

B 4 How to Approve Expenses

Access level: Director and System Administrator.

Learn: How to approve the employees' expenses and how to indicate whether they are billable.

In TimeLog Project you can approve the employees' expenses. This makes it possible to get an overview of which expenses has been handled and accepted. Furthermore, it is possible to indicate whether an expense should be passed on to a customer's invoice.

When You Want to Approve Expenses:

Figure 1: Main Menu -> Management Reports -> Approve Expenses

- Select an *Employee*: in order to see a single employee's expenses, or select *All Employees* for a complete overview of all expenses 1 on all employees.
- If necessary, select an *Expense Type*: 2 and a *Payment Method*: 3. This limits the search further. (Expense types and payments methods can be set up in the System Administration (F10)).
- Select whether you want to see *All*, *Approved Records* or *Not Approved Records*. Select *Not Approved Records* for an overview of expenses that needs to be handled 4.
- Select the wanted *Period*: 5.
- Click on *Show* in order to update the list 6.
- The list of expenses makes it possible to approve and at the same time indicate whether an expense is billable or not. Tick off the box below *Approve* 7 next to the entries that should be approved, and tick off the box below *Non-billable* 8 next to the entries that should not be passed on to the customer.
- Click on *Update* in order to make the changes 9.

Tip: Use approval of expenses in order to approve employee paid expenses that has been refunded. This makes it possible for an employee to see when an expense has been handled.

Figure 1: Main Menu-> Management Reports-> Approve Expenses

APPROVE EXPENSES

Main Menu -> Management Reports -> Approve Expenses

View

Employee: ASC (Ashlee Samson) Show all fields

Expense Type: All

Payment Method: All

Approval: All

Standard Period: Select Period

Period: 01/11/2007 30/11/2007

6 Show

Export [Print]

Expenses (2)

Expense no.	Empl.	Date	Project no.	Project	Dest.	Details	Cost	Approved	Non-billable
U.07.0006	ASC	02/11/2007	AIT.07.0002	AIT - extranet	-	To the airport	23.00	<input type="checkbox"/>	<input type="checkbox"/>
U.07.0004	ASC	09/11/2007	AIT.07.0002	AIT - extranet	-	Lunch	120.00	<input type="checkbox"/>	<input type="checkbox"/>
Total							143.00		

9 Update

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