLOADS. Add attachment +

Press Add File button to upload new file

[Save]   [Cancel]

Add Expense Tracking (Close / Save)

Enter Departments *   Select

Pay Type *   [Mileage ⌄]

Quantity *   [200]

(Rate: $ 0.67 per 1)

Total Amount $ 134

Date *   [2024-09-02] 📅

Description *   [Drive to client site]

☑ Bill Client

☑ Reimburse

Payment Method *   [Visa]

FILE UPLOADS. Add attachment +
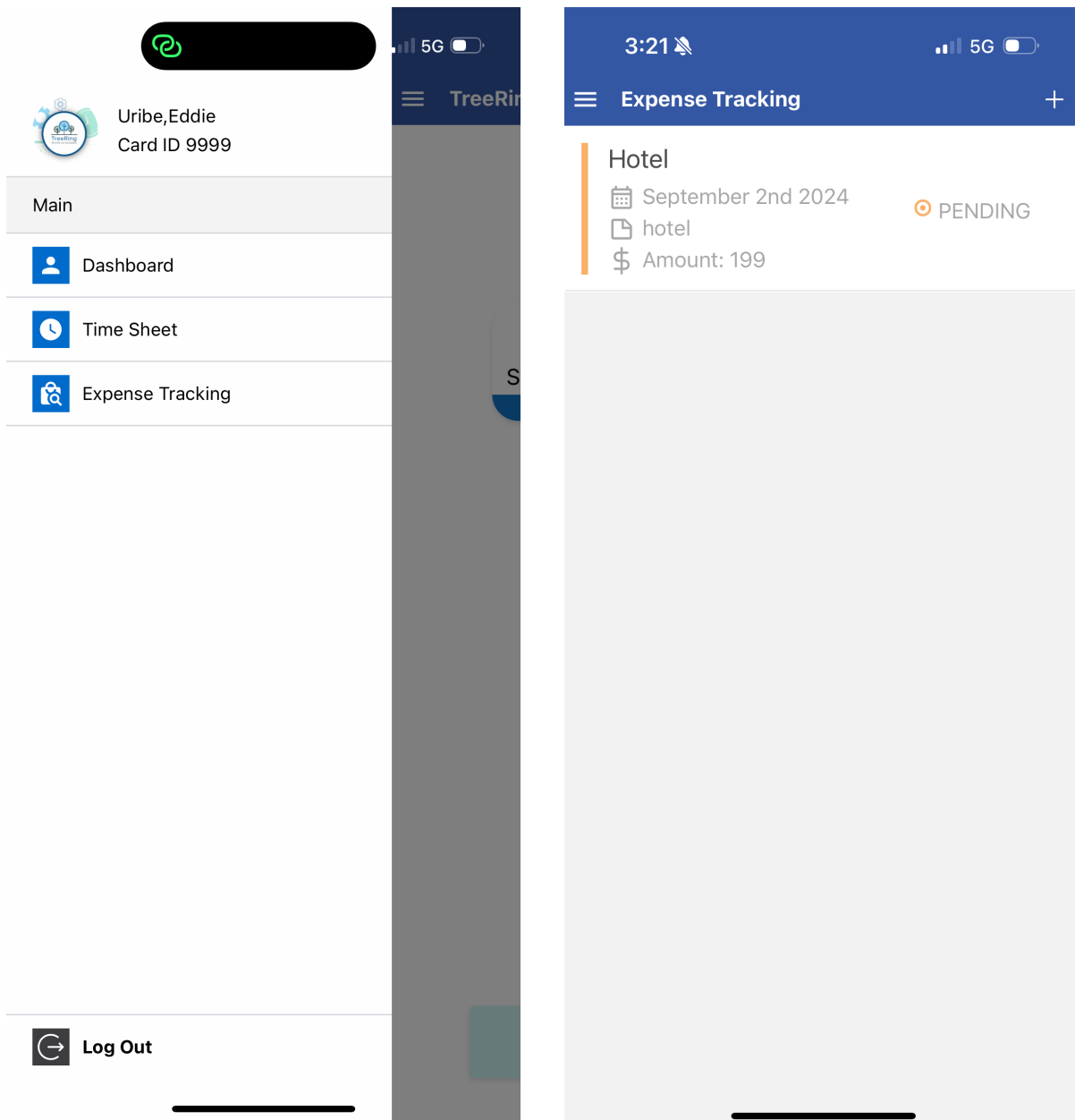
Press Add File button to upload new file

[Save]   [Cancel]

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