



## **TreeRing Time 8.0**

# **System Administrator User Guide**

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Enterprise

Time, Attendance and

Workforce Management

# Notices

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# Chapter 1. Introduction

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Discusses the product, its benefits, and roles.

## In This Chapter

[TreeRing Time Overview](#) on page 13  
Overview of TreeRing Time features.

[Benefits of Tracking Time and Attendance](#) on page 13  
A high level summary of the benefits of tracking time and attendance.

[Creating Workflow Roles](#) on page 15  
Login workflow roles in TreeRing Time overview.

## TreeRing Time Overview

Overview of TreeRing Time features.

TreeRing Time is an industry-leading integrated time, attendance, and labor tracking system that streamlines the timekeeping process and pro-actively manages labor costs. Greater workforce efficiency and increased profitability are the primary benefits of using TreeRing Time. This system has the ability to identify patterns of high or low productivity through the tracking of labor costs by employee, shift, department, line, task, work order, and more. TreeRing Time captures real-time labor data and cost information, produces time card and management reports, and exports data to payroll with the click of a mouse.

TreeRing Time can use a variety of data capture devices – badge time clocks, biometric time clocks, telephone entry systems, PC entry systems, and mobile scanners – whatever suits your company’s specific work environment.

## Benefits of Tracking Time and Attendance

A high level summary of the benefits of tracking time and attendance.

TreeRing Time is an intuitive time & attendance system allows employees to clock in, out, and request time off without any assistance. Behind the scenes, managers and payroll professionals get a cutting-edge tracking system that can help you lower labor costs and comply with wage and hour requirements. Unlike our competition, TreeRing Time is a flexible time & attendance solution that expands as your business expands. Start with low-cost clock-in/clock-out functionality and basic labor analytics. When you’re ready, we’ve got innovative add-ons like biometric time clocks, advanced scheduling and labor-cost forecasting.

The benefits of this technology are far reaching:

### Advanced Analytics

- **Dashboards:** Get the “big picture” with dynamic, real-time summary charts and dashboards.

- **Flexible reporting:** Easily configure reports to filter and view business metrics around time, gross pay, overtime, labor costs & compliance.
- **Schedule and share reports:** Schedule reports with time and gross pay data to be emailed at regular intervals to key people in your business.

### Flexible Timesheets

- **Intuitive time capture:** Capture the total hours or in/out times and automatically add paid holidays to the timesheet.
- **Multiple formats:** Configure timesheets easily to collect custom information such as activities, shifts, locations.
- **Support for all employees:** Manage exempt, non-exempt, contractors, and other employee types.
- **Regular vs overtime:** Track regular vs. overtime hours and time worked for both salary and hourly employees.

### Mobile Time Tracking

- **Employee self-service:** Empower your workforce with self-service capabilities to manage time & attendance accurately, even when they are mobile from any device.
- **Real-time updates:** Supervisors and managers get real-time updates about timesheet submissions and can review/approve right from the app.

### GPS Timesheets

- **Time + location intelligence:** Track location details associated with time entries for consistent application of business policies.
- **Real-time tracking:** Get real-time visibility into employee location information to control your remote and field teams.
- **Geofencing:** Leverage advanced geo-fencing capabilities to inform employees & supervisors based on virtual fences and never worry about data accuracy.

### Advanced Time Clocks

- **'Unified Clock Operations':** Same user experience across all devices.
- **Turn any tablet into a clock:** Quickly turn any Android or iOS tablet device into a cloud-connected kiosk for time capture and self-service management.
- **Smart Terminal:** Build the Perfect Time Clock. Smart Terminal allows you to customize a time collection device best suited for your organization. Options include Touchless Badge Readers, Biometric Readers, Barcode Readers, and Magnetic Readers.
- **eTimeClock (Web Clock):** Whether you're accessing from the comfort of your home or in the hustle and bustle of an office, eTimeClock allows full control of when and where you take care of business.
- **Mobile App:** *TreeRing Time Employee app* is our time clock app that removes the bounds of fixed time collection devices and provides employees the ability to perform time clock operations from wherever they may be. The *TreeRing Time Manager app* lets you handle time management operations directly from your phone.
- **In/out, breaks, activities & more:** Enable end users with advanced capabilities to clock in/out, manage breaks, rounding or enter time towards jobs and activities.
- **No more buddy punching:** Eliminate time theft and buddy-punching with smart features like facial recognition or real-time image capture, combined with a photo-audit trail.
- **Round-the-clock monitoring:** Benefit from the around the clock device monitoring and maintenance, from our world-class support team.

### Advanced Business Validations

- **Configurable rules:** Set up automatic validation of time entries and punches using predefined rules.
- **Build your own validations:** Create custom validation rules to meet business and gross pay requirements.

- **Zero errors:** Automatic validations of timesheet entries minimize errors for common and specific business requirements.

### Intelligent Approvals

- **Approval workflows:** Select from our predefined approvals library to manage your approval workflows for timesheets and time off.
- **Custom approvals:** Create and orchestrate intelligent business workflows that meet your business requirements and real-time data conditions.
- **Alerts and notifications:** Make timely submissions and approvals with alerts and notifications.

### Manage Employee Absences

- **Automate policies:** Create time off, vacation, and other policies to automate time off management across your global business and manage liabilities with ease.
- **Accruals and resets:** Set accrual rules, resets, carryovers, overdraw limits, and effective dates.
- **Employee self-service:** Enable employees to request vacation, sick, and other time off types and add specific comments.
- **Enhanced team calendar:** Get real-time information about employee time off schedules with an intuitive calendar view.

### Labor Law Compliance

- **Pay Rule Library:** Utilize our up-to-date, pre-configured pay rule library to consistently apply overtime, meal breaks, and other labor laws across geographies.
- **Compliant gross pay:** Automate pay calculations and always be confident that you are complying with relevant labor policies.
- **Union & other complex scenarios:** Easily create and adhere to company-specific labor law requirements that you need to comply with.

### In-sync With Your Enterprise

- **NetCore API integrations:** Turnkey and seamless cloud-based integrations make it easy to implement, deploy and upgrade.
- **Payroll, HR, ERP & more:** Fast and easy to integrate TreeRing Time with any HR, payroll, ERP or other systems that your business uses.
- **Flexible payroll exports:** Create templates and completely automate payroll exports to multiple vendors streamlining the entire process.

## Creating Workflow Roles

Login workflow roles in TreeRing Time overview.

Workflow definition for your organization is an important part of having a smooth operation. Different users have different roles to play in operating TreeRing Time. By creating a process unique to your company, you will be able to more effectively communicate the expectations to each system operator.

Every company will use TreeRing Time differently and have different standards for workflow processes. TreeRing Time features different “login roles” which are appropriate for the functions that each individual may be responsible for. Defining roles and responsibilities now can help later on in the implementation process. The following sections provides a list of general workflow functions listed by role.

### System Administrator

System Administrator tasks in TreeRing Time.

A system administrator can do the following:

- If using Enterprise on-site version, ensure all necessary data backups are completed on a cycle as determined by company policy.
- Customize or add forms and reports as required.
- Add or change security roles for system users.
- Set up navigation profiles for new roles.
- Change business rule profiles.
- Perform system maintenance on the database as required, such as re-indexing, bulk data changes, etc.



**Note:**The system administrator should have a good working knowledge of SQL. If custom work is to be done, the administrator should understand how to use Visual Interdev, Active Reports, and Active Server Pages.

## Administrator

The Administrator tasks in TreeRing Time.

An administrator can do the following:

- Handle all TreeRing Time system changes to be made through the application.
- Create an eTimeClock profile for each user that requires one.
- Reprocess Card IDs when required.
- Configure Top menus for each role.
- Set up security and data rights for supervisors and employees.

## Payroll Administrator

The Payroll Administrator tasks in TreeRing Time.

A payroll administrator can do the following:

- Set up security and data rights for supervisors and employees.
- Set up codes and rules.
- Set up new employees with appropriate business rules and assignments.
- Run all exception reports periodically and at the end of the period to insure there are no unresolved punches or transaction errors.
- Run all management reports as required on a predefined schedule. These may include Approaching Overtime, Department Summary Reports, Job Reports, Daily Report, etc. Set up security and data rights for supervisors and employees.



**Note:**In many cases, these reports may be run only by managers or supervisors.

- Run supervisor exception reports at the end of the pay period to ensure supervisor approval of employee time sheets.
- Run time sheet reports at the end of the pay period and run any additional management reports that may be required.
- Generate employee certification (if employee self-service is used).
- Check employee certification exception forms (if employee self-service is used).
- Export data to payroll at the end of the period.
- Close the payroll period.



- Close the Year-In many cases, these reports may end process at the end of the payroll year to move attendance and benefit data to their appropriate locations.



**Note:** Payroll Administrators may vary in their roles and responsibilities.

## Manager

The Manager tasks in TreeRing Time.

A manager can perform the following:

- Edit exceptions daily.
- Add data to the time sheet where required, including worked time and time away.
- Run daily reports including Who's In, Who's Not In, Approaching Overtime, Exceptions, Early/Late, Department Distributions, Job Distributions, Daily Time, Time Sheets, and Time Sheet Summaries.
- Approve time sheets at the end of the period.
- Make any necessary changes if employee certifications are used.

## Supervisor

The Supervisor tasks in TreeRing Time.

A supervisor can do the following:

- Edit exceptions daily.
- Add data to the time sheet where required, including worked time and time away.
- Run daily reports including Who's In, Who's Not In, Approaching Overtime, Exceptions, Early/Late, Department Distributions, Job Distributions, Daily Time, Time Sheets, and Time Sheet Summaries.
- Approve time sheets at the end of the period.
- Make any necessary changes if employee certifications are used.

## Timekeeper

The Timekeeper tasks in TreeRing Time.

A timekeeper can do the following:

- Edit exceptions daily.
- Add data to the time sheet where required, including worked time and time away.
- Run daily reports including Who's In, Who's Not In, Approaching Overtime, Exceptions, Early/Late, Department Distributions, Job Distributions, Daily Time, Time Sheets, and Time Sheet Summaries.
- Make any necessary changes if employee certifications are used.

## Employee

The Employee tasks in TreeRing Time.

The Employee can utilize our self-service tool called eTimeClock or one of our physical clocks.

An employee can do the following:

- Enter Start, End, Switch, Lunch Leave, Lunch Return, Break Leave, and Break Return punches on the data capture devices they have been assigned to.

- Enter various data they are prompted for such as department, job, or count.
- View his or her time cards, schedules, and other pertinent reports.
- Approve time sheets and comment on corrections.
- Request time off and view available balances.

## Chapter 2. Navigation Tips

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The design of TreeRing Time Enterprise is based on popular Web design principles. If you are already familiar with the Internet, getting around TreeRing Time will be intuitive.

### In This Chapter

[Navigating TreeRing Time](#) on page 19  
Navigation overview in TreeRing Time.


[The TreeRing Time Window](#) on page 19  
The TreeRing Time Enterprise window elements.

[Technical Requirements](#) on page 21  
The TreeRing Time technical requirements.

## Navigating TreeRing Time

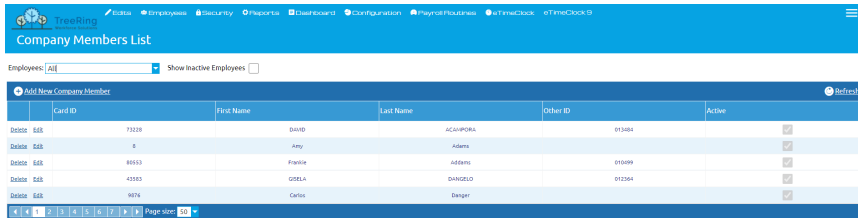
Navigation overview in TreeRing Time.

The design of TreeRing Time is based on popular Web design principles. If you are already familiar with the Internet, getting around TreeRing Time will be intuitive:

- A single mouse click on any link opens that selection.
- Press the **Tab** key to move from field to field in any form.
- **Dates:** If the date being entered is in the current year, the year will automatically be filled in when you press the **Tab** key or click **Save**. Use the **slash** on the keypad to separate day and month.
- Clicking this icon  launches a calendar window where you can scroll through months to find and enter a particular date using the mouse. Many forms will display a calendar icon. **For example:** Type 10/6 to indicate October 6 of the current year.
- **Times:** Times can be entered with a period or a colon between the hour and minute (8.00 or 8:00). Alternately, four digits times do not need a separator at all (0800 = 8:00). When entering PM time, use military format (17:00 = 5:00 pm) or append “**pm**” to the end of the value (5:00 pm = 17:00).

## The TreeRing Time Window

The TreeRing Time Enterprise window elements.



## MENU

The Menu Bar is the top level of the navigation.

### Edits tab

The **Edits** tab displays all the editing forms in a drop down menu in which you can change, delete, or add time data in various configurations.

### Employees tab

The **Employees** tab displays the employees and their profiles form a drop down menu. You can add, delete, or edit the employee /profile.

### Security tab

The **Security** tab displays options for setting up user accounts, roles, permissions, notifications, and passwords in a drop down menu.

### Configuration tab

The **Configuration** tab displays a listing of all code and business rule settings in a drop down menu, such as rules, policies, PTO plans, administration, and customization.

### Reports tab

The **Reports** tab displays, by category, a listing of all reports on the Left menu. You can choose the report, search for groups of information or text on the report, navigate the report page by page, print the report, or e-mail it.

### Payroll Routines tab

The **Payroll Routines** tab displays options in a drop down menu for functions like pay period end, importing and exporting data, and sign off of timesheets.

### Dashboard tab

The **Dashboard** tab displays information personalized to the role of the user.

### eTimeClock tab

The **eTimeClock** tab is a link to the time entry and request functions.

The **Menu** icon in the top rights allows you to:

- **Filters** link. The **Filters** form allows you to filter the information you see in TreeRing Time by a variety of factors including employee, department, and employment status.
- **Logout** button. Ends the current user session. Click **Logout** before you leave TreeRing Time, then close the browser and reopen the browser to go to another Web site.

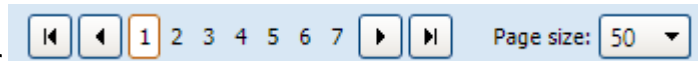
## Help

Click **Help** to access the TreeRing Time online help file.

## Data Window

The **Data Window** displays the form, process, or report you have selected.

## Record Selector



The **Record Selector** available at the left side of the Task Bar allows for easy navigation to specific records on forms. The left-most arrow icon presents the first record. The right-most arrow moves to the last record. The two inside arrows move the focus forward and back one record at a time. On a report, these arrows increment page numbers displayed on the screen.

### Editing Existing Data

To make a change to data that has already been entered, you have two options.

- Click the **Edit** link. A new dialog box appears allowing you to edit the details.
- Simply double-click with your mouse into the specific area and edit the data. Click **Save** in the first column to finish.

## Technical Requirements

The TreeRing Time technical requirements.

To use TreeRing Time version 8.0, you can use Internet Explorer 10.0 or higher, Chrome, Firefox, or Opera. Chrome is the recommend browser.



## Chapter 3. Setting Up TreeRing Time

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There are some basic steps to take when configuring information in TreeRing Time for the first time.

### In This Chapter

[TreeRing Time Order of Setup](#) on page 23

You have to take some basic steps when configuring information in TreeRing Time for the first time.

[Quick Start Instructions](#) on page 23

You can get started quickly by following these Quick Start Instructions.

### TreeRing Time Order of Setup

You have to take some basic steps when configuring information in TreeRing Time for the first time.

There are some basic steps to take when configuring information in TreeRing Time for the first time. Data entry for information such as pay policies, holiday policies, and employee names can be made easier if these steps are taken in a certain order. Follow these guidelines to make the initial setup of TreeRing Time run smoothly and quickly:

- **Configuration** tab: The Configuration tab contains a Company Setup section where labor tracking information is entered and a Rule Setup section where various business rules are configured. To configure all of the information in the Configuration tab, simply start at the top and work your way down. You will need information about your company policies and labor tracking levels in order to configure the forms.
- **Employee** tab: After all of the labor tracking levels are entered under the Company Setup section and all of the company's business rules have been defined under the Rule Settings section, you are ready to enter your employees. As you enter the employees, you can assign all of the business rules to them simultaneously. This saves time and trouble, and makes entering employees a one-step process.

### Quick Start Instructions

You can get started quickly by following these Quick Start Instructions.

If time does not permit following the preceding instructions, there are a number of configuration items that can be skipped and entered at a later date. To configure TreeRing Time and enable your employees to use the system as quickly as possible follow these setup guidelines:

- **Pay Period:** You must configure a Pay Period in TreeRing Time and apply this to all employees before they can use the system. From the **Configuration** tab, select **Company Setup** and then **Pay Periods** and configure at least one Pay Period. See [PayPeriods](#) for instructions on how to set up pay periods.

- **Pay Policy:** You must configure a Pay Policy in TreeRing Time and apply this to all employees before they can use the system. From the **Configuration** tab, select **Configure Pay Rules** and then **Pay Policies** and configure at least one Pay Policy. See [PayPolicies](#) for more information on how to do this.
- **Create an Employee Record:** Each employee in your company that will be using a TreeRing Time time clock must have a record in the Employee Rules form (accessed from the **Employees** tab by selecting **Company Members**). Only a minimum of information needs to be filled in, however. The fields: **Card ID**, **Last Name**, **OT Policy** (Pay Policy), and **Pay Period** are the four fields of data needed to create an employee record. The employees can start using the system and any additional needed TreeRing Time features can be configured and used at a later date. See employee [Employee Rules](#) for more information on setting up Employee Rules.



# Chapter 4. TimeClock Server

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TimeClock Server manages the connections with the time clocks.

## In This Chapter

[TimeClock Server Overview](#) on page 25

TimeClock Server organizes time clocks into groups and servers.

[TimeClock Server Navigation](#) on page 26

The navigations features of TimeClock Server.

[Adding a TimeClock Server](#) on page 27

You must add a TimeClock Server before configuring time clocks.

[Adding a Time Clock Group](#) on page 29

You must add a Time Clock Group before you can add Time Clocks.

[Adding a New Time Clock](#) on page 30

You can a new time clock.

[Accessing TimeClock Server Activity Logs](#) on page 33

You can access the TimeClock Server activity logs when troubleshooting.

## TimeClock Server Overview

TimeClock Server organizes time clocks into groups and servers.

TreeRing Time manages the time clocks using Time Clock Server. This is a System Administration function.

You use TimeClock Server to organize your time clocks into logical groups (for example, division, location, timezone) and to create the data connection between those time clocks and TreeRing Time.

You can access Time Clock Server though the TreeRing Time user interface.

It is important at this point to note the relationship between servers and time clocks. Time clocks are assigned to a particular server and that server is responsible for managing the scheduled events for that time clock. However, if a server is off line, it is possible for a time clock to contact a different server and have the punches routed to the correct database. If a clock does so no scheduled events will be executed, only the punches are collected and forwarded to the database.

Time Clock Server manages the connections with the time clocks and currently, there are two versions of Time Clock Server.

- Time Clock Server v8 mangers legacy clocks like US10C and HandPunch.

- Time Clock Server v9 manages our current offering including tablet kiosk applications.

To set up a server and time clock installation, follow these steps:

1. Add a Clock Server. See [Adding a TimeClock Server](#).
2. Add a Time Clock Group to manage the Time Clocks. See [Adding a TimeClock Group](#).
3. Add the Time Clocks. See [Adding a NewTime Clock](#).

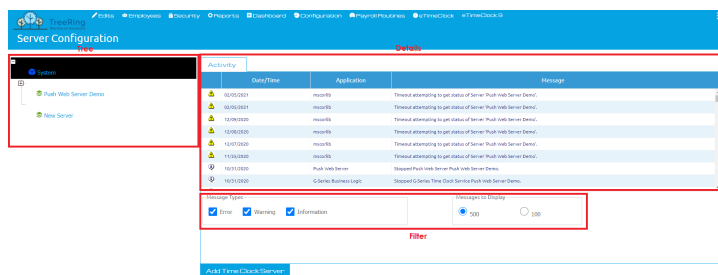
## TimeClock Server Navigation

The navigations features of TimeClock Server.

Time Clock Server is accessed by going to **Configuration > Time Clocks > Time Clock Server**.

The screen has two main components:

- A Time Clock Server **Tree** on the left.
- A **Details** section on the right.



The **Filter** portion of the Details section is only present when the System node in the **Tree** is selected. You can filter based on:

- Activity Message Types
- The number of Messages to display.

The **Tree** displays:

- **Servers:** These entries correspond to locations where the Time Clock Server windows service is installed. For each location, you will need to add a server node to the tree.
- **Groups:** The group nodes are beneath the servers and hold multiple time clocks. The group node is a logical grouping, like a folder, for helping to organize time clocks belonging to a server.
- **Time Clocks:** Time clocks are the leaf nodes of the time clock tree. These nodes correspond to the individual time clocks that a server will talk to.

In addition there is the root **System** node that exists on startup. This type of node cannot be added, there is only one and it exists when the application starts up. The purpose of the system node, in addition to anchoring the tree, is to present a view into the log table. The detail window on the right shows the most recent events from the log table. This will report information about all the windows service and UI installations that connect to this database.

In the **Tree**, server and time clock nodes have icons that indicate their status. In general, red means not running and green means running. However there are slightly different shades of meaning depending on whether you are talking about a server or a time clock. We will cover, in detail, the red/green icon in the subsections for servers and time clocks.

The **Details** section presents detailed information about each node in the tree. The view is necessarily different for different types of nodes. The detail window for the System node has already been described above. It is important to note that the detail window may have multiple tabs of information about the node. In the case of the System node, there is only one tab, labeled **Activity**.

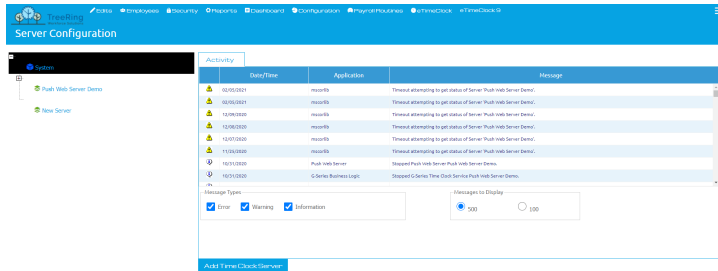
# Adding a TimeClock Server

You must add a TimeClock Server before configuring time clocks.

Follow these steps to add a time clock server.

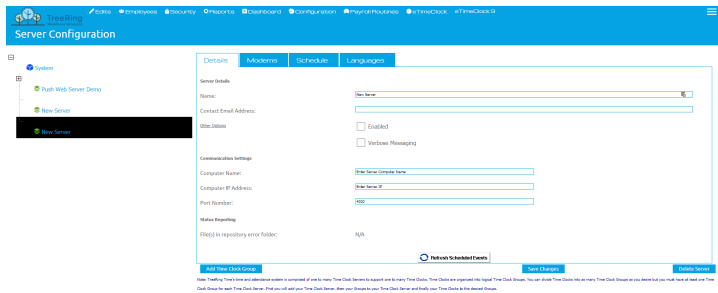
1. From the **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server**.

The Server Configuration form displays.



2. Click **Add Time Clock Server** in the bottom right.

A new node called New Server is added to the tree and the Details tab displays on the right.



3. In the **Name** field, enter a new name for the server.

4. Complete the remaining fields and check boxes.

- **Server Name:** A logical name that will be displayed at the top of the details page and in the tree. This name can be anything that you want, use a name that will help you identify this installation. Good candidates include the actual name of the server or the location where the server is located.
- **Enabled Check Box:** This check box indicates to the front end whether or not the server is considered active. Generally, this check box should be checked. If it isn't, then the front end will not try to communicate directly with the server. In the case of the server the red (down) or green (running) status is established by a direct connection to the running windows service. This connection is only attempted if the server is marked as active.

If a server is marked as active, the UI will attempt to contact the service when the UI is started.

If a connection is made, then the icon displayed is green indicating that the server is up and running.

If the service is not running or the network is down between the two, the connection attempt will timeout and the icon that will be displayed is red. If the timeout occurs, you can have delays of about 5 seconds for each server. If the UI opens slowly this is a warning sign that your servers are down.

To avoid delays for servers that are not yet active, uncheck the **Enabled** check box.

- **Capture Detail Messages Check Box:** This box tells the server whether or not it should print verbose messages. In general this box should be left unchecked because of the volume of messages that it generates. If you are attempting to diagnose a network problem or are instructed by TreeRing Time technical support then you would want to check this box. Once you are finished diagnosing the problem you should again uncheck the box.

- **Contact Email Address:** Put in the address or addresses (separated by semicolons) of individuals who should receive emails if any problems occur. These emails are only sent if you have activated the email messaging in the TimeClockServer.exe.config file.
- **Computer Name:** Logical name of the computer where Time Clock Server is running.
- **Computer IP Address:** IP Address of computer where Time Clock Server is running.
- **Port Number:** The TCP/IP port on which the Time Clock Server installation can be reached. The default value is 4002, but can be changed by editing the TimeClockServer.exe.config file. You should only enter a different value from 4002 if you have a very good reason for doing so.

The refresh scheduled events button allows you to send a direct message to a running server telling it to go to the database and update its scheduled events. You will need to visit this tab and click this button if you have made changes to schedules or added clocks and you do not want to restart the windows service. Restarting the service has an equivalent effect.

5. Click **Save Changes**.

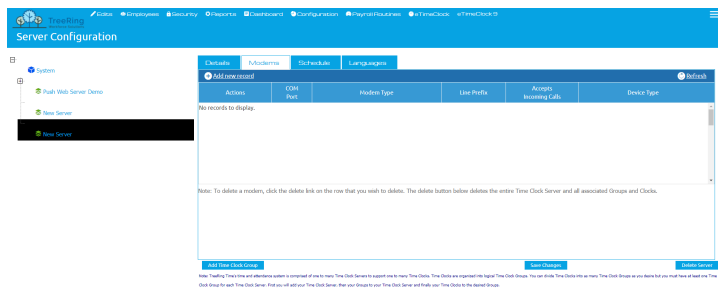
6. Click the **Modems** tab.

This tab contains information about modems associated with this server. Not all Time Clock Server installations have modems so you may or may not use this tab.

The server modems tab is where you set up modems associated with a particular installation of time clock server. If you are using TCP/IP communications to talk to your clocks, you can skip this section.

It is important to note that you must set up the modem in this tab if you want Time Clock Server to use it. Time Clock Server cannot detect modems on its own. You must tell it what modems are available, what com port they use, and what type they are by filling out this record correctly.

The Modem tab appears.



7. Select an existing modem or click **Add New Record** to add a new modem.

The Modem tab refreshes with a new row.

8. Complete the following fields.

- **Com Port:** The number of the com port where the modem resides on the server. Enter the NUMBER ONLY. If the modem resides on COM1, enter the numeral '1' in this field.
- **Modem Type:** Pick from the supported modem types. Currently, supported modems are US Robotics Sportster, US Robotics Courier, and Digi Acceleport RAS. Pick the one that corresponds to the com port you are entering.
- **Line Prefix:** Enter any prefix that this modem needs to put before the number. Often a '9' will need to be dialed to get an outside line.
- **Accepts Incoming Calls:** Check this box if the modem will accept incoming calls.
- **Device Type:** For incoming calls, select the type of clock that will be calling in to this modem. If **Accepts Incoming Calls** is not checked, then this field will be disabled and all values in this field will be ignored.

9. Click **Save Changes**.

10. Click the **Schedule** tab.

The schedule tab displays information about scheduled events associated with this server. You may view all events of subsets divided into time intervals.

The Schedule Tab displays.

11. Click the **Languages** tab if you want to configure multiple languages.

The Language Tab displays.

12. Complete the fields for the number of languages you wish to support and the corresponding greeting audio files (VAP files).
13. Click **Save**.

## Adding a Time Clock Group

You must add a Time Clock Group before you can add Time Clocks.

A group of time clock is a logical grouping for the purposes of display only. This group has no meaning beyond this web interface; it is a means of organizing groups of clocks. Use it as you see fit. It could be used to group clocks from different hardware vendors or to specify a geographic region.

Follow these steps to add a time clock group.

1. From the **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server**.

The Server Configuration form displays.

2. Click on the desired server node in the tree.

The Details tab appears.

3. Click **Add Time Clock Group**.

A new node entitled New Group appears in the directory tree. You may need to open the node to see it.

4. Click on the **New Group** folder node.

The Group Maintenance tab displays.

5. In the **Group Name** field, enter a group name.
6. Click **Save Change**.

7. Add time clocks by:
  - Selecting a clock in the **Available Clocks** column and clicking the **Move Clocks** button.
  - Enter a **Device ID** into that field and click **Locate**. The Item will appear in the Available clocks. Select it and click **Move Clocks**.
  - Click **Add Time Clock**. See [Adding a New Time Clock](#).
8. Click **Save Change**.

## Adding a New Time Clock

You can a new time clock.

Because these different manufacturers support different feature sets, the setup for these devices are necessarily different. This topic will cover the generic set up for all clocks and some information with regard to setting up specific types of clocks. For more information on each clock see the documents specific to that type of clock.

Follow these steps to add a time clock.

1. From the **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server**.  
The Server Configuration form displays.
2. Click on the desired server node in the tree.  
The Group Maintenance tab displays.
3. Click **Add Time Clock**.  
A new node entitled New Time Clock appears in the directory tree. You may need to open the node to see it.
4. Click on the **New Time Clock** node.  
The Details tab displays on the right. There will also always be a tab for Schedule, Tracking level, and Log. There may be a tab for ATS and RSI if you are using those clocks.
5. Configure the details.
  - **Name:** The logical name of this clock. This is the name that will appear in the tree and at the top of the details tab. This is a logical name only and should be a value that helps you identify the clock.
  - **Active:** Check box to indicate whether a clock is active or not. Unchecking this box will cause a clock's scheduled events to not be loaded to the server. The clock can still communicate with the server if it is inactive but no scheduled events will occur.
  - **Model:** The type of clock you will be talking to. The values correspond the types of clocks listed at the beginning of this section.
  - **Comm Method:** The communication method that the server will use to converse with the clock. Legitimate values are: TCP/IP and Modem.
  - **Device ID:** The internal identifier that time clock server will use to identify this device. This is a very important field. In the case of some clock types it is critical that this value be correct or communication with the clock will not function properly. Because different hardware manufacturers provide different protocols and because different communication methods function differently the appropriate value for this field varies.
  - **Legacy #:** Enter this value if you are upgrading from TreeRing Time's Communications 6.5 product and wish to carry over the numbers and descriptions that were used in the previous application.
  - **Time Zone:** Not currently used. This field will be used to indicate the time zone in which the clock is located.
  - **Time Zone Offset:** The number of minutes difference between the time zone of the server and the time zone of the clock. This value may be negative if the clock is in a time zone west of the server. For instance, if your server resides in Denver and your clock is in San Francisco the clock should be set 60 minutes earlier than the server. The offset in this scenario would be -60.
  - **Polling address:** Relevant to modem clocks and to all RSI clocks. This is the serial polling address of the clock. This is very often 1, but can be a different value. For RSI Ethernet clocks this value should always be 0. If you set this value

incorrectly you will not be able to communicate with the clock. If you are having difficulty communicating with a modem or RSI clock, double check this value.

- **Phone Number:** The phone number of a modem clock.
- **Display Banner:** The banner displayed on an ATS clock when the clock is not in use. This value is only valid for ATS clocks.
- **Star:** Check box to enable start punches on this clock. This value is only valid for ATS clocks.
- **End:** Check box to enable end punches on this clock. This value is only valid for ATS clocks.
- **Switch:** Check box to enable switch punches on this clock. This value is only valid for ATS clocks.
- **Lunch:** Check box to enable lunch punches on this clock. This value is only valid for ATS clocks.
- **Break:** Check box to enable break punches on this clock. This value is only valid for ATS clocks.
- **Schedule:** Not currently used.
- **Daylight Savings:** Check box to enable time auto-change for daylight savings time. This value is only valid for ATS-4000 clocks and some ATS-300 clocks.
- **PIN:** Check box to enable PIN number. Checking this box requires PIN number to interact with that clock. This value is only valid for web service time clocks.
- **Level Hierarchy:** Check box to enable level hierarchy. Checking this box will cause all levels entered at a clock to be validated using level hierarchy. This value is only valid for web service time clocks.
- **Last notification time:** The value in this field indicates the last date and time at which a successful communication took place.

6. Click **Save Change**.

7. Click the **Schedule** tab.

The Schedule tab displays.

Actions	Event	Active	Immediate	Scheduled Date/Time	Recurring	Failed Attempts	Max Attempts	Regular Interval (M)	Monthly Interval	Retry Interval (S)	Active Window (M)
Edit Delete	Send clock setup	<input type="checkbox"/>	<input type="checkbox"/>	11/12/19 9:00 PM	<input type="checkbox"/>	0	5	30	<input type="checkbox"/>	300	120
Edit Delete	Send validation info	<input type="checkbox"/>	<input type="checkbox"/>	11/12/19 9:00 PM	<input type="checkbox"/>	0	5	30	<input type="checkbox"/>	300	120

8. Configure a schedule, by clicking **Add New Record**.

For an existing event, the **Actions** column will show **Edit** or **Delete**. To edit an event, including changing its type, click the **Edit** link. To delete an event, click the **Delete** link.

The schedule works basically the same way for all time clocks. However, because some clocks drive the communications while others wait to be contacted by the host there are some differences.

When a hardware vendor's protocol specifies that it is the clock's responsibility to contact the host then the host must wait for the clock. When this happens the schedule is necessarily tied to the clock contacting the host. If an event is scheduled for 10 AM, but the clock does not contact the host until 10:05 AM then the event will happen at 10:05, if the event is configured to work that way. It is possible to disallow an event after a certain period of time, as we shall see.

If it is the host's responsibility to contact the clock then the event will occur at the scheduled time with some delay for contacting the clock, the amount is small in the case of TCP/IP clocks, but in the case of a modem can amount to 15 – 30 seconds. If multiple events are scheduled to occur at once they will be taken care in a single communication session.

A new entry appears in the grid that you can configure and change values for the schedule.

Details   Schedule   Tracking Level   ZK Tech   Activity												
+ Add new record												Refresh
Actions	Event	Active	Immediate	Scheduled Date/Time	Recurring	Failed Attempts	Max Attempts	Regular Interval (M)	Monthly Interval	Retry Interval (S)	Active Window (M)	
<a href="#">Insert</a> <a href="#">Cancel</a>	Send validation info	<input type="checkbox"/>	<input type="checkbox"/>	2/9/2021 9:25 PM	<input type="checkbox"/>	0	5	30	<input type="checkbox"/>	300	120	
<a href="#">Edit</a> <a href="#">Delete</a>	Send clock setup	<input type="checkbox"/>	<input type="checkbox"/>	11/12/19 01:20 PM	<input type="checkbox"/>	0	5	30	<input type="checkbox"/>	300	120	
<a href="#">Edit</a> <a href="#">Delete</a>	Send validation info	<input type="checkbox"/>	<input type="checkbox"/>	11/12/19 04:06 PM	<input type="checkbox"/>	0	5	30	<input type="checkbox"/>	300	120	

Note: To delete a scheduled event, click the delete link on the row that you wish to delete. The delete button below deletes the entire Time Clock.

[Save Changes](#) [Copy Clock](#) [Delete Clock](#)

- In the new row in the Schedule, enter values in the fields. You will need to use the scroll bar at the bottom to see that last five columns.

An event is processed if it is set to "Active". To run an event immediately, set it to "Active" and "Immediate." To set up a periodic event, set it to "Active" and "Recurring." "Recurring" will require setup of the "Regular Interval (M)" or selection of "Monthly Interval". To run a "Recurring" event immediately, check "Immediate" and update the record. After the event is triggered and run, it will resume its regular schedule. If the time to the next scheduled run is less than the "Regular Interval", the event will advanced by the "Regular Interval."

Events are stored in memory in Time Clock Server instances to reduce loading on the database. Events only load for clocks that are set to active. Changes to a clock's active status, or to event's details, are not seen by the program until the **Refresh Scheduled Events** button is clicked on the appropriate server node on the Time Clock Server page. This button should be clicked once only per set of changes to clocks and/or events, to avoid the potential of the same event running multiple times simultaneously.

- Event:** This is the type of event that will occur. This is chosen from a drop down. The events available in that drop down differ for different types of clocks.
- Active:** Check box specifying whether or not an event is active. Checking this box means that Time Clock Server will schedule the event to happen, leaving it unchecked means that Time Clock Server will ignore it.
- Immediate:** Check box specifying whether or not the event should occur immediately. If you leave this box unchecked then the event will be scheduled to occur in the future if the Reoccurring check box is selected. If you check the Immediate check box, then the server will automatically uncheck it for you when the event completes.

Immediate can really mean two different things depending on the type of clock you are talking to. In the case of a clock that initiates the conversation (Omni, A4000, etc.) this event will occur the next time that the clock contacts the server.

In the case where the server must contact the clock (RSI F-Series) then this event will happen immediately. It does this by opening a new communication session with the clock.

- Schedule:** The next date and time the event is scheduled to occur.
- Reoccurring:** Check box whether you want this event to be re-scheduled to occur again in the future. The reoccurring check box is the counterpart of the immediate check box. You must check one or the other or the event will not fire at all.

You may check both if you want the event to occur now and on a recurring basis in the future.

- Failed Attempts:** A count of the number of consecutive times the event has failed. This value should modified. If the event succeeds then this value is set back to zero. If the event fails the maximum number of times then an error



message is published, an email is sent if email messaging is enabled, the 'Failed' value is set back to zero, and the event is scheduled to occur at its next regularly scheduled time.

- **Max Attempts:** The maximum number of times that an event should be allowed to fail before an alert is sent and the event is rescheduled for its next normal time.
- **Regular Interval:** The number of minutes between successful events. Use this field to indicate the normal period for the re-occurrence of the event, if everything goes as planned. (60 for hourly, 1440 for daily, 10080 for weekly, etc.)
- **Monthly Interval:** Check box to indicate whether you want this event to occur on a monthly schedule. Since a month is not a fixed number of minutes, the 'Regular' interval can't be used to schedule monthly events. Check this box and set 'Regular' to zero to schedule an event that occurs once a month.
- **Retry Interval (S):** The number of seconds to wait before retrying an event if there is a failure. Generally, it is best to keep this number above 120. TreeRing Time recommends leaving it at 300 unless of unusual circumstances. For a modem, a value like 300 is useful. Because of the length of modem initialization and other resource constraint a low 'Retry' value is not recommended for modem clocks.
- **Active Window (M):** The number of minutes from the 'Schedule' time within which the event is allowed to occur. This should be left at 120 except in unusual circumstances.

Consider the following example by way of explanation. An event is scheduled for 2 AM and the window time is set to 120 minutes. Time Clock Server is off line at 2AM because the hardware server is down. The event will still occur if the server comes back on line before 4 AM. But if the server comes back on line after 4 AM then the event will not occur until the next regularly scheduled time. If it were a daily event, the event would not occur again until the following day.

For practical purposes the 'Window' value becomes meaningless for events that are scheduled very frequently. If, for instance, you have a TCP/IP RSI clock that is scheduled to poll every 5 minutes then setting a 'Window' value is meaningless. The 5 minute 'Regular' value will happen so often that the 'Window' value is meaningless and will likely be overridden by the 'Regular' interval anyway.

The 'Window' value is useful for events that are scheduled to occur at a specific time and which you would not want to happen after a specific period of time. RSI Template Synchronization is a good example. Running a synchronize event may take the clock off line for several minutes which could be bad if it comes at a high traffic time.

Consider setting an appropriate 'Window' value for daily and modem events which may have a larger impact on the device the event is communicating with.

10. Click **Save Changes**.
11. Click the **Tracking Level** tab.
12. Edit a level by clicking the **Edit** link and change the **Prompt Text** or **Default Value** for the time code. Click **Enabled** if you want this value to appear on the time clock.
13. Repeat for each level desired.
14. Click **Save Changes**.
15. Click any other time clock specific tabs and configure them according to that time clocks manual.
16. Click **Save Change**.

## Accessing TimeClock Server Activity Logs

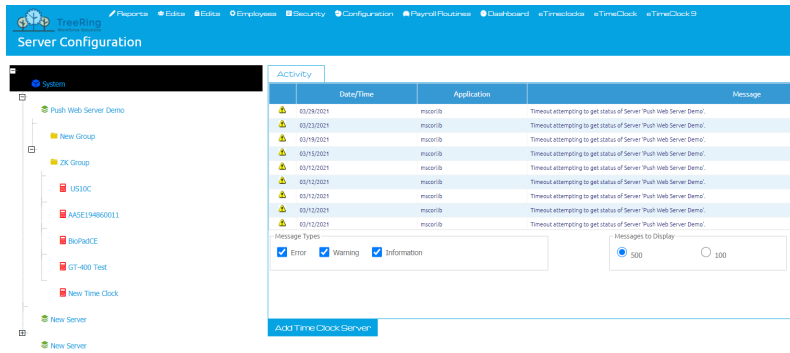
You can access the TimeClock Server activity logs when troubleshooting.

Follow these steps to access the TimeClock Server 9 time clock activity logs.

1. In TreeRing Time top level menu, go to **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server**.  
A list of devices displays.
2. Click the desired device.  
The Details tab displays.

3. Click the **Activity** tab.

The Activity tab displays.



# Chapter 5. TimeClock Server 9

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TimeClock Server 9 manages the connections for mobile devices with the time clocks.

## In This Chapter

[TimeClock Server 9 Overview](#) on page 35

TimeClock Server 9 organizes time clocks into groups and servers for mobile devices.

[Adding Your Device to TimeClock Server 9](#) on page 36

You can add your mobile device to TimeClock Server9.

[Adding a TimeClock Server 9 Time Clock Schedule](#) on page 38

Add a schedule for the TimeClock Server 9 Time Clock.

[View Levels for a TimeClock Server 9 Time Clock Schedule](#) on page 40

View levels for the TimeClock Server 9 Time Clock.

[Accessing TimeClock Server 9 Activity Logs](#) on page 40

You can access the TimeClock Server 9 activity logs when troubleshooting.

## TimeClock Server 9 Overview

TimeClock Server 9 organizes time clocks into groups and servers for mobile devices.

TreeRing Time manages the time clocks for mobile devices using TimeClock Server 9. This is a System Administration function.

You use TimeClock Server 9 to organize your time clocks into logical groups for mobile devices (for example, division, location, timezone) and to create the data connection between those time clocks and TreeRing Time.

You can access TimeClock Server 9 through the TreeRing Time user interface.

It is important at this point to note the relationship between servers and time clocks. Time clocks are assigned to a particular server and that server is responsible for managing the scheduled events for that time clock. However, if a server is off line, it is possible for a time clock to contact a different server and have the punches routed to the correct database. If a clock does so no scheduled events will be executed, only the punches are collected and forwarded to the database.

TimeClock Server manages the connections with the time clocks and currently, there are two versions of Time Clock Server.

- TimeClock Server 8 manages legacy clocks like US10C and HandPunch.

- TimeClock Server 9 manages our current offering including tablet kiosk applications.

## Adding Your Device to TimeClock Server 9

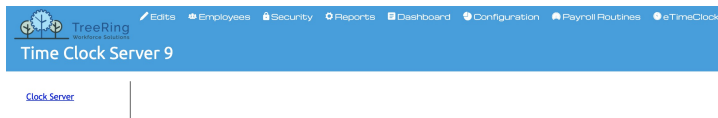
You can add your mobile device to TimeClock Server9.

Because these different manufacturers support different feature sets, the setup for these devices are necessarily different. This topic will cover the generic set up for all clocks and some information with regard to setting up specific types of clocks. For more information on each clock see the documents specific to that type of clock.

To add a device:

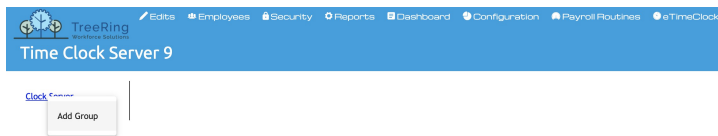
1. In TreeRing Time top level menu, go to **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server 9**.

A list of devices displays.



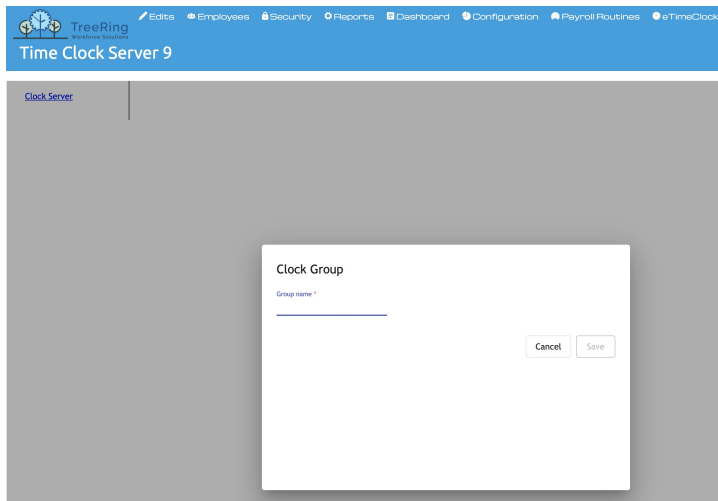
2. Right click on **Clock Server**.

The Add Group option displays.

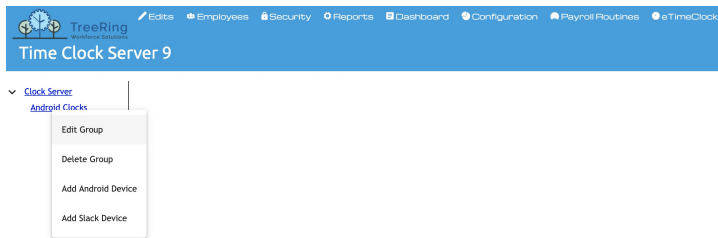


3. Click **Add Group**.

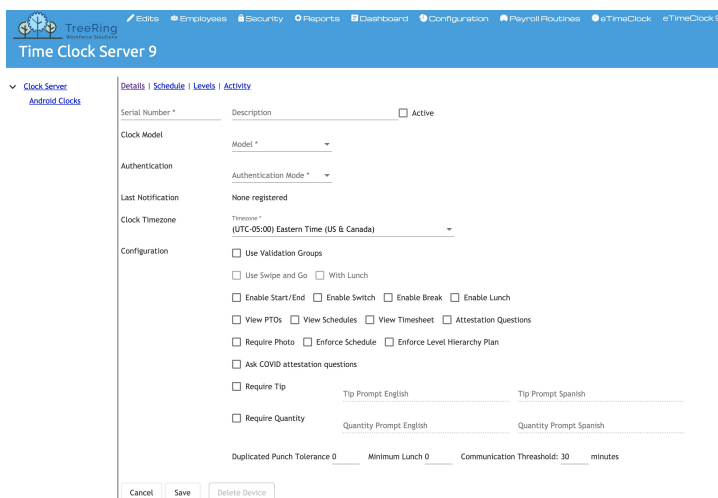
The Clock Group dialog displays.



4. Enter the Group Name of the clock group, and click **Save**.
5. Right click on the Clock Group.  
An options dialog displays.

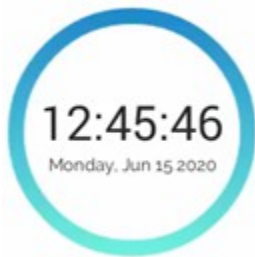


6. For the appropriate clock type, select **Add... Device**.  
The Device Details tab displays.



7. Enter the following information:

- **Serial Number:** Enter the serial number that is shown on clock / tablet setup screen. This is the name that will appear in the tree and at the top of the details tab. This is a logical name only and should be a value that helps you identify the clock.
- **Description:** Enter the appropriate description to identify this clock. For example, the description can be the location of clock.
- **Active:** Check box to indicate whether a clock is active or not. Unchecking this box will prevent the clock from communicating with server.
- **Model:** Select appropriate clock modem from drop down list.
- **Authentication Mode:** Select appropriate clock authentication mode from drop list. The authentication mode varies depends on clock model.
- **Clock Time Zone:** Select the time zone in which the clock is located.
- **Validation Groups:** Check if used.
- **Use Swipe and Go:** Check box to enable Swipe and Go mode. The Swipe and Go function is available for In and Out only or with Lunch as an option. The Ring color around clock will change to blue green once clock is connected to server.



- 
- **Enable Start / End:** Check box to enable start and end punches on this clock.
- **Enable Break:** Check box to enable break punches on this clock.
- **Enable Lunch:** Check box to enable lunch punches on this clock.
- **View PTOs:** Check box to enable the ability to view PTOs.
- **View Schedules:** Check box to enable the ability to view schedules.
- **View Timesheet:** Check box to enable the ability to view timesheet
- **Attestation Questions:** Check box to enable break and safely attestation questions.
- **Require Photo:** Check box to require clock to take a photo of employee at start and end punch.
- **Enforce Schedule:** Check box to enforce schedule.
- **Enforce Level Hierarchy Plan:** Check box to enable level hierarchy. Checking this box will cause all levels entered at a clock to be validated using level hierarchy.
- **Ask COVID attestation Questions:** Check box to enable health attestation questions.
- **Require Tip:** Check box to require employees to enter tip amount.
- **Require Quantity:** Check box to require employees to enter quantity.
- **Duplicate Punch Tolerance:** Enter minimum time before clock should accept a punch from same employee.
- **Minimum Lunch:** Enter minimum lunch requirement.
- **Communication Threshold:** Enter minimum time system should wait for pin from clock. The default setting is 30 minutes.

8. Click **Save**.

## Adding a TimeClock Server 9 Time Clock Schedule

Add a schedule for the TimeClock Server 9 Time Clock.

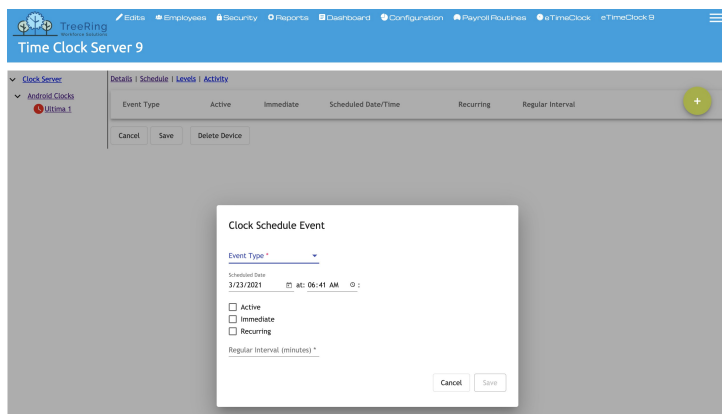
The next step in making your time clock ready is to create its schedule. The schedule works basically the same way for all time clocks.

TimeClock Server 9 utilizes the following events to communicate with the Ultima time clock:

Event Name	Purpose	Frequency
Send clock setup	Set up the device per the TCS configuration on details page	As required
Send level codes	Sends level codes details to clock. Check required levels on levels page.	As required and/or as a recurring event
Synchronize templates (FP only)	Send employees and collected templates to device (non-employee templates per the company rules as with other devices).	As required and/or as a recurring event

To add a schedule:

- In TreeRing Time top level menu, go to **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server 9**. A list of devices displays.
- Click the **Green Plus** button at the top of the screen. The Clock Schedule Event dialog displays.



3. Enter the following options:

- Event:** This is the type of event that will occur. This is chosen from a drop-down menu.



- Note:** For 'BioSmart' you need to setup 'Sync\_Clock\_Setup' and 'Sync\_Template' events.
- Active:** Check box specifying whether an event is active. Checking this box means that the Time Clock Server will schedule the event to happen; leaving it unchecked means that Time Clock Server will ignore it.
- Immediate:** Check box specifying whether the event should occur immediately. If you leave this box unchecked, then the event will be scheduled to occur in the future if the Reoccurring check box is selected. If you check the Immediate check box, then the server will automatically uncheck it for you when the event completes.
- Schedule:** The next date and time the event is scheduled to occur.
- Reoccurring:** Check box whether you want this event to be re-scheduled to occur again in the future. The Reoccurring check box is the counterpart of the Immediate check box. You must check one or the other or the event will not fire at all. You may check both if you want the event to occur now and on a recurring basis in the future.

- **Regular Interval** (minutes): The number of minutes between successful events. Use this field to indicate the normal period for the reoccurrence of the event, if everything goes as planned. (60 for hourly, 1440 for daily, 10080 for weekly, etc.)

4. Click **Save**.

## View Levels for a TimeClock Server 9 Time Clock Schedule

View levels for the TimeClock Server 9 Time Clock.

To view the TimeClock Server 9 levels:

1. In TreeRing Time top level menu, go to **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server 9**.  
A list of devices displays.
2. Click the desired device.  
The Details tab displays.
3. Click the **Levels** tab.

The Levels tab displays.

Level	Description	Required	Prompt English	Prompt Spanish	Default Level Code
1	Divisions	<input checked="" type="checkbox"/>			
2	Business Unit	<input checked="" type="checkbox"/>			
3	Jobs	<input checked="" type="checkbox"/>			
4	Projects	<input checked="" type="checkbox"/>			
5	Location	<input checked="" type="checkbox"/>			

## Accessing TimeClock Server 9 Activity Logs

You can access the TimeClock Server 9 activity logs when troubleshooting.

Follow these steps to access the TimeClock Server 9 time clock activity logs.

1. In TreeRing Time top level menu, go to **Configuration** tab, select **Time Clocks**, and then select **Time Clock Server 9**.  
A list of devices displays.
2. Click the desired device.  
The Details tab displays.
3. Click the **Activity** tab.

The Activity tab displays.

Date/Time	Message
03/23/2021 06:41	Clock Device Created



# Chapter 6. Dashboards

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You can use your dashboard to give you a quick summary of all the timesheet activity by your employees.

## In This Chapter

[Dashboard Overview](#) on page 41

You can use the dashboard to get a summary view of the most important information you want to track.

[Setting Up Your Dashboard](#) on page 42

Before you can see data on your dashboard, you must set it up

[Viewing Your Dashboard](#) on page 43

You can view your dashboard for important daily attendance management.

## Dashboard Overview

You can use the dashboard to get a summary view of the most important information you want to track.

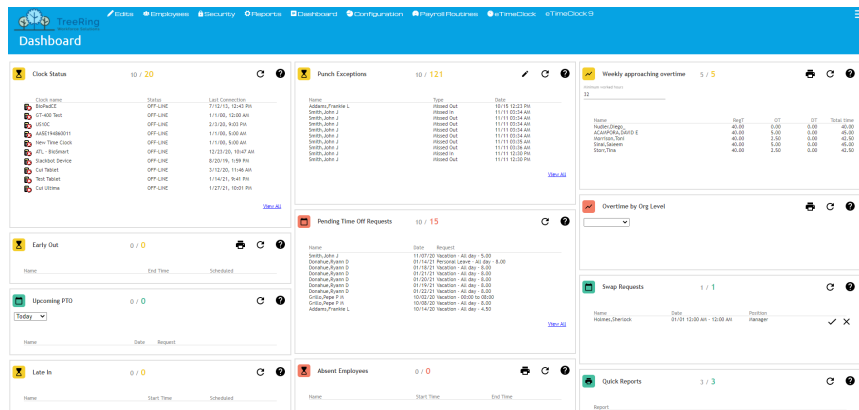
The Dashboard form displays information important to your daily schedule and attendance management. This way you only need focus on the exceptions to your schedule plan. You can quickly see if all scheduled employees are present as schedule, late, early, or forgot to punch in or are missing. You can even see who has a PTO scheduled.

These are the specific piece of information you can see on your dashboard

- **Clock Status:** The status of the punch clock.
- **Missed Punches:** Employees that have missed a punch. Click **View All** to see all the missed punches.
- **Approaching Overtime:** Employees that are approaching overtime.
- **Early Out:** Employees that left early.
- **Approval Completion:** Employees that have punches approved or unapproved. Click the **Approved** or **Unapproved** in the legend to change the display
- **Pending Time Off Requests:** Employees that have submitted time off requests that are not yet approved.
- **Overtime by Department:** Employees in the department with overtime. Click Unassigned in the legend to change the display.
- **Upcoming PTO:** Employees that have PTO approved in the time period drop down. Time periods include Today, within 1 Week, and within 1 Month.

- **Absent Employees:** Employees that did not punch in even though they were scheduled to work.

This is an example of a My Dashboard form.



## Setting Up Your Dashboard

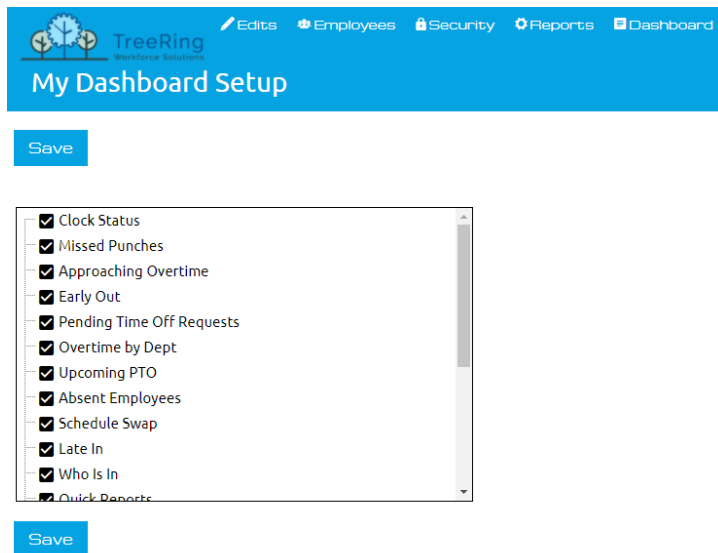
Before you can see data on your dashboard, you must set it up

Before you can view your dashboard, you must set it up for the widgets that you want to see. Widgets are section of a web page that are formatted in a particular way and self contained for showing data.

Follow the instructions below to set up your dashboard.

1. From the **Dashboard** tab, select **Dashboard Setup**.

The My Dashboard Setup form displays.



2. Select all the dashboard items that you wish to appear.

- **Early for work:** Employees that punched in before their scheduled start.
- **Late In:** Employees that punched in after their scheduled start.
- **Absent Employees:** Employees that did not punch in even scheduled to work.
- **Notifications widget:** A list of all recent notification. After selecting, you can click on the notifications widget to select which notifications you want to show on the dashboard.
- **Scheduled PTO:** A list of employees with approved PTO.
- **Who is in:** A list of employees that are punched in.

- **Early Out:** A list of employs that punched out before the end of their scheduled end.
  - **Weekly Approaching Overtime:** A list of employees that are now earning Overtime rates. You can enter a threshold number for the Minimum worked hours.
  - **Upcoming Employee Anniversaries:** A list of employee work anniversaries for a specified time period.
  - **Quick Reports:** Shortcuts to reports as configured in My Dashboard Setup.
3. Click on any of the six elements allows you to select the background color. For you most important widgets, pick a color that draw your attention to it.
  4. Click the **Save** button.  
A confirmation message appears.
  5. Click **OK**.  
You return to the Dashboard Setup form.


## Viewing Your Dashboard

You can view your dashboard for important daily attendance management.

Follow the instructions below to view your dashboard.

1. From the **Dashboard** tab, select **My Dashboard**.

The My Dashboard form displays.

2. Click the toggle layout icon  in the top right corner of the screen to switch the arrangement of the widgets from wide screen to narrow screen.



# Chapter 7. Code Settings

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Using code settings enables you to more accurately record the usage of time by allowing you to assign different levels of detail to the time an employee works.

## In This Chapter

[What Are Code Settings?](#) on page 45

TreeRing Time has the ability to track eight levels of labor information.

[Configuring Code Settings](#) on page 46

You can use codes to define various levels of detail.

[Working with Supervisors in TreeRing Time](#) on page 48

You can assign supervisors to employees to automate some features.

[Working with Managers in TreeRing Time](#) on page 50

You can assign managers to supervisors and employees to automate some features.

## What Are Code Settings?

TreeRing Time has the ability to track eight levels of labor information.

TreeRing Time has the ability to track eight levels of labor information in addition to the employee ID number. These levels are Levels 1 through 8. Generally, these eight levels go from most general to most detailed. You can call a level by any name you wish but it is common to have a structure something like: Division, Department, and Job.

TreeRing Time offers two ways to gather labor information:

- **Assign a “Home” (default) value** - A Home assignment is made in the Employee Details form by choosing a value in the Level 1 to 8 drop down menus. A Home assignment automatically credits all time worked for this employee to the assigned values. This is convenient when an employee always works in one department so that prompting for department at the clock becomes unnecessary.
- **Track a “Work” value at the time clock** - This method of gathering labor information tracks Work data at the data collection device. The employee can enter the specific department that they are currently working in when they punch in, and can subsequently switch departments at the time clock throughout the course of a work shift. The time clock collects the detailed and accurate labor information and passes it to the TreeRing Time database for processing and reporting.

Home and Work labor information can be configured together. A Work value for any of the labor tracking levels overrides any Home assignment in the Employee Rules form. For example, an employee that usually works on a job named Painting does not enter a job value at the time clock when they punch in since that job is assigned to them in the Employee Details form. However,

twice a week, this employee will work on the job named Sanding, so when the employee works on this different job, they will enter it at the time clock, thereby overriding their Home job assignment.



**Note:**TreeRing Time includes both home and work labor distribution reports.

When configuring the code values for the labor tracking levels, keep in mind that it is the limitations of your data collection device that will determine whether those values are appropriate or not. *Example:* eTimeClock has the ability to track alphanumeric job codes, while a HandPunch 3000 does not. The format of the code values entered will have to match the technical specifications of the data collection device being used.



**Note:**For technical specifications, please consult the user manual for the data collection device in use.

## Configuring Code Settings

You can use codes to define various levels of detail.

Using code settings enables you to more accurately record the usage of time by allowing you to assign different levels of detail to the time an employee works. For example, you can record time broadly by division or in fine detail by the actual task performed in a set area during a specific job in a specific department in a specified division of the company. There are eight codes levels available for use in TreeRing Time. They can be labeled using your companies hierarchy.

- Level 1 Codes
- Level 2 Codes
- Level 3 Codes
- Level 4 Codes
- Level 5 Codes
- Level 6 Codes
- Level 7 Codes
- Level 8 Codes

## Importing Code Settings

You can import code settings.

TreeRing Time allows for the import of Code Setting information from an external file. Levels 1 to 8 can all be imported. For more information and instructions see [DataImportFunctions](#).

## Adding a New Level Code

You can add a new level code.

Follow the instructions below to add a new level code.

1. From the **Configuration** tab, select **Company Setup** and then **Organization Level**.  
The Org Level form displays.
2. Click the sideways black triangle on the far left beside the level of the organization you wish to add the code to (Level 1-8).  
We have included a an example company setup
  - Level 1 - Division: For the most general of tracking.
  - Level 2 - Department: Provide an additional level of detail below division codes.

- **Level 3 - Job:** Accurate job tracking helps meet profitability goals. Ensure that labor costs are not exceeding budget as a job moves through your organization. Jobs can be work orders, customers, projects, tasks, or other type of labor information that needs to be tracked. Job codes can be entered when the employee clocks in and can be up to 14 digits.



- **Note:** Ensure the data device you choose recognizes the necessary job codes. The data collection device dictates the maximum number and character format of the job code.
- **Level 4:** Provides an additional user-defined tracking level for labor information. Level 4 would be used for more specific labor tracking information than the Job level.
- **Level 5:** Reporting provides an additional user-defined tracking level for labor information. Typically, Level 5 data is more detailed than Level 4 data. Use Level 5 tracking for work orders, customers, projects, tasks, or other type of job information.
- **Level 6**
- **Level 7**
- **Level 8**

The Add New Level Code form displays.

3. Click **Add New Org Level** on the task bar.  
A new line is added to the top of the grid.
4. Click in the **Level Code** column and enter alphanumeric code of up to 6 characters.



**Note:** If you are settings up division codes using alphanumeric characters, ensure the data device you choose recognizes the alpha characters.

5. Click in the **Level Code Description** column and add a description for the code.
6. Click in the **Extra Info Column** to add optional information.
7. Click **Save** to save your new code.

The Code has now been added to the level you chose.

## Deleting a Level Code

You can delete a Level code.

Follow the instructions below to delete a level code.



**WARNING:** If you delete a level code, ensure you assign a new code to all employees previously assigned to the deleted code. This is important to maintain accurate reporting.

1. From the **Configuration** tab, select **Company Setup** and then **Organization Level**.  
The Org Level form displays.
2. Click the sideways black triangle on the far left beside the level of the organization you wish to add the code to (Level 1-8).  
The Add New Level Code form displays.
3. Click in the row of the code you want to delete.
4. Click **Delete**.  
A dialog box displays asking you to confirm the deletion. If any employee is assigned to this level as a Home level, you will be asked to reassign them.
5. Click **Yes** to confirm the deletion.  
The code is removed from the list of codes.
6. Click **Save** to save your changes.

## Editing a Level Code

You can edit a level code.

Follow the instructions below to edit an existing level code.

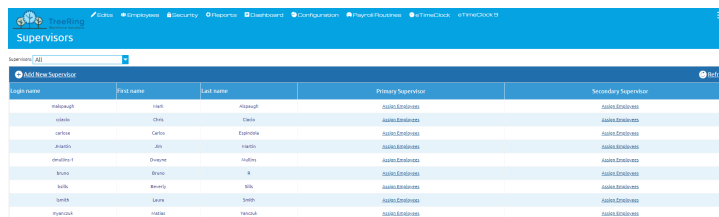
1. From the **Configuration** tab, select **Company Setup** and then **Organization Level**.  
The Org Level form displays.
2. Click the sideways black triangle on the far left beside the level of the organization you wish to add the code to (Level 1-8).  
The Add New Level Code form displays.
3. Click the **Edit** link in the row for the desired code.
4. Click in the field(s) you want to make changes to and enter your changes.
5. Click **Save** to save your changes.

## Working with Supervisors in TreeRing Time

You can assign supervisors to employees to automate some features.

Supervisors can be entered into the TreeRing Time application and then assigned to individual employees. In organizations where the supervisor is responsible for correcting employee punches or running labor reports, this automates the login security setup function for that supervisor. In addition, the Supervisor Signoff feature, which allows supervisors to visit the signoff form at the end of each pay period to sign off on their employees and notify the payroll administrator for payroll purposes, depends on this supervisor setup and assignment.

This is an example of the Supervisor form.



Login Name	First Name	Last Name	Primary Supervisor	Secondary Supervisor
MS10000	Mark	MS10000	ADMINISTRATOR	ADMINISTRATOR
MS10001	Chris	MS10001	ADMINISTRATOR	ADMINISTRATOR
MS10002	Carole	MS10002	ADMINISTRATOR	ADMINISTRATOR
MS10003	John	MS10003	ADMINISTRATOR	ADMINISTRATOR
MS10004	Thomas	MS10004	ADMINISTRATOR	ADMINISTRATOR
MS10005	John	MS10005	ADMINISTRATOR	ADMINISTRATOR
MS10006	Barry	MS10006	ADMINISTRATOR	ADMINISTRATOR
MS10007	Luca	MS10007	ADMINISTRATOR	ADMINISTRATOR
MS10008	Frank	MS10008	ADMINISTRATOR	ADMINISTRATOR

## Adding a New Supervisor

You can add a new Supervisor.

Follow the instructions below to add a new Supervisor.

1. From the **Security** tab, select a **Supervisors**.  
The Supervisor form displays.
2. Click **Add New Supervisor** on the task bar to enter a new supervisor.  
The New Manager form displays.
3. In the **Login Name** name field, enter a login name.  
This can be any combination of first name then last name or the reverse or anything else such as an employee ID.
4. Click in the **First Name** field and enter the supervisor's first name  
There is a 30 character maximum on the entire name. Do not include an apostrophe.
5. Click in the **Last Name** field and enter the supervisor's last name  
There is a 30 character maximum on the entire name. Do not include an apostrophe.
6. Click in the **E-mail** field and add the Supervisors email address.  
This is needed for notifications.
7. Click the **Role** drop down menu to select the type of supervisory role the supervisor will do.



- Click **Save** to save.

## Assigning Employees or Changing Supervisors

You can change an employee's supervisor code.

This feature allows employees to be assigned to a supervisor or reassigned to another supervisor in the event of a reorganization or personnel change. If needed, the old Supervisor can be made inactive from the **Security** tab by selecting **User Accounts** and then click the **Edit** link for the desired Supervisor. Once a supervisor is made inactive, the name will not show up in any supervisor drop down throughout the application. Supervisors can be made inactive only if there are no active employees assigned to them.

Follow the instructions below to reassign the employees who report to one supervisor to a different supervisor.

- From the **Security** tab, select a **Supervisor**.  
The Supervisor form displays.
- Click **Assign Employees** in the row for the desired supervisor.  
The Employee Assignment form displays.
- Using the filters at the top of the form, search for the employee by **Card ID** or **Employee Name**. Click the **Filter** button  
A list of Employee(s) appears.
- Place a check mark beside the desired name.
- In the **Main Supervisor** field, use the drop down to select the new supervisor.
- Click the **Confirm** button.  
A message displays asking you to confirm the change.
- Click **OK**.  
A message displays informing you that the change has taken place
- Click **OK**.

## Adding a Secondary Supervisor

You can add a secondary Supervisor.

You may wish to assign secondary supervisors as a backup to the primary supervisor in cases of vacation, time off, or other reasons.

Follow the instructions below to add a secondary supervisor.

- From the **Security** tab, select **Supervisors**.  
The Supervisor form displays.
- For the supervisor you wish to assign a secondary supervisor, in the **Secondary Supervisor** column, click the link **Assign Employees**.  
The Employee Assignment form displays.
- Filter the list using the **Main Supervisor** drop down and clicking the **Filter** button.
- Select all the employees that apply.
- Click **Confirm** to save.  
A message displays asking you to confirm the change.
- Click **OK**.  
A message displays informing you that the change has taken place
- Click **OK**.

## Inactivating a Supervisor

You can inactivate a supervisor code when they are no longer supervising.

Follow the instructions below to mark an supervisor as inactive.



**WARNING:** Ensure you reassign employees to a new supervisor from the to be inactivated supervisor before you inactivate the supervisor.

1. From the **Security** tab, select **User Accounts**.  
The User Accounts form displays.
2. Find the name of the supervisor you want to inactivate.
3. Click the **Inactivate** link in the row of the desired supervisor.  
A message displays asking you to confirm the inactivation.
4. Click **OK**.  
The second column now appears blank for the desired supervisor.

## Working with Managers in TreeRing Time

You can assign managers to supervisors and employees to automate some features.

Managers can be entered into the TreeRing Time application and then assigned to individual supervisors and employees. In organizations where the manager is responsible for correcting employee punches or running labor reports, this automates the login security setup function for that manager. In addition, the Manager Signoff feature, which allows Managers to visit the signoff form at the end of each pay period to sign off on their supervisors and employees and notify the payroll administrator for payroll purposes, depends on this manager setup and assignment.

This is an example of the Manager form.

login name	first name	last name		
Change	John	Smith	Assign Supervisors	Assign Employees
change	J	Smith	Assign Supervisors	Assign Employees
smithj	John	Smith	Assign Supervisors	Assign Employees
smithj	J	Smith	Assign Supervisors	Assign Employees
smithj	John	Smith	Assign Supervisors	Assign Employees

## Adding a New Manager

You can add a new Manager.

Follow the instructions below to add a new Manager.

1. From the **Security** tab, select a **Manager**.  
The Managers form displays.
2. Click **Add New Manager** on the task bar to enter a new manager.  
The New Manager form displays.
3. In the **Login Name** name field, enter a login name.  
This can be any combination of first name then last name or the reverse or anything else such as an employee ID.
4. Click in the **First Name** field and enter the manager's last name  
There is a 30 character maximum on the entire name. Do not include an apostrophe.
5. Click in the **Last Name** field and enter the manager's first name  
There is a 30 character maximum on the entire name. Do not include an apostrophe.
6. Click in the **E-mail** field and add the Supervisors email address.  
This is needed for notifications.
7. Click the **Role** drop down menu to select the type of manager role the manager will do.

- Click **Save** to save.

## Assigning Employees or Changing Managers

You can change an employee's manager code.

This feature allows employees to be assigned to a managers or reassigned to another managers in the event of a reorganization or personnel change. If needed, the old Managers can be made inactive from the **Security** tab by selecting **User Accounts** and then click the **Edit** link for the desired managers. Once a managers is made inactive, the name will not show up in any supervisor drop down throughout the application. Managers can be made inactive only if there are no active employees assigned to them.

Follow the instructions below to reassign the employees who report to one manager to a different manager.

- From the **Security** tab, select a **Manager**.  
The Managers form displays.
- Click **Assign Employees** in the row for the desired manager.  
The Employee Assignment form displays.
- Using the filters at the top of the form, search for the employee by **Card ID** or **Employee Name**. Click the **Filter** button  
A list of Employee(s) appears.
- Place a check mark beside the desired name.
- In the **Main Supervisor** field, use the drop down to select the new manager.
- Click the **Confirm** button.  
A message displays asking you to confirm the change.
- Click **OK**.  
A message displays informing you that the change has taken place
- Click **OK**.

## Adding a Supervisor or Employee to a Manager

You can add a supervisor or employee to a manager.

If Managers have a role in monitoring and approvals, you will need to assign employees (if direct reports), or supervisors to the manager. Assigning a supervisor to a manager automatically brings in that group of employees under the manager supervision.

Follow the instructions below to add a manager.

- From the **Security** tab, select **Managers**.  
The Managers form displays.  
**Supervisor Assignment**
- For the manager you wish to assign supervisors, click the link **Assign Supervisors**.  
The Supervisors Assignment form displays.
- Select all the supervisors that apply.
- Click **Confirm** to save.  
A message displays asking you to confirm the change.
- Click **OK**.  
A message displays informing you that the change has taken place
- Click **OK**.  
**Employee Assignment**
- For the manager you wish to assign employees as direct reports, click the link **Assign Employees**.  
The Employee Assignment form displays.

8. Select all the employees that apply.
9. Click **Confirm** to save.  
A message displays asking you to confirm the change.
10. Click **OK**.  
A message displays informing you that the change has taken place
11. Click **OK**.

## Inactivating a Manager

You can inactivate a manager code when they are no longer managing.

Follow the instructions below to mark an manager as inactive.



**WARNING:** Ensure you reassign employees to a new manager from the to be inactivated manager before you inactivate the manager.

1. From the **Security** tab, select **User Accounts** a  
The User Accounts form displays.
2. Find the name of the manager you want to inactivate.
3. Click the **Inactivate** link in the row of the desired manager.  
A message displays asking you to confirm the inactivation.
4. Click **OK**.  
The second column now appears blank for the desired manager.

# Chapter 8. Rule Settings

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Rules turn your payroll policies into business rules that can be applied to your timesheets. These are configurable based on your organizations policies.

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## AutoLunch Rules

You can set up a rule to automatically subtracts a predetermined lunch period after a set amount of time is worked each day.

The AutoLunch feature automatically subtracts a predetermined lunch period after a set amount of time is worked each day. AutoLunch allows you to establish multiple lunch rules that can be assigned to an individual employee or a group of employees.

AutoLunch are assigned to employees in the Auto Lunch form.

### Entering a New Lunch Rule

You can enter a new AutoLunch rule.

Follow the instructions below to enter a new lunch rule.

1. From the **Configuration** tab, select **Rule Setup** and then **Auto Lunch**.

The AutoLunch form displays.

Auto Lunch						
Lunch Code	Minimum Time Worked	Lunch Deduction	Lunch Time	Deduct Difference	Deduct Multiple Lunches	Deduct if Punched
0000	60	60	12:00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0001	90	90	12:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0002	120	120	12:00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0003	150	150	12:00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Click **Add New Auto Lunch** on the task bar.  
The New Auto Lunch form displays.
3. Click in the **Lunch Code** field and enter a unique description for this lunch rule (up to 8 characters).
4. Click in the **Minimum Time Worked** field and enter the number of minutes to be worked before the lunch period is automatically deducted.  
Any complete work punch over this time threshold will qualify for the automatic lunch deduction and TreeRing Time will deduct the autolunch minutes for this employee.
5. Click in the **Lunch Deduction** field and enter the actual number of minutes to be deducted for this lunch period.
6. Click in the **Lunch Time** field and enter the time of day at which the lunch deduction occurs.  
The lunch time will be deducted from the beginning of the work shift that is closest to this time.
7. Check the **Deduct Difference** check box to have only the difference between the automatic lunch deduction assigned to the employee and the actual lunch punch\* time is taken.  
TreeRing Time will consider the employees lunch punch versus the assigned automatic lunch and will deduct any difference in order to match the number of minutes configured in the Lunch Adjustment field.  
For example: If the AutoLunch adjustment is 60 minutes and the employee punches out for only 45 minutes, TreeRing Time will insert an automatic lunch deduction of 15 minutes. If the employee punches out for 70 minutes, TreeRing Time will take no automatic lunch action since the lunch deduction has been met.



**Note:**\* The AutoLunch feature looks for actual Lunch type (LI and LO) punches coming from the time clock. These punch types are produced by pressing special ‘Lunch Leave’ and ‘Lunch Return’ keys on the time clock. Simply punching ‘Out’ and then ‘In’ again during the middle of a work shift is not sufficient for the Deduct Difference function to work properly.

8. Check the **Deduct Multiple Lunches** check box for employees that have multiple meal breaks for longer shifts.

9. Check the **Deduct if Punched** check box to have the automatic lunch deduction taken even if the employee punches out for lunch\* at the time clock.
10. Click **Save** on the task bar.

The new lunch rule is added to the list.

## Making Changes to a Lunch Rule

You can make changes to an AutoLunch rule.

Follow the instructions below to make changes to a lunch rule.

1. From the **Configuration** tab, select **Rule Setup** and then **Auto Lunch**.  
The AutoLunch form displays.
2. Click the **Edit** link for the row that you want to make changes.  
The Update Auto Lunch form displays.
3. Make the desired changes.
4. Click **Save** on the task bar.

The changes are saved to the list.

## Deleting a Lunch Rule

You can delete an AutoLunch rule.

Follow the instructions below to delete a lunch rule.

1. From the **Configuration** tab, select **Rule Setup** and then **Auto Lunch**.  
The Auto Lunch form displays.
2. Click the **Delete** link in the row of the lunch rule that you want to delete.  
A dialog box displays asking you to reassign employees assigned to this Auto Lunch.
3. In the **Reassign Employee Auto Lunch Code** to drop down, select the new Auto Lunch value.
4. Click **Save** on the task bar.

The rule is removed from the list.

## Break Time Rules

You can set up a rule to automatically subtract a predetermined break period after a set amount of time is worked each day.

The Break Time feature automatically subtracts a predetermined break period after a set amount of time is worked each day. Break Time allows you to establish multiple break rules that can be assigned to an individual employee or a group of employees.

Break Time are assigned to employees in the Break Time Allowed form.

## Entering a New Break Time Rule

You can enter a new Break Time rule.

Follow the instructions below to enter a new break rule.

1. From the **Configuration** tab, select **Break Time Allowed**.  
The Break Time Allowed form displays.

Break Time Allowed			
+ Add Break Time Allowed			
			Description
<a href="#">Delete</a>	<a href="#">Edit</a>	<a href="#">Assign Employees</a>	0 to 3
<a href="#">Delete</a>	<a href="#">Edit</a>	<a href="#">Assign Employees</a>	Breaks Paid
<a href="#">Delete</a>	<a href="#">Edit</a>	<a href="#">Assign Employees</a>	test
+ Add Break Time Allowed			

- Click **Add Break Time Allowed** on the task bar.  
The New Break Time Allowed Detailed form displays.

**New Break Time Allowed Detail** ✕

Description:

Break Time Detail:

+ Add New

			From (Hours)	To (Hours)	Max Break Time (Minutes)
--	--	--	--------------	------------	--------------------------

[Save](#)

- In *Description*, enter a description for the break rule. If you have several employee groupings that either earn different break time intervals or a different elapsed hours intervals, you should name the break after that employee group. For example “Break Time - Hourly employees.”
- Click **Add New**.

The Break Time Detail form displays

**New Break Time Detail** ✕

From (Hours):  To (Hours):  Break Time (Minutes):

[Save](#)

- Click in the *From (hours)* field and enter the number of hours to be worked before the break period is automatically calculated.  
Any complete work punch over this time threshold will qualify for the break and TreeRing Time will add the break minutes for this employee.
- Click in the *To (Hours)* field and enter the maximum number of elapsed hours for this break period.
- Click in the *Break Time (Minutes)* field and enter the number of minutes allowed for the break.  
The break time will be applied to the work shift.
- Check the **Deduct Difference** check box to have only the difference between the automatic lunch deduction assigned to the employee and the actual lunch punch\* time is taken.  
TreeRing Time will consider the employees start time punch versus the end time punch and automatically calculate the maximum allowable break time.  
For example:



			From (Hours)	To (Hours)	Max Break Time (Minutes)
<input type="checkbox"/>	Edit	Delete	3.75	7.5	15
<input type="checkbox"/>	Edit	Delete	7.5	11.25	30
<input type="checkbox"/>	Edit	Delete	11.25	24	45

In the previous example:

- If the employee works less than 3.75 hours. No paid break time is given.
- If the employee works between 3.75 and 7.5 hours. 15 minutes of paid time is given.
- If the employee works between 7.5 and 11.25. 30 minutes are given.
- If the employee works between 11.25 and 24 hours. 45 minutes are given.

The worked time is calculated based on the actual worked time. That means that if an employee punched “In” at 8 am, “Out” at 12 pm, but has taken 30 minutes of break, the time for the calculation will be 4 hours – 0.5 break hours = 3.5 hours worked.

Per the rule, the person has no paid break because worked less than 3.75hs, so all break time will be deducted and, for that day, the Total Worked time will be 3.5 hours.

If the person took 6 minutes of break time the calculation will be 4hs – 0.1 break time = 3.9. So the employee has 15 minutes (0.25 hours) of break time allowed, since the person took less than that the total time of the day will be 4 hours.

9. Click **Save** in New Break Time Detail task bar.

The new break rule is added to the list.

10. Add additional entries for each different time interval that will result in different break time earned.

11. When done entering all the different break time intervals, in the New Break Time Allowed Detailed form, click Save.

The new break rule is added to the Break Time Allowed list.

Assign employees to the Break Time Rule in the Break Time Allowed form (Assign Employees link ) or in the Employee Details page (**Employees > Company Members > [Employee Name]** >Allowed Break Time field.

## Updating a Break Time Rule

You can make changes to an Break Time rule.

Follow the instructions below to make changes to a break rule.

1. From the **Configuration** tab, select **Break Time Allowed**.

The Break Time Allowed form displays.

2. Click the **Edit** link for the row that you want to make changes.

The Update Break Time form displays.

3. Click Edit to adjust the hours or duration of the Break Time rule. Make the desired changes.

The Update Break Time Allowed details form displays.

4. Edit the **From**, **To** or **Max Break Time** fields.

5. Click **Save** on the task bar.

The changes are saved to the rule.

- Click **Save** on the task bar.

The changes are saved to the Break Time Allowed list.

## Deleting a Break Time Rule

You can delete a Break Time rule.

Follow the instructions below to delete a break rule.

- From the **Configuration** tab, select **Break Time Allowed**.  
The Break Time Allowed form displays.
- Click the **Delete** link in the row of the break rule that you want to delete.  
A dialog box displays asking you to confirm the delete action.
- Click **OK** in the dialog box.

The rule is removed from the list.

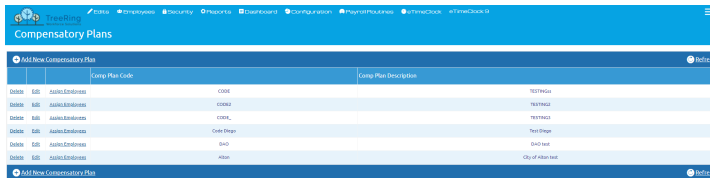
## Compensatory Time Plan

You can set up accrue, track, and expend Compensatory Time.

TreeRing Time has the ability to accrue, track, and expend Compensatory Time, also known as Comp Time. A Compensatory Time Plan must be set up that defines the comp time policy for the company. After the plan is defined it must be assigned to the employee in the Employee Rule setup form. Once a compensatory time plan is assigned to the employee, that person becomes eligible to accrue and use this time type.

Comp Plans are assigned to employees in the Compensatory Plans form.

This is an example of the Compensatory Plans form.



Plan Code	Comp Plan Description
0000	TestPlan
0000	TestPlan
0000	TestPlan
0000	TestPlan
0000	TestPlan

## Creating a New Compensatory Time Plan

You can create a new compensatory time plan.

- From the **Configuration** tab, select **Rule Setup** and then **Comp Plans**.  
The Compensatory Time Plan form displays.
- Click **Add New Compensatory Plan** on the task bar and complete the form.
- In the **Plan Code** field, enter a code representing the compensatory time plan.  
This code can be up to 10 alphanumeric characters.
- In the **Description** field, enter a descriptive name for the plan, up to 50 characters.
- In the **Pay Policy** box, check a pay policy.
- Leave the check box **Manually Redistribute Hours only** selected to manually redistribute the hours..
- Click **Save** on the task bar when complete and continue with additional plans.

## Automatic Redistribution of Hours

You can automatically maintain the hour redistribution from OT to Comp time based on the given set of rules.

With the Redistribute Hours option, Supervisors and Time Keepers can manually distribute time according to their company policy. The Auto Redistribute Hours feature automatically maintains the hour redistribution from OT to Comp time based on the given set of rules. The rules are definable for every plan in the Compensatory Time Plan form. Only straight time (Regular, OT and DT) can be moved to comp time (Regular comp, OT comp and DT comp). Either all the time or time after a specific number of hours can be moved to comp time automatically.

## Configuring Automatic Redistribution of Hours

You can automatically redistribute hours from overtime to compensatory time.

Follow the instructions below to automatically redistribute hours.

- From the **Configuration** tab, select **Rule Setup** and then **Comp Plans**.  
The Compensatory Time Plan form displays.
- Deselect the check box **Manually Redistribute Hours only** to activate this feature.
- Choose work time type. Choose the type of worked time to transfer to Comp time by clicking in the circle next to the time type:
  - OT** = Overtime
  - DT** = Double Time
  - OT and DT** = Overtime and Double Time
  - OT, DT, and RegT**= Overtime, Doubletime, and Regular (non-premium) time.
- Specify the **Comp Time** to create. There are four types of comp time - Comp OT, Comp DT, Comp RegT, and Corresponding Comp Time. The Corresponding Comp Time option will translate the work time to the corresponding type of Comp Time.
- Choose **Hourly Rule**: Click in the **Daily** box to move work hours to comp time after a certain number of hours worked per day then fill in this quantity in the 'After X Hours' box below or select 'All Hours.' The All Hours option will move all work time to comp time. Click in the **Weekly** box to move work hours to comp time after a certain number of hours are worked in a week and then fill in this quantity in the **After X Hours** box below.
- Click **Save** on the task bar.

## Deleting a Compensatory Time Plan

You can delete a Compensatory Time Plan.

Follow the instructions below to delete a Compensatory Time Plan.



**Note:**Deleting a Compensatory Time Plan does not delete employee comp time history.

- From the **Configuration** tab, select **Rule Setup** and then **Comp Plan**.  
The Compensatory Time Plan form displays.
- Click the **Delete** link in the row for the Comp Plan you wish to delete.
- Click **Yes** in the dialog box asking to confirm the deletion.

## Compensatory Time Plan: History

You can set up a history for an employees comp time.

Assigning a Comp Plan to employees in the Employee Rules form allows you to use the Comp Time History form (available from the **Configuration** tab, by selecting **Rule Setup** and then **Compensatory Time History**) to enter initial balance information.

Employee Name	Last ID	Plan	Other ID	Hours Current Pay Period	Earned	Taken	Balance	Last updated
BernardDobson	13103	TESTHAG		Food Service Payroll	35	35	0	10/20/12 12:01:08 PM
DURHAM/DONALD	13112	TESTHAG	01000	Food Service Payroll	35	35	35	10/20/12 12:00:00 PM
BLACK/JAMES	13112	TESTHAG	01000	Food Service Payroll	0	0	0	10/20/12 12:00:45 PM
Ward/Denise	13113	TESTHAG	01100	Food Service Payroll	0	0	0	10/20/12 12:00:19 PM
ALLEN/ROBERTA	13113	TESTHAG	01100	Food Service Payroll	0	0	0	10/20/12 12:00:19 PM
HARRIS/DENNIS	13114	TESTHAG	01100	Food Service Payroll	0	0	0	10/20/12 12:00:19 PM
BernardDobson	13115	TESTHAG	011	Food Service Payroll	0	0	0	10/20/12 12:00:19 PM
OWENS/DON	13116	TESTHAG	01000	Food Service Payroll	0	0	0	10/20/12 12:00:19 PM
DONALD/CHARLES	13119	TESTHAG	02070	Food Service Payroll	0	0	0	10/20/12 12:00:19 PM
WILLIAMS/BOB	13120	TESTHAG	02200	Food Service Payroll	0	0	0	10/20/12 12:00:19 PM
WILLIAMS/BOB	13120	TESTHAG	01000	Food Service Payroll	1015	1025	100	10/20/12 12:00:19 PM

For each employee that has been assigned a Comp Plan, this History form shows:

- **Earned:** This field shows the total of all comp time assigned multiplied by the appropriate comp factor set up in the Comp Time Plan for regular, overtime and double-time.
- **Taken:** This field shows all the comp time taken.
- **Balance:** This field shows the remaining comp time balance.
- **Last Updated:** This field displays the last date the record was updated.

The comp time assigned during the period is multiplied by the comp factor from the plan and added to the Comp Time History form at Period End.



**Note:**Deleting a Compensatory Time Plan does not delete employee comp time history.

## Entering Compensatory Time History for an Employee

You can enter employee comp history.

Follow the instructions below to enter employee history which has occurred before the employee has been assigned a comp plan.

1. From the **Configuration** tab, select **Rule Setup** and then **Compensatory Time History**.
2. Click **Add New Record** on the task bar.  
A new Compensatory Time History form displays.
3. From the **Employee** drop down menu, select the employee for whom you want to enter comp time history.  
The employees listed in are only those that have not yet been assigned a Comp Time Plan in the Employee Rules form.
4. If the employee has already earned and taken comp time, enter these values in the **Earned** and **Taken** fields.
5. Click **Save**.
6. Select another employee from the drop down menu to continue.

## Holidays

You can set up automatic holidays.

Automatic holidays can be set up specific to your company policy and can be assigned to employees or groups of employees. You can assign an employee to a holiday group in the Employee Details form. A listing of many standard holidays is included in the Holiday form. Enter any additional holidays that your company may observe that are not found in this list. Once the holiday listing is complete, proceed to the next section to configure a Holiday Group which then can be assigned to employees.

## Entering a Holiday

You can enter a new holiday.

Follow the instructions below to enter a new holiday.

1. From the **Configuration** tab, select **Rule Setup**, select **Holidays**, and then select **Holidays**.

The Holidays form displays.

Name	Date Range
CHRISTMAS DAY	12/25/2014
NEW YEAR'S DAY	1/1/2015
DAY AFTER THANKSGIVING	11/23/2014
DAY BEFORE THANKSGIVING	11/20/2014
LABOR DAY	9/8/2014
INDEPENDENCE DAY	7/4/2014
NEW YEAR'S DAY	1/1/2015
MEMORIAL DAY	5/26/2014
JUNES DAY	6/19/2014
THANKSGIVING	11/27/2014
HALLOWEEN	10/31/2014
BLACK FRIDAY	11/28/2014
ST. PATRICK'S DAY	3/17/2014
ST. PASCAL'S DAY	4/24/2014
CHARLES DAY	6/23/2014

- Click the **Add New Holiday** link and enter a unique holiday name, up to 25 characters.
- Enter the **Date** for this holiday.
- Click **Save**  
The holiday is added to the form.
- Repeat this procedure for each company holiday not found in this list.

## Editing a Holiday

You can change an existing Holiday rule.

Follow the instructions below to make changes to a holiday.

- From the **Configuration** tab, select **Rule Setup**, select **Holidays**, and then select **Holidays**.  
The Holidays form displays.
- Click the **Edit** link for the row you wish to edit.
- Click in the field that you want to make changes to and make the changes.
- Click **Save**.

The holiday is updated on the form.

## Deleting a Holiday

You can delete an existing holiday rule.

Follow the instructions below to delete a holiday.

- From the **Configuration** tab, select **Rule Setup**, select **Holidays**, and then select **Holidays**.  
The Holidays form displays.
- Click the **Delete** link for the holiday that you want to delete.
- Click **OK** in the dialog box asking to confirm the deletion.

The holiday is removed from the form.

## Holiday Groups

Use Holiday Groups to define the benefit criteria of a group of holidays.

The Holiday Groups form is used to define the particular holidays that are observed, the exact amount of holiday pay hours, and to configure any premium pay awards. Holiday groups can be created for different benefit levels and can accommodate unique benefit rules for each employee or group of employees.

Create unique holiday groups definitions for each group of employees that have different holiday benefit policies, such as full-time versus part-time employees, or if holiday policies vary by length of service or union rules.

Holiday Groups are assigned to employees in the Holiday Groups form.

## Defining a New Holiday Group

You can define a new holiday group.

Follow the instructions below to define a holiday group.

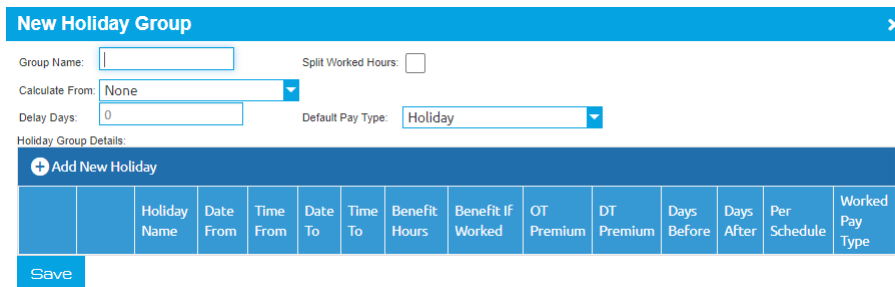
1. From the **Configuration** tab, select **Rules Setup**, select **Holidays**, and then select **Holiday Group**.

The Holiday Groups form displays.



2. Click **Add New Holiday Group** on the task bar.

The Holiday Groups form displays.



3. In the **Group Name** column, enter a descriptive label for the holiday group. This code can be alpha-numeric and up to 25 characters long.
4. Check the **Split Worked Hours** check box to cause a worked time transaction to become split on the start and/or end time of the Holiday.  
The total work time of the time transaction will not be changed, but the transaction will be split into multiple punches.
5. From the **Calculate From Date** drop down list, select an event from the drop down list and the employee will not receive a holiday premium until that threshold passes. Use this feature to define a waiting period before an employee is eligible for holiday benefits. This field is optional. Leave blank if not used.



**Note:**The referenced dates must be entered into the Employees Rules form (accessed from the **Employees** tab by selecting **Company Members**) for the employee to allow this feature to work.

6. In the **Delay Days**, enter the number of days after the **Calculate From Date** event.  
Enter 0 to qualify the employee immediately on that event. This field is optional. Leave blank if not used.
7. From the **Default Pay Type** drop down list, select a new pay if you don't want to use the TreeRing Time default pay type of the worked time transaction.  
Leave the field empty, or choose **None** to retain the default pay type and to not modify it.
8. You can then add a new holiday group details by clicking on the **Add New Holiday** link.  
The New Holiday Group Detail form displays.

New Holiday Group Detail
✕

---

Holiday:

Worked Pay Type:

Holiday Date From:

Date To:

Per Schedule:

Benefit Hours:

Days Before:

Days After:

Benefit If Worked:

OT Premium:

DT Premium:

Save

9. Click the **Edit** link for the desired Holiday group.
10. Click in the **Holiday** box then click the down arrow, this reveals a list holidays created in the Holidays form. Click on the holiday name to select the first holiday for this group.
11. In the **Worked Pay Type**, use the drop down menu to select the appropriate pay code for this holiday.
12. In the **Holiday Date From**, the default date and time appears for the holiday name you have just selected. Optionally, the time can be modified to reflect the exact start time of day for the holiday to be observed.
13. In the **Date To**, the default ending date and time appears for the holiday selected. Make certain the End Date is the day after the holiday. Optionally, you can modify the time to reflect the exact end time for the holiday.
14. Check the **Per Schedule**, box to take the hours from the employees schedule for that day and apply them to the holiday to calculate holiday pay. If left unchecked, employees must enter hours to be paid. If checked, the hours come from the schedule.
15. In the **Benefit Hours** column, enter the number of hours of holiday hours the employee will receive.
16. Check the **Benefit If Worked** box if you award the holiday pay even if the employee works on this day.
17. In the **Days Before** field, enter the number of scheduled days that must be worked before the holiday in order to qualify for the holiday pay.  
If your company does not have this rule simply leave this field blank.
18. In the **Days After** field, enter the number of scheduled days that must be worked after the holiday in order to qualify for the holiday pay.  
If your company does not have this rule simply leave this field blank. If the holiday falls on the last day of the pay period, it is important that the pay period is not closed until the requisite work days into the next pay period are completed. TreeRing Time will wait to see if the necessary number of work days are completed before it will award the holiday pay. Therefore it is important that the pay period containing the holiday remain open until this rule is fulfilled.  
\*To use the Day Before and Day After rules, schedules must be defined and built for employees. This is the manner in which TreeRing Time tracks the scheduled work days for each employee. See Chapter 11 for more information regarding employee schedules.
19. Check the **OT Premium** box to make any worked hours overtime.  
This rule is irrespective of the Pay Policy assigned to the employee.

20. Check the **DT Premium** box to make any worked hours double time.  
This rule is irrespective of the Pay Policy assigned to the employee.
21. When all holidays are added to the group, click **Save**.  
The holiday group can be assigned to the employee in the Employee Rules form.
22. Click **Save** on the task bar.

## Editing a Holiday Group Definition

You can edit a holiday group definition.

1. From the **Configuration** tab, select **Rules Setup**, select **Holidays**, and then select **Holiday Group**.  
The Holiday Groups form displays.
2. Click the **Edit** link for the row you wish to edit.
3. Click in the field that you want to make changes to and make the changes.
4. Click **Save**.

The holiday group is updated on the form.

## Deleting a Holiday Group

You can delete a holiday from a group.

Follow the instructions below to delete a holiday from a group.

1. From the **Configuration** tab, select **Rule Settings** and then **Holiday Groups**.  
The Holiday Groups form displays.
2. From the **Select Group** drop down list, select the appropriate holiday group from the drop down menu.  
This will access groups created by the Holiday Group Definition form.
3. Click on the **Delete** link for the holiday group that you want to delete.  
A dialog box asks for confirmation of deletion.
4. Click **OK** in the dialog box asking to confirm the deletion.

The item disappears from the form.

## Level Hierarchy Plan

The Level Hierarchy feature in TreeRing Time links two labor-tracking levels.

The Level Hierarchy feature works with eTimeClock™.

The Level Hierarchy feature in TreeRing Time is a method in which two labor-tracking levels can be linked in order to restrict the second level labor tracking options that are available to the employee as they track their time. A Department can be linked to one or more Jobs, a Job can be linked to one or more Level 4 (Work Order) entries, and a Level 4 entry can be linked to one or more Level 5 (Task) entries. When an employee selects that first level labor tracking entry, the next level is restricted to only the assigned entries; ex. if Jobs 200, 210, and 230 only are performed when an employee works in Department 20, a Level Hierarchy can be configured to link these jobs to this Department so that when the employee punches into Department 20, he is able to select only one of these three jobs, regardless of how many other jobs are entered into the TreeRing Time system.

The employee may not select any tracking entries that are not included in the Level Hierarchy plan. There is one exception to this, however. If the employee tracks their time with eTimeClock and the drop down selection box is used, the employee is able to manually type any labor tracking code into the drop down text field to track their time.

Level Hierarchy Plans are assigned to employees in the Level Hierarchy Plan form.

This is an example of the Level Hierarchy form.



## Creating a New Level Hierarchy Plan

You can create a new level hierarchy plan.

Follow the instructions below to create a new level hierarchy plan.

1. From the **Configuration** tab, select **Rule Setup** and then **Level Hierarchy**.  
The Level Hierarchy form displays.
2. Click **Add New Level Hierarchy Plan** on the task bar.  
The Create New Plan dialog box displays.

3. In the **Code** field, enter a value to represent the plan, up to 10 alphanumeric characters.
4. In the **Description** field, enter a name or description for the plan, up to 30 characters.
5. In the **Base Level** field, define the top labor tracking level of the plan.  
The top tracking level will be the information the employee enters first. The second tracking level will be tied to this top level.  
If you change this level, you will get a warning that you are erasing the current plan. Click **OK** or **Cancel**.
6. Select the first level entry from the left hand box.
7. Then select the second level entry from the right hand selector box that will be linked to this first level entry.  
You can select several entries.
8. Click the **Add Level Codes** button below the right hand selector box.
9. Click **Save**.
10. Repeat this process until all tracking entries have been defined for this employee.

If more than one first level entry can be tracked by the employee, then complete the form for all the possible combinations of allowable labor tracking entries for the employee.

You must now assign employees to the new Level Hierarchy Plan. See [Assigning the Hierarchy Level Plan to the Employee](#).

## Assigning the Hierarchy Level Plan to the Employee

Assign the Hierarchy Level Plan to each employee.

Follow the instructions below to assign a level hierarchy plan to employees.

1. From the **Configuration** tab, select **Rule Setup** and then **Level Hierarchy**.  
The Level Hierarchy form displays.
2. Click the **Assign Employees** link for the schedule that you wish to assign employees to.  
The Employee Assignment form displays.
3. In the **Card ID** field, enter the employees Card ID, Name, or Supervisor to filter the list.
4. Check all the names you wish to assign to the Plan.
5. Click the **Confirm** button.
6. Repeat this process for each employee, assigning the appropriate schedule from the drop down menu.

## Editing a Level Hierarchy Plan

You can change the level hierarchy plan.

Follow the instructions below to make changes to a level hierarchy plan.

1. From the **Configuration** tab, select **Rule Setup** and then **Level Hierarchy**.  
The Level Hierarchy form displays.
2. Click the **Edit** link in the row of the plan you want to make changes to and make the changes.
3. Click **Save**.

## Delete a Level Hierarchy Plan

You can delete the level hierarchy plan.

Follow the instructions below to delete a level hierarchy plan.

1. From the **Configuration** tab, select **Rule Setup** and then **Level Hierarchy**.  
The Level Hierarchy form displays.
2. From the **Select Plan** drop down list, choose the plan you want to delete.  
The plan's information displays.
3. Click the **Delete** link in the row of the plan you wish to delete.  
The Reassign Level Hierarchy Plan form displays.
4. In the **Reassign Level Hierarchy Plan to** field, select a plan to transfer the information to.
5. Click **Save**.

## Clock Location Tracking

Monitor and report the physical location from which an employee tracks their time.

*Applies to ETimeClock, TeleTrak and other time clock data collection device locations.*

The Location Tracking feature in TreeRing Time is a means of monitoring and reporting the physical location from which an employee tracks their time. This is useful if a company needs to track in which building, or from which computer, an employee creates a time record. This is most important when employees use a Web-based system such as eTimeClock that can be accessed over the Internet from any location, or when using the telephone-based TeleTrak system. Known, permissible, computer IP addresses and phone numbers are entered into the Location Tracking form, then any punch activity from a computer not listed is

reported. All punches are still accepted no matter the location, but those locations not listed in this form are flagged as Location Exceptions.

This is an example of the Clock Locations form.

## Configuring a Clock's Location

You can configure a punch clock's location.

Follow the instructions below to configure a clock's location.

1. From the **Configuration** tab, select **Company Setup** and then **Punch Location**.

The Clock Locations form displays.

2. Click **Add New Punch Location** on the task bar to enter a data capture device.

The New Punch Location form displays.

3. Click in the **Location Name** field and enter a location, up to 50 characters. Names do not need to be unique, such as "approved" or "in house," but can also be given names such as "Harold's PC", "Jack's phone", etc...
4. Click in the **Location** field and enter the location number.
  - If the clock being entered is an eTimeClock device, enter the IP address of the computer.
  - If a hardware time clock is used enter the clock number here (up to 3 digits).
  - If the tracking device is a TeleTrak computer, enter the 10-digit telephone number the employee is allowed to call in from, without parentheses or dashes, and Location Tracking will sense the Caller ID information provided by the phone company.
  - For offices with numerous outside phone lines or a computer network with numerous IP addresses, enter all possible numbers in this form or use the TreeRing Time Dynamic Import function (see chapter 18 for more information).



**Note:** Caller ID tracking is an optional feature available at an additional cost.

5. Click **Save**.
6. Continue in this manner until all device locations are entered (if you have multiple locations to enter).

## Editing a Clock's Location

You can edit a time clocks location when it is moved or assigned a new IP address.

Follow the instructions below to edit a clock location from the list.

1. From the **Configuration** tab, select **Company Setup** and then **Punch Location**. The Clock Locations form displays.
2. Click the **Edit** link in the row of the location you want to edit.

The Update Punch Location form displays.

3. Edit the desired fields.

You can also declare a punch location to be inactive by deselecting the **Active** checkbox.

4. Click **Save**.

## Deleting a Clock's Location

You can delete a time clocks location when it is taken out of service.

Follow the instructions below to delete a clock location from the list.

1. From the **Configuration** tab, select **Company Setup** and then **Punch Location**.

The Clock Locations form displays.

2. Click the **Delete** link in the row of the location you want to delete.
3. Click **OK** in the dialog box asking to confirm the deletion.

## Viewing Clock Locations

You can view the date and time of the activity and the location for the In and Out punches.

This form reports exceptions only. It will display the date and time of the activity and the location for the In and Out punches.

Follow the instructions below to view any location exceptions.

1. From the **Configuration** tab, select **Company Setup**, and then **Punch Location**.

The Clock Location form displays.

## Pay Periods

Define the pay cycle dates, not the day on which employees are paid.

Defining pay periods and assigning one to each employee is a necessary step in configuring TreeRing Time. The Pay Period configured here defines the pay cycle dates, not the day on which employees are paid. The pay period setup permits multiple pay period assignments in a company that requires the ability to pay different pay periods to different employee classes or groups of employees. The Pay Period code is assigned to the employee in the Pay Periods form.



**Note:** The payroll export is performed independently for each pay period configured in TreeRing Time. Therefore, if there exists a group of employees whose time data should not be exported to a payroll program (salaried employees for example), configure and assign an unique pay period for that group.

This is an example of the Pay Periods form.

## Entering a New Pay Period

You can enter a new pay period.

Follow the instructions below to enter new pay periods.

1. From the **Configuration** tab, select **Company Setup** and then **Pay Periods**.  
The Pay Periods form displays.
2. Click **Add New Pay Period** on the task bar.  
The New Pay Period form displays.
3. In the **Pay Period Code** column, enter a unique alphanumeric code, up to 6 characters.
4. In the **Description** column, enter a description for this pay period, up to 50 characters in length.
5. **Period Type**: Click in this box to activate the drop down list and select the period type.
  - **Weekly** for a 7-day payroll.
  - **Biweekly** for a 14-day payroll.
  - **Semimonthly** if your payroll starts on the 1st and 16th of each month.
  - **Monthly** if your payroll starts on the 1st of each month.
  - **Custom** if your payroll begins at any other time during the month, for semi-monthly and monthly payrolls.
  - **Accrued Custom** to accrue overtime on a weekly basis, even if the Pay Period dates bisect a work week. Be sure to select the starting day for your overtime accrual in the Pay Week Start Day column.
6. If **Custom** or **Accrued Custom** is selected in the previous field, then in the **Days** column, enter the number of days in the pay period. Otherwise, this field is automatically calculated based on the period type selected.
7. Enter the **Start Date** and **Start Time** of this pay period.  
If no time is entered, midnight will automatically be entered. Enter date in MM/DD/YY format. Enter time in 24-hour format, as HH:MM.
8. Skip the **End Date** and **End Time** columns as these will be calculated automatically when you click Save.
9. In the **Sequence Number** field, type a sequence number.
10. Select the **Pay Period Modification** from the drop down list.  
This setting determines how TreeRing Time will allocate work time that crosses the pay period boundary.
  - **Start**: This setting will allocate all time transactions on that same work day to the pay period in which the first time transaction starts.
  - **End**: This setting will allocate all time transactions on that same work day to the pay period in which the last time transaction ends.

- **Split:** This setting will split allocate each time transaction separately, according to the pay period in which the individual time transaction starts. If a time transaction crosses the pay period threshold, that transaction will be allocated to the pay period in which it starts. However, this behavior can be changed to allocate that particular time transaction to the pay period in which it ends. If this change is desired, please contact a TreeRing Time representative.

**11. Click Save.**



**Note:**

**Note:** Once a pay period is Saved you cannot change the Start Date or End Date (Unless it is Accrue Custom, then you can change the Number of Days that will update the End Date. This must be done before the current End Date. You also cannot change the Pay Period Modification.)

**12. Repeat this procedure for each pay period to be established.**

## Making Changes to a Pay Period

You can make changes to a pay period.

Follow the instructions below to make changes to a pay period.

1. From the **Configuration** tab, select **Company Setup** and then **Pay Periods**.  
The Pay Periods form displays.
2. Click the **Edit** link in the row of the pay period you want to edit.  
The Update Pay Period form displays.
3. Click in the field you want to make changes to and make the changes.
4. Click **Save**.

## Deleting a Pay Period

You can delete an unused or out of date pay period.

Follow the instructions below to delete a pay period.

1. From the **Configuration** tab, select **Company Setup** and then **Pay Periods**.  
The Pay Periods form displays.
2. Click on the **Delete** link for the pay period that you want to delete.  
A dialog box asks for confirmation of deletion.
3. Click **OK** in the dialog box asking to confirm the deletion.  
The item disappears from the form.

## Pay Policies

You can set the rules by which overtime and other premiums are paid.

The purpose of pay policies is to provide the rules by which overtime and other premiums are paid. Pay policies consist of overtime and other pay premium rules. A company can have many different pay policies for employees and groups of employees. Pay Policies are assigned to employees in the Employee Rules form.

In addition to the Flexible Day Definitions and OT Week Start settings that define what happens to an employee's time transaction when it crosses work day and work week boundaries, the Pay Period Modification setting found in the Pay Period form determines what happens to an employee's time transaction when it crosses a pay period boundary.

Pay policies are assigned to employees in the Overtime Policies form.

This is an example of the Overtime Policies form.

## Entering a New Pay Policy

You can enter a new pay policy.

Follow the instructions below to enter a new pay policy.

1. From the **Configuration** tab, select **Rule Setup** and then **OT Policies**.  
The Overtime Policies form displays.
2. Click **Add New OT Policy** on the task bar.  
The New Overtime Policy dialog box displays.
3. In the **OT Policy Code** field, enter a unique number for this policy.
4. In the **Description** dialog box, enter a unique name for this pay policy in the dialog box, up to 15 characters in length.
5. Check the **Blended O.T.** check box if the overtime will be blended.
6. Click **Add New Premium** to add a new premium type, or click **Edit** to edit the existing one.
  - a) Click on the **Pay Type** to select it.
  - b) In the **Pay** field, select a multiplier of the base salary for the overtime rate.
  - c) In the **Daily**, **Weekly**, or **BiWeekly** fields, determine the length of the period in which the overtime will accrue and the number of hours after which overtime or double-time is paid.
    - If both Daily and Weekly, or Daily and Biweekly overtime types are selected a box labeled **Accrue Daily OT** appears. A check in this box considers the Daily overtime as occurring in the Weekly overtime calculations. For example: If checked -An employee's 10-hour workday (8 regular hours, 2 overtime hours) would permit all 10 hours to be included in calculating weekly overtime.
    - If both Daily and Weekly, or Daily and Biweekly overtime types are selected a box labeled **Accrue Daily OT** appears. A check in this box considers the Daily overtime as occurring in the Weekly overtime calculations. For example: If checked -An employee's 10-hour workday (8 regular hours, 2 overtime hours) would permit all 10 hours to be included in calculating weekly overtime.
  - d) Click **Save**.
7. The **Premium Week Def** section settings determine how the 7-day work week is defined in order to calculate premium pay and is used to define what happens when an employee's time transaction crosses the weekly boundary.
  - **Day:** Select the day of the week on which the overtime week will begin for overtime calculation.
  - **Time:** (00:00:00 AM\PM): Enter the time of day that the work week begins on. This time defines the beginning of the 7-day work week.

- **Mod:** This setting defines what happens to an employee's time transaction when it crosses the week boundary.

The beginning of the OT week may be defined independently for each pay policy. This allows each employee, or group of employees, to have a complete and separate set of premium pay rules.

**8.** In the **Day Group Modification** section, choose the **Flexible Day Definitions** setting from the drop down menu.

- **OT Week:** This setting defines the work day as a 24 hour period starting from the time defined in the 'Time' field of the 'OT Week Start' described below.
- **Pay Period:** This setting defines the work day as a 24 hour period starting from the time set in the 'Pay Period Start Day/Time' field in the Pay Period form.
- **Duration of off time:** This setting defines the work day when a user-definable period of time has passed between the end time of an employee's time transaction and the start time of the next time transaction. When this selection is made the 'Punch Match Threshold' field becomes visible below. This field is used to set the duration of time that forms the threshold for the start of a new day. Enter an amount of time in minutes

This setting determines how the work day is defined. The work day can be defined three different ways. Moreover, it is possible to choose what happens when an employee's time transaction crosses a workday/pay period threshold.

**9.** The **Mod Type** setting defines how to calculate an employee's time transaction that crosses the work day definition (defined above).

(Visible only if OT Week or Pay Period is selected above.)

- **End:** This setting includes the time transaction in whole on the day in which the transaction ended.
- **Split:** This setting will split the time transaction in two at the defined start of the work day.
- **Start:** This includes the time transaction in whole on the day in which the transaction started.

**10.** Enter time if you pay a minimum time to an employee who works for a specific period of time.

For example, the company might elect to pay 4 hours for everyone who works at least an hour. You would enter 4 in the "Pay\_\_\_\_\_hours" field and 1 in the "for\_\_\_hours" field.

- **Pay (Hrs.):** Click in this field and type in the number of hours you wish to pay the employee for a minimum time worked.
- **For min. hrs. worked:** Click in this field and type in a minimum number of hours that must be worked before the minimum time premium is paid.

**11.** In the **Consecutive Day Rules** box, click **Add Premium** if there is a premium for working more than a normal number of consecutive days. If no premium is paid for working consecutive days, skip this section.

- In the **On** field, type the number of days after which a consecutive premium would begin to pay.
  - Click the **Inclusive** box if you want the time to be inclusive of the selected day. If this is not checked it is assumed that a certain number of total hours must have accrued before the consecutive day pay applies. Inclusive functions with the next parameter of Qualifying hours.
  - Click on the **Dest. Pay Type** to select it.
  - In the **Pay** field, type the Times factor for this premium.
- In the **After** field, qualifying hours determines how many hours must be worked before the consecutive day rule is to be applied.
  - Check the **Override weekend premiums** check box if this rate overrides any weekend premiums.

Example: A setting of 6th Day, Pay Time and One-Half set at 0, Inclusive checked, and 40 Qualifying Hours would pay overtime immediately starting the sixth day of a consecutive work week if 40 hours had already been worked in the five previous work days. If not, then the overtime premium would begin as soon as the 40 hours had been worked.

**12.** In the **Weekend Premiums** section, specific Saturday and Sunday premiums:

- Select **On** or **Off** if no weekend premium applies.
- Select the appropriate **Destination Pay type**, using the drop down menu.
- Select a calculation method:



- If you pay a percentage of pay rates as a premium, type in empty field the % of pay field and type in the percentage number. Change the Times Payrate drop down selection to % of Payrate.
- If you pay straight dollars, type in the empty field type in the dollar premium paid. Change the Times Payrate drop down selection to \$ Fixed Amount.

d) Check the **Accrue** check box if you allow accruing of this time.

The premium amount is displayed in the **Other** column of TreeRing Time reports.

13. Click **Save** on the task bar.

14. Repeat this procedure for each new pay policy you wish to establish.

15. Assign these pay policies to employees by clicking on the **Assign Employees** link for the corresponding row in the Overtime Policies form.

## Editing a Pay Policy

You can change an existing pay policy.

Follow the instructions below to make changes to a pay policy.

1. From the **Configuration** tab, select **Rule Setup** and then **OT Policies**.  
The Overtime Policies form displays.
2. Click the **Edit** link for the row you wish to edit.
3. Click in the field that you want to make changes to and make the changes.
4. Click **Save**.

The Pay Policy is updated on the form.

## Deleting a Pay Policy

You can delete an unused or out of date pay policy.

Follow the instructions below to delete a pay policy.

1. From the **Settings** tab, select **Rule Settings** and then **Pay Policy**.  
The Pay Policy form displays.
2. Click the **Delete** link for the Pay Policy that you want to delete.
3. Click **OK** in the dialog box asking to confirm the deletion.
4. Click **Save** on the task bar to save your changes.

The Pay Policy is removed from the form.

## Pay Type

The types of time employees can receive in the TreeRing Time application.

The Pay Type form defines the pay types, or types of time, employees can receive in the TreeRing Time application. It also dictates if the pay types are paid or unpaid, and it determines if they are worked time, absence, or leave without pay. TreeRing Time is installed with a set of pay types that are sufficient to meet the needs of most companies. If your company uses a pay type that is not listed, you may create new ones.



**Note:** Do not add new Pay Types or delete existing entries without discussing the action with a TreeRing Time specialist.

This is an example of the Pay Types form.

**New Pay Type**
✕

Code:	<input type="text"/>	Accrue To OT:	<input type="checkbox"/>
Description:	<input type="text"/>		
Punch Type:	<input type="text" value="Advance Entry"/>	Include In Threshold:	<input type="checkbox"/>
Multiplier:	<input type="text"/>	PT Protect:	<input type="checkbox"/>
Map To HR:	<input type="text"/>	InclInBlendedOT:	<input type="checkbox"/>
Map To Payroll:	<input type="text"/>	Standard Punch Type:	<input type="checkbox"/>
		Is Active:	<input type="checkbox"/>

## Setting Up Pay Types

You can set up a pay type.


Follow the instructions below to set up a pay types.



**Note:** Do not add new Pay Types or delete existing entries without discussing the action with a TreeRing Time specialist.

1. From the **Configuration** tab, select **Company Setup** and then **Pay Types**.  
The Pay Types form displays.
2. Click in the **Code** field and enter a code for this pay type.
3. Click in the **Description** field and enter a new description for this pay type, if necessary (up to 20 characters in length).  
**Punch Type:** The punch type code is dependent on the pay type. Punch type refers to the standard punch type coming in from a data capture device such as a time clock. The Pay Type marked as Standard Punch type is the Pay Type (i.e. Work) that the Punch Type (i.e. C) will default to when it comes over from the clock. Standard punch types are already set up as part of the system installation and they include:
  - A = Advance Entry
  - AB = Absence
  - B = Bulk Time
  - BC = Break Complete
  - BE = Break Edited
  - C = Complete Punch
  - E = Edited Complete Punch
  - H = Holiday
  - LC = Lunch Deduction
  - LE = Lunch Edited
  - PP = Personal Time Paid
  - PU = Personal Time Unpaid
  - S = Sick

- V = Vacation
  - X = Adjustment/Other
4. In the optional **Multiplier** field, add a value to adjust the pay rate when it would be different than the standard pay rate. For example, time and half would be a multiplier of 1.5.
  5. Depending on your installation, enter the HR mapping code in the **Map to HR** column (up to 10 characters). This will indicate exactly where this record type will interface with the HR program.
  6. Depending on your installation, enter the Payroll mapping code in the **Map to Payroll** column (up to 10 characters). This will indicate exactly where this record type will interface with your payroll program.
  7. Select the **Accrue to OT** check box if you want the hours reported for this pay type to accrue toward overtime. This includes regular Worked Time, Bulk Time and Edited Time Pay Types if they are to be accrued to OT. Time Type: After selecting a Punch Type, the Time Type will automatically be filled in. This field can only be changed by choosing a different Punch Type.
    - 1 - For time worked and paid.
    - 2 - For time not worked but paid (sick, vacation, etc.)
    - 3 - For dollar amounts or count, such as tips, advances, and other amounts.
    - 4 - For time not worked and not paid (FMLA, etc.)
  8. Check the **Include in Threshold** check box if this pay type is to be included in the threshold.
  9. Check the **PT Protect** check box to prevent the deletion of a key pay type.
  10. Check the **InclnBlendedOT** check box if this pay type is to be included in Blended Overtime.
  11. Select the **Standard Punch Type** check box if you want this to be the standard punch type for this pay type. There can be only one pay type for each standard punch type. If there is already a pay type for the punch type you are selecting and it is marked Standard Punch Type leave this field blank. The standard punch type descriptions are listed above: A, AB, B, BC, BE, C, E, H, LC, LE, P, S, V, X. Only one standard punch type is allowed for any given category of punch types. For example, a "P" punch type can define many types of personal leave: civil leave, education, and funeral. Only one of these can be marked a standard punch type. This will be the one that comes in from the data clock as a "P" punch.
 



**Note:** If you have questions about this field, do not make any changes without prior approval from you TreeRing Time representative. You can have more than one pay type for each punch type, but only one can be a Standard punch type
  12. Check the **Is Active** check box to make this pay type active and appear in other menus.
  13. Click **Save**.

## Editing Pay Types

You can modify a pay types.

Follow the instructions below to modify a pay types.



**Note:** Do not add new Pay Types or delete existing entries without discussing the action with a TreeRing Time specialist.

1. From the **Configuration** tab, select **Company Setup** and then **Pay Types**. The Pay Types form displays.
2. Click the **Edit** link for the row of the pay type you wish to edit.
3. Click in the field that you want to make changes to and make the changes.
4. Click **Save**.

## Deleting Pay Types

You can delete a pay types.

Follow the instructions below to delete pay types.



**Note:** Do **not** delete existing entries without discussing the action with a TreeRing Time specialist.

1. From the **Configuration** tab, select **Company Setup** and then **Pay Types**.  
The Pay Types form displays.
2. Click the **Delete** link in the row of the pay type you want to delete.
3. Click **OK** in the dialog box asking to confirm the deletion.

## Rate Matrix

You can pay employees different amounts based on the department or job they work in.

The Rate Matrix feature in TreeRing Time can be used to pay employees different amounts based on the department or job they work in. The rate matrix option allows department and job rates to be assigned by employee, and allows a different rate to be assigned to each employee. This feature overrides other pay and bill rates that are set up for the employee in the Employee Rules.

Rate matrices are assigned to employees in the Rate Matrix form.

If the user's login security settings prevent them from viewing pay rates or bill rates in TreeRing Time, those columns will be hidden from view in this form.

This is an example of the Rate Matrix form.

## Setting Up a Rate Matrix

You can set up a rate matrix.

Follow the instructions below to set up a rate matrix.

1. From the **Configuration** tab, select **Rule Setup** and then **Rate Matrix**.
2. Click **Add New Rate Matrix** on the task bar.  
The New Rate Matrix form displays.
3. In the **Code** field, enter a value to represent the plan, up to 10 alphanumeric characters.
4. In the **Description** field, enter a name or description for the plan, up to 30 characters.
5. In the **Base Level** field, define the top labor tracking level of the plan.  
The top tracking level will be the information the employee enters first. The second tracking level will be tied to this top level.

If you change this level, you will get a warning that you are erasing the current plan. Click **OK** or **Cancel**.

6. Select the first level entry from the left hand box.
7. Then select the second level entry from the right hand selector box that will be linked to this first level entry. You can select several entries.
8. Click the **Add Level Codes** button below the right hand selector box.  
The Set new level rates form displays.
9. In the **Pay Rate** field, enter a pay rate for the selected employee for the chosen department/job.  
The amount can be:
  - **\$**: The amount will be added to employee pay or bill rate and successive levels. The dollar amount can contain up to four digits after the decimal point. This field will populate with the rate entered in the Company setup form (“Decimals In Rates”) but can be changed. If you use this optional pay rate category, this pay rate can be calculated and displayed in department and job reports and exported to payroll.
  - **%**: The amount is a percentage applied to employee pay or bill rate and successive levels.
  - **F**: The amount is the rate applied (pay or bill).
10. In the **Bill Rate** field, enter a bill rate for the selected employee for the chosen department/job.  
This field will populate with the rate entered in the job setup form but can be changed. If you use this optional bill rate category, this rate can be calculated and displayed in department and job reports. Bill rates are often used for third party billing.
  - **\$**: The amount will be added to employee pay or bill rate and successive levels. The dollar amount can contain up to four digits after the decimal point. This field will populate with the rate entered in the Company setup form (“Decimals In Rates”) but can be changed. If you use this optional pay rate category, this pay rate can be calculated and displayed in department and job reports and exported to payroll.
  - **%**: The amount is a percentage applied to employee pay or bill rate and successive levels.
  - **F**: The amount is the rate applied (pay or bill).
11. Click **Add Level Codes**.
12. Click **Save**.  
The Rate Matrix form updates.
13. Continue adding rate matrices in this manner.



**Note:** A quick way to turn off the rate matrix feature for an individual employees is to simply go to the **Employees Rules** screen, find the **Rate Matrix** drop down, and chose **None**.

## Modifying a Rate Matrix

You can modify a rate matrix when pay rates change.

Follow the instructions below to make changes to a rate matrix

1. From the **Configuration** tab, select **Rule Setup** and then **Rate Matrix**.
2. Click the **Edit** link for the row you wish to edit.
3. Click in the field you want to make changes to and make the changes.
4. Click **Save**.

## Deleting a Rate Matrix

You can delete a rate matrix when it no longer applies.

1. From the **Configuration** tab, select **Rule Setup** and then **Rate Matrix**.

2. Click the **Delete** link in the row of the rate whose information you want to delete.
3. Click **OK** in the dialog box asking to confirm the deletion.
4. Click **Save**.

## Time Rounding

Employee work time can be rounded based on the clock or the employee's schedule.

Employee work time can be rounded based on the clock or the employee's schedule. Independent rounding policies can be configured and applied for different groups of employees.

The Rounding Policies form sets standard clock-based rounding rules. Standard Punch Rounding can be used in conjunction with Schedule-based rounding. Schedule rounding takes priority, therefore any punches that fall outside of the Schedule rounding rules will be rounded by punch rounding rules.

Rounding rules are assigned to employees in the Rounding Policies form.



**Note:** TreeRing Time will never change the Start or End Time of a punch. Rounding takes place on the Time Totals, not the actual punches. Labor reports will show the actual punch time of each record, but the time Totals will reflect the rounding rules.

Once a rounding policy is configured and assigned to an employee, all system calculations are based on the rounded work time, not the actual punch time. This includes calculations performed for Overtime, End-of-Day, End-of-Pay-Period, and Shift Allocations, etc.

## Entering a New Rounding Policy

You can enter a new Rounding Policy.

Follow the instructions below to enter a new rounding policy.

1. From the **Configuration** tab, select **Rule Settings** and then **Rounding Policy**.  
The Rounding Policy form displays.
2. Click **Add New Rounding Policy** on the task bar.  
The New Rounding Policy form displays.
3. In the **Rounding policy name** field, enter a unique number (up to 20 digits).
4. In the **Policy Description** field, enter a descriptive name (up to fifteen characters) for this rounding policy.
5. Click **OK**.  
The Rounding Policies form displays.
6. Specify the rounding rule for each punch type described below.
  - **Start:** This rounding will apply to the work starting time only. Click on either forward, nearest or backward and select the number of minutes.
  - **End:** This rounding will apply to the work ending time only. Click on either forward, nearest or backward and select the number of minutes.
  - **Transfer/Switch:** This rounding will apply to the Switch type punch. The Switch punch is used when an employee presses the special Switch key on a data collection device to change the department or job that they're working on. Click on either forward, nearest or backward and select the number of minutes.
  - **Lunch Start:** This rounding will apply to the lunch starting time only. Click on either forward, nearest or backward and select the number of minutes.
  - **Lunch Return:** This rounding will apply to the lunch ending time only. Click on either forward, nearest or backward and select the number of minutes.

- **Break Start:** If breaks are used, this rounding will apply to the break starting time only. Click on either forward, nearest or backward and select the number of minutes.
- **Break Return:** This rounding will apply to the break ending time only. Click on either forward, nearest or backward and select the number of minutes.

For each of the punch types, you can choose whether to round forward, to the nearest increment, or backward by clicking on that radio button in each row. The rounding options are explained below:

- **Forward:** Punches are rounded forward to the selected number of minutes after the hour. For example, if a user selects Forward, 15 minutes the punch will be rounded forward to :15, :30, :45 or :00. A punch between 6:01 and 6:15 would be rounded to 6:15.
- **Nearest:** Punches are rounded to the nearest time. If a time is evenly between 2 entries, it is rounded backwards. If a user selects Nearest, 15 minutes, a punch will be rounded to :00, :15, :30 or :45, whichever is nearest. For example, a punch at 6:03 will become 6:00; a punch at 6:07 will become 6:00; a punch at 6:57 will become 7:00.
- **Backward:** Punches are rounded back the number of selected minutes. For example, if a user selects Backward, 6 minutes the punch will be rounded backwards to :00, :06; :12, :18, :24, :30, :36, :42, :48 or :54 minutes. A punch at 6:08 would become 6:06.
- **Minutes:** From the Minutes drop down list, you select the number of minutes you want to round to for each punch type.



**Note:** An assumption of 0 minutes and 60 minutes is always made as the Start and End point for the rounding. A time being rounded backwards will go to :00 at most. A time being rounded forward will be rounded to the next hour at the most. For example, if a user enters 22 as the number of minutes, the program will be rounding to :00, :22, :44 and :60 (not :66 minutes).

Example: For each of the categories: start time, end time and transfer/switch, rounding can be set forward, backward, or nearest, and a number of minutes can be input. The number of minutes has 6, 12, 15 and 30 listed in the drop down menu. Click in the field to type in any other number of minutes you want to round to.

7. In the **Shift Threshold** field, enter the amount of time in minutes that need to go by when an employee is off the clock in order for TreeRing Time to decide if the next 'Start' punch should be rounded as a start or as a switch type punch. A small number, such as 5 minutes, works well to round the punch as a 'Start.'
8. Click **Save**.

## Editing a Rounding Policy

You can edit a Rounding Policy.

Follow the instructions below to edit a rounding policy.

1. From the **Configuration** tab, select **Rule Settings** and then **Rounding Policy**.  
The Rounding Policy form displays.
2. Click the **Edit** link for the row you wish to edit.  
The Update Rounding Policy form displays.
3. Click in the field that you want to make changes to and make the changes.
4. Click **Save**.

## Deleting a Rounding Policy

You can delete a Rounding Policy.

Follow the instructions below to delete a rounding policy.

1. From the **Configuration** tab, select **Rule Settings** and then **Rounding Policy**.





3. In the choice dialog that appears click:
  - **Yes** to copy an existing Shift Group. The Select a Shift Group to Copy dialog displays. Go to step 4.
  - **No** to create a unique Shift Group. Go to step 7.
4. In the **Select a Shift Group to Copy**, select from the drop down list a Shift Group. Click **Copy**.
5. Edit the **Description** with a new name.  
The new Shift Group appears in the Shift Differentials form.
6. Click the **Edit** link to continue making changes to the new Shift Group.
7. In the **Description** column, enter the name or a description of the shift group.
8. Select the **Include Diff in OT/DT Rate?** check box to determine whether shift differential dollar amounts will apply to regular time only, or if they will also be calculated reflecting the OT and DT rules applied to the employee.
9. Select the **Include Diff in Bill Dollars?** check box to determine whether shift differential amounts will be added to the Bill Dollars calculated.
10. **Fallback Diff:** For time worked in a shift which is less than the minimum required (as set in the Shift form), this option determines how that worked time gets paid:
  - **Assigned Shift:** The worked time gets paid at the differential rate of the employee's assigned shift in the Employee Rules form.
  - **Qualifying:** The worked time gets paid at the rate of the worked shift contiguous to the failed minimum shift.
  - **No Shift Diff:** The worked time receives no differential pay at all.



**Note:** If either Assigned Shift or Qualifying is chosen and Best of Any is selected in the Employee Rules form, then the Non-Qualifying time is paid at the Best of Any rate.

11. **Fallback Shift:** For time worked in a shift which is less than the minimum required (as set in the Shift form), this option determines to which shift that worked time will be allocated:
  - **Non-qualifying:** The worked time is allocated to the actual shift worked.
  - **Contiguous:** The worked time is allocated to the worked shift contiguous to the failed minimum shift.
  - **Assigned shift:** The worked time is allocated to the assigned shift in the Employee Rules form.



**Note:** The Adjusted Shift value is shown in the field Adj Shift on the Edit Timesheet form.



12. To define a new shift, click the **Add New** button on the Shift task bar. Fill in the following information for the first shift of the first day:  
You will define the actual work times using the Shifts form. Specify differential amounts and minimum time worked rules as well. When defining the work shifts, keep in mind these rules:
  - Shifts must be defined for seven, 24-hour days. Define work shifts that have no differential pay in order to fill any undefined time if weekends are not worked, or if the shifts do not span a complete 24-hour cycle.
  - The shifts defined for each day must be either contiguous or overlapping. If the shifts are overlapping, then the Min Worked value for the second of the two shifts must be a value equal to or greater than the amount of overlap. For example, Day Shift runs from 6:00AM to 2:30PM and Swing Shift runs from 2:00PM to 10:30PM. The amount of overlap is 30 minutes, therefore the Min Worked value must be 30 or more.
  - The Shift Designator value must be unique for every row on this form.
  - Shift times defined for each day may be different from those defined for other days as long as the shifts meet the 24-hour requirement. Therefore, weekend shifts can differ from week day shifts. These varying shifts require unique Shift Designator values.

- Shift Differential amounts can differ for each shift and each day worked. The format of the differential (% or \$) can also vary. These varying shifts require unique Shift Designator values.
- **Day of Week:** Select the day of the week for this shift.
- **Shift Designator:** Enter a label for the shift. This label must be unique for each row on the form. It can contain alpha and numeric characters.
- **Description:** Enter a description of the Shift.
- **Start:** Enter the starting time of the shift.
- **End:** Enter the ending time of the shift.
- **Minimum Worked:** Enter the amount of time in minutes required to work into this shift in order to qualify for the shift differential pay amount as well as to qualify this work time for the shift.
- **\$/%:** Define the unit that the differential will be paid in:
  - **N:** No differential for this shift.
  - **\$:** Dollar amount. The differential will be paid as an amount in dollars.
  - **%:** Percentage. The differential will be paid as a percentage of the employee's hourly rate set in the Employee Rules form.
- **Shift Diff Amount:** The amount of differential to be paid per hour worked. Either in dollar format (xx.xx) or a percentage (xx.).
- **AutoLunch Min Worked:** If there is a shift specific lunch time, specify the minimum amount of time, in minutes, worked in this shift in order to qualify for the lunch deduction. The shift-specific AutoLunch can then be assigned in the Employee Rules form.
- **AutoLunch Adjustment:** Specify the amount of time, in minutes, to deduct for the AutoLunch.
- **SD Reg Code:** Specific pay codes per shift may be defined here for use by the payroll export. Enter a payroll code for regular shift differential. If this field is left blank, the Shift Diff pay codes defined in the Payroll Codes form (accessed from the **Configuration** tab by selecting **Rules Setup** and **Payroll Codes**) are used.
- **SD OT Code:** Specific pay codes per shift may be defined here for use by the payroll export. Enter a payroll code for overtime shift differential. If this field is left blank, the Shift Diff pay codes defined in the Payroll Codes form (accessed from the **Configuration** tab by selecting **Rules Setup** and **Payroll Codes**) are used.
- **SD DT Code:** Specific pay codes per shift may be defined here for use by the payroll export. Enter a payroll code for double-time shift differential. If this field is left blank, the Shift Diff pay codes defined in the Payroll Codes form (accessed from the **Configuration** tab by selecting **Rules Setup** and **Payroll Codes**) are used.

**13.** Click **Save** to save the shift.

**14.** Repeat this process to define a full 7 days of 24-hour shifts.

The **Copy** button on the form makes this process easy. Simply check the newly created shift to and the days of the week you want it copied to. Click the **Copy** button.

Since the TreeRing Time shift feature requires that 7 days of 24-hour shifts are defined, if weekends are not worked for this shift, or if the shifts do not span a complete 24 hour cycle, simply define work shifts that have no differential pay in order to fill the undefined time. By specifying the correct Fallback criteria in the Shift Group form, this blank shift can be prevented from interacting with the employee's pay rate or worked time.

**15.** Click **Save**.



**Note:** TreeRing Time monitors the Shift Setup form errors or incomplete configuration. When Save is clicked and the defined shifts are incomplete, or there is a problem with the data, TreeRing Time will show an error message. These messages are descriptive of the problem encountered and prompt the user to correct or complete the data entry. Please read these messages and note the problem and solution. Oftentimes, the Save Action can still be performed and the data entry can then continue.

## Assigning Employees to a Shift Group

You can assign employees to a Shift Group

The last step to configure shifts and shift differential is to assign the appropriate shift to the employee and set the parameters affecting the differential pay and AutoLunch.

1. From the **Configuration** tab, select **Rules Setup** and then **Shift Differentials**.

The Shift Differentials form displays.

2. Click the **Assign Employees** link for the schedule that you wish to assign employees to.

The Select Shift Designator form displays.

3. Select the **Shift Designator** from the drop down list.

4. Click **Select**.

The Employee Assignment form displays.

5. In the **Card ID** field, enter the employees Card ID, Name, or Supervisor to filter the list.

6. Check all the names you wish to assign to the Shift Group.

7. Click the **Confirm** button.

8. Repeat this process for each employee, assigning the appropriate schedule from the drop down menu.

## View Work Time by Shift in the Edit Timesheet Form

You can view the work time by shift using the Edit Timesheet form.

Time records for an employee who has a Shift assigned to them are displayed in two separate boxes in the Edit Timesheet form. The upper grid is the standard interface that displays time records by date. The lower grid displays time records by shift. When a time record is selected in the upper box, that same time record is displayed in the lower grid broken into shift worked. It is easy to reference regular versus overtime worked and in which shift it occurs. Another benefit is to see the shift differential totals by shift in an easy-to-read format, with the ability to override these amounts if necessary.

1. From the **Edits** tab, select **Edit Timesheet**.

The Edit Timesheet form displays.

The lower grid contains the following fields:

- **Shift Group:** The Shift Group to which the worked shift belongs.
- **Work Shift:** The Shift into which the worked hours fall.
- **Adjusted Shift:** If Fallback Shift on the Shift Group setup form is set to Assigned Shift or Contiguous, then this field will contain the shift to which the time record has been reassigned. If it has not been reassigned, the value in this field will match that in the Work Shift field.
- **Diff Rate:** The hourly differential rate that applies to the shift.
- **AutoLunch:** Any AutoLunch time that was subtracted from the time record. The sum of all of the time displayed in the AutoLunch column will equal the amount shown under Lunch in the parent time record shown in the top grid.
- **Reg Hrs:** The number of regular hours worked in the shift.
- **OT Hrs:** The number of overtime hours worked in the shift. This column will not display if the option Include diff in OT/DT rate? on the Shift Groups setup form is not checked.
- **DT Hrs:** The number of double time hours worked in the shift. This column will not display if the option Include diff in OT/DT rate? on the Shift Groups setup form is not checked.
- **Total Hrs:** The total of regular, overtime, and double time hours worked in the shift.
- **Shift Diff Calc Amt:** The amount of shift differential for the shift. If the box labeled Include diff in OT/ DT rate? is checked in the Shift Group setup form, then this amount will be calculated by multiplying the dollar amount by 1.5 before calculating overtime and by 2.0 before calculating double time.

- **Shift Diff Override Amt:** The amount of shift differential can be modified and overridden by editing this field. Click into this field and enter a dollar value to override the amount of shift differential shown in the previous field. If there should be no differential pay, a value of 0.00 will negate the differential.
- **Meets Min:** A check in this box indicates the time worked in the shift meets the minimum to qualify for that shift's differential amount. If the box labeled No Min Required is checked in the Employee Rules form, this box will always be checked.

## Printing Shift Labor Reports

You can print shift labor reports.

There are two labor reports specifically designed to present shift-based information in a valuable format. These two reports can be accessed from the **Reports** tab by selecting **Shifts**.

- **Home Shift Worked Department Employee Detail:** A report that displays worked time by day, broken down by worked shift with time and pay totals by shift.
- **Home Shift Worked Department Summary:** Displays worked time records sorted by employee, then presents hour totals and worked hours segregated by worked shift with total dollar amounts.

## Employee Rules

You can use the Employee rules form to maintain the employee roster and assign business rules to them.

The Employee Rules form is used to maintain the employee roster and assign business rules to them. It is a simple matter to add new employees or inactivate employees that have left.

Different business rules (autolunch policy, pay policy, comp time policy, etc.) can be defined in the **Configuration** tab **Rule Setup** or **Company Setup** and then assigned to different employees independently. This assignment activates or qualifies the employee for the business rule.

To change an employee's Card ID and transfer their work history to a new Card ID, see the instructions for the [Change Card ID](#) feature.

## Viewing Employee Rules

You can view the rules set up for an employee.

Follow the instructions below to view the rules set up for an employee.

1. From the **Employees** tab, select **Company Members**.

The Company Members List form displays.

Card ID	First Name	Last Name	Card ID	Action
1000	John	JACKSON	10000	[Edit] [Delete]
1001	Mary	JONES	10000	[Edit] [Delete]
1002	Frank	HENRY	10000	[Edit] [Delete]
1003	Stella	DANIELO	10000	[Edit] [Delete]
1004	Peter	BAKER	10000	[Edit] [Delete]

2. Click the **Edit** link for the desired employee.

The Employee Details form displays.

## Configuring Employee Rules Default Profile Settings

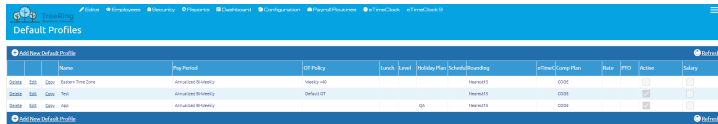
You can configure default profile settings for the employee rules.

Default values for common business rule assignments can be created and applied to employees, thus saving time. For example, if a large number of employees share the same holiday policy, lunch policy, and time offset, these values can be set in a Default Profile and can be applied in an automated fashion using the Apply Default option on the Employee Rules task bar.

To configure a Default Profile for the Employee Rules form, follow this procedure.

**1. From the **Employees** tab, select **Default Profiles**.**

The Default Profiles form displays.



Name	Pay Period	OT Policy	Lunch	Level	Holiday Plan	Schedule	Rounding	eTimeClock	Comp Plan	Rate	PTO	Active	Salary	Vendor
0001	001	001	001	001	001	001	001	001	001	001	001	001	001	001
0002	002	002	002	002	002	002	002	002	002	002	002	002	002	002
0003	003	003	003	003	003	003	003	003	003	003	003	003	003	003

**2. Click **Add New Default Profile** on the top task bar.**

The New Default Profile form displays.

**3. In the **Name** field, enter a name for the profile.**

**4. Select plans, policies, and other settings for these fields:**

- Time Offset:
- OT Policy
- Lunch Plan
- Holiday Plan
- Schedule
- Rounding
- eTimeClock
- Comp Plan
- Pay Period
- Rate Matrix
- Main Supervisor
- PTO Plan
- Level Hierarchy Plan
- Active: is the employee active. If checked, yes.
- Salary: is the employee salaried. If checked, yes.
- Vendor
- Departments
- Job

**5. When you are finished assigning values, click **Save**.**

After the Default Profile is configured, it can be used to populate data fields as you enter new employees on the Employee Rules form (accessed from the **Employees** tab by selecting **Company Members**).

## Entering Employee Rules

You can enter employee rules.

Follow the instructions below to view the rules set up for an employee.

**1. From the **Employees** tab, select **Company Members**.**

The Company Members List displays.

**2. Click **Add New Company Member** on the task bar.**

An empty form displays ready for new employee information to be entered.



**Note:**The minimum required information for a new employee is: Card ID, Last Name, and Pay Period.

3. Enter the employee's **First name** (up to 50 characters in length), enter a **Middle** initial for this employee, and then enter the employee's **Last** name (up to 50 characters in length).
4. Enter the unique **Card ID** number, up to 10 digits, that the employee will use to clock in. The limit to the number of digits in the card ID is dependent on the data capture device.

If you have a default profile of rules set up which you want to apply to this employee, then do the following now that you have filled in Card ID for this employee:



**Note:**See [Configuring Employee Rules Default ProfileSettings](#) for directions on how to set up profiles which will make entering employee rules a much quicker process, especially if you have certain rules which apply equally to several employees.

- a) In the **Default Profile** drop down, select a profile.  
The Employee Details form updates.
5. Continue entering information for the employee which the profile did not enter automatically for you. In the **Other ID** field enter another unique identifier for the employee, usually the social security number. This field is the link between TreeRing Time labor information and payroll, human resources, and other programs. You can use any alphanumeric entry up to 50 characters. TreeRing Time does not use this number but it is often used in the payroll export file.
6. From the **Level Hierarchy** drop down list box, select the appropriate plan for this employee. This is can be left blank.
7. From the **Pay Policy** drop down list box, select the premium pay policy to be assigned to this employee.
8. Assign the **Master PTO Plan** to the employee.  
The employee will be eligible to accrue all PTO types defined within the Master Plan.
9. From the **Lunch** drop down list box, select from the list of automatic lunch rule codes established for your organization. Select the lunch rule to be assigned to this employee. If no automatic lunch rule is assigned, leave this box blank.
10. Enter the **Hire** date of the employee. Click the calendar icon to select the date or enter the date in MM/DD/YY format.
11. From the **Job** drop down list box, select the job that should be assigned as a home, or default, job for this employee. If the job is tracked at the data collection device, the entered job department will override this home department entry. If no home job is to be assigned, leave this box blank.
12. From the **Holiday** drop down list box, select the holiday group to be assigned to this employee.

If this employee does not qualify for Holiday Pay, leave this box blank. In cases where an employee does not qualify for a holiday benefit until after a preset period of time (90 days is a common rule), simply leave this field blank until that time threshold has been met and then make the assignment.

**13.** Enter the **Benefit** date of the employee (Optional).

Enter the benefit date only if the Benefit Date is used in the Plan Details form for a PTO type. The 'Calculate Dates' feature or the calendar icon can be used to enter the date, or simply enter the date in xx/xx/xx format.

**14.** From the **Schedule** drop down list box, select from the list of schedule templates established for your organization.

Select the schedule to be assigned to this employee. If no schedule should be assigned to the employee, leave this box blank. A schedule may include time rounding rules and once a rounding rule is assigned to an employee, all system calculations will use the rounded work time, not the actual punch time.

**Anniversary:** The Anniversary date will fill in automatically with a date one year from the Hire date. If this is not correct it may be changed. The 'Calculate Dates' feature or the calendar icon can be used to enter the date, or simply enter the date in xx/xx/xx format.

**15.** From the **Rounding** drop down list box, select from a list of rounding policies established for your organization.

If you want this employee's punches to be rounded, click the rule to be assigned to this employee. If no rounding rules apply to this employee, leave this box blank. Once a rounding rule is assigned to an employee, all system calculations will use the rounded work time, not the actual punch time.

**16.** From the **Comp Plan** drop down list box, select the comp time plan which this employee will be following.

**17.** Enter an e-mail address for the employee.

When employee certifications are generated, a message can be sent to this e-mail address, advising the employee they are ready to view and approve time sheets. This e-mail address is also used by the Automate Reports feature to send reports to recipients.

**18.** From the **Pay Period** drop down list box, select the pay period to be assigned to this employee. You must select a pay period for each employee.

**19.** If this employee will use eTimeClock, then from the **eTime Profile** drop down list, select the employee's eTimeClock profile. **Refer to chapter 16 for more detailed information.**

**20.** From the **Supervisor** drop down list box, select the name of this employee's supervisor.

It is recommended that this assignment be made if your organization's supervisors will be logging into TreeRing Time to view, edit, or approve this employee's work time, as it simplifies the Login Data Security. **See Chapter 10 for more information about logins and security.**

**21.** From the **Rate Matrix** drop down list box, select the rate matrix type that will be applied to this employee. Select either **Job** rates or **Department** rates. If no rates are required, leave the setting at **None**.

**22.** In the **Time Offset** field, record the employee's time zone relative to the TreeRing Time SQL Server.

Enter a number that is the time difference between the employee and the TreeRing Time server. For example, if the server is in Chicago and the employee is in Colorado, enter -1 because the employee's time is one hour behind the server time. If the employee is in New York, enter 1. Leave this field blank if employee is located in the same time zone as the server.

**23.** If the employee will be using eTimeClock and you have turned on the PIN code requirement in their selected eTimeClockProfile, enter a **PIN** code for the employee here.

**24.** Enter in the employee's base **Pay Rate** per hour in this field.

Reports can optionally display the total pay so costs can easily be determined for the employee, or for a division, shift and date range.

**25.** Enter in the employee's **Bill Rate** per hour in this field. This is often used to bill a third party.

**26.** From the **Shift** drop down list, select the standard shift that this employee works.

The employee may work in other shifts besides the assigned one, but not within other shift groups.

**27.** To send texts to an employee if they have missed punches, in the **SMS notifications to** field, enter the employees mobile number and using the drop down, select the mobile provider.

**28.** Make sure the **Active** check box is marked for this employee.

This will default to Active, which signifies that this employee is active with the company. When an employee leaves the company simply deselect this box and click **Save**. After the pay period passes, the employee will not show on any reports but the work history is still retained. Inactive employees do not count toward an employee license.

29. Mark the **Salary** check box if this is a salaried employee.  
Leave this field blank for hourly employees.
30. Mark the **AutoGenerate Time Sheets** box if you wish to AutoGenerate work time for this employee.  
Otherwise, leave this field blank. See the [Autogenerating Time Sheets](#) section for more information on this feature.
31. Mark the **Certify** check box to activate the Certify Time Sheets feature for this employee.  
For more information see Chapter 14.
32. Mark the **Best of Any** check box should be ONLY if Rate of Assigned Shift is not checked.  
If this box is checked then the rate from the highest paying qualifying shift worked during a continuous time record is applied to time worked in all shifts of the time record, regardless of whether the time in a shift qualifies or not.
33. Mark the **No Min Required** check box if you want to specify that no minimum work time is required for the employee to qualify for shift differential pay on any shift, regardless of Min Worked values specified in the Shift setup form.  
Note that if No Min Required is checked, then the Best of Any shift differential rate may come from a shift on which the minimum is not met. Also, if No Min Required is checked, the Meets Min field in the Shift Differential grid on the Edit Timesheet form will always be checked.
34. Mark the **Shift Differential** box if shift differentials are to be applied. Additional check boxes appear.
  - a) Assign a shift group in the **Shift Group** drop down menu.
  - b) Assign a shift in the **Shift** drop down menu.
35. Click **Save** on the task bar.
36. In the **Home Levels** tab, select the appropriate values for each Level or Label shown. They are ordered from the most general to the most specific. ensure you select a Home level from the Company members record.
37. Click **Save** on the task bar.
38. In the **PTO Banks** tab, adjust the PTO values as needed.
39. Click **Save** on the task bar.
40. In the **Positions/Skills** tab, check all the *Positions* the employee has the training for and the check all the *Skills* they have.
41. Click **Save** on the task bar.
42. Repeat this procedure to add each employee.

## Making an Employee Inactive

You can mark an employee inactive if they take leave or if they leave the company.

If an employee leaves the company or takes an extended leave of absence, the employee can be marked Inactive instead of deleting their employee record. The benefit to this is that the work history of the employee is retained and can be accessed with historical reporting, yet the employee does not normally display on any reports or lists. Inactive employees do not count toward an employee license either.

Follow the instructions below to remove the employee from active status.

1. From the **Employee** tab, select **Company Member** .  
The Company Members List form displays.
2. From the **Employee** drop down list, select the employee who you want to delete or make inactive.  
The employee's rule data displays.
3. Click in the **Active** box to remove the check, which renders this employee inactive.
4. Click **Save**.

After inactivating an employee, to view their work history use the Show Inactive Employees check box in the Filters form and set the date range for Historical with the appropriate dates entered. See [Filters](#) for more details.

Inactive employee card IDs should not be reassigned without first changing the ID number. See the instructions for [Change Card ID](#) for more information.



## Chapter 9. Filters

The Filters form allows you to filter the information you see in TreeRing Time by a variety of data factors including employee, department, date range, and employment status.

### In This Chapter

[Filters Overview](#) on page 89

An overview to the filter settings.

[Configuring Employee Filters](#) on page 91

You can configure filters for employees, thus saving them time.

## Filters Overview

An overview to the filter settings.

When you log in to TreeRing Time, you can view all employees that are assigned to you in the Data Security form in the current pay period. The Filters form allows you to filter the information you see in TreeRing Time by a variety of data factors including employee, department, date range, and employment status. By changing the parameters in the Filters form, you can limit the number of records you are seeking for viewing, editing, or printing. Once the parameters are set, all forms and reports will appear with only the filtered information. This is useful for looking at a single employee's data for a six month historical period.



**Note:**The Filters form only operates within the range of your login security settings.

## Personalizing Your Filters

Select the criteria to personalize your current and future TreeRing Time sessions.

The Filters form allows you to select the criteria for your current and future TreeRing Time sessions. Once the parameters are set, all forms and reports will appear with only the selected information. The changes made in Filters are only permanent for all subsequent logins. The settings on the Filters form only affect all future session view of labor data. If you no longer require the filter, you must reconfigure your filters to the desired parameters.



**Note:**The Filters form only operates within the range of your login security settings.

To set specific filter parameters:

1. From the **Top Menu** in the top right, select **Filters**.

The Filters form displays.

**Your current employees filters**

User: Admin, TC (ccadmin)

account:

Custom Filters: **Load/Delete** Current Custom Filter: None

Employees Status Selected All Employees

Employee Pay Periods No Pay Period Filter

Salaried employees

Managers Selected 0 of 5

Supervisor Selected 0 of 5

Shift Groups Selected 0 of 6

- Specify the data you want to work with in this TreeRing Time session.

### Employee Status

This is where you specify the employment status of the employees you wish to view.

- Select **All Employees** if you wish all employees, both active and inactive, to appear in the forms and reports for this session.
- Select **Only Active Employees** if you wish to view active employee information only.
- Select **Only Inactive Employees** if you wish to view only the information on employees who are no longer active.

### Employee Pay Period

All forms and reports will reflect labor data for the date period selected in this section. All dates are relative to the pay period currently configured in the Pay Period form under the **Configuration** tab.

- All Pay periods
- List of all Active or Pending Pay Periods

### Salaried employees

- Select **Salaried and Non-salaried Employees** if you want the complete list of salaried and non-salaried employees.
- Select **Only Non-Salaried Employees** if you want the complete list of non-salaried employees.
- Select **Only Salaried Employees** if you want the complete list of salaried employees.
- To select/deselect all managers at once, click the **Check/Uncheck All** button.
- To select a particular manager, locate him or her in the **Managers** list, then click on the supervisor.

### Supervisor

- To select a particular supervisor, locate him or her in the **Supervisors** list, then click on the supervisor.

### Managers

- To select a particular supervisor, locate him or her in the **Supervisors** list, then click on the supervisor.

### Shift Group

- To select/deselect all shift groups at once, click the **Check/Uncheck All** button.

- To select a particular shift group, locate it in the **Shift Group** list, then click on the shift group.

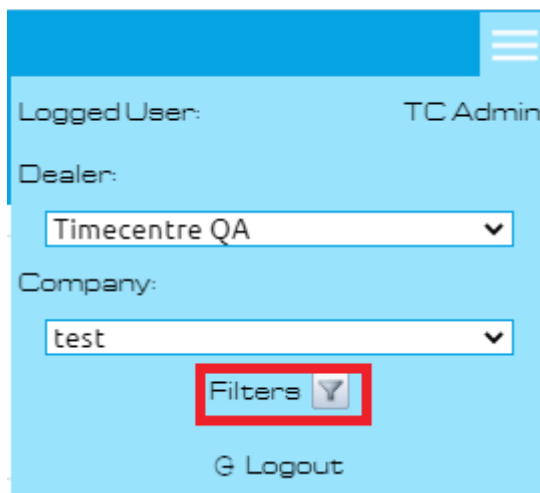
### Departments

- Available groups are: Divisions, Bushness Unit, Job, Projects, or Location.
- To select/deselect all departments at once, click the **Check/Uncheck All** button.
- To select a particular department, locate it in the **Managers** list, then click on the department.

### Jobs

- To select/deselect all jobs at once, click the **Check/Uncheck All** button.
- To select a particular job, locate it in the **Managers** list, then click on the job.

- Click **Save** after each data selection or once you have finished selecting the viewing parameters.  
A filter icon now appears beside **Filter** in the heading of TreeRing Time. (See the red square around the icon.)



- Proceed in the usual manner to run reports and forms. Only the data based on saved parameters will be shown. The data available is based ultimately on your security level.

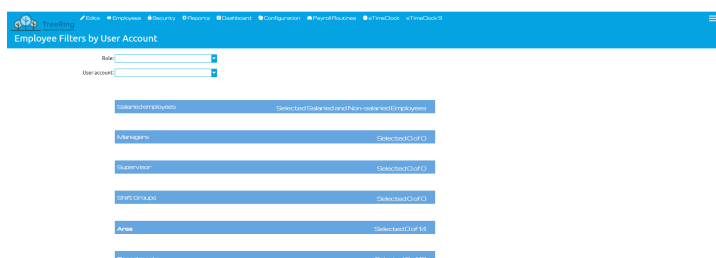
## Configuring Employee Filters

You can configure filters for employees, thus saving them time.

You can pre-configure filters for employees, supervisors, or managers. This saves them time from setting them up for themselves.

- From the **Security** tab, select **Employee Filters by User Account**.

The Employee Filters by User Account form displays.



- In the **Role** field, select using the drop down menu, the desired role for the filter.

This helps filter the User Accounts filter.

3. In the **User Account** field, select using the drop down menu, the desired user for the filter.
4. Chose the options you wish to configure for the filter by clicking each of the categories.  
Categories include:
  - **Employee Status:** This is where you specify the employment status of the employees you wish to view.
  - **Employee Pay Period:** All forms and reports will reflect labor data for the date period selected in this section. All dates are relative to the pay period currently configured in the Pay Period form under the Configuration tab.
  - **Salaried Employees:** Select **Salaried and Non-salaried Employees** if you want the complete list of salaried and non-salaried employees. Select **Only Non-Salaried Employees** if you want the complete list of non-salaried employees. Select **Only Salaried Employees** if you want the complete list of salaried employees.
  - **Managers:** To select/deselect all managers at once, click the **Check/Uncheck All** button. To select a particular manager, locate him or her in the Managers list, then click on the supervisor.
    - **Supervisor**
    - **Shift Group**
    - **Departments**
    - **Jobs**
5. In each category, click the check box for all the items that should appear in the filter.
6. Click **Save**.

The filter is applied for the user. They can tell if a filter was configured because a funnel icon will appear beside the **Filter** link in the top right of the Time Centre heading.

# Chapter 10. Edits and Processes

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The Edits tab in TreeRing Time houses procedures needed for daily and weekly processes.

## In This Chapter

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Overview of the Edits Tab in TreeRing Time houses procedures needed for daily and weekly processes.

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Work with Duplicate and Overlapping punches.

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Displays time records for an employee ID that does not exist in the Employee Rules form

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You can display punches over 24 hours in duration.

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The Edit Timesheet form is a listing of all complete work punches and special punch types.

[Working with PTO Requests](#) on page 107

You can work with PTO requests using the PTO Requests tab on the TimeSheet.

[Redistributing Hours](#) on page 109

Redistribute Hours gives the user the ability to reallocate work time totals.

[Clock Location Exceptions](#) on page 110

Lists all punches that did not originate from an approved location.

[Supervisor Signoff](#) on page 110

Provides payroll administrators confirmation that each supervisor and if configured, manager, has reviewed their employees' time cards and signed off the time sheets.

[Manager Signoff](#) on page 113

Provides payroll administrators confirmation that each manager has reviewed their employees' time cards and signed off the time sheets.

[Bulk Transaction Entry Form](#) on page 115

You can use the Bulk Transaction Entry Form to make a timesheet change for a whole department.

[Adjust Daylight Saving Time](#) on page 116

Adjusts the start time of a work shift, lunch punch, or break punch whenever there is a time change.

[Creating a Holiday Exemption for an Employee](#) on page 119

You can create a holiday exemption for an employee that will not be paid holiday rates.

## Edits Tab Overview

Overview of the Edits Tab in TreeRing Time houses procedures needed for daily and weekly processes.

The **Edits** tab in TreeRing Time houses procedures needed for daily and weekly processes. Tasks such as reviewing employee time records, correcting incomplete punches, and adding bulk time for employees can be found in this tab. In addition, forms designed to create, build, and edit employee schedules are also located within this tab. The Administrator, Payroll Administrator, and Supervisor logins each have access to the **Edits** tab.

Each time a time record is edited, the punch type is changed to an “E” in the system, denoting an Edit type punch. This Edit flag is part of the built-in security in TreeRing Time. This security tracks edit activity by login and can report by individual punch what the data was prior to the edit and then afterwards. TreeRing Time also tracks when a login adds a new punch.

## Edits Tab Procedures

Forms available to you in the Edits tab.

The various forms in the Edits tab are used frequently throughout the course of a pay period. Every company has unique needs and procedures, but the following suggestions are designed to give general guidance for managing employee labor data as the company moves through a pay period:

- **Check Missed Punches Frequently:** It is always better to stay current when editing and correcting employee labor data. A missed punch (when an employee punches Start in the morning but forgets to punch End at the end of the day or vice versa) is the most common mistake an employee can make and should be corrected as soon as possible. The Missed Punches form should, therefore, be kept free of mistakes.
- **Duplicates and Overlaps Correction:** These are two additional types of erroneous punches that employees can make at the time clock. The Duplicates and Overlaps form is designed to filter for just these types of errant punches. Correct these mistakes by editing and correcting the times or deleting unintended extra punches.
- **Use Bulk Entry forms when needed:** If there is an employee traveling, or if there is a group meeting or retreat, use the Bulk Entry forms to add employee work time. The Bulk Time form is useful for adding work time for a single employee, while the Bulk Transaction Entry is useful for giving a group of employees a single punch.

If the edits and corrections are performed throughout the work week, accurate labor reports can be run whenever needed. The Period End processes will also go more smoothly as well. See subsequent chapters for more information regarding labor reports and the payroll export and Period End Routines.

## Missed Punches

You can use the Missed Punch form to correct missed punch types.

Missing a punch at the time clock is the most common type of mistake that an employee can make. These are often very easy to correct, simply fill in the missing punch time to complete the work shift. The Missed Punches form will help with this task as it lists all employee punches that are not complete.

It is always better to stay current when editing and correcting employee labor data. If the employee needs to be consulted in order to complete a punch, they will remember the time they left work yesterday much more accurately than a day last week sometime. The Missed Punches form should be kept free of punches as the pay period progresses.



**Note:** Missed punches will not display in a regular time sheet or a labor report until they are completed.

Follow the instructions below to work with missed punches.

1. From the **Edits** tab, select **Time Management**.

The Exceptions tab displays with the default Missed/Duplicates Punches displaying.

Card ID	Name	Punch Type	Date	Time	Date Out	Time Out	Status	Incomplete
800 0000	8000	IN	10/20/2020	07:30:00				
800 0000	8000	IN	10/20/2020	07:30:00				
800 0000	8000	IN	10/20/2020	07:30:00	11/11/2020	07:30:00		
800 0000	8000	IN	10/20/2020	07:30:00				
800 0000	8000	IN	10/20/2020	07:30:00	11/11/2020	07:30:00		
800 0000	8000	IN	10/20/2020	07:30:00				
800 0000	8000	IN	10/20/2020	07:30:00	11/11/2020	07:30:00		
800 0000	8000	IN	10/20/2020	07:30:00				
800 0000	8000	IN	10/20/2020	07:30:00	11/11/2020	07:30:00		

As a default, TreeRing Time will only show punches older than 18 hours, figuring that work shifts are shorter than this time period and an unmatched punch older than this threshold is a mistake. If your company has work shifts longer than 18 hours, increase the punch match threshold on the Companies form by selecting **Securities** tab, then **Companies**, and then selecting **Edit** for your company.

## 2. You can filter based on Card ID, Manager, Supervisor, Department, Jobs.

The employee's card ID, name, department, and originating clock ID display. The incomplete punch is listed indicating the date and time of the punch. All of the information available in the system is displayed, showing you what needs to be added or adjusted. The Punch Type column shows the type of punch error:

- An "I" in the Punch column indicates this is an "IN" punch without an Out punch.
- An "O" in the Punch column would indicate this is an "OUT" punch without an In punch.

If Lunch and Breaks are tracked, these punches can be incomplete as well:

- LO (Lunch Out without Lunch In)
- LI (Lunch In without Lunch Out)
- BO (Break Out without Break In)
- BI (Break In without Break Out)

## 3. Correct each erroneous punch using one of the methods described below.

## Completing a Punch

You can complete a punch for an employee.

Follow the instructions below to complete a punch for an employee.



**Note:** Ensure that if you complete a punch, by adding the date and time out, that this In Punch is not a duplicate. It is a common mistake to punch in at the time clock twice. In that event, the employee's Out Punch will match together with one of the In Punches, leaving the duplicate In Punch unmatched, and therefore, it will appear in the Missed Punches form. Consult the Punch Detail Report or the Edit Timesheet Form to verify that there is not already complete work punch for the day in questions before completing a work punch.

1. Click in the empty field **Date** or **Time**, whichever does not show a punch already, and enter the missing data.
2. Enter the date in MM/DD/YY format and the time in 24-hour format (00:00.) When the punch edit is complete, the punch type will change to "E", which indicates a completed, edited punch. Edited punches for lunch and breaks would change to "LE" and "BE".
3. Click **Save** after each correction and the row of data will disappear from this screen, denoting that it is fixed and no longer a problem.
4. Continue until the form is clear of any Missed Punches.

## Adding a New In Punch

You can complete a new In Punch for an employee.

Follow the instructions below to complete a punch for an employee.

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Add New Punch** button on the task bar.  
The Add New Punch dialog box displays.

**Add New Punch** ✕

Employee: 73228 - ACAMPORA, DAVID (013 > Other ID: 013484 Pay Period: 01/03/2021 - 01/17/2021

Punch Type: In Punch Date: 02/10/2021 Time: 12:00 AM

Notes:

Area 001 - Mour Departments 1000 - Fina Location Leave blan Job Leave blan

Save

3. From the drop down list, select the employee who is to receive the new punch.
4. Under **Punch Type**, choose from:
  - In Punch
  - Out Punch
  - Break In Punch
  - Break Out Punch
  - Lunch In Punch
  - Lunch Out Punch

A new In punch is added for the selected employee.



**Note:** Depending on the Punch Type selected, there are different options/fields available in the Add New Punch form.

5. Enter the date for the new punch in the **Date** field.
6. Enter the starting time for the new punch in the **Time** field.
7. If needed, add any missing information by selecting the correct values from the list for **Department, Job, Level 4, and Level 5** labor information.  
If nothing is selected, TreeRing Time will apply the home/default Organization Code, if any, from the employee's detail record.
8. Click **Save** on the task bar.

The Exceptions tab Missed Punches form displays. A new In punch has been added for the employee.

## Switching an In Punch

You can switch an existing In Punch for an employee.

Follow the instructions below to switch a In Punch for an employee.

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Edit** link beside the employees name.



The Edit Punch dialog box displays.

- From the drop down list, select the employee who is to receive the new punch.
- Under **Punch Type**, choose the correct punch type.
- Enter the date for the new punch in the **Date** field.
- Enter the starting time for the new punch in the **Time** field.
- If needed, add any missing information by selecting the correct values from the list for **Department, Job, Level 4, and Level 5** labor information.
- Click **Save**.

The Exceptions Missed Punches form displays. A new In punch has been added for the employee and the row of data for the exception will disappear from this screen, denoting that it is fixed and no longer a problem.

- Continue until the form is clear of any Missed Punches.

## Adding a Lunch Leave Punch

You can add a lunch leave punch for an employee.

Follow the instructions below to add a Lunch Leave Punch for an employee.

- Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
- Click the **Add New Punch** button on the task bar.  
The Add New Punch dialog box displays.

- From the drop down list, select the employee who is to receive the new punch.
- Under **Punch Type**, choose **Lunch Out Punch** or **Lunch In Punch**.
- Enter the date for the new punch in the **Date** field.
- Enter the starting time for the new punch in the **Time** field.
- If needed, add any missing information by selecting the correct values from the list for **Department, Job, Level 4, and Level 5** labor information.

- Click **Save** on the task bar.

The Exceptions Missed Punches form displays. A new In punch has been added for the employee.

## Adding a Break Leave Punch

You can add a break leave punch for an employee.

Follow the instructions below to add a Break Leave Punch for an employee.

- Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
- Click the **Add New Punch** button on the task bar.  
The Add New Punch dialog box displays.

- From the drop down list, select the employee who is to receive the new punch.
- Under **Punch Type**, choose **Break Out Punch** or **Break In Punch**.
- Enter the date for the new punch in the **Date** field.
- Enter the starting time for the new punch in the **Time** field.
- If needed, add any missing information by selecting the correct values from the list for **Department**, **Job**, **Level 4**, and **Level 5** labor information.
- Click **Save** on the task bar.

The Exceptions Missed Punches form displays. A new In punch has been added for the employee.

## Delete a Missed Punch

You can delete a punch for an employee.

Follow the instructions below to delete a punch for an employee.

If you have more than one punch to delete, see [Deleting Overlap Punches in Bulk](#).

- Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
- Click the **Delete** link for the desired punch.
- Click **OK** when the confirmation window displays.  
The row of data will disappear from this screen, denoting that it is deleted.
- Continue until the form is clear of any Missed Punches.

## Producing the Punch Detail Report

Producing a Punch Detail Report for an employee

Follow the instructions below to produce the Punch Detail Report for a specific employee.

1. From the **Edits** tab, select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the link for the employees name to produce the Punch Detail report for the highlighted employee only.  
The Timesheet tab displays with the punches for the employee in the current pay period.

## Printing the Missed Punched Report

You can print the Missed Punches Report for reviewing.

Sometimes it is useful to print this report to distribute to supervisors or to consult particular employees.

Follow the instructions below to print the Missed Punches Report.

1. From the **Reports** tab, select **Management** and then **Punch Exceptions**.  
The Exceptions tab Missed Punches form displays.
2. Specify a **Date Selection**:
  - **Current Period**: The current pay period
  - **Pay Period List**: Select from a drop down list of past pay periods.
  - **Date Range**: Specify a date range.
3. Use the drop down list for **Employee Selection**. Click all that apply.  
The information displays as a list in a print ready format.
4. If applicable, select a **Department**.
5. Click **Regenerate Report**. You can also click **Save Options** if you want to refer to it later.  
The Punch Exceptions Report appears.
6. Click the **Print** icon on the task bar.  
  
You can also export the report in Excel or CSV. Click the **Export to...** button select a format and then click **Export**.  
The Missed Punches report prints.

## Duplicate and Overlapping Punches

Work with Duplicate and Overlapping punches.

The Duplicate and Overlapping Punches form filters through all punch data and looks for punches with the following problems:

- **Duplicate Punches**: Any two punches of the same type (In, Out, etc...) on the same minute.
- **Overlapping Punches**: Complete work shifts that have overlapping times. In this case the employee would be getting paid twice for the same work time.

Follow the instructions below to work with duplicate and overlapping punches.



**Note:** Ensure that if you complete a punch, by adding the date and time out, that this In Punch is not a duplicate. It is a common mistake to punch in at the time clock twice. In that event, the employee's Out Punch will match together with one of the In Punches, leaving the duplicate In Punch unmatched. A duplicate punch or work shift will appear in the Duplicate and Overlap Form and an unmatched punch will appear in the Missed Punches form.

1. From the **Edits** tab, select **Time Management** .

The **Exceptions** tab displays with the Missed/Duplicate Punches checked.

No.	Punch Type	Date	Start	End	Time In	Time Out	Status	Punch Location
1	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
2	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
3	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
4	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
5	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
6	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
7	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
8	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
9	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked
10	Worked	11/11/2020	07:30 AM	03:30 PM	07:30 AM	03:30 PM	Completed	Worked

The employee card ID and the associated punch in the system is detailed on the Duplicate and Overlapping Punches form. The punch type is noted, such as a completed worked punch (C), an edited punch (E), or other punch type coming from the data capture device, along with the start date & time and end date and time of the entry.

- Determine the corrective course of action to take. With Duplicated punches, oftentimes one of them can be deleted (click the **Delete** link for the entry you wish to delete). With Overlapping punches, the start and end times can be edited so that the punches are contiguous instead of overlapping.
- Click in any of the rows or the edit link to edit and correct the data.
- Click **Save** when finished. Sometimes multiple punches disappear when **Save** is clicked. This means that those punches are no longer a problem and do not qualify to be displayed on this form any longer.
- Continue the corrections until all punches are cleared from this form.

## Viewing Punch Detail Data for a Specific Employee

You can view punch details for an employee.

Follow the instructions below to view an employees punch details.

- From the **Reports** tab, select **Management**, and then select **Punch Exceptions**.  
The Punch Exceptions form displays.
- Filter by an employee's name.

The Timesheet tab displays with the punch exceptions for the employee in the current pay period.

## Viewing the Duplicates/Overlap Report

You can view the duplicate overlap report.

Follow the instructions below to view the Duplicates/Overlap Report.

- Select **Reports** tab, then select **Time**, then select **Duplicates/Overlap**.  
The Duplicates /Overlap report displays.
- Click the **Printer** icon in the task bar.  
The Windows Printer window displays.
- Select your printer and any other options. Click **Print**.

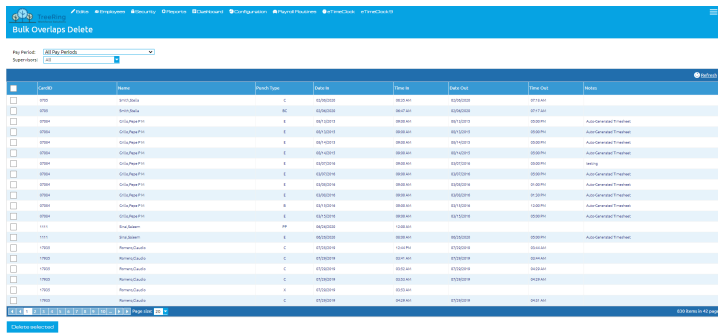
The timesheet prints.

## Deleting Overlap Punches in Bulk

You can delete overlap punches in bulk.

Follow the instructions below to delete overlap punches in bulk.

- From the **Edits** tab, select **Bulk Overlaps Delete**.  
The Bulk Overlaps Delete form displays.



2. Filter by a **Pay Period** or **Supervisor** name.  
The form displays with the punch exceptions for the supervisor or the pay period.
3. Select the check boxes for all the punches you wish to delete.
4. Click **Delete Selected**.  
A confirmation dialog displays.
5. Click **OK**.  
The punches disappear from the form.

## Unknown IDs

Displays time records for an employee ID that does not exist in the Employee Rules form

The Unknown IDs form displays time records for an employee ID that does not exist in the Employee Details form. Using this form, the user can choose to delete the time record, correct the ID associated with it, or add that ID as a valid employee. To avoid this type of punch data, validation can be enabled for certain data collection devices, thereby disallowing an unknown employee from punching or by notifying an employee if they enter their ID number incorrectly.

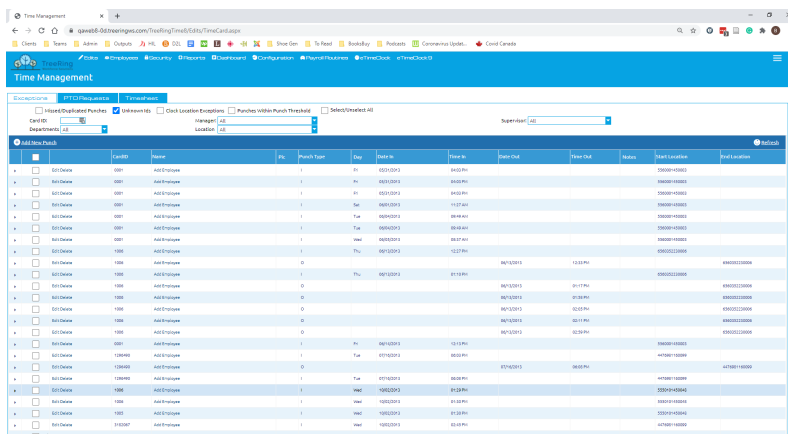
## Correcting Unknown IDs Exceptions

Correct unknown IDs exceptions.

Follow the instructions below to correct unknown IDs exceptions.

1. From the **Edits** tab, select **Time Management**.
2. Deselect **Missed/Duplicate Punches** and select **Unknown Ids**.

The Unknown IDs form displays showing the complete punch information contained in the system. The Clock ID field will display the source of the punch, which may help in determine the corrective course of action.



You can do the following to repair Unknown ID Exceptions:

- Delete the Punch. See [Deleting the Unknown ID Punch](#).
- Add the Employee. See [Adding the Employee](#).
- Correct The ID Number. See [Correcting Unknown IDs Exceptions](#) on page 101.

## Adding the Employee

You can add an employee if they are new.

If the punch activity is from a new employee, the Card ID can be added to the Employee Details form from this screen.

1. From the **Edits** tab, select **Time Management**.
2. Deselect **Missed/Duplicate Punches** and select **Unknown Ids**.  
The Unknown IDs form displays showing the complete punch information contained in the system.
3. In the **Name** column for the desired punch, click the **Add Employee** link.  
The Employee Details form displays
4. Add the employee information to the form.
5. Click **Save**.

The punches in will disappear from the Unknown IDs form since they no longer qualify as a problem.

## Correcting the Employee ID Number

You can correct the Employee ID number when it is incorrect.

If it is determined that the ID entered with the punch is incorrect and should be reassigned to a valid employee in the system, it is easy to correct this information.

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Edit** link beside the employees name.  
The Edit Punch dialog box displays.

The screenshot shows the 'Edit Punch' dialog box with the following fields and values:

- Employee: 9999 - Granger, Hermione
- Other ID: (empty)
- Pay Period: 01/03/2021 - 01/16/2021
- Punch Type: In Punch
- Date: 09/28/2020
- Time: 11:36 AM
- Notes: Note one
- Area: 001 - Mour
- Departments: 2000 - Sale
- Location: 100 - 100 -
- Job: Leave blan

A blue 'Save' button is located at the bottom left of the dialog box.

3. From the drop down list, select the employee who is to receive the new punch.
4. Click **Save**.

## Deleting the Unknown ID Punch

You can delete an unknown ID punch to remove it.

If the time record is considered a mistake, it is a simple matter to delete it from the system.

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Deselect **Missed/Duplicate Punches** and select **Unknown Ids**.  
The Unknown IDs form displays showing the complete punch information contained in the system.
3. Click the **Delete** link for the desired punch.
4. Click **OK** when the confirmation window displays. **Note:** The **Save** button does not need to be clicked in this case.  
  
All punches in the system for this unknown employee are also deleted.

## Over 24 Hours

You can display punches over 24 hours in duration.

The Over 24 Hours form will display punches over 24 hours in duration. These punches are usually created by editing mistakes since the TreeRing Time system will never match two punches that are over 24 hours in duration or exceed the Punch Match Threshold set in the Configuration form (set to 18 hours by default). The punches listed here need to be corrected or deleted, because TreeRing Time does not allow punches to exceed 24 hours. Punches over 24 hours in length occur rarely but this form should be checked before closing the pay period.

## Editing an Over 24 Hour Punch

Edit an incorrect Over 24 hour punch

Follow the instructions below to edit a punch.

1. From the **Edits** tab, select **Time Management** and then **Exceptions** tab.  
The Exceptions form displays.
2. Select only the **Punches Within Punch Threshold**.  
The Exceptions tab updates with only punches that are incomplete as of the current time but most likely the employee is still "on the clock". By default, if 18 hours goes by and the punch does not match up, the punch will move to the Missed/Duplicated Punches screen.
3. Click anywhere to be changed and enter the new data. Or you can click the **Edit** link for the row you are interested in. Edit the data for the desired punch and correct the data. Ensure to enter the date in MM/DD/YY format and the time in 24-hour format.  
  
When the punch edit is complete, the punch type will change to "E", which indicates a completed, edited punch. Edited punches for lunch and breaks would change to "LE" and "BE".
4. Click the **Save** button  
The Exceptions form updates.
5. Continue making the appropriate edits or deletions until all of the punches have been removed.

## Deleting an Over 24 Hour Punch

Delete an incorrect Over 24 Hour punch.

Follow the instructions below to delete a punch.

1. From the **Edits** tab, select **Time Management** and then **Exceptions** tab.  
The Exceptions form displays.
2. Select only the **Punches Within Punch Threshold**.

The Exceptions tab updates with only punches that are incomplete as of the current time but most likely the employee is still “on the clock”. By default, if 18 hours goes by and the punch does not match up, the punch will move to the Missed/Duplicated Punches screen.

3. Click the **Delete** link for the desired punch.
4. Click **OK** when the confirmation window displays.

The row of data will disappear from this screen, denoting that it is deleted.

## Printing the Punch Detail Report for a Specific Employee

You can print the Punch Detail Report for a specific employee.

Follow the instructions below to print the Punch Detail Report for a specific employee.

1. From the **Reports** tab, select **Management**, then select **Punch Exceptions** and then **Over 24 Hours**.  
The Over 24 Hours form displays.
2. Click on the grey box beside the name of the employee for whom you wish to print the Punch Detail report.
3. Click **Punch Detail** on the task bar to produce the Punch Detail report for the highlighted employee only.

## Printing the Over 24 Hours Report

Print the Over 24 Hours Report.

Follow the instructions below to print the Over 24 Hours Report.

1. From the **Edits** tab, select **Time Management**, then select **Exceptions** and then **Over 24 Hours**.  
The Over 24 Hours form displays.
2. Click **Print** on the task bar.  
The Over 24 Hours report displays as a list in a print ready format.
3. Click **Print** on the upper task bar.  
The Print dialog box displays.
4. Click the **Print** button.

The Over 24 Hours report prints.

## Edit Timesheet Form

The Edit Timesheet form is a listing of all complete work punches and special punch types.

The Edit Timesheet form is a listing of all complete work punches and special punch types such as Holiday, Vacation, etc... that have been made in the current pay period. This form displays this punch data for each employee and the employee can be chosen by using the selection list on the top right portion of the form.

This form is useful for editing existing time records, adding labor tracking data to existing time records, or for creating new time records. For audit trail purposes, when editing punches, the “E” Pay Type is automatically entered when modifying existing punch data. The Audit Report is available to view any updates or entries made through the Edit Timesheet form.

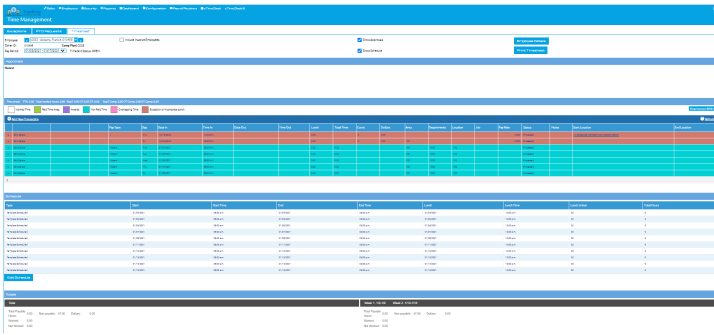
If a signoff/certification work flow is in use, a **Sign Off** button will appear below the **Pay Period** field.



**Note:** You will need to select the **Show Approvals** check box.

This is an example of the Edit Timesheet form.





If you have the correct permissions, you will see an **Employee Details** button on the right which will allow you to move quickly to the Employee Details form so that you can view or adjust the employees settings.



## Editing a Timesheet

You can edit the timesheet for an employee.

Follow the instructions below to make changes to existing entries in a time sheet.

1. From the **Edits** tab, select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Timesheet** tab.  
The TimeSheet appears for the first person in your timesheet list.
3. In the **Employee** field, select the desired employee.
4. Click any cell to be changed and enter the new data. Or you can click the **Edit** link for the row you are interested in. Edit the data.
5. Click **Save** on the far left when finished.

## Adding a New Transaction to a Time Sheet

Add a new transaction to a time sheet.

Follow the instructions below to add a new transaction to a time sheet.



**Note:** If you edit comp time in the Edit Timesheet Form that previously has been edited in the Redistribute Hours Form, it could bring the comp balance to a negative number. If this occurs, an "Alert" message will appear, but the edit will be allowed. You should immediately return to the Redistribute Hours Form to reassign the hours to achieve a positive comp balance.

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Timesheet** tab.
3. From the drop down list, select the employee who is to receive the new transaction.
4. Click the **Add New Transaction** button on the task bar.  
The Add New Transaction dialog box displays.

5. Under **Transaction Type**, choose from:
  - **In/Out Transaction**: To indicate a whole shift.
  - **Unpaid Time**
  - **Bulk Transaction**: If it will apply to multiple dates.
  - **Awards**: For Expenses.
  - **PTO Transaction**: For any of the PTO policies. For example, a whole sick day.
  - **Holiday Transaction**
6. Select the **Pay Type** from the drop down menu.
7. Enter the start date for the new transaction in the **Start/Date Time** field.
8. Enter the end time for the new transaction in the **End Date/Time** field.
9. If needed, enter the **Lunch Time**, unless autolunch applies, then leave blank.
10. In the **Notes** field, enter any note desired.
11. If needed, add any missing information by selecting the correct values from the list for **Department, Job**, or any other **Level** labor information.
12. Click **Save** on the task bar.

The Timesheets tab displays. A new transaction has been added for the employee.

## Deleting a Transaction From a Time Sheet

You can delete a transaction from a time sheet

Follow the instructions below to delete a transaction from a time sheet.

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Timesheet** tab.
3. From the drop down list, select the employee who is to receive the new transaction.
4. Click the **Delete** link for the desired transaction.
5. Click **OK** when the confirmation window displays.

The row of data will disappear from this screen, denoting that it is deleted.

## Assigning Hours

Assign hours to time sheets.

With the Assign Hours feature, a supervisor can quickly and easily split worked time between departments, jobs, or any other level. Reassigning or allocating labor tracking information for time punches is automated by the Assign Hours function because it allows the user to edit all fields of data and break apart a long work shift, all the while it creates additional time punches equal to the original work time. Time cannot be added or subtracted by using this feature.

For the TreeRing Time Administrator, Payroll Administrator, and Supervisor, the Assign Hours function is part of the Edit Timesheet form.

Follow the instructions below to assign hours to a labor level(s).

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Timesheet** tab.
3. From the drop down list, select the employee who is to receive the new transaction.
4. For any of the white Worked Time entries, click **Assign and Redistribute** link beside the employees name.  
A form with the date displays showing the selected row.

5. Click the check box **Redistribute Hours**.
6. Enter the correct number of hours in the first entry.  
A new entry generates to ensure there is enough entries to add up to the original hours.
7. Edit the **Department** or **Job** fields to accurately reflect the labor information.
8. Repeat this step to assign hours and continue until all hours have been assigned appropriately for the work day.
9. Click **Save**. To cancel and return to the Timesheet form, click **Cancel**.

## Printing From the Edit Timesheet

Print the current time sheet of the specified employee.

Follow the instructions below to print the current time sheet of the specified employee.

1. Click on **Edit** tab and select **Time Management**.  
The Exceptions tab Missed Punches form displays.
2. Click the **Timesheet** tab.
3. From the list, click the employee names.
4. Click the **Print Timesheet** button.  
A nicely formatted Timesheet displays
5. Click the **Printer** icon in the task bar.  
The Windows Printer window displays.
6. Select your printer and any other options. Click **Print**.  
The timesheet prints.

## Working with PTO Requests

You can work with PTO requests using the PTO Requests tab on the TimeSheet.

Managers, Supervisors, Timekeepers, or Administrators use the Edit Timesheet Form to view, approve, or disapprove employee requests for PTO. Once a request is approved, and the date is within the current pay period, the requested PTO hours or days will automatically be added to the employee's time sheet. If the date is in the future, the request can still be approved by the supervisor or administrator, but it will remain in the form until the date of the request enters the current pay period and then it will process.

Requests made for the current open Pay Period will appear in white. Requests made for future Pay Periods will appear alternately in green. If rejected, they will appear in red. These approved requests will appear in the employee's time sheet on the first day of the Pay Period in which they exist after the previous Period End is run.

If an employee creates a request for more time than they are allowed, and the ‘Time Off Permitted’ field populates with a number lower than the requested time, the supervisor or administrator can still approve or disapprove the request as they normally would. If approved, the request will be met with the maximum time permitted. The remaining balance can be left unaccounted for in the employee time sheet, or can be filled in with a Time Type 4 (time not worked and not paid) manually by the supervisor or administrator.



**Note:** This form is accessible to administrators, payroll administrators, supervisors, and timekeepers. The employee can view approval status in the PTO Request form.

1. From the **Edits** tab, select **Time Management**.  
The Time Management form with the Exceptions tab displayed.
2. Click the **PTO Requests** tab.  
The PTO Requests tab displayed.

Card ID	Name	Day	Date	Start Time	Hours Bank	Hours to Deduct	Remaining Hours	Time of Request	Status	Revert
8000	ADMINISTRATOR	Mon	10/20/2010	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert
8000	ADMINISTRATOR	Mon	10/20/2010	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert
8000	ADMINISTRATOR	Mon	10/20/2010	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert
8000	ADMINISTRATOR	Mon	10/20/2010	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert
8000	ADMINISTRATOR	Mon	10/20/2010	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert

- **Card ID:** This field displays the card ID for the employee that made the PTO request.
- **Name:** This field displays the name of the employee that made the PTO request.
- **Day:** The day of the week requested off. If there were multiple sequential days requested, there will be an entry for each day.
- **Date:** This is the date for which the employee has requested PTO.
- **Start Time:** The time the request is for if not All day.
- **Hours Bank:** This will display the Pay Type, or type of PTO that the employee is requesting.
- **Hours to Deduct:** This field will display the amount of PTO requested. Hours units have the ability to accept up to two decimal places, so it is possible to request only a portion of a PTO Day. The amount requested can be edited if necessary.
- **Remaining Hours:** This field displays the number of PTO Hours left for the employee for this Pay Type up to the amount requested. Hours over the requested amount will not display here.
- **Time of Request:** The time and date of the request. This field is important if your company has a “first come-first served policy” when staff ask for the same day off.
- **Notes:** Indicate if the employee entered any notes to accompany the PTO request.
- **Status:** This field displays the status of the request.
- **Revert link.** Changes the status back to unapproved.



**Note:** It is the supervisor’s responsibility to approve or disapprove the PTO Request. Optionally, notes can be added to explain or qualify a decision. If the employee has already entered text into the Notes field, this can be deleted and replaced with notes by the supervisor. The employee will see the new notes when they visit the PTO request form to check the status of their PTO request.

3. Click the **Approve** link for the employee to approve the PTO request.

- **Applied:** If a PTO request for the current Pay Period is approved and saved (by clicking **Save** on the task bar), it will be entered automatically into the employee's time sheet. At this point, the request will move to the **Resolved** grid. If a request has been approved for a future pay period, it will also move to the **Resolved** grid.
  - **Notes:** This field will display any notes entered by the employee when the request was made. This field is also available for supervisors to add their own notes. These notes will appear on the employee's PTO Request form once the supervisor's changes have been saved.
4. If the PTO request for the employee is not approved, then click the **Deny** link.  
The PTO approvals or disapprovals are saved to the system and will appear on the employee's time sheet.
  5. You can edit the PTO bank by clicking the **Edit Banks** link.
  6. You can create a new PTO request by clicking the **Add New PTO Request** link. See [Creating a PTO Request](#)
  7. You can revert a PTO request in the **Resolved Section** by clicking the **Revert** link for the required request.

## Redistributing Hours

Redistribute Hours gives the user the ability to reallocate work time totals.

The Redistribute Hours form can be used in conjunction with the Compensatory Time function or by itself. Redistribute Hours gives the user the ability to reallocate work time totals. Regular work time can be manually moved to Overtime or Double Time. It can also be transferred to Compensatory Time and added to that employee's bank of hours. If there is no comp plan assigned for the employee, the three comp time columns will not appear. The Compensatory Time Plan, if any, will be displayed on the top right portion of the form, along with the maximum and current balance for the employee. The balance includes compensatory time taken in the current pay period.



**Note:** The Redistribute Hours feature cannot be used when shift differentials are used.

The Redistribute Hours feature cannot be used with Type 2 transactions (time not worked but paid, for example, sick leave, vacation, and so on.)

When the Comp time is "Spent" by the employee, the pay type is changed to CMPT for tracking purposes.

Follow the instructions below to redistribute hours.

1. From the **Edits** tab, select **Time Management**, and then select the **TimeSheet** tab.  
The Time Management form displays.
2. From the **Employee** drop down list, select the employee whose hours you wish to redistribute.  
The employee's information displays.
3. In the **Pay Period** field, select the desired pay period.  
The current pay period shows by default.
4. For the desired time punch, click the **Assign and Redistribute** link.  
A date dialog box displays.

Start Time	Hours	LunchT	End Time	Area	Departments	Location	Job	Notes
01/04/2021 08:00	9.00	0.00	01/04/2021 17:00	001 - Mount Vernon Road Infrastructure Improvements	1000 - Finance	100 - 100 - Job 100		Auto-Generated TT

5. Select the **Redistribute Hours** checkbox.  
Additional Compensatory columns appear.

Start Time	RegT	OT	DT	RegT Comp	OT Comp	DT Comp	LunchT	Total	End Time	Area	Department	Location	Job	Notes
01/04/2021 08:00	8:00	0:00	0:00	0:00	0:00	0:00	0:00	8:00	01/04/2021 17:00	[00] - Hours: Verion Road Infrastructure Improvements	[000] - Finance	[100] - 100 - 100		(Auto-Generated ID)

- Click in the time fields and adjust the redistribution of hours.
- Enter in the **Notes** field for any memos regarding the action taken if necessary.
- Click **Save**.

## Clock Location Exceptions

Lists all punches that did not originate from an approved location.

The Location Exceptions report lists all punches that did not originate from an approved location. Approved locations are added to the Clock Location form (available from the **Configuration** tab by selecting **Company Setup** and then **Punch Location**).

## Adding a New Clock Location from the Punch Location Form

Add new permissible locations as an acceptable location.

If a location listed on the Location exceptions form is deemed to be permissible, then follow the instructions below to add it as an acceptable location.

- From the **Configuration** tab, select **Company Setup** and then **Punch Location Exceptions**.
- Click **Add New Punch Location** link on the task bar.

The Add New Punch Location dialog box displays.

- In the **Description** field, add a description.
- In the **Location** field, add the IP address of the punch clock.
- Click **Save**.

The Location Exceptions form redisplay with all punches from the newly added clock added to the list.

## Supervisor Signoff

Provides payroll administrators confirmation that each supervisor and if configured, manager, has reviewed their employees' time cards and signed off the time sheets.

The Supervisor Signoff feature provides payroll administrators confirmation that each supervisor has reviewed their employees' time cards and signed off that the time sheets are in order and are ready for payroll. The Manager can also be configured to do this function in addition to the supervisor. The Signoff function is designed to be performed at the end of each pay period and before the administrator runs payroll. This procedure works well in organizations where the supervisor is responsible for editing their employees' time records. The employee's time-card is appended with a note indicating which Supervisor and Manager approved the time card. An administrator can then run the Supervisor Signoff Exception report and determine if there are employees whose time cards have not yet been approved by a supervisor.

The Supervisor Signoff feature can be used in conjunction with the Employee Certification feature or independently. If it is used with the Employee Certification feature, that function should be performed first by the employee before the supervisor signs off on the time sheet.

## Supervisor Signoff Prerequisites

Prerequisites for a supervisor to be able to signoff a timesheet.

For a supervisor to use supervisor signoff, the following criteria must be met:

- The Supervisor must be entered in the Supervisors form (accessed from the **Security** tab by selecting **Supervisors**)
- The supervisor must be assigned to the employee on the Employee Details form (accessed from the **Security** tab by selecting **Supervisors** and then clicking the **Assign Employees** link for the desired supervisor).
- The supervisor must have the correct login security rights to view the employees assigned to him or her.

## Using the Supervisor Approval Form for Supervisor Signoff

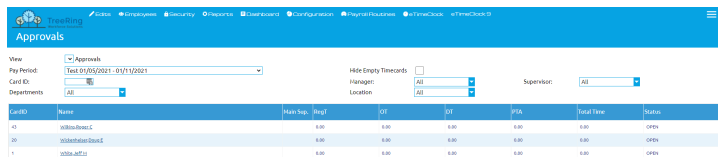
You can sign off on an employee's time using the Supervisor Approval form.

When employees view their time sheets, they have the option to approve or to disapprove their time. An employee can add comments to the time sheet regardless of the certification status, but it is assumed that if they disapprove their time, they will enter a note explaining the reason. The Approvals form allows the person responsible for editing employee time sheets to see who has not certified their time sheet and the reason why. This information can be used to make any changes to employee time sheets before payroll to ensure payroll is complete.

Follow the instructions below to sign off on an employee's time using the Supervisor Approval form.

1. From the **Edits** tab, select **Payroll/Admin Approvals**.

The Approvals form displays showing all of the employees who have been assigned to that supervisor.



CardID	Name	Hourly Rate	OT	PTA	Total Time	Status
01	WILLIAMSON, C	8.00	0.00	0.00	8.00	OPEN
01	WILLIAMSON, C	8.00	0.00	0.00	8.00	OPEN
1	WILLIAMSON, C	8.00	0.00	0.00	8.00	OPEN

2. Select all the employees that you wish to approve by click the check box for their row.
3. Click the **Sign Off** button or the **Sign Off** link in the last column for an individual row.
4. Click the **OK** button to confirm.

The Approvals form should now be blank.

## Using the Timesheet Tab for Supervisor Signoff

Sign off on an employee's time via the Edit Timesheet tab.

Follow the instructions below to sign off on an employee's time using the Timesheet form.



**Note:** Once a supervisor signs off on an employee's time sheet, all forms that allow that employee to enter a time record are locked. A supervisor cannot undo the signoff once it is completed; only an administrator can override this signoff.

1. From the **Edits** tab, select **Time Management** then select the **Timesheet** tab.  
The Timesheet tab displays.
2. From the **Employee** drop down list, select the name of the employee whose time you wish to sign off on.  
The employee's time sheet displays.

3. Click the **Show Approvals** check box.
4. Click the **Sign Off** on the task bar.  
A confirmation box will appear.
5. Click **OK**.

## Rejecting a Request for Supervisor Signoff

You can reject an employee's timesheet submission.

Follow the instructions below to reject a request for supervisor's signoff on an employee's time and unlock the employee's time record.

1. From the **Edits** tab, select **Approvals**.  
The Approvals form displays showing all of the employees who have been assigned to that supervisor.
2. Select all the employees that you wish to reject a sign off by clicking the check box for their row.
3. Click the **Reject** button (if multiple selections) or click the **Reject** link for the row.
4. Click the **OK** button to confirm.

## Rejecting a Request for Supervisor Signoff in the Timesheet Tab

You can reject a request for sign off on an employee's time using the Timesheet tab.

Follow the instructions below to reject a sign off request on an employee's time using the Timesheet Tab.



**Note:** Once a supervisor signs off on an employee's time sheet, all forms that allow that employee to enter a time record are locked. A supervisor cannot undo the signoff once it is completed; only an administrator can override this signoff.

1. From the **Edits** tab, select **Time Management** then select the **Timesheet** tab.  
The Timesheet tab displays.
2. From the **Employee** drop down list, select the name of the employee whose time you wish to sign off on.  
The employee's time sheet displays.
3. Click the **Show Approvals** check box.
4. Click the **Reject** on the task bar.  
A confirmation box will appear.
5. Click **OK**.

## Undoing a Supervisor Signoff

You can undo a supervisor's signoff on an employee's time and unlock the employee's time record.

Follow the instructions below to undo a supervisor's signoff on an employee's time and unlock the employee's time record.



**Note:** Only a TreeRing Time administrator can undo the supervisor signoff and unlock an employee's time.

1. From the **Edits** tab, select **Approvals**.  
The Approvals form displays showing all of the employees who have been assigned to that supervisor.
2. Select all the employees that you wish to revert by clicking the check box for their row.
3. Click the **Revert** button.
4. Click the **OK** button to confirm.



## Printing the Supervisor Signoff Exception Report

For your reference, print the Supervisor Signoff Exception Report.

The Supervisor Exception Report lists all supervisors and shows the time sheet signoff status of each employee.



**Note:** This report can only be run by a TreeRing Time administrator.

Once the period end routine is run, all employee sign off check boxes are cleared.

1. From the **Reports** tab, select **Supervisory** and then **Supervisor Exception**.
2. Click the **Print** button.
3. Click **Print** icon on the upper task bar.  
The information displays in a print ready format.
4. Click the **Print** button.

The Signoff Exception report prints.

## Manager Signoff

Provides payroll administrators confirmation that each manager has reviewed their employees' time cards and signed off the time sheets.

The Manager Signoff feature provides payroll administrators confirmation that each manager has reviewed their employees' time cards and signed off that the time sheets are in order and are ready for payroll. The Supervisor can also be configured to do this function in prior to the Manager. The Signoff function is designed to be performed at the end of each pay period and before the administrator runs payroll. This procedure works well in organizations where the manager is responsible for editing their employees' time records. The employee's time-card is appended with a note indicating which Supervisor and Manager approved the time card. An administrator can then run the Manager Signoff Exception report and determine if there are employees whose time cards have not yet been approved by a manager.

The Manager Signoff feature can be used in conjunction with the Employee Certification feature or independently. If it is used with the Employee Certification feature, that function should be performed first by the employee before the manager signs off on the time sheet.

## Manager Signoff Prerequisites

Prerequisites for a manager to be able to signoff a timesheet.

For a manager to use manager signoff, the following criteria must be met:

- The Manager must be entered in the Manager form (accessed from the **Security** tab by selecting **Managers**)
- The manager must be assigned to the employee on the Employee Details form (accessed from the **Security** tab by selecting **Manager** and then clicking the **Assign Employees** link for the desired manager).
- The manager must have the correct login security rights to view the employees assigned to him or her.

## Using the Manager Signoff Form for Manager Signoff

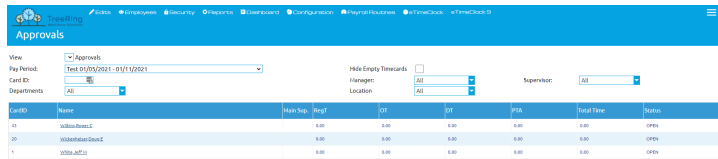
You can sign off on an employee's time using the Manager Signoff form.

When employees view their time sheets, they have the option to approve or to disapprove their time. An employee can add comments to the time sheet regardless of the certification status, but it is assumed that if they disapprove their time, they will enter a note explaining the reason. The Approvals form allows the person responsible for editing employee time sheets to see who has not certified their time sheet and the reason why. This information can be used to make any changes to employee time sheets before payroll to ensure payroll is complete.

Follow the instructions below to sign off on an employee's time using the Manager Approval form.

1. From the **Edits** tab, select **Payroll/Admin Approvals**.

The Approvals form displays showing all of the employees who have been assigned to that manager.



Card ID	Name	Hourly Rate	Reg	OT	PTA	Total Time	Status
01	William Jones	8.00	8.00	0.00	0.00	8.00	OPEN
02	William Jones	8.00	8.00	0.00	0.00	8.00	OPEN
03	William Jones	8.00	8.00	0.00	0.00	8.00	OPEN

2. Select all the employees that you wish to approve by click the check box for their row.
3. Click the **Sign Off** button or the **Sign Off** link in the last column for an individual row.
4. Click the **OK** button to confirm.

The Approvals form should now be blank.

## Using the Timesheet Tab for Manager Signoff

Sign off on an employee's time via the Edit Timesheet tab.

Follow the instructions below to sign off on an employee's time using the Timesheet form.



**Note:** Once a manager signs off on an employee's time sheet, all forms that allow that employee to enter a time record are locked. A manager cannot undo the signoff once it is completed; only an administrator can override this signoff.

1. From the **Edits** tab, select **Time Management** then select the **Timesheet** tab.  
The Timesheet tab displays.
2. From the **Employee** drop down list, select the name of the employee whose time you wish to sign off on.  
The employee's time sheet displays.
3. Click the **Show Approvals** check box.
4. Click the **Sign Off** on the task bar.  
A confirmation box will appear.
5. Click **OK**.

## Rejecting a Request for Manager Signoff

You can reject an employees timesheet submission.

Follow the instructions below reject a request for manager's signoff on an employee's time and unlock the employee's time record.

1. From the **Edits** tab, select **Approvals**.  
The Approvals form displays showing all of the employees who have been assigned to that manager.
2. Select all the employees that you wish to reject a sign off by clicking the check box for their row.
3. Click the **Reject** button (if multiple selections) or click the **Reject** link for the row.
4. Click the **OK** button to confirm.

## Rejecting a Request for Manager Signoff Using the Timesheet Tab

You can reject a request for sign off on an employee's time using the Timesheet tab.

Follow the instructions below to reject a sign off request on an employee's time using the Timesheet Tab.



**Note:** Once a manager signs off on an employee's time sheet, all forms that allow that employee to enter a time record are locked. A manager cannot undo the signoff once it is completed; only an administrator can override this signoff.

1. From the **Edits** tab, select **Time Management** then select the **Timesheet** tab.  
The Timesheet tab displays.
2. From the **Employee** drop down list, select the name of the employee whose time you wish to sign off on.  
The employee's time sheet displays.
3. Click the **Show Approvals** check box.
4. Click the **Reject** on the task bar.  
A confirmation box will appear.
5. Click **OK**.

## Undoing a Manager Signoff

You can undo a manager's signoff on an employee's time and unlock the employee's time record.

Follow the instructions below to undo a manager's signoff on an employee's time and unlock the employee's time record.



**Note:** Only a TreeRing Time administrator can undo the manager signoff and unlock an employee's time.

1. From the **Edits** tab, select **Approvals**.  
The Approvals form displays showing all of the employees who have been assigned to that supervisor.
2. Select all the employees that you wish to revert by clicking the check box for their row.
3. Click the **Revert** button.
4. Click the **OK** button to confirm.

## Bulk Transaction Entry Form

You can use the Bulk Transaction Entry Form to make a timesheet change for a whole department.

At times, a company may wish to send an entire department home early or pay a certain number of hours of bonus time when certain goals have been achieved. At other times, managers may wish to record time relating to vacation, holidays, or time out of office for an entire department. The Bulk Transaction Entry form can be used to enter time records very efficiently for these types of events. In addition, the text "Bulk Transaction Entry" will be entered automatically into the Notes field of each time record so that the source of it may be ascertained easily.

You can also add work punches in the Edit Timesheet form. However, if you have a large quantity of time data to enter or you want to enter time worked for many employees, the Bulk Transaction form will save you time. The Bulk Transaction features are suitable for use when employees travel and are not physically near a time clock, for special occasions such as company meetings or picnics, or for unexpected events such as power outages. If the PTO module is in use and configured to accrue time for Hours of Service, the Bulk Time Entry can be used to give work time to those employees who would not normally punch a clock.

Follow the instructions below to make a bulk transaction entry.

1. From the **Edits** tab, select **Bulk Transactions Entry**.  
The Bulk Transaction entry form displays.

2. Under **Assign by**, click the drop down menu and select the group that will receive the punch. Alternately, select the employees name form the drop down list to choose a single employee to receive the time record.
3. In the **Pay Type** field, select the punch type for this entry.
4. Select a **Single Day** or **Multiple Days**. If multiple days, select a **From Date** and **To Date**; otherwise if a single day, select the Start Date.
5. Click on the **Start Date** field or **From Date** field calendar icon and select the date for the beginning of this punch. Every date in the current pay period is automatically set up as a record.
6. If multiple days, click on the **To Date** calendar icon and select the date for the end of this punch.
7. In the **State Time/Time Worked** field, enter a start time and the time out for the end of this punch.



**Note:** Bonus, holiday, and other Time Type 2, 3, or 4 records. If you are entering a set number of bonus, holiday, or other punch hours, just enter the following:

- **Date In:** Enter the date of the punch.
  - **Hours:** Enter the total number of hours you will be granting for every specific person in the department you have selected.
  - **Job:** If this applies to your installation, you can select the specific **Job, Level 4, or Level 5** code for this punch.
8. Add comments in the **Notes** field that will be added to this record for each employee (optional).
  9. Specify **Department, Job, Level 4** and **Level 5** selections as necessary.
  10. Click the **Save** button.

## Editing an Entry After It Has Been Saved

Edit an entry after it has been saved and before signoff.

If you need to edit an entry after it has been saved (but has not yet been signed off on by the supervisor), then follow the instructions below.

1. From the **Edits** tab, select **Time Management** and then select **Edit Timesheet** tab.  
The Timesheet form displays.
2. Select the **Employee**.
3. Click the **Edit** link beside the transaction you wish to edit.  
The Edit Transaction form displays.
4. Make the necessary changes to the transaction.
5. Click **Save**.

## Adjust Daylight Saving Time

Adjusts the start time of a work shift, lunch punch, or break punch whenever there is a time change.

The TreeRing Time Daylight Saving Time feature adjusts the start time of a work shift, lunch punch, or break punch whenever there is a time change. One hour is either subtracted or added to it depending on the direction of the time change.

The time set in the time clock plays an important role in this process. It is not until the time in the time clock is changed that the loss or gain of one hour is realized by the employee. If the time in the time clock is not adjusted during the entire work shift ('in' and 'out', or 'switch' time transactions) then the total work time for the employee is still correct, despite the actual time of day being incorrect on the time transaction. It is only when the time in the time clock is changed and the employee is currently on a work shift, lunch, or break that the time on the employee's time transaction needs to be adjusted, and the TreeRing Time Daylight Saving Time feature needs to be used.

When it is run, the Daylight Saving Time feature will insert a comment into the Notes field of each time transaction. The text Adjusted for DST will display there and may be viewed by any administrator, supervisor, or employee. To set up this feature, see [Running Daylight Saving Time Adjustment Automatically](#) on page 117

The Daylight Saving Time form is sensitive to the Filter function. Using Filters, you can filter for certain groups of employees and this may aid in the DST adjustment process.

If you do not have DST set to automatically run, see [Adjusting Transactions for a Change in Daylight Saving Time](#) on page 118.

## Running Daylight Saving Time Adjustment Automatically

You can enable automatic Daylight Savings Time adjustments.

This function to update time transactions for Daylight Saving Time can be set to automatically occur. When configured in this manner, TreeRing Time will automatically adjust every punch that crosses the time change threshold, in effect acting as if your time clock updated its time at 2:00 am. This automatic setting is recommended for use with implementations that use eTimeClock only.

Follow the instructions below to use the Adjust for Daylight Savings feature.

1. From the top menu, select the **Security** tab, and then select **Companies**.  
The Companies form displays.
2. Click the **Edit** link for the desire company.  
The Edit Company form displays.

**Edit company**
✕

Dealer:

Company code:  ✕

Company name:

Company group:

Company logo:  No file chosen

Splash image:  No file chosen

Company thresholds (in minutes)

Punch threshold:     Lunch threshold:     Break threshold:

Ignore Empty Timecards for Approval Circuit:

Show notifications popup:

Validate Punch Locations:

Enable current pay period approval:

Ignore Non paid pay types in overlaps:

Use 24 hours format:

Decimals In Time:

Decimals In Rates:

Date Format:

Currency:

Define First Pay Period Of The Year By:

Net Time Clock Url:

Daylight saving time:

Login Url:

Connection string:

3. Check the **Daylight Saving Time** check box.
4. Click the **Save** button.

## Adjusting Transactions for a Change in Daylight Saving Time

You can make manual adjustments for transactions affected by Daylight Savings Time.

This function allows a user to quickly change all transactions affected by a Change in Daylight Savings time if Daylight Savings Time wasn't automatically set to run. (See [Running Daylight Saving Time Adjustment Automatically](#) on page 117)

Follow the instructions below to find all the transactions affected by a change in Daylight Savings Time.

1. From the top menu, select the **Edits** tab, and then select **Daylight Savings Time Adjustments**. The Daylights Savings Adjustments form displays.

2. In the DST Change time field, enter the time of day that Daylight Savings went into effect in 24 hour clock format.
3. Click **Get Transactions** link for the desire company.  
A list of employees with transactions affected by the change in DST displays.
4. Click **Apply DST Adjustment** to apply the DST time change to the transactions. (You can also click **Remove DST Adjustment** to remove the DST adjustment form the list of transactions.

# Creating a Holiday Exemption for an Employee

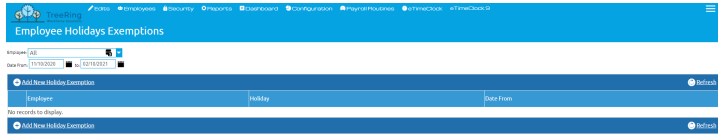
You can create a holiday exemption for an employee that will not be paid holiday rates.

An employee may need to be exempted from holiday pay for a variety of reasons.

Follow the steps below to create a holiday exemption.

1. From the **Edit** tab, select **Employee Holiday Exemptions**.

The Employee Holidays Exemptions form displays.



2. Using the **Employee** filter, select the employee to apply this to.
3. click the **Add New Holiday Exemption** link.  
The New Holiday Exemption form displays.
4. In the **Holiday** field, use the drop down menu to select the applicable holiday.
5. Click **Save**.

The form updates with the new entry.





# Chapter 11. Reports

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All time and attendance reports, schedules, and summary reports are available from the Reports tab. Not all reports may be active in your implementation.

## In This Chapter

[Report Overview](#) on page 121

Time and attendance reports, schedules, and summary reports are available from the Reports tab bar.

[Report Description](#) on page 122

The available reports.

[Customizing a Report](#) on page 125

You can customize a report type, save it, and share it with others.

[Deleting a Customized Report](#) on page 125

You can delete a customized report type.

[Sharing a Customized Report](#) on page 125

You can share a customized report type..

[Automating Reports](#) on page 126

You can automate reports to generate on a schedule.

## Report Overview

Time and attendance reports, schedules, and summary reports are available from the Reports tab bar.

All time and attendance reports, schedules, and summary reports are available from the **Reports** tab. Not all reports may be active in your implementation. For example, unless employee schedules are defined and built, the Schedule Reports will not be activated. Likewise, Job data must be tracked at the time clock in order for the Worked Job Reports to contain data.



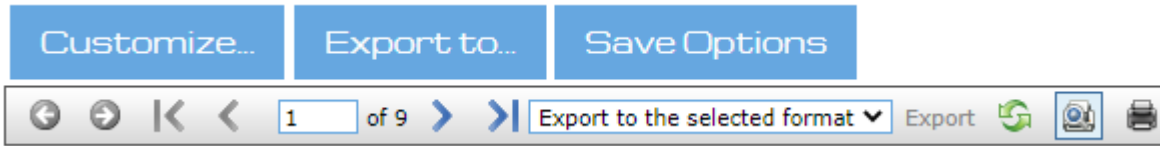
**Note:** Report access is dependent upon login role, user rights, and security configurations.

All reports can be selected for a specific range of data by indicating your preferences in the Filters form. Details are found in the [Filters](#) chapter.

## Report Navigation

A description of each option available on the Report tab.

A menu displays at the top of each report. See below for a description of each option available on the menu.



From left to right the buttons are as follows:

- **Customize** button: Allows you to customize the report.
- **Export to...** button: Saves the report outside of TreeRing Time so that it can be viewed or edited by another application, or can be e-mailed to a coworker. File formats to choose from are .xls, .pdf, .rtf, and .txt.
- **Save Options** button: Saves the report definition (after customization). It will now appear in the global navigation for the report type.
- **Navigate back**: Jump back to the last place viewed.
- **Navigate forward**: Jump forward to a previous place viewed.
- **First Page**: Increments to the first page of the report.
- **Previous page**: Increments the page being displayed on the screen.
- **Current Page**: The current page. You can type a new page number and jump to that page.
- **Next Page**: Increments the page being displayed on the screen.
- **Last Page**: Increments to the last page of the report.
- **Export**: Saves the report outside of TreeRing Time so that it can be viewed or edited by another application, or can be e-mailed to a coworker. File formats to choose from are .xls, .pdf, .rtf, and .txt.
- **Switch to Interactive View**: Presents a graphical layout of the report. Click on any page to view it directly.
- **Print**: Displays the printer driver to print the report.

## Report Description

The available reports.

Depending on your implementation, you may have different and/or additional reports available.

### Time Reports

- **Default Time Sheets**: Lists individual punches for a specified period (defaulted to current pay period) for all employees; includes weekly and pay period totals. This report is formatted to include a page break between each employee for distribution purposes and sorts by home department first then employee last name.
- **Extended Time Sheets**: Lists individual punches for a specified period (defaulted to current pay period) for individual employees; it includes all levels of tracking, notes, and weekly and pay period totals.
- **Employee Time Summary**: Lists all employees with daily totals of regular, overtime, double time and PTO hours without the punch details of the Time Sheets or Extended Time Sheets reports.
- **Daily Report**: Lists all card ID activity for a user-defined range for completed punches only.
- **Simple Time Summary**: Summary of regular, overtime, double time and PTO hours for all employees for the current pay period or other designated date range.
- **Time Off Sheet**: Similar to the Extended Time Sheet report (above) in its format. However, the Time Off Sheet only includes Paid Time Off and Unpaid Time Off (Time Type 2s and 4s in the Pay Types setup, chapter 5.) This report includes a signature line for employee or supervisor approval.

- **Work Department Time Summary:** Displays a summary of all employees working in a department including type of pay, total times, and total payments.
- **Duplicates/Overlap:** Lists punches that may be duplicates or have overlapping shifts that could cause double payment.
- **CAD Time Summary**
- **Detailed Time Sheet:** Displays as much information in as little space possible. Daily punch data sorted by employee with time type columns.
- **Potential Missed Edits**
- **Days and Hours Worked**
- **Unpaid Break Time**
- **Detailed Time Sheet by Other ID**
- **Default Time Sheet by Other ID**

#### Supervisor Report

- **Supervisor Exception:** List of all supervisors who still have employee time sheets that have not been approved by the supervisor.

#### PTO Reports

- **Employee PTO Bank History:** Displays the remaining days available for vacation, sick, and other cumulative time off options.
- **PTO Employee Plans**

#### Levels Reports

- **Job Detail By Dept/Task:** Displays job details for an employee for a department including type of pay, total times, and total payments.
- **Level Report:** Displays job details for an employee for a level (vendor, department, job) including type of pay, total times, and total payments.
- **Work Department Time Summary:** Displays a summary of all employees working in a department including type of pay, total times, and total payments.
- **Work Department Employee Time Summary:** Displays a specific employees working in a vendor, department, or job including type of pay, total times, and total payments.
- **Work Level Detail:** Displays the details for a department including type of pay, total times, and total payments.
- **Employee Summary by Level:** Reports by Employee by Organization Levels.
- **Work Department Time Summary MultiLevel**

#### Management Reports

- **No Punch Activity:** Indicates employees with no punch activity when scheduled for work.
- **Approaching OT:** Indicates all employees who are approaching overtime based on the user-set criteria.
- **No Project Activity:** Indicates employees with no punch activity when scheduled for project work.
- **Who's In:** Lists employees who have clocked in during a user-specified time range.
- **Historical Data:** A report listing data from previous TimeCenter versions.
- **Punch Exceptions:** Lists all punches that are duplicate or overlapping with another punch, all incomplete punches in the system for all employees, and all unknown IDs reported but not in the system as an employee. Clock numbers are listed to assist in tracking user/site-related errors. This report sorts by clock ID number first, then employee name.
- **Who is in now?:** Lists employees with an IN punch by department.

- **Who is not in:** Lists employees missing an IN punch that has not been completed as of the current date and time and are not qualified exceptions yet.
- **ACA Employee Eligibility**
- **Tips and Commissions Report**
- **Tip Allocation Report**
- **Punch Locations**
- **Who is in by Dept With Date Range**

#### Administrative Reports

- **Audit Transaction:** An audit of all transactions.
- **Audit Exceptions:** An audit of who approved all exceptions.
- **Employee Pay Periods:** An audit of who approved an employees pay periods.
- **Audit Employee PTO Request:** An audit of who approved all exceptions.
- **Audit Employee PTO Banks:** An audit of who approved all PTO banks.
- **Pay Period Approval Audit:** An audit of who approved a pay period.
- **Audit Supervisor Signoff w/.Hours:** An audit of who approved signoffs.

#### Schedule Reports

- **Absences:** Lists days not worked and hours missed against the schedule for any specified period, listed by employee number. Paid time off such as vacations and holidays do not report as absence days; for a report of all non-worked time see the Time Off Sheet above.
- **Early/Late:** Reports all early in, late in, early out and late out exceptions as well as time worked but not scheduled, and lunches over and under the allotted time.
- **Variance:** Comparison of scheduled versus actual worked hours for an individual or group of employees for a specified period.
- **Weekly:** The weekly assignment schedule for an individual or group of employees for a specified period.

#### Employees Reports

- **Employee Journal:** Company Member record view that you can expand to view details of this employees record.

#### Dashboard Reports

- **Who is Early OUT:** Lists employees that punched out before their scheduled end.
- **Who is Late in?:** Lists employees that punched in after their scheduled start.
- **Employee PTO Request:** List of employees with requested PTO.
- **Who is in?:** List of employees that are punched in.

#### Shift Differential Reports

- **Worked Shift Summary:** Displays worked time records sorted by employee, then presents hour totals and worked hours segregated by worked shift with total dollar amounts.
- **Shift Differential Time Sheet:** Displays worked time by day, broken down by worked shift with time and pay totals by shift.

#### Pay Types

#### User Accounts

#### Time Card Category Rpeort

## Attestation Reports

- **Meal Compliance Report**
- **Safety Compliance Report**
- **COVID-19 Attestation Report**
- **COVID-19 Attestation Summary Report**

## Customizing a Report

You can customize a report type, save it, and share it with others.

Reports commonly need to be customized by users to focus on their specific work unit, employees, or time periods. TreeRing Time allows you to customize each type of report and save it. Further, you can then share this report with other users.

Follow these steps to create a customized report.

1. For any report (**Reports** tab), move your mouse to the right of the report in the menu.  
The **Customize** label appears.
2. Click **Customize**.  
The appropriate Report form displays with the Default Options form displayed.
3. Select the options drop down menus and check boxes to modify the particular aspect of the report that you want.
4. You should preview the results to ensure you are getting what you want. Click the **Regenerate Report** button.  
The report regenerates. This may take a few seconds.
5. If the report looks OK, click the **Save Options** button.  
The Save Custom Report Definition form displays.
6. In the **Save Report As** field, enter a report name.  
  
The report should include part of the name of the report type. It may also include a label for a Supervisor group, organizational group or time period.

## Deleting a Customized Report

You can delete a customized report type.

Follow these steps to delete a customized report.

1. For any report (**Reports** tab), move your mouse to the right of the customized report in the menu.  
The **Delete** or **Share** label appears.
2. Click **Delete**.  
A confirmation dialog displays.
3. Click **OK**.  
  
The report disappears from the menu system.

## Sharing a Customized Report

You can share a customized report type..

You may want to share a customized report with an employee group.

Follow these steps to delete a customized report.

1. For any report (**Reports** tab), move your mouse to the right of the customized report in the menu.  
The Delete or Share label appears.
2. Click **Share**.  
Share Report With form displays.
3. In the **User Account** field, use the drop down menu to select the employee name you wish to share with.  
The report disappears from the menu system.
4. Click **Share**.  
The customized report will now appear the next time the user logs in.
5. Repeat for any other users.

## Automating Reports

You can automate reports to generate on a schedule.

The Automate Reports feature can run certain labor reports at a specified time and e-mail these reports to other managers and supervisors automatically. This action can be scheduled to take place as often as many times per day, or as infrequently as once per month or pay period. TreeRing Time's Data Security rules are applied to these reports just as they are in the application to ensure recipients only see the information they're supposed to.

The following reports can be run using the Automate Reports function:

- Approaching OT
- Default Time Sheet
- Detailed Time Sheets
- Employee Time Summary
- Shift Differential Time Sheet
- Daily Report

Follow the instructions below to configure an Automated Report.

1. From the **Configuration** tab, select **Automate Reports**.  
The Automate Reports form displays.
2. Click **Add New Configuration Record** on the task bar.
3. From the **Report Name** drop down menu, choose the report that you want to run and e-mail automatically.
4. From the **Format** drop down menu, select the file format for the report file.  
Currently, only PDF output is supported.
5. In the **Subject** field type a message to appear in the Subject line of the e-mail message.
6. In the **Recipients** box, place a check into the box next to each person that will receive an e-mail message with the report attached.

For a recipient to be available for selection they must have:

- An e-mail address entered in the Supervisors form.



**Note:** Each person will receive data only for allowed employees, because the report will be generated separately for each selected person so his/her security will be applied.

- A login configured in Login Setup form that has a User ID selected for that manager or supervisor (accessed from the **Security** tab by selecting **User Accounts**).
7. In the lower box labeled **Scheduling**, select a cycle frequency for this report to be run from the Select Email Cycle drop down menu. There are three options:

- **Weekly:** Select the weekdays the report will generate and the email will be sent.
- **Monthly:** Select the days of the month the report will generate and the email will be sent.
- **Pay Period:**
  - In the From the **Interval** drop down list box, select the time increment for which this process should happen. drop down menu, select the pay period that will be used for the report generation.
  - In the **Select Pay Period to Use in Report** section: Select if current **Active Pay Period** or **Last Pending Pay Period** should be used to generate the report.
  - Check the days the report will generate and the email will be sent. The amount of available days will be fulfilled according to the pay period duration.
  - In the **Run Time Start** field, enter the time of day for the process to first take place. This field is mandatory.
  - In the **Run Time End** field, enter the time of day for the process to stop. This field is not mandatory.
  - From the **Interval** drop down list box, select the time increment for which this process should happen.

This cycle determines the days that the report will run and the e-mail will be sent. The cycle will repeat as you move through time. Depending on this selection, the appropriate number of days will populate below in the area marked **Select Days During Email Cycle to Send Report**. If Pay Period is chosen and there are multiple pay periods defined in TreeRing Time, then select the correct pay period from the drop down menu that appears (**Active Pay Period** or **Last Pending Pay Period**). Place a check into the box for each day that you would like the report to be e-mailed.

8. In the **Run Time Start** field, enter the time of day for the process to first take place. Enter the time in 24 hour format or append PM to the end of the time if necessary.
9. From the **Interval** drop down list box, select the time increment for which this process should happen. If the report should be e-mailed only once per day then leave this field blank.
10. Click the **Send Now** to send this report on demand.  
Note that the report must first be saved. This can be useful for testing or for running the report at additional times other than those scheduled.
11. Click **Save**.





# Chapter 12. Pay Period End

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Processes needing completion at the end of the pay period.

## In This Chapter

[Closing the Pay Period](#) on page 129

You need to complete processes to finalize a pay period.

[Additional Optional Processes for Users of Advanced Features](#) on page 130

You may need to run optional advanced processes if using advanced features.

[Export to Payroll](#) on page 131

You export the time data for import into third party applications.

[Running the Pay Period End Routine](#) on page 131

You need to run the pay period end routine to close out and archive the open pay period, open a new payroll period, clear all supervisor signoff forms, and if schedules are in use, build a new set of schedules.

## Closing the Pay Period

You need to complete processes to finalize a pay period.

There are a number of important processes to consider at the end of each pay period. The particular process will differ for every company and depend on a number of factors. Here are some common procedures followed at the end of each pay period:

- **Complete time edits and finalize employee time sheets.** This may involve supervisors, employees, or just the administrator. Be sure that all worked hours are accounted for correctly.
- **Run time and labor reports.** This may range from running a standard time sheet to hand to employees or involve department and job labor tracking summary and detail reports.
- **Perform the Employee Certification and/or Supervisor and Manger Signoff functions.** These are optional procedures but are especially useful in large companies.
- **Running additional advanced optional processes.** For users of advanced features in TreeRing Time.
- **Perform the payroll export.** When all labor data and worked hours are correct and signed off, export the data to payroll to produce paychecks.

- **Run the Period End Routine in TreeRing Time.** This should be the last step of the process as it turns the time data from the last pay period into read only and advances the date range of the current pay period in TreeRing Time automatically. Read data is always available for historical reporting purposes but can no longer be edited or exported.

## Additional Optional Processes for Users of Advanced Features

You may need to run optional advanced processes if using advanced features.

If you are using some advanced features like PTO requests and approvals or auto-generation of scheduled timesheets, additional steps may be necessary at this point. This is covered in the advanced training sessions or available in the TreeRing Time User's Guide through the Help Menus.

### Import PTO Balances

You can simply import the PTO time balances each pay period and use the convenient TreeRing Time interface for easier administration and improved employee communication.

If your company already has a PTO accrual system in place, you can simply import the time balances each pay period and use the convenient TreeRing Time interface for easier administration and improved employee communication. The TreeRing Time Dynamic Import can be used to import PTO data from an external source. This process happens each pay period and can update time balances for every employee. Throughout the pay period, employees request time off, supervisors approve or disapprove the request, and administrators can oversee the process or manually input PTO time. At the end of the pay period, PTO time used can be exported to payroll or any other application used to calculate time off accruals.

### Autogenerating Time Sheets

You can configure timesheets to automatically be available for certain schedules.

Some companies require salaried employees and professionals, who are not required to use a time clock, to certify their time sheets, show time worked to satisfy state and federal regulations, or are required to have worked hours in the system in order to accrue PTO time. The AutoGenerate Time Sheets function automatically fills an employee's schedule with work time (Punch Type E for Edit Time). Once generated, employees can access these time sheets and make notations on time not worked, such as vacation and sick days, and verify and approve the time sheets.

Administrators and Payroll Administrators can set up auto-generate time sheets. In order for an employee to qualify for this feature and have Bulk (type B) punches added to their record, they must be set up in the following manner:

- **Schedule:** The AutoGenerate Time Sheets feature fills the schedule that is built for the employee with work time. Therefore, it is necessary that the employee have a schedule built for them. See [Scheduling Overview](#) for more information on building schedules.
- **Employee Details:** The AutoGenerate TimeSheets box needs to be checked in the Employee Details form for every employee that will receive time.

To run the auto-generation of time sheets, follow the instructions below.

1. From the **Configuration** tab, select **Rule Setup**, then select **Schedule Templates**.  
The Schedule Templates form displays.
2. For the schedule template that you wish to auto generate, click the link in the right hand column called **Generate employee schedules**.  
The Generate Employees Schedule Template Condition form displays.
3. Select an option:
  - Click **Start on the next pay period**.
  - Click **Rebuild on current pay period**.



4. Repeat this procedure for each pay period to be closed if you have multiple pay periods.



**Note:** Each pay period must be closed individually. If you encounter an error that refers to the Period End Errors Report, see [Period End Errors Report](#).

# Chapter 13. Logins and Security

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The administrator controls data security and allows the creation of user logins, with corresponding rights and permissions for each login.

## In This Chapter

[Security Overview](#) on page 133

The security model is focused on six login roles.

[Login Setup](#) on page 134

The first step to allow access to the TreeRing Time system is to configure a login for the employee.

[Change Password](#) on page 138

You can change your password.

[Adding a New Dealer](#) on page 139

You add a new dealer when first setting up TreeRing Time.

[Company](#) on page 140

The company is an organizing concept.

## Security Overview

The security model is focused on six login roles.

The TreeRing Time security model is focused on the most common login roles. Starting from most powerful, these roles are Administrator, Payroll Administrator, Supervisor, Manager, Timekeeper, Employee, and EmpSelf. Each login role can have a predefined set of menus (see chart below.) The menus - access to forms and reports - can be customized for the login role. New roles can be added as well. Additionally, the write privileges for each individual login can be turned on or off for each form.

The login role not only defines security access for the employee, but it also connotes the responsibilities for that employee, since the roles are pre-configured for each standard level of responsibility in the labor tracking/payroll process. For example, the Supervisor login accesses all time-editing forms and labor reports, but does not access the setups of the application nor the payroll processing functions.

The Administrator of TreeRing Time is initially set up with all rights and permissions. With these rights, the administrator controls data security and allows the creation of user logins, with corresponding rights and permissions for each login.



**Note:** A login to the TreeRing Time system is not necessary for an employee to be able to use eTimeClock.

The following chart illustrates menu access by login role.



**Note:** Every login role has access to the Filter function.

Login Role	Configurati on Tab	Edits Tab	Reports Tab	Security Tab	Employee s Tab	Payroll Routine s	Dashboa rd tab	eTimeClo ck
Administrator	Administrator login has access to all forms (except the employee/supervisor specific functions), security controls, and reports.							
Payroll Administrator	Yes	Yes	Yes	Yes, minus security forms and Reprocess IDs form.	Yes	Yes	Yes	Yes
Manager	No	Yes	Yes	No	No	No, except Manager Signoff	Yes	Yes
Supervisor	No	Yes	Yes	No	No	No, except Supervis or Signoff	Yes	Yes
Timekeeper	No	Yes, minus Supervisor Signoff and Redistribute Hours	Yes, selected reports only	No	No	No	Yes	Yes
Employee	Views the Employee tab with access to eTimeSheet, Assign Hours, and time, expense, PTO, and schedule reports. The Employee login can modify his or her own labor hours.							
EmpSelf	Views the EmpSelf tab with access to time certification, schedule, and PTO reports. The EmpSelf login cannot modify his or her own labor hours.							

## Login Setup

The first step to allow access to the TreeRing Time system is to configure a login for the employee.

The first step to allow access to the TreeRing Time system is to configure a login for the employee. A login consists of a user name and password. When you create the login, you must also specify the role of that login. See the preceding chart for more information about login roles.

## Adding a New Login

You add a new login when an employee needs to access more than the eTimeClock feature.

Follow the instructions below to add a new login.

1. From the **Security** tab, select **User Accounts**.

The User Accounts form displays.

2. Click **Add New User Account** on the toolbar.

The New User Account form displays in the Login Setup form.

3. In the **Login Name** field, enter the login for this employee.  
The employee will use this ID to log into TreeRing Time. The login is not case sensitive and may contain any combination of letters, numbers, and special characters, except it cannot contain a backslash (\). It must contain at least one character and no more than 128 characters.
4. In the **First Name** field, enter the employees first name.
5. In the **Last Name** field, enter the employees last name.
6. In the **E-Mail** field, enter the employees email address.
7. In the **SMS notifications to** field, enter the employees mobile phone number and select the service provider from the drop down list.  
The user will receive notifications of new missing punches every hour if the user has a mobile phone entry in their User Account.
8. In the **Default Dealer** field, select from the drop down menu any alternate Dealers.
9. In the **Default Company** field, select from the drop down menu any alternate Companies.
10. From the **Global Role** drop down menu, select the desired role for this login. See [Security Overview](#) for more information about login roles.
11. Click **Save**.

An email is sent to the user with a temporary password which needs changing upon first login.

## Changing the Role Assigned to a Login

You can change a login role when the person changes jobs or is promoted.

The Change Role feature can quickly change the login role assigned to an existing login. This may be used in the case when an employee's job responsibilities have changed. After using this feature, the login and the password remain the same as they were before, but the user will have revised menu access in TreeRing Time.

Follow the instructions below to change a login role

1. From the **Security** tab, select **User Accounts**.  
The User Accounts form displays.
2. Find the desired employee and click the link **Edit** for that person.  
The **Edit User Account** form displays
3. Click the **Companies** tab.  
This tab is only available to dealers with more than one company, otherwise this appears on the **Security** tab.  
The following form loads in the data window.

Dealer: Timecentre QA

User Account Companies

Company Group: All company groups

	Company name	Role in company
<input type="checkbox"/>	G6 Hospitality DEV	-- Select --
<input checked="" type="checkbox"/>	G6 Hospitality QA	G6 - Supervisor Restricted
<input type="checkbox"/>	test	-- Select --

Save

4. Check the applicable **Company Name** and use the drop down menu to select a **Role in company**.  
See [Security Overview](#) for more information about login roles.
5. Click **Save** to make the changes permanent.

## Making a Login Inactive

You can inactivate a login.

The inactivate login command deletes the user's right to access the TreeRing Time program.



**Note:** This does not remove data from the database; only access.

Follow the instructions below to inactivate a user login.

1. From the **Security** tab, select **User Accounts**.  
The User Accounts form displays.
2. Click the link **Inactivate** for the desired employee you wish to inactivate.
3. Click **OK** to confirm the command.

Please wait while the page refreshes.

## Creating a Role

You can create new roles when needed.

Roles define the features and permissions an employee can have. Roles are for employees doing common or like jobs under the same conditions with the same pay and benefits. You can easily create derivative roles from existing roles. You can modify administrators, managers, and supervisor roles to give or take away additional features and permissions.

Follow the instructions to create a new role.



**1. From the Security tab, select Roles.**

The Roles form displays.

**2. Click Add New Role.**

The New Role form appears.

**3. In the Dealer field, select a dealer.**

**4. In the Role code field, enter a code for the role.**

**5. In the Role name field, enter a descriptive name for the role.**

**6. In the Role level drop down menu, select a role.**

- **Administrator**
- **Manager**
- **Supervisor**

**7. Define the menu by**

- In the left hand choice section, placing a check mark beside a role you want to **Copy permissions from**. The right hand section will populate and you can further edit it
- Click the **Load permissions** button and check the desired **Menu items included**.
- Click Clear permissions button to clear the permissions.

**8. Click Save.**

**9. In the Dashboard widgets tab, select the widgets you want to appear for the role.**

**10. Click Save.**

The role is now available for all appropriate features.

## Copying a Role

You can copy an existing role when needed.

You can easily create derivative roles from existing roles. Pre-configured roles edit for administrators, managers and supervisors. You can modify these roles and give or take away additional features and permissions.

Follow the instructions to copy a role.

1. From the **Security** tab, select **Roles**.  
The Roles form displays.
2. For the Role that you want to copy from, in the last column, click the link **Copy Role to Dealer**.  
The Copy Role to Dealer form displays.

3. Select Either
  - Check if you want to **Create a new role with a code** and enter the code.
  - Check if **ONLY overwrite existing role menu structure**: The copy replaces the original top level menu structure. This technique is used to fix menu issues quickly.
4. Click **Copy**.  
The role appears in the Roles list and you can now edit it.

## Change Password

You can change your password.

Every login role has access to the change password function, but the menu location varies with each login. The TreeRing Time Change Password function works in the standard method where it will ask the user for their old password (to confirm identity) and then the new password twice (to prevent typographical errors). You should urge users to change their password the very first time they login to the system and at regular intervals, perhaps monthly, after that. The following are some basic guidelines for secure passwords:

- Use a combination of letters and numbers.
- Do not use words that can be found in the dictionary.
- Change the password at intervals.

There are two ways to change a login password in TreeRing Time.

- The standard method is for the employee to log into TreeRing Time, navigate to the Change Password form (the location of this form varies with the different login roles), and use this form to change their password to a new one. The user enters their old password once and the new password twice. This method is secure and private.
- The second method to change a login password is for an administrator login to reset the password in the Login Setup form. The second method must be accomplished by a TreeRing Time Administrator and the old password is not needed. This method could be used in the case when an employee forgets their password and it must be reset.

## Changing Your Password - Self Serve

You can change your password.

Follow the instructions below to change your password.

1. Navigate to **Security** tab and then select **Change Password** form.  
This feature may be located in different menus depending on the login role of the person accessing it.  
**Login:** The User Login appears at the top of the form. This is the login name of the current user.

2. In the **Current Password** field, type in the previously used password.
3. In the **New Password** field, click in this box and type a new password.
4. In the **New Password (Confirmation)** field, click in this box and type the new password again to prevent typographical errors.
5. Click **Change Password** to activate the new password.

The new password is effective immediately.

## Changing a Login Password - Administrator

An Administrator can change or reset a user password.

When a user forgets their password, the Administrator can reset it.

Follow the instructions below to change or reset a user password.

1. From the **Security** tab and then **User Setup**.  
The User Account form displays.
2. Find the desired employee using the search box, sorting the various columns, or clicking through the pages.
3. Click the link **Reset Password**.  
A confirmation dialog displays.
4. Click **OK** to make the changes permanent. Click **Cancel** to undo any changes.

## Adding a New Dealer

You add a new dealer when first setting up TreeRing Time.

Follow the instructions below to add a new dealer.

1. From the **Security** tab, select **Dealers**.  
The Dealer form displays.
2. Click **Add New Record** on the tool bar.  
The New Dealer form displays in the Login Setup form.
3. In the **Dealer Name** field, type the name of the dealer.
4. In the **Email for Notifications** field, type the email address to be used for notifications.
5. Click **Save**.

## Edit a Dealer

You can edit a dealer.

Follow the instructions below to edit a dealer.

1. From the **Security** tab, select **Dealers**.  
The Dealer form displays.
2. Click the link **Edit** for the row of the desired dealer.  
The Edit Dealer form displays in the Login Setup form.
3. In the **Dealer Name** field, edit the name of the dealer.
4. In the **Email for Notifications** field, edit the email address to be used for notifications.
5. Click **Save**.

## Edit a Dealer

You can edit a dealer.

Follow the instructions below to edit a dealer.

1. From the **Security** tab, select **Dealers**.  
The Dealer form displays.
2. Click the link **Edit** for the row of the desired dealer.  
The Edit Dealer form displays in the Login Setup form.
3. In the **Dealer Name** field, edit the name of the dealer.
4. In the **Email for Notifications** field, edit the email address to be used for notifications.
5. Click **Save**.

## Company

The company is an organizing concept.

A company is at the heart of organizing time sheets and schedules. Every company is set up differently so you will need to configure your company, its roles, employees, supervisors, pay types, schedules, time sheets and business rules accordingly.

Your company may belong to a group of companies; you can also set up an optional Company group to organize your companies together.

A Company Group must belong to a Dealer. You will need to configure a Dealer.

You can customize the login page to include support information, messages, and Terms and Conditions as shown in this example.



From the Companies form (**Security > Companies [Company Name]**), you can:

- Add roles applicable to the company. See [Creating a Role](#).
- Add pay types applicable to the company. See [Setting Up Pay Types](#).
- Modify the approval circuit (work flow) for time sheets. See [Creating a Notification](#).
- Configure Business rules (PTO and Comp policies). See [Setting the Bill Rate Modification](#) and [Running the Bill Rate Modification](#).

## Adding a New Company Group

You add a new company group when first setting up TreeRing Time.

Follow the instructions below to add a new company group prior to assigning companies.

1. From the **Security** tab, select **Company Group**.  
The Company form displays.
2. Click **Add New Record** on the tool bar.

The New Company Group form displays.

3. In the **Dealer** field, select from the drop down menu any alternate Dealers.
4. In the **Company Group Name** field, type the name of the company.
5. Click **Save**.

## Edit a Company Group

You can edit a company group.

Follow the instructions below to edit a company group.

1. From the **Security** tab, select **Company Group**.  
The Dealer form displays.
2. Click the link **Edit** for the row of the desired company group.  
The Edit Dealer form displays.
3. In the **Dealer** field, select from the drop down menu any alternate Dealers.
4. In the **Company Group Name** field, edit the name of the company.
5. Click **Save**.

## Delete a Company Group

You can delete a company group.

Follow the instructions below to delete a company group.

1. From the **Security** tab, select **Company Group**.  
The Company Group form displays.
2. Click the link **Delete** for the row of the desired company group.  
The Reassign Company Group form displays.
3. Reassign the company to another company group using the drop down menu.
4. Click **Save**.

The Company Group disappears from the form.

## Adding a New Company

You add a new company when first setting up TreeRing Time.

Follow the instructions below to add a new company.

1. From the **Security** tab, select **Companies**.  
The Company form displays.
2. Click **Add New Company** on the tool bar.  
The New Company Group form displays in the Login Setup form.
3. In the **Dealer** field, select from the drop down menu your Dealers.
4. In the **Company Name** field, type the name of the company.
5. In the **Company Group Name** field, select from the drop down menu your Company Group.
6. Configure the remaining desired options:
  - **Company Logo**: Upload you company logo for company personalization.
  - **Splash Image**: Upload an image for a splash screen.
  - **Punch Threshold**: Enter the number of minutes typically between punches.

- **Lunch Threshold:** Enter the expected time in minutes for a lunch break.
- **Break Threshold** Enter the expected time in minutes for a coffee break.
- **Ignore Empty Time cards for Approval Circuit:** Check if you want empty time cards to not use the approval work flow.
- **Use 24 Hours Format:** Check if you want time reported in the 24 hour format. For example, 1:00 pm would be 13:00 hours.
- **Show Notifications Prompt:** Check if you want any notifications to appear as pop ups.
- **Decimals in Time:** Indicate how many decimal places are needed for time entry.
- **Validate Punch Locations**
- **Decimals in Rates:** Indicate how many decimal places are needed for time entry.
- **Enable Current Pay Period Approval:** Check if you want current pay periods to go through approvals.
- **Date Format:** Select the date format - American or European
- **Ignore Non Paid Pay Types in Overlaps:** Check if you want to ignore this type of exception.
- **Currency:** Select the currency type - US Dollars, Pound sterling, Euros.
- **Define First Pay Period of the Year By:** Pick a date for the beginning of the pay year. This will likely match your fiscal year.
- **Net Time Clock URL:** Enter the URL for the employee to access the eTimeClock.
- **Daylight Saving Time:** Check if you will be using Daylight Savings time.
- **Login URL:** Enter the URL for the TreeRing Time login.
- **Connection String**

7. Click **Save**.

## Edit a Company

You can edit a company.

Follow the instructions below to edit a company.

1. From the **Security** tab, select **Company**.  
The Company form displays.
2. Click the link **Edit** for the row of the desired company.  
The Edit Company form displays.
3. Edit the desired fields.
4. Click **Save**.

# Chapter 14. Scheduling and Attendance

---

The Scheduling module of TreeRing Time is a powerful means of tracking employees' attendance, reporting on how punctual they are, and rounding their work time to their scheduled time. These features can be used separately or in conjunction with each other. Once a schedule has been built for an employee, it is easy to modify in the case of an approved schedule variance or requested time off.

## In This Chapter

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The Scheduling module allows you to specify how to track attendance, punctuality, and rounding..

[Setting Up Scheduling](#) on page 144

Setting up a Schedules follows this flow of tasks.

[Defining the Schedule Template](#) on page 148

The schedule template defines the work times and days.

[Dynamic Scheduling](#) on page 154

Manage your dynamic work schedule.

[Schedule and Attendance Reports](#) on page 158

These schedule and attendance reports can be run by both administrators and supervisors and provide essential feedback on employee performance.

## Scheduling Overview

The Scheduling module allows you to specify how to track attendance, punctuality, and rounding..

The Scheduling module of TreeRing Time is a powerful means of tracking employees' attendance, reporting on how punctual they are, and rounding their work time to their scheduled time. These features can be used separately or in conjunction with each other. Once a schedule has been built for an employee, it is easy to modify in the case of an approved schedule variance or requested time off.

Schedules are used to track time worked as well as time not worked. When an employee misses a work shift TreeRing Time automatically inserts an Absence (punch type AB) record. TreeRing Time then can track these absences and provide cumulative, yearly totals.

Building schedules for employees, an optional feature of TreeRing Time, has numerous benefits:

- Knowing when employees arrive for work early or late, or leave work early or late.
- Providing the ability to report absences.

- Providing the ability to round actual clock in/out punches to the scheduled work time.
- Disallowing an employee from using the time clock at an unscheduled time (with certain clock models).
- Generating attendance reports, including absence, early/late, and attendance summary reports.
- Generating schedule variance reports, which compare the actual time worked to the scheduled time worked, in a department, job, or work order.

Schedules are assigned to employees by the day and/or by a date range. A scheduled work day can include specific department, job, or work order assignments. A complete listing of the schedule can be printed and distributed to employees or supervisors.

## Setting Up Scheduling

Setting up a Schedules follows this flow of tasks.

The scheduling process consists of three tasks:

1. Defining the schedule template. Any number of employees may share a template. See [Defining the Schedule Template](#).
2. Assigning the schedule templates to the employees. See [Assigning the Schedule to the Employee](#).

Two optional steps can be taken:

3. Configuring schedule-based time rounding rules. Define smart rounding rules with specific 'round in before' and 'grace in after' rules for both in and out punches. See [Schedule-Based Rounding and Exceptions Reporting](#).
4. Editing schedules at any time to accommodate daily changes or time off requests. [Changing an Existing Schedule](#).

## Assigning the Schedule to the Employee

Assign the schedules to each employee in the Employee Rules form

The Card IDs of all of the employees.

After the schedule templates have been created, assign the schedules to each employee in the Employee Rules form. It is important to assign the correct template to the employee. Only assign a template to employees that adhere to a schedule.

1. From the **Configuration** tab, select **Rules Setup** and then **Schedule Templates**.  
The Schedule Templates form displays.
2. Click the **Assign Employees** link for the schedule that you wish to assign employees to.  
The Employee Assignment form displays.
3. In the **Card ID** field, enter the employees Card ID.
4. Click the **Confirm** button.  
The Generate Employees Schedule Template Condition displays.



5. Select from the options for when this Schedule will apply.  
Normally, it will be **Start on the Next Pay Period**. However, if you are building several schedules (you are going on holidays and need to build them before), then you will want to specify the future schedule **Starting Date** within an active Pay Period.



**Note:** Schedules can only be created for active pay periods. You may need to request from the Payroll Administrator that a new future Pay Period be created to accommodate your future schedule.

Any time a schedule is rebuilt for a specific pay period, it will wipe out any existing schedule for that period.

6. Click the **Save** button.
7. Repeat this process for each employee, assigning the appropriate schedule from the drop down menu.

## Automating Schedule Building

If you schedules, you can automatically make new ones available for new pay periods.

If you have built schedules for the length of the pay period, it is possible to automate successive schedule builds. The action of closing out the pay period can automatically build a schedule for any employee that has a schedule assigned in the Employee Rules form and is assigned to a pay period. The schedule built for them will be the schedule that is assigned in the Employee Details form. It will be built for the length of the next pay period. This is a very convenient feature and can essentially mean that you have to build a schedule for an employee one time only.

Follow the instructions below to turn this feature on.

1. From the **Employees** tab, select **Company Members**.  
The Company Members List form displays with the Details tab displayed.
2. From the Employee drop down, select the desired employee
3. Check the box labeled **AutoGenerate TimeSheets**.  
Not all employees with schedules may have this checked.
4. Click the **Save** button.

## Changing an Existing Schedule

You can change an existing schedule to match changes in work routine.

Updating an employee's schedule to match their work times is important to keep the Early/Late and Absence reports accurate. Small changes in the employee's schedule, such as requesting to leave early one day, can qualify as an 'Early Out' on a report. To prevent this erroneous tallying, it is important to update the employee's schedule and keep it as accurate as possible. However, this schedule maintenance is optional, as TreeRing Time will function the same way with or without an updated schedule, so the amount of effort extended to update schedules is at the discretion of the manager or company policy.

There are two different ways to change an employee's schedule. Choosing the correct method depends on whether the schedule change is permanent or temporary.

- For permanent changes to an employee's schedule, reassign the employee's schedule template (create a new one if necessary). See [Assigning the Schedule to the Employee](#).
- If the change is temporary, or for small modifications to the schedule such as leaving early or arriving late, use the **Edits > Employee Schedules** form to manually adjust the days and times of the schedule. See [Change an Employee's Schedule Temporarily](#).

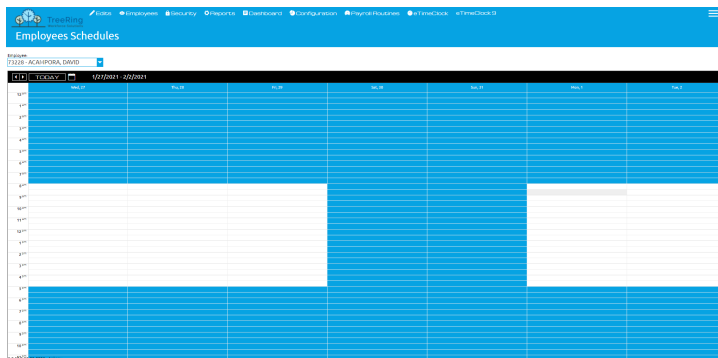
See the sections below for more information including: [Print a Employee's Schedule](#).

## Changing an Employee's Schedule Temporarily

Change an employee's schedule temporarily.

Follow the instructions below to change an employee's schedule temporarily.

1. From the **Edits** tab, select **Employees Schedules**.  
The Employees Schedules form displays.
2. To view a schedule for a particular employee, select the employee from the **Employee** drop down list.  
The employees current pay period schedule appears.



3. Use the **left and right arrows** to move between the previous and next pay period. Click the **down arrow** to open a calendar to select a pay period further into the future.
4. Double click on the **“Template Schedules”** rectangle or right click on it and select **Edit Schedule** on the desired day. You can also:
  - To add a new workday, right click on the day and hour concerned. The Add New Schedule pop up appears. Click it and the New Employee Schedule form appears. Enter the start and end times, lunch minutes, and other necessary information. Click the **Save** button.
  - To delete a work day from this employee's schedule, hover over the day and rectangle and click the **X** that appears. Click **Yes** on the dialog box to verify the deletion of this line.

The Edit Employee Schedule form displays.

- To adjust the work times, right click on the double click in the **Start Time** or **End Time** fields and make the change. Click **Save**.

The schedule changes. All labor reports will be based on this new schedule.

## Printing a Employee's Schedule

You can print an employee's schedule to give to the employee or for reference

Follow the instructions below to print an employee's schedule

- From the **Reports** tab, select **Schedule** and then **Weekly**.  
The Weekly form displays.
- Click the **Customize** button.  
The Weekly Schedule Report Options form displays.

- In the **From** field, select a start date to run the report from.
- To view a schedule for a particular employee, select the employee from the **Employee Selection** drop down list and click on the employee name.
- Click the **Regenerate Report** button.  
An employee specific Weekly Schedule with Assignment report displays.
- Click the **Print** icon on the task bar.  
The print window displays showing the schedule in a print ready format.

**7.** Click the **Print** button.

The schedule prints.

## Schedule-Based Rounding and Exceptions Reporting

Time rounding rules that are based on the employee's schedule can be created and applied for each employee.

Time rounding rules that are based on the employee's schedule can be created and applied for each employee. See [Creating a New Schedule Template](#).

Rounding criteria can be set independently for arriving early or late, or leaving early or late. The Early/Late report criteria can also be defined to provide the most valuable information for each supervisor or administrator. Absence tracking can be toggled on or off as well.

These settings are found on the Rounding Policies form accessed from the **Configuration** tab by selecting **Rule Setup** and the **Rounding Policies**.

See Rounding Policies in the *System Administrator User Manual* for detailed information.

## Defining the Schedule Template

The schedule template defines the work times and days.

The schedule template defines the work times and days. TreeRing Time will repeat the template that is defined as you move through time, simply building one set of days after another. Here are some guidelines to remember when building a template:

- Select the **Start Day of Week** as the first work day for the schedule so that it matches the day number one listed in the template.
- It is best to define at least one work week for each template. Currently, you can only specify a maximum of one week to a template.
- If the schedule rotates on a cycle, define multiple days or weeks to encompass the entire rotation. For example, if a schedule works a different time every other Friday, define two templates (one for each week) to account for the full cycle.
- You only need to define one template for a particular schedule, no matter how many employees may share it.
- If one set of work times varies from another, no matter how similar they may be, it should be defined with its own template.

Here is an example of the Schedule Templates form.

**Update Schedule Group** ✕

Description:

Schedule rounding:

<input checked="" type="checkbox"/> Round and grace Round In Before: <input type="text" value="15"/> Round Out After: <input type="text" value="15"/> Grace Out Before: <input type="text" value="15"/> Grace In After: <input type="text" value="15"/>	<input checked="" type="checkbox"/> Report exceptions Early In: <input type="text" value="5"/> Lunch Under: <input type="text" value="0"/> Early Out: <input type="text" value="0"/> Lunch Over: <input type="text" value="0"/> Late In: <input type="text" value="5"/> Late Out: <input type="text" value="0"/>	<input checked="" type="checkbox"/> Report Absence
---	--	--

Create schedule on holidays

Schedules:

+ Add New

			DayOfWeek	Start Time	End Time	Lunch Time	Lunch Start
<input type="checkbox"/>	Edit	Delete	Mon	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Tue	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Wed	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Thu	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Fri	08:00 a.m.	05:00 p.m.	30	12:00 p.m.

Monday
  Tuesday
  Wednesday
  Thursday  
 Friday
  Saturday
  Sunday
 Copy

Save

## Creating a New Schedule Template

Create a new schedule template to set up a new schedule.

Follow the instructions below to create a new schedule template.



**Note:** An Employee's schedule can always be manually adjusted after it has been built.

1. From the **Configuration** tab, select **Rules Setup** and then **Schedule Templates**.  
The Schedule Templates form displays.
2. Click **Add New Schedule Template** on the task bar to start a new Schedule Template.  
A confirmation window displays.

✕

Do you want to copy an existing Schedule Template?

Yes
No

3. Answer the question Do you want to copy and existing Schedule Template?
  - Click **No** if you want to create a new template.
  - Click **Yes** if you want to copy an existing template.

If **No**, the New Schedule Group form displays.

**New Schedule Group**

Description:

Schedule rounding:

<input type="checkbox"/> Round and grace Round In Before: <input type="text" value="0"/> Round Out After: <input type="text" value="0"/> Grace Out Before: <input type="text" value="0"/> Grace In After: <input type="text" value="0"/>	<input type="checkbox"/> Report exceptions Early In: <input type="text" value="0"/> Lunch Under: <input type="text" value="0"/> Early Out: <input type="text" value="0"/> Lunch Over: <input type="text" value="0"/> Late In: <input type="text" value="0"/> Late Out: <input type="text" value="0"/>	<input type="checkbox"/> Report Absence
--	---	---

Create schedule on holidays

Schedules:

+ Add New						
	DayOfWeek	Start Time	End Time	Lunch Time	Lunch Start	
<input type="checkbox"/>	Monday					
<input type="checkbox"/>	Tuesday					
<input type="checkbox"/>	Wednesday					
<input type="checkbox"/>	Thursday					
<input type="checkbox"/>	Friday					
<input type="checkbox"/>	Saturday					
<input type="checkbox"/>	Sunday					

4. Enter a name for the template in the **Description** field using up to 25 characters. Use a name that is descriptive of the schedule, for example, "8:00-5:00" or "Administrative."
5. Check if you want to allow **Scheduling rounding** for **Round and grace**, **Report Exceptions**, and **Report Absence**.
  - **Round and grace**: can actually affect the hours an employee gets paid.
  - **Report exceptions**: simply for reporting purposes.
  - **Report Absence**: will show employees as absent on their timesheet if they do not punch in on a day they are scheduled.
6. Enter rounding values as minutes.
7. Check if you want to **Create schedule on holidays**. this would only be for companies that work holidays.
8. Click **Add New** to create the schedule for the first day of the schedule.

The New Schedule Group Detail form displays.

**New Schedule Group Detail**

Day of the week:

Start Time:

End Time:

Lunch Time:

Lunch Start:

9. From the **Day of week** drop down list, choose the day of the week for the first work day. The day specified here defines what day number 1 will be in the template. Choosing a start day of Monday, for example, will ensure the first day of the

schedule will always start on Monday. TreeRing Time will start building the schedule for the employee on the first instance of the day of the week you have selected following the start date you specify in the Schedule Builder form.

10. In the **Start Time** field, enter the start time of your schedule day in 24 hour, 4-digit format. For example, enter 8:00AM as 0800; enter 1:00PM as 1300. Acceptable times range from 00:00 (midnight) to 23:59.
11. In the **End Time**, field, enter the end time of your schedule day in 24 hour, 4-digit format. For example, enter 3:00PM as 1500; enter 6:00PM as 1800. Acceptable times range from 00:00 (midnight) to 23:59.
12. In the **Lunch Time** field, enter the number of minutes for the lunch period allowed for each day. This lunch value is used solely for the purpose of the 'Lunch Under' and 'Lunch Over' reporting. This time will not be deducted from the work day.
13. In the **Lunch Start** field, enter the start time of the lunch period in 24 hour, 4-digit format. For example, enter 8:00AM as 0800; enter 1:00PM as 1300. Acceptable times range from 00:00 (midnight) to 23:59.
14. Click **Save** after defining the day.  
You return to the main form.
15. Define the next day of the schedule either by:
  - If the rest of the schedule repeats the first day, click the check box beside the row for the first **Day of the Week**. Then click each day of the week you want to copy it to. Click the Copy button.
  - If the next day will have a different start and end time or lunch period, repeat this process for each day of this schedule by clicking **Add New** on the task bar to enter subsequent days within this template.
16. Repeat the previous step until the schedule is complete.
17. Click the **Save** button to save the schedule.
18. You can repeat the entire schedule template setup process for each new schedule template in your installation, or you can copy an existing schedule, rename it, and edit the differences.

**Time Saving Tip:** When you are creating similar schedules templates, use the Copy Group option from the task bar and save time when many different schedules must be created without vast differences between them.

## Editing a Schedule Template

Make changes to an existing schedule template.

Follow the instructions below to make changes to an existing template.

1. From the **Edits** tab, select **Configuration** and then **Schedule Templates**.  
The Schedule Templates form displays.
2. From the **Select Schedule** drop down list, select the schedule template to which you want to make changes.  
The schedule displays.
3. Click **Edit** in the row for the schedule that you want to make changes to.  
The Update Schedule Group form displays.

**Update Schedule Group** ✕

Description:

Schedule rounding:

<input checked="" type="checkbox"/> Round and grace Round In Before: <input type="text" value="15"/> Round Out After: <input type="text" value="15"/> Grace Out Before: <input type="text" value="15"/> Grace In After: <input type="text" value="15"/>	<input checked="" type="checkbox"/> Report exceptions Early In: <input type="text" value="5"/> Lunch Under: <input type="text" value="0"/> Early Out: <input type="text" value="0"/> Lunch Over: <input type="text" value="0"/> Late In: <input type="text" value="5"/> Late Out: <input type="text" value="0"/>	<input checked="" type="checkbox"/> Report Absence
---	--	--

Create schedule on holidays

Schedules:

+ Add New

			DayOfWeek	Start Time	End Time	Lunch Time	Lunch Start
<input type="checkbox"/>	Edit	Delete	Mon	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Tue	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Wed	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Thu	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Fri	08:00 a.m.	05:00 p.m.	30	12:00 p.m.

Monday
  Tuesday
  Wednesday
  Thursday
  Friday
  Saturday
  Sunday
 Copy

Save

4. Click in the fields that you want to make changes to and make your changes.
5. Click **Save** button to save the changes.

## Copying a Schedule Template

You can copy a template to save time when creating additional templates that are similar to an existing template.

Copy a template to save time when creating additional templates that are similar to an existing template. Simply edit the differences between the two templates.

1. From the **Configuration** tab, select **Rules Setup** and then **Schedule Templates**.  
The Schedule Templates form displays.
2. Click **Add New Schedule Template** on the task bar to start a new Schedule Template.  
A confirmation window displays.

✕

Do you want to copy an existing Schedule Template?

Yes
No

3. Answer the question Do you want to copy and existing Schedule Template?
  - Click **Yes** if you want to copy an existing template.



- If **No**, the Select a Schedule Template to copy displays.

- Using the drop down menu, select a schedule to copy.
- Click the Copy button

The Update Schedule Group form displays

Description:

Schedule rounding:

Round and grace <input checked="" type="checkbox"/>	Report exceptions <input checked="" type="checkbox"/>	Report Absence <input checked="" type="checkbox"/>
Round In Before: <input type="text" value="15"/>	Early In: <input type="text" value="5"/> Lunch Under: <input type="text" value="0"/>	
Round Out After: <input type="text" value="15"/>	Early Out: <input type="text" value="0"/> Lunch Over: <input type="text" value="0"/>	
Grace Out Before: <input type="text" value="15"/>	Late In: <input type="text" value="5"/>	
Grace In After: <input type="text" value="15"/>	Late Out: <input type="text" value="0"/>	

Create schedule on holidays

Schedules:

+ Add New			DayOfWeek	Start Time	End Time	Lunch Time	Lunch Start
<input type="checkbox"/>	Edit	Delete	Mon	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Tue	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Wed	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Thu	08:00 a.m.	05:00 p.m.	30	12:00 p.m.
<input type="checkbox"/>	Edit	Delete	Fri	08:00 a.m.	05:00 p.m.	30	12:00 p.m.

Monday  Tuesday  Wednesday  Thursday  
 Friday  Saturday  Sunday

- Enter a name for the template in the **Description** field using up to 25 characters. Use a name that is descriptive of the schedule, for example, "8:00-5:00" or "Administrative."
- Click in the fields that you want to make changes to and make your changes.
- Repeat steps 7 until you have tailored the new schedule to fit your needs.
- Click **Save**.

## Deleting a Schedule Template

You can delete a schedule template when it is no longer needed.

Follow the instructions below to delete a template.

- From the **Configuration** tab, select **Rules Setup** and then **Schedule Templates**.  
The Schedule Templates form displays.
- Click the **Delete** link in the first column for the row of the template you wish to delete.  
The Delete Template dialog box displays asking if you want to delete the selected template.

### 3. Click **OK**.

The template is deleted.

## Dynamic Scheduling

Manage your dynamic work schedule.

The Dynamic Scheduling feature of TreeRing (if enabled), allows an employee to easily manage their general availability as well as availability to accept a specific period of scheduled work.

- **General Availability:** This is the days of the week or time of day that you are generally availability to work. This availability is generally a reflection of the employment agreement you have with the employer. For example, you may be available to work Monday to Saturday, but not Sunday. Or, day and evening shift, but not the night shift.
- **Monthly Availability:** This is your specific availability for an upcoming time period (week, two-week period or month). It is a good idea to update this before your manager starts to build the next schedule. You can also block off days or time for leave or appointments.
- **Schedule:** This is the scheduled time for you to work. You can request a swap with another employee, so long as they have indicated their availability.
- **Easy Shift Swapping:** Employees can swap shifts easily and quickly, and managers can decide whether to approve or deny swap requests.

## Dynamic Schedules Setup

You can add dynamic schedules for advanced shifts.

To use the advanced shifts module, you must configure some parameters such as Positions, Skills and Dynamic Schedules and assign them to the employees so you know which of them would fit a shift requirement.

1. Create the Position. See [Adding a New Position](#) on page 154.
2. Create and Add Skills to the position. See [Adding a New Skill](#) on page 155.
3. Create a Dynamic Schedule for the position. See [Configure a Schedule Definition](#) on page 156.

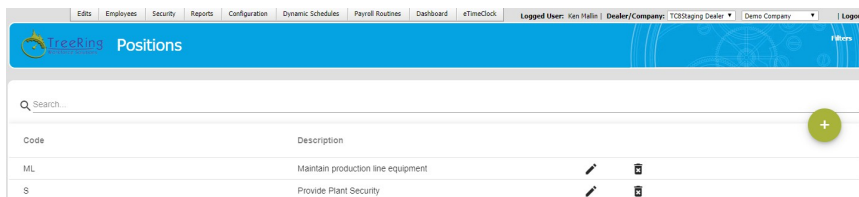
## Adding a New Position

You can add a new position for dynamic schedules

Follow the instructions below to add a new position for dynamic schedules.

1. From the **Dynamic Schedules** tab, select **Position**.

The Positions form displays.



2. In the top right of the form, click the **green circle** with the “+” in the middle.  
The Positions Edition dialog displays.

## Positions Edition

Code \*

Must provide a code

Description \*

Cancel Save

3. In the **Code** field, enter a code for the position. It cannot duplicate any other position code.
4. In the **Description** field, enter a title for the position.
5. Click **Save**.

The Positions displays in the Positions form.

## Adding a New Skill

You can add a new skill for a position in dynamic schedules

For a skill to be applied to a position, the position must be created first. See [Adding a New Position](#) on page 154.

Follow the instructions below to add a new skill for a position in dynamic schedules.

1. From the **Dynamic Schedules** tab, select **Skills**.

The Skill form displays.

Position	Code	Description		
Maintain production line equipment	LM1	Maintain conveyor lines		
Maintain production line equipment	LM2	Maintain crusher		
Maintain production line equipment	LM3	Maintain bagging machine		
Provide Plant Security	S1	Search Vehicles		
Provide Plant Security	S2	Conduct Security rounds		
Provide Plant Security	S3	Security Desk Operations		

2. In the top right of the form, click the **green circle** with the “+” in the middle.  
The Skills Edition dialog displays.

### Skills Edition

The screenshot shows a form titled "Skills Edition" with three input fields: "Position \*" (a dropdown menu), "Code \*" (a text field), and "Description \*" (a text field). Below the form are two buttons: "Cancel" and "Save".

- Using the **Positions** drop down, select a Position that the skill applies to.



**Note:** If the skill applies to more than one position, you will have to repeat this process for each position.

- In the **Code** field, enter a code for the position. It can duplicate other skill codes.
- In the **Description** field, enter a title for the position.
- Click **Save**.

The new skill displays in the updated Skills form.

## Configure a Schedule Definition

You can configure a dynamic schedule for advanced shifts.

Set up the Positions and Skills need for a shift requirement. See [Adding a New Position](#) on page 154 and [Adding a New Skill](#) on page 155.

To use the advanced shifts module, you must configure the dynamic schedule.

- From the **Dynamic Schedules** tab, select **Schedule Definitions**.

The Schedule Definitions Form displays.

The screenshot shows the "TreeRing Schedule Definitions" form. It includes a "Configuration" section with a "Location" dropdown (set to "South Bend Co."), a "Choose a date" field (set to "8/6/2019"), and a "Days to display" dropdown (set to "7"). Below this is a "Position" section with a list of checkboxes for various roles, including "Concert Choir Conductor", "Cello Teaching Artist", "Clarinet Teaching Artist", "French Horn Teaching Artist", "High Strings Coach", "Maintenance", "Oboe Teaching Artist", "Percussion Teaching Artist", "Site Assistant - Perkinson Park Recreation Center", "Site Assistant - South Bend Center", "Site Assistant - Sylvan Hills Middle School", "Special Events Coordinator", "Security", "Substitute Teaching Artist", "Trumpet Teaching Artist", "Tuba Teaching Artist", and "Violin Teaching Artist". There are also "Copy Schedules" and "Refresh Schedules" buttons.

- In the **Location** drop down, select the desired location.
- In the **Choose a date** field, select the beginning date for the schedule.
- In the **Days to display** drop down, select the number of days to display.
- In the **Position** check box list, select at least one position or as many needed for the schedule.

The positions display in the main panel of the screen.

6. For a desired position in the main panel, click the + button beside the position name.

The Position dialog displays.

Position: **Security**

Required Employees \*   Is Open Position

Shift Date  
8/6/2019 Starts at: --:-- : Ends at: --:-- :

Skills required:  
 Off Duty Police

Cancel Save

7. In the **Required Employees** field, type the number of employees required for the schedule.
8. Check if this is **Open Position**.
9. In the **Starts at** and **Ends at** time fields, type in or use the up and down arrows to enter the start and end times.
10. In the **Skills Required** list, check the skills required.
11. Click **Save**.
12. Repeat steps 6 to 11 for the remaining positions.



13. To add an employee to the scheduled shift, click the yellow head profile in the schedule time line.

The Assign Employees dialog displays.

Assign Employees (0/1)  Ignore required skills

Card ID Employee Name Main Supervisor  Include Inactive

Level Level Code Level Level Code Level Level Code

Filter View Assigned Confirm Cancel

<input type="checkbox"/>	Card Id	Employee Name	Other Id
<input type="checkbox"/>			

14. Enter the employees **Card ID** or **Employee Name** or **Main Supervisor**. You can also specify the **Level** and **Level Code**.
15. Click **Filter**.

A list of employees displays.

Assign Employees (1/1)  Ignore required skills

Card ID Employee Name Main Supervisor  Include Inactive

Level Level Code Level Level Code Level Level Code

Filter View Assigned Confirm Cancel

<input type="checkbox"/>	Card Id	Employee Name	Other Id
<input checked="" type="checkbox"/>	9873	Abel,Abe	9873

16. Check the desired employee(s).
17. Click **Confirm**.

The scheduled entry in the time line displays with a green profile.



18. To copy the schedule to other days, click **Copy Schedule**.

The Copy Schedules dialog displays.

## Copy Schedules

Copy starts at

9/3/2019



Copy Assignments

Copy

Cancel

19. Select the **Date** to copy the schedule to.

20. Check **Copy Assignments**.

21. Click **Copy**.

A success message displays.

## Copy Schedules

Schedules copied Successfully

Accept

22. Click **Accept**.

23. To publish the schedule so that the employee will see it in eTimeClock, click **Publish Schedules**.

24. Refresh the screen or navigate to **Dynamic Schedules, Schedule Definition**.

The main panel displays Shift Positions.

The Employee will now have the shift schedule appear in eTimeClock. They must accept or reject the shift assignment before this work assignment process is complete. If the employee rejects the work assignment, assign a new employee to the shift by clicking the **Pencil** icon to edit the shift.



**Note:** You will have to do this for each day in the schedule that the employee rejects.

## Schedule and Attendance Reports

These schedule and attendance reports can be run by both administrators and supervisors and provide essential feedback on employee performance.

There is a Print option on the task bar of all the schedule forms in the Edits tab. TreeRing Time also provides numerous valuable reports accessed from the Reports tab by selecting Schedules for scheduling reports or by selecting Attendance for attendance

reports. These reports can be run by both administrators and supervisors and provide essential feedback on employee performance. These schedule-based reports are described in detail below.

### Attendance Reports

- **Absences Report:** lists days not worked and hours missed against the schedule for any specified period, listed by employee number. Paid time off such as vacations and holidays do not report as absence days.
- **Early/Late by Card ID and Early/Late by Employee Reports:** reports all early in, late in, early out, late out, time worked but not scheduled, as well as lunches over and under allotted time as defined in the lunch column in the template.
- **Variance:** shows schedule variance comparing hours scheduled to hours actually worked.
- **Weekly:** shows schedule for employees on a weekly basis.

### Schedules Reports

- **Schedule Listing:** allows you to view or print the schedules you have created for all employees. This report can be useful to check the current schedule for the employee, to verify that schedules have been built correctly, or to distribute to employees for informational purposes.
- **Schedule Templates:** provides a printing of all the schedule templates you have created.
- **Weekly Schedules:** shows schedule data in a compact format with a specific starting date can be printed for all employees who have schedules built in the system.
- **Weekly Schedules with Assignments and Weekly Schedules by Department:** shows weekly schedules sorted by either job assignment or by department.
- **Schedule Variance:** shows scheduled hours, actual worked hours, and the variance between the two.





# Chapter 15. Paid Time Off

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The TreeRing Time Paid Time Off (PTO) system is used to accrue, administer, track, and export paid time away.

## In This Chapter

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The TreeRing Time Paid Time Off (PTO) system is used to accrue, administer, track, and export paid time away.

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You can create a PTO Master Plan to be a template for detailed policies you will create later.

[Creating and Adding PTO Plan Details](#) on page 163

You can create and add details of a PTO plan.

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[Editing the Employee PTO Bank](#) on page 167

You can view or edit the Employee PTO Bank.

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You can designate how many hours or days of PTO an employee will receive dependent on the length of time they've been with the company.

[Configuring PTO Rules in the Employee Details Form](#) on page 171

You can qualify employees for PTO rules.

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Your employees can use the TreeRing Time PTO Request as the interface for the PTO system.

[Approving PTO](#) on page 173

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[PTO Dynamic Import](#) on page 175

You can import PTO data dynamically.

[PTO Reports](#) on page 176

You can view Paid Time Off Reports that are available to management and employees.

## Paid Time Off Introduction

The TreeRing Time Paid Time Off (PTO) system is used to accrue, administer, track, and export paid time away.

The TreeRing Time Paid Time Off (PTO) system is used to accrue, administer, track, and export paid time away. Utilizing a flexible setup process, you can define which types of time off employees receive, the rate at which that time accrues, the rules governing how the employee is allowed to use this time, and how TreeRing Time should treat this time when allocated to the employee or exported to payroll.

If you already have a system in place to accrue PTO, the Dynamic Import can be used to import PTO balances each pay period. This process can enable you to use the TreeRing Time interface - the employee request form, the supervisor approval, and the administrative controls - without having TreeRing Time calculate accruals. PTO used can be exported at the end of each pay period and updated time totals can then be imported in order to repeat the process for the next pay period.

## Overview of Paid Time Off

The flow of tasks involved in using the TreeRing Time Paid Time Off system.

The following list outlines the flow of tasks involved in using the TreeRing Time PTO system:

- **Request Time Off:** Employees can log into the TreeRing Time system to check their PTO balances and then request days off for any date in the future.
- **Supervisor Approval:** Supervisors can monitor time off requests and either approve or disapprove them. Approved requests are automatically entered when the date approaches.
- **Manager Approval (optional):** Managers can monitor time off requests and either approve or disapprove them. Approved requests are automatically entered when the date approaches.
- **Oversee Time Taken:** Supervisors, Managers, and TreeRing Time administrators can view PTO time records and enter new time off manually. They can view PTO time balances for all employees.

## Import PTO Balances

You can simply import the PTO time balances each pay period and use the convenient TreeRing Time interface for easier administration and improved employee communication.

If your company already has a PTO accrual system in place, you can simply import the time balances each pay period and use the convenient TreeRing Time interface for easier administration and improved employee communication. The TreeRing Time Dynamic Import can be used to import PTO data from an external source. This process happens each pay period and can update time balances for every employee. Throughout the pay period, employees request time off, supervisors approve or disapprove the request, and administrators can oversee the process or manually input PTO time. At the end of the pay period, PTO time used can be exported to payroll or any other application used to calculate time off accruals.

## Creating a PTO Master Plan

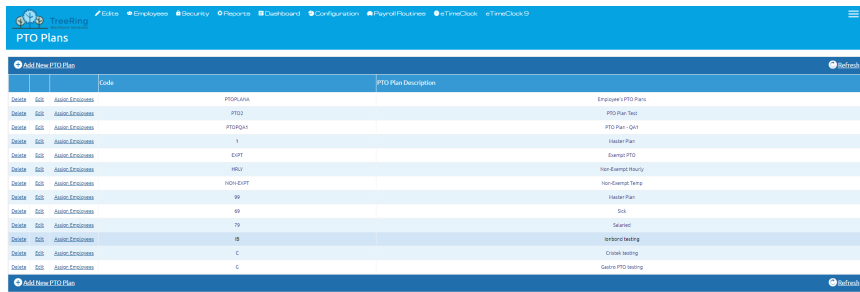
You can create a PTO Master Plan to be a template for detailed policies you will create later.

The PTO Master Plan will function as the shell for all of the detailed policies you will create further on. Create a Master Plan for each group of employees that receive different types of PTO time. This Master Plan will be assigned to each individual employee that fits the PTO Plan that you have created.

Follow the instructions below to create a new Master Plan.

1. From the **Configuration** tab, select **PTO Plans**.

The PTO Plans form displays.



Add New PTO Plan		Code	PTO Plan Description
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN
Default	ESS	Admin_Employee	PTO/PLN

- Click **Add New PTO Plans** on the task bar at the top of the screen.  
The New PTO Plan form displays.
- Click in the **Code** field and enter up to a 15-character alphanumeric code. This code will designate the settings created in this plan when it is assigned to the employee, as well as appearing in several drop down lists during the PTO plan creation process.
- Enter a **Description** of up to a 30-character description for this Master Plan.
- On the left hand side, select all the **Pay types** you wish to include by selecting the check boxes.
- For any types you check, you can also edit the following columns:
  - Default Hours
  - Maximum Hours
  - Minimum Request
  - Allow Negative Balance
  - Valid Values
  - Allow for Employee Timesheet
  - Ignore/Deduct Approved PTOs on Import
  - Enable PTO Accrual
  - When Accrue
  - Day Nb. to Accrue
  - PTO Accrual Configuration
- Once all of your additions have been made, click **Save**.
- Repeat this process until all of your Master Plans have been added. Remember that you can always create new Master Plans at a later time.

## Creating and Adding PTO Plan Details

You can create and add details of a PTO plan.

The PTO Plan Detail designates several settings that will be applied to the Master Plan you have selected. Here you will decide which Pay Types (i.e. Sick, Vacation, etc.) the employees will receive. In addition, you will select how PTO will be calculated, when time will begin accruing, and when it will be available to the employee.



**Note:** This form is accessible to only the administrator and payroll admin logins.

You must have at least one master plan defined to create or add plan details.

Follow the instructions below to create or add plan details.

- From the **Configuration** tab, select **PTO Plans**.  
The PTO Plans form displays.

- From the **PTO Plans**, click the link **Edit** for the Master plan you want to define.

If there are no PTO Plans available in this drop-down, make sure that you have created and saved a Master Plan (see [Creating a PTO Master Plan](#) for instructions on how to do this).

The Update PTO Plan appears.

- Check a **Pay Type** to define.

All Pay Types that are considered Time Type 2 (Not Worked and Paid) and have not yet been defined for use with this Master Plan are displayed. If the Pay Type you are looking for is not displayed, make sure that it is entered Pay Types form (available from the **Configuration** tab by selecting **Pay Types**) and is marked as a Time Type 2.

If you are adding a Pay Type to an existing set of Plan Details, only Pay Types that are already set up will be displayed on this form.

- Check the **Enable PTO Accrual** check box for the Pay Type.

You will need to define in the next steps when that accrual should occur.

A View link appears in the PTO Accrual Configuration column.

- Click the **View** link in the **PTO Accrual Configuration** column.

The PTO Accrual Configuration form displays.

**PTO Accrual Configuration**
✕

Method: Hours Of Service ▼

Accrue Time From: Hire Date ▼ Start Benefit On: Hire Date ▼

Accrue OT:  Yes  No

Allow Percentage:  Yes  No Minimum Percentage:  Full Month Hours:

Time of Service Time Unit:   ▼ Every Time Unit: Hours ▼ First 'From' Time of Service:

PTO Time Of Service Details:

+ Add New PTO Time Of Service Detail

		From	To	Time Unit	Earn Hours	Every	Time Unit	Carry Forward	Maximum Hours
Edit	Delete	0	5		2	36	Month	0	200
Edit	Delete	6	10		3	40	Month	0	200
Edit	Delete	11	99		4	40	Month	200	200

Save

- Select the **Method** for which you accrue PTO.

Choosing *Hours of Service* will accrue PTO according to the number of hours or days that an employee has actually worked. *Time of Service* will accrue PTO according to the number of days that the individual has been employed regardless of actual hours worked. The method you select will dictate the options available to you in the last few steps of this section.

- Specify when to Calculate To, if you do not accept the defaults.

If you have chosen *Hours of Service* as the method in the above step, the **Calculate To** field will default to **Beginning of Pay Period**. This indicates that all PTO hours that have been accrued or taken will be applied to the system when the Period End is run. **Beginning of Pay Period** indicates that PTO hours will be applied only for the pay period that you are closing; PTO will always be up to date as of the end of the previous pay period.

If you have chosen **Time of Service** as the method above you will be able to choose either **Beginning of Pay Period** or **End of Pay Period**. Beginning of Pay Period will apply all PTO hours for the current pay period once the Period End Routine has been run. End of Pay Period will apply all PTO hours through the end of the next pay period when the Period End Routine is run. This means that a Plan Detail with End of Pay Period selected will always be one pay period ahead in PTO calculations.

When closing the Period End, hours taken in the previous pay period are applied, while hours earned in the new pay period are accrued and applied.

- 8.** If you have chosen Hours of Service as your **Method**, you will have the option to choose either `Hours` or `Days` as your Time Units for calculating PTO.

Choosing hours will accrue PTO based on the number of hours an employee has worked. Choosing days will accrue PTO based on the number of days an employee has actually worked.

- Time Units also indicate what factor (hours or days) will be used throughout the PTO program. Your accrual factor will be calculated using the Time Units you have chosen. Employees will request time off in number of hours or number of days depending on your selection.
- If you choose `Days` as your Time Units you will need to fill in the 'Number of Hours per Day' field outlined below. Employees may request time off in fractions of days.
- If you have chosen `Time of Service` as your method, `Days` will be defaulted as your Time Units. A Time of Service Method indicates that you wish PTO to accrue based on the length of employment, not on hours or days actually worked, thus the absence of the Hours option for Time Units.

- 9.** Specify when to **Accrue Work Time From**.

This field indicates the starting point for PTO accruals. This date will dictate when hours/days of work or employment will begin to count towards PTO accrual.

- `Hire` correlates to the employee's Hire Date in the Employee Rules form.
- `Anniversary` correlates to the anniversary of the Employee's benefit date in the Employee Rules form.
- `Benefit` is a date set by the Administrator in the Employee Rules form that is available in case the Benefit Start Date is separate from the Hire or Anniversary Date. For example, the Benefit Date may be three months after the Hire Date if Benefits are not to begin accruing until after three months of employment.

- 10.** Specify when to **Start Benefits On**.

Here you have the same choices as the preceding step. Your Start Benefits On date will indicate at what time an employee is allowed to use PTO time that has accrued.

- `Hire` correlates to the employee's Hire Date in the Employee Rules form.
- `Anniversary` correlates to the anniversary of the Employee's benefit date in the Employee Rules form.
- `Benefit` is a date set by the Administrator that is available in case the Benefit Start Date is separate from the Hire Date. For example, the Benefit Date may be three months after the Hire Date, if Benefits are not available for use until after three months of employment.

- 11.** Specify the **Number (No.) of Hrs/Day**.

This is available only if `Days` is selected as Time Units above. This field indicates the number of hours an employee must work before it is considered one day of work. For example, you may set this to 8 if a normal work day is eight hours. In this case, if an employee punches in for only four hours that day, they will have accrued PTO for only half a day of work (assuming you are using Hours of Service, not Time of Service.) In this example they must work a full eight hours to be allotted a full day's accrual of PTO. For plans using Time of Service as the method, the No. of Hrs/Day field indicates the number of hours an employee will receive when they request one day off. Employees may request and use time in fractions of days.

- 12.** Specify whether you want to **Accrue OT**.

This field indicates whether or not you wish overtime hours worked to count towards PTO accruals. This option is only available if you have chosen Hours of Service as your Method and Hours as your Time Units. To have overtime hours accrue towards PTO like regular hours, put a check mark in this box. Leave this box empty if you would not like to include overtime hours in your PTO accruals.

- 13.** Click **Add New PTO Time of Service Detail** in the task bar to add a new PTO Terms of Service.

The New PTO Time of Service Detail form displays.

- 14.** In the **From** field, enter the starting year for this Time of Service time period.  
For example, if benefits are received during the first year of employment, you will want to create a line with a 'From' value of 0 (zero) to indicate employment from zero years up to the one year anniversary.
- 15.** In the **To** field, enter the ending year for this Time of Service increment.  
In the above example, to set up the first year of employment, your 'To' value would be 1 to indicate the one year anniversary.



**Note:**When creating multiple lines for different accrual factors, ensure that the 'From' field always matches the preceding 'To' field.

If only one accrual factor applies for any year of employment, simple create one time of service line with a 'From' value of 0 (zero) and a 'To' value of 99.

- 16.** Enter a number for **Earn Hours**. This is the number of hours to calculate how much PTO will be accrued for a specified number of work hours.
- 17.** Enter a number for **Every**. This is the number of hours a person has to work before they earn the designated Earn Hours value.
- 18.** Enter a number for **Carry Forward**. This shows the maximum number of PTO hours that an employee is allowed to accrue during the specified date range (specified in the 'From' and 'To' fields.)
- 19. Maximum Hours:** This displays the number of PTO hours for the selected Pay Type that an employee will be allowed to carry over into the next year.  
The Year End will be indicated by the End of Year date in the Employee Plan (see Employee Plan section below.) This date can be manually changed in the Employee Plan screen and is not required to be exactly one year from the Benefit Start date.
- 20.** Click **Save** and return to the PTO Accrual Configuration form.
- 21.** Click **Save** and return to the Update PTO Plan form.
- 22.** Specify whether to **Allow Negative Balance**.  
This field indicates whether or not the employee is allowed to take PTO that they have not yet earned. Even with 'Allow Negative Balance' turned on (checked), each employee is still limited by their 'Maximum Time' setting and cannot take more than the maximum.
- 23.** Once all of your additions are finished, click **Save**.

## Deleting Plan Details

You can delete a plan details.

Follow the instructions below to delete plan details.



**Note:**From this form, you can only delete pay type setups, not the master plan itself.

- From the **Configuration** tab, select **PTO Plans**.  
The PTO Plans form displays.
- From the **PTO Plans**, click the link **Edit** for the Master plan you want to edit.  
The Update PTO Plan appears.

3. Check a **Pay Type** to edit.
4. Click the **View** link in the **PTO Accrual Configuration** column.  
The PTO Accrual Configuration form displays.
5. Click the link **Delete** for the row of the details you wish to delete.  
A confirmation dialog will display.
6. Click **OK**.
7. Click **Save** on each form until you return to the PTO Plans.

## Editing the Employee PTO Bank

You can view or edit the Employee PTO Bank.

The Employee Details will display PTO Plan settings for individual employees as well as PTO hours earned, taken, and the current balance of time.



**Note:** This form is only accessible to the Administrator and Payroll Admin login. A report that displays this information is available to all roles.

Some fields on this form are available for editing, however, this form is not designed to be used to change or update values. Changes should be made through the PTO Plan setups and the Request and Approval forms described in the next section. The TreeRing Time application will automatically update the values on this form as you move through time and use the PTO features.

Follow the instructions below to view or change the PTO Bank for an employee.

1. Click on **Employees** tab and select **Company Members**.  
The Company Members List displays.
2. Click the **Edit** Link for the desired employee.  
The Employee Details form appears.
3. In the **Select by** section, choose to select employees from the drop down menu by name or card ID.
4. Click the **PTO Banks** tab.  
A summary of the PTO Bank for the employee displays.

PTO Bank	Remaining hours
Comp Time	0.00
Jury Duty	45.00
Personal Leave	0.00
Vacation	100.00

Save

5. In the desired fields, enter the new values.
6. Click **Save** to save your changes.

The PTO Bank is updated.

# Time of Service

You can designate how many hours or days of PTO an employee will receive dependent on the length of time they've been with the company.

The Time of Service setup form will designate how many hours or days of PTO an employee will receive dependent on the length of time they've been with the company. You can create different accrual rates for each Pay Type within a Master Plan. For each period of employment defined in the Time of Service form, by Pay Type, you can choose to allow employees to take time that they have not yet earned. This 'Negative Accrual' amount, however, will never exceed the employee's maximum time allowed.



**Note:** This form is only accessible to the Administrator and Payroll Admin login.

## Creating Time of Service Rules

You can create a Time of Service rule for employees that help define pay and PTO benefits.

Follow the instructions below to create time of service rules.

- From the **Configuration** tab, select **PTO Plans**.  
The PTO Plans form displays.
- From the **PTO Plans**, click the link **Edit** for the Master plan you want to define.  
The Update PTO Plan appears.
- Check the **Enable PTO Accrual** check box for the Pay Type.  
You will need to define in the next steps when that accrual should occur.  
A View link appears in the PTO Accrual Configuration column.
- Click the **View** link in the **PTO Accrual Configuration** column.  
The PTO Accrual Configuration form displays.

**PTO Accrual Configuration**
✕

Method: Hours Of Service

Accrue Time From: Hire Date Start Benefit On: Hire Date

Accrue OT:  Yes  No

Allow Percentage:  Yes  No Minimum Percentage: 75 Full Month Hours: 173

Time of Service Time Unit:  Every Time Unit: Hours First 'From' Time of Service:

PTO Time of Service Details:

+ Add New PTO Time Of Service Detail

		From	To	Time Unit	Earn Hours	Every	Time Unit	Carry Forward	Maximum Hours
Edit	Delete	0	5		2	36	Month	0	200
Edit	Delete	6	10		3	40	Month	0	200
Edit	Delete	11	99		4	40	Month	200	200

Save

- Select the **Method** for which you accrue PTO.  
Choosing `Hours of Service` will accrue PTO according to the number of hours or days that an employee has actually worked. `Time of Service` will accrue PTO according to the number of days that the individual has been employed regardless of actual hours worked. The method you select will dictate the options available to you in the last few steps of this section.
- Specify when to `Calculate To`, if you do not accept the defaults.



If you have chosen Hours of Service as the method in the above step, the **Calculate To** field will default to **Beginning of Pay Period**. This indicates that all PTO hours that have been accrued or taken will be applied to the system when the Period End is run. **Beginning of Pay Period** indicates that PTO hours will be applied only for the pay period that you are closing; PTO will always be up to date as of the end of the previous pay period.

If you have chosen **Time of Service** as the method above you will be able to choose either **Beginning of Pay Period** or **End of Pay Period**. Beginning of Pay Period will apply all PTO hours for the current pay period once the Period End Routine has been run. End of Pay Period will apply all PTO hours through the end of the next pay period when the Period End Routine is run. This means that a Plan Detail with End of Pay Period selected will always be one pay period ahead in PTO calculations.

When closing the Period End, hours taken in the previous pay period are applied, while hours earned in the new pay period are accrued and applied.

**7.** If you have chosen Hours of Service as your **Method**, you will have the option to choose either **Hours** or **Days** as your Time Units for calculating PTO.

Choosing hours will accrue PTO based on the number of hours an employee has worked. Choosing days will accrue PTO based on the number of days an employee has actually worked.

- Time Units also indicate what factor (hours or days) will be used throughout the PTO program. Your accrual factor will be calculated using the Time Units you have chosen. Employees will request time off in number of hours or number of days depending on your selection.
- If you choose **Days** as your Time Units you will need to fill in the 'Number of Hours per Day' field outlined below. Employees may request time off in fractions of days.
- If you have chosen **Time of Service** as your method, **Days** will be defaulted as your Time Units. A Time of Service Method indicates that you wish PTO to accrue based on the length of employment, not on hours or days actually worked, thus the absence of the Hours option for Time Units.

**8.** Specify when to **Accrue Work Time** From.

This field indicates the starting point for PTO accruals. This date will dictate when hours/days of work or employment will begin to count towards PTO accrual.

- **Hire** correlates to the employee's Hire Date in the Employee Rules form.
- **Anniversary** correlates to the anniversary of the Employee's benefit date in the Employee Rules form.
- **Benefit** is a date set by the Administrator in the Employee Rules form that is available in case the Benefit Start Date is separate from the Hire or Anniversary Date. For example, the Benefit Date may be three months after the Hire Date if Benefits are not to begin accruing until after three months of employment.

**9.** Specify when to **Start Benefits On**.

Here you have the same choices as the preceding step. Your Start Benefits On date will indicate at what time an employee is allowed to use PTO time that has accrued.

- **Hire** correlates to the employee's Hire Date in the Employee Rules form.
- **Anniversary** correlates to the anniversary of the Employee's benefit date in the Employee Rules form.
- **Benefit** is a date set by the Administrator that is available in case the Benefit Start Date is separate from the Hire Date. For example, the Benefit Date may be three months after the Hire Date, if Benefits are not available for use until after three months of employment.

**10.** Specify the **Number (No.) of Hrs/Day**.

This is available only if **Days** is selected as Time Units above. This field indicates the number of hours an employee must work before it is considered one day of work. For example, you may set this to 8 if a normal work day is eight hours. In this case, if an employee punches in for only four hours that day, they will have accrued PTO for only half a day of work (assuming you are using Hours of Service, not Time of Service.) In this example they must work a full eight hours to be allotted a full day's accrual of PTO. For plans using Time of Service as the method, the No. of Hrs/Day field indicates the number of hours an employee will receive when they request one day off. Employees may request and use time in fractions of days.

**11.** Specify whether you want to **Accrue OT**.

This field indicates whether or not you wish overtime hours worked to count towards PTO accruals. This option is only available if you have chosen Hours of Service as your Method and Hours as your Time Units. To have overtime hours accrue towards PTO like regular hours, put a check mark in this box. Leave this box empty if you would not like to include overtime hours in your PTO accruals.

- Click **Add New PTO Time of Service Detail** in the task bar to add a new PTO Terms of Service.

The New PTO Time of Service Detail form displays.

- In the **From** field, enter the starting year for this Time of Service time period.

For example, if benefits are received during the first year of employment, you will want to create a line with a 'From' value of 0 (zero) to indicate employment from zero years up to the one year anniversary.

- In the **To** field, enter the ending year for this Time of Service increment.

In the above example, to set up the first year of employment, your 'To' value would be 1 to indicate the one year anniversary.



**Note:** When creating multiple lines for different accrual factors, ensure that the 'From' field always matches the preceding 'To' field.

If only one accrual factor applies for any year of employment, simple create one time of service line with a 'From' value of 0 (zero) and a 'To' value of 99.

- Enter a number for **Earn Hours**. This is the number of hours to calculate how much PTO will be accrued for a specified number of work hours.
- Enter a number for **Every**. This is the number of hours a person has to work before they earn the designated Earn Hours value.
- Enter a number for **Carry Forward**. This shows the maximum number of PTO hours that an employee is allowed to accrue during the specified date range (specified in the 'From' and 'To' fields.)
- Maximum Hours:** This displays the number of PTO hours for the selected Pay Type that an employee will be allowed to carry over into the next year.  
The Year End will be indicated by the End of Year date in the Employee Plan (see Employee Plan section below.) This date can be manually changed in the Employee Plan screen and is not required to be exactly one year from the Benefit Start date.
- Click **Save** and return to the PTO Accrual Configuration form.
- Click **Save** and return to the Update PTO Plan form.
- Specify whether to **Allow Negative Balance**.  
This field indicates whether or not the employee is allowed to take PTO that they have not yet earned. Even with 'Allow Negative Balance' turned on (checked), each employee is still limited by their 'Maximum Time' setting and cannot take more than the maximum.
- Once all of your additions are finished, click **Save**.

## Viewing PTO Time of Service Rules

You can view the PTO Time of Service rules.

Follow the instructions below to view PTO Time of Service rules.

- From the **Configuration** tab, select **PTO Plans**.

The PTO Plans form displays.

- From the **PTO Plans**, click the link **Edit** for the Master plan you want to view.

The Update PTO Plan appears.

- Check a **Pay Type** to view.

- Click the **View** link in the **PTO Accrual Configuration** column.

The PTO Accrual Configuration form displays.

- Select the link **Edit** for which you wish to see a specific Time of Service rule.

Only Pay Types that were previously set up in the Plan Details screen appear here.

- Method:** This field will display the Method chosen for this Pay Type in the previous Plan Detail screen. 'Hours of Service' indicates that PTO will accrue according to the number of hours or days worked by an employee. 'Time of Service' indicates that PTO will accrue based on the number of days the individual has been employed with the company.
- Calculate To:** This field will display the 'Calculate To' selection chosen for this Pay Type from the previous Plan Detail screen. 'Beginning of Pay Period' indicates that all hours of PTO for the current pay period will be calculated during the Period End routine. 'End of Pay Period' indicates that all hours of PTO for the next pay period will be calculated during the Period End Routine.
- Time Units:** This field will display the type of Time Units chosen for this Pay Type in the previous Plan Detail screen. 'Hours' or 'Days' can be chosen as the accrual Time Unit. Your Time Units selection will designate how to calculate your accrual factor.
- Accrue Work Time From:** This field will display the date (Hire, Anniversary, or Benefit) chosen in the previous Plan Details screen. This date indicates when the hours or days worked by the employee will begin accruing towards PTO.
- Start Benefits On:** This field will display the date (Hire, Anniversary or Benefit) chosen in the previous Plan Details screen. This date indicates when the employee will be allowed to begin taking PTO hours.
- No. of Hrs/Day:** This field will only show a value if it was set up in the previous Plan Details screen. If Number of Hours per Day was an option during the Plan Details setup, you will see the number of hours that constitute a day displayed here.
- Accrue OT:** This box will either display a check mark or be left empty according to your settings in the previous Plan Detail screen. A check mark in the box indicates that all Overtime hours worked by this employee will accrue towards PTO hours for the selected Pay Type within the selected Master Plan.

- Click the **X** in the corner of each form to exit..

## Configuring PTO Rules in the Employee Details Form

You can qualify employees for PTO rules.

Qualify each employee for the PTO rules that have been defined by assigning a Master Plan and inputting relevant dates in the Employee Details form.



**Note:** This form is only accessible to the Administrator and Payroll Admin login.

Follow the instructions below to configure PTO rules for employees.

- From the **Employee** tab, select **Company Member**.

The Employee Rules form displays.

- Select the employee from the list.

- In the **PTO Plan** field, assign the Master Plan to the employee.

The employee will be eligible to accrue all PTO types defined within the Master Plan.

- In the **Hire Date** field, enter the hire date of the employee.

Click the calendar icon to navigate to the date or enter the date in xx/xx/xx format.

5. In the **Benefit Start Date** field, (Optional) enter the Benefit date of the employee.

Enter the benefit date only if the Benefit Date is used in the Plan Details form for a PTO type. The 'Calculate Dates' feature or the calendar icon can be used to enter the date, or simply enter the date in xx/xx/xx format.

**Anniversary Date:** The Anniversary date will fill in automatically with a date one year from the Hire date. If this is not correct it may be changed. The 'Calculate Dates' feature or the calendar icon can be used to enter the date, or simply enter the date in xx/xx/xx format.

6. If the dates are correct, and all necessary dates are configured, click **Save** to return to the Employee Details form.

## Paid Time Off

Your employees can use the TreeRing Time PTO Request as the interface for the PTO system.

Employees may request PTO for any date in the future. Once the entry is saved and sent to the supervisor, the form conveniently tells the employee whether or not they have the hours requested available to them for use. If a request is approved, the row of data will stay in the Request Form until that date enters the current pay period. When the requested date enters the current pay period, the PTO hours or days will be entered into the employee's time sheet and the request will be cleared from this form.



**Note:** This form is only available to employee level logins. This form is sensitive to login security so each employee will only see their own time data and not the information of any other employee. For special needs or custom implementations, this form can be added to other login roles.

Employees are more likely to use the eTimeClock application to enter their requests.

## Creating a PTO Request

You can create a Paid Time Off request for an employee.

An employee may lack the ability to make a PTO request (sick or invalid, or not able to access the system. In this case, the supervisor can create a PTO request on behalf of the employee.

See [Entering a PTO Request](#) for the employees instructions in eTimeClock if they did it personally.

Follow the instructions below to create a PTO request for an employee.

1. From the **Edits** tab, select **PTO Request**.

You can also add a PTO request from the Timesheets. **Edit > Timesheet > PTO Request** tab.

The PTO Request form displays for your first employee.

2. In the **Employee** field, select the employee needing the PTO request.

3. Click **Add New PTO** on the task bar.

The New PTO Request form displays.

4. In the **Date From** field, enter the date on which they wish to use the requested PTO.  
Date format is MM/DD/YY. It is not necessary to enter a time, however the option is available if you deselect **All Day**. The time format is 24 hour or military time. If no time is entered, the system will default the time to midnight (00:00).
5. In the **Date To** field, enter the date to which they wish to use the requested PTO.  
Date format is MM/DD/YY. The time format is 24 hour or military time. If no time is entered, the system will default the time to midnight (00:00).
6. In the **Hours per day** field, enter the amount of PTO requested. If the Time Units are Hours, the employee will enter the number of PTO Hours that they wish to request. If the Time Units are Days, the employee will enter the number of PTO Days that they wish to request. Both of these options, Hours and Days, have the ability to accept up to two decimal places, so it is possible to request only a portion of a PTO Day.
7. In the **Notes** field, enter any pertinent notes in this field.  
This text will display into the Notes field of the resulting time transaction, if the PTO time is approved, where the note can be viewed in the Edit > Timesheet Management form and numerous reports. This field is available to both the employee and the supervisor; either one or both, may enter notes here to be viewed by the other individual.
8. In the **Bank** field drop down list, select the type of PTO you wish to take.
9. Click the **Generate Requests** button.  
A new entry appears at the bottom summarizing your request and indicating the remaining hours you have left for this category. You can click the Edit link to revise the request.
10. Click **Confirm Request** button.  
A dialog indicates the data was saved.
11. Click **OK**.  
A new entry appears in the PTO Request form.  
This sends this request to the employee's supervisor.

## Canceling or Editing a PTO Request

An employee can cancel a PTO request or edit it before it is approved or rejected.

Once a PTO request has been created and saved, the employee cannot delete if it is resolved (approved or rejected). If a supervisor or manager has not approved or rejected it, they can adjust the amount of time requested, date, or type of PTO. Or they can even delete it. Once approved, however, they cannot cancel it. If needed, the employee can zero the amount of time requested. However, the supervisor, timekeeper, payroll administrator, or administrator level logins can modify the time requested or delete the request entirely if desired.

## Approving PTO

You can approve PTO requests using the PTO Approval form.

Managers, Supervisors, Timekeepers, or Administrators use the Edit Timesheet Form to view, approve, or disapprove employee requests for PTO. Once a request is approved, and the date is within the current pay period, the requested PTO hours or days will automatically be added to the employee’s time sheet. If the date is in the future, the request can still be approved by the supervisor or administrator, but it will remain in the form until the date of the request enters the current pay period and then it will process.

Requests made for the current open Pay Period will appear in white. Requests made for future Pay Periods will appear alternately in green. If rejected, they will appear in red. These approved requests will appear in the employee’s time sheet on the first day of the Pay Period in which they exist after the previous Period End is run.

If an employee creates a request for more time than they are allowed, and the ‘Time Off Permitted’ field populates with a number lower than the requested time, the supervisor or administrator can still approve or disapprove the request as they normally would. If approved, the request will be met with the maximum time permitted. The remaining balance can be left unaccounted for in the employee time sheet, or can be filled in with a Time Type 4 (time not worked and not paid) manually by the supervisor or administrator.



**Note:** This form is accessible to administrators, payroll administrators, supervisors, and timekeepers. The employee can view approval status in the PTO Request form.

1. From the **Edits** tab, select **Time Management**.  
The Time Management form with the Exceptions tab displayed.
2. Click the **PTO Requests** tab.  
The PTO Requests tab displayed.

Employee	Date	Day	Hours Bank	Hours to Deduct	Status
1001	10/15/2020	Mon	8.00	8.00	Approved
1002	10/16/2020	Tue	8.00	8.00	Approved
1003	10/17/2020	Wed	8.00	8.00	Approved
1004	10/18/2020	Thu	8.00	8.00	Approved
1005	10/19/2020	Fri	8.00	8.00	Approved

- **Card ID:** This field displays the card ID for the employee that made the PTO request.
- **Name:** This field displays the name of the employee that made the PTO request.
- **Day:** The day of the week requested off. If there were multiple sequential days requested, there will be an entry for each day.
- **Date:** This is the date for which the employee has requested PTO.
- **Start Time:** The time the request is for if not All day.
- **Hours Bank:** This will display the Pay Type, or type of PTO that the employee is requesting.
- **Hours to Deduct:** This field will display the amount of PTO requested. Hours units have the ability to accept up to two decimal places, so it is possible to request only a portion of a PTO Day. The amount requested can be edited if necessary.
- **Remaining Hours:** This field displays the number of PTO Hours left for the employee for this Pay Type up to the amount requested. Hours over the requested amount will not display here.
- **Time of Request:** The time and date of the request. This field is important if your company has a “first come-first served policy” when staff ask for the same day off.
- **Notes:** Indicate if the employee entered any notes to accompany the PTO request.
- **Status:** This field displays the status of the request.

- **Revert** link. Changes the status back to unapproved.



**Note:** It is the supervisor's responsibility to approve or disapprove the PTO Request. Optionally, notes can be added to explain or qualify a decision. If the employee has already entered text into the Notes field, this can be deleted and replaced with notes by the supervisor. The employee will see the new notes when they visit the PTO request form to check the status of their PTO request.

3. Click the **Approve** link for the employee to approve the PTO request.
  - **Applied:** If a PTO request for the current Pay Period is approved and saved (by clicking **Save** on the task bar), it will be entered automatically into the employee's time sheet. At this point, the request will move to the **Resolved** grid. If a request has been approved for a future pay period, it will also move to the **Resolved** grid.
  - **Notes:** This field will display any notes entered by the employee when the request was made. This field is also available for supervisors to add their own notes. These notes will appear on the employee's PTO Request form once the supervisor's changes have been saved.
4. If the PTO request for the employee is not approved, then click the **Deny** link.  
The PTO approvals or disapprovals are saved to the system and will appear on the employee's time sheet.
5. You can edit the PTO bank by clicking the **Edit Banks** link.
6. You can create a new PTO request by clicking the **Add New PTO Request** link. See [Creating a PTO Request](#)
7. You can revert a PTO request in the **Resolved Section** by clicking the **Revert** link for the required request.

## PTO Dynamic Import

You can import PTO data dynamically.

Using the Dynamic Import feature, you can import PTO time balances into TreeRing Time each pay period. This is convenient when you already have another PTO accrual system in place, but want to use the TreeRing Time interface to manage and allocate PTO.

By importing PTO balances, the TreeRing Time time off request and authorization forms can be used by employees and managers. At the end of the pay period PTO time taken can be exported, and new time balances can be imported, to start the process again for the next pay period.

PTO import process overview:

1. Throughout the pay period, employees request time off, supervisors approve or disapprove the request, and administrators can oversee the process or manually input PTO time.
2. At the end of the pay period, PTO time used can be exported to payroll or any other application used to calculate time off accruals.
3. Import new time balances and then close the pay period. It is important to import balances for the next pay period before closing the previous pay period because TreeRing Time performs calculations on the time data during the period end process.
4. Close the pay period and restart the process. When closing the pay period, it is important to deselect the box labeled Calculate PTO Accruals.

When this procedure is done, employees will have a balance of PTO time in the system. The employees can then use the PTO Request Form, the supervisors can manage these requests by using the PTO Approval form, and the TreeRing Time administrator can manually input time taken, if necessary, and export totals to payroll. This is useful to validate PTO requests. The TreeRing Time interface can be used as a tool to enhance communication with employees, supervisors, and administrators.

## Setting Up the TreeRing Time PTO System

Steps for setting up the PTO system.

Follow this overview to use the TreeRing Time PTO request and approval forms with balance imported from other accrual systems. See the preceding section for detailed instructions.

1. **PTO Master Plan:** Configure Master Plan(s) for your employees in 'PTO Master Plans' form.
2. **PTO Plan Details:** Complete plan details for the PTO pay types that will be imported.
3. **Assign PTO plan to employees:** Enter the applicable Hire, Benefit, and Benefit Anniversary dates that are used by the Plan Details.
4. **Import PTO balances:** Pay types existing in the import file must be setup in the PTO Plan details.

## Dynamic Import with PTO System

Technical information related to dynamically importing PTO data.

For complete and detailed information regarding the Dynamic Import, see [Data Import Functions](#) or consult your TreeRing Time representative. The following section contains technical information specific to using the Dynamic Import function to import PTO time balances:

- All numeric values for the time off data contained in the import file should use the same unit (hours or days) as defined in the PTO Employee Plan form.
- If 'Allow Negative Accrual' is turned on in the PTO Employee Plan form, the balance value in the import file should be the remaining PTO time against the maximum allowed.
- 'Carry Forward' time, if any, should be included with any balances imported.
- CardID and OtherID cannot exist together in the import file. The file must contain one or the other.
- If there are existing values in the TreeRing Time tables for data fields that are being imported, the Dynamic Import will overwrite those values and update the system with the newly imported values.
- If there is no PTMCode (PTO Master Plan) value in the import file, the default value assigned to the employee in the Employee Rules form will be used. If no plan is assigned, the default profile in the Import Map will be used. If there is no default value, then the data will not be imported
- If there is no PayType in the import file, the default profile in the Import Map will be used. If there is no default value, then the data will not be imported.

## PTO Reports

You can view Paid Time Off Reports that are available to management and employees.

The following reports are available once the PTO system has been configured:

- **PTO Balance Report:** Available to all logins. This report displays all information from the Employee Details form. Details on this report will include the start and end dates of the current Benefit Year for each Pay Type, plus the number of PTO hours taken.

This information is available at **Employees Tab > Company Member > [Employee] > PTO Balance Tab**.



# Chapter 16. Employee Expense System

The Tree Ring Time Tree Ring Time Employee Expense System provides a means of recording, tracking, and reporting employee expenses.

## In This Chapter

[Employee Expense System Overview](#) on page 177

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

## Employee Expense System Overview

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

The Tree Ring Time Employee Expense System provides a means of recording, tracking, and reporting employee expenses. Expense types can be controlled by the supervisor or administrator. Expense reports are available for both the employee and the administrator. Expense types can be entered through the Transaction form. Users can access expense reports at any time, which can be sorted by date, job, or expense type.

Employees can enter their expenses by using the dedicated 'Transaction Form' or eTimeSheet, both of which are convenient and easy to use.



**Note:** The eTimeClock application also works well for employees to track their time and enter expenses simultaneously. For more information about eTimeClock, see [eTimeClock](#).

## Working with Expense Types

The TreeRing Time administrator or supervisor can enter, delete, or print the type of expense to be tracked in the Expense Type Entry form.

The TreeRing Time administrator or supervisor can enter or delete, the type of expense to be tracked in the Transaction Type Entry form.

## Adding a New Expense Type

You can add a new expense type using the pay types.

Follow the instructions below to add new expense types.

1. From the **Configuration** tab, select **Rule Setup**.  
The Pay Type form displays.

2. Click **Add New Pay Type** on the task bar.  
New Pay Type form displays.
3. In the **Code** field, enter the new expense code.
4. In the **Description** field, enter a description.
5. In the **Punch Type** drop down menu, select the option *Awards*.
6. Click the **Is Active** check box.
7. Leave other fields and check boxes blank to prevent this transaction type from interfering with normal time sheet operations.
8. Click **Save**.

## Deleting an Expense Type

You can delete an expense type that is no longer needed.

Follow the instructions below to delete an expense transaction type from the list.

1. From the **Configuration** tab, select **Rule Setup**.  
The Pay Type form displays.
2. Click on the expense type you want to delete to select it.
3. Click **Delete** on the task bar.  
A dialog box displays asking you to confirm the deletion.
4. Click **OK**.

The transaction type is deleted from the form.

## Entering Actual Employee Expenses

You can enter an actual expense.

Administrators, supervisors, or employees can enter new expenses. Follow the instructions below to enter new expenses.

1. Navigate to the Timesheet Form, which varies in menu location according to the login role.  
For most login roles, it is available from the **Edits** tab.
2. Click **Add New Transaction** to enter a new expense.
3. In the **Transaction Type** drop down, select *Awards*.
4. In the **Pay Type** drop down, select the specific expense type.
5. Enter the **Start Date/Time** the expense was incurred.
6. In the **Count** field, enter the number of people the expense applied to.
7. In the **Dollars** field, enter the value of the expense.
8. Enter any applicable notes in the **Notes** field and the total of the expenditure in the **Amount** field.
9. Select from the drop down menus the **Vendor**, **Job**, and **Paid By** fields.
10. Click **Save**.

# Chapter 17. Notifications

Notifications help employees and supervisors complete time sheet work flows and address issues in a timely manner.

## In This Chapter

[Notifications Overview](#) on page 179

Notifications alert employees and supervisors to work that needs doing.

[Creating a Notification](#) on page 179

You can create a notification for a number of events.

## Notifications Overview

Notifications alert employees and supervisors to work that needs doing.

Notifications are emails sent to employees and supervisors on a scheduled to notify them about actions that have happen.



**Note:** TreeRing Time does not send notifications in a real-time manner. Rather, the system queries for all specific actions that have occurred at certain points in time or on a scheduled time frame (hourly, daily, weekly, per pay period).

Reminder notifications can also happen until such a time that a new action is taken canceling the original notification event. For example, if an employee has certified their timesheet, the Supervisor receives an email that he or she can now sign off that time sheet. If they do not do it right away, TreeRing Time will continue to send emails to the supervisor until the supervisor approves the timesheet. The reminder email is then canceled because the reminder condition no longer applies.

To set up notifications, you need to configure it in three places:

- On the Company form as a global setting if notification pop-ups are desired. See [Adding a New Company](#).
- Configure an email address for each employee. See [Adding the Employee](#).
- Configure the Notifications Setup. See [Creating a Notification](#).



**Note:** Notifications are not the same as the Approval Circuit (signoff work flow). Approval Circuit designate a sequential movement from one person to the next. Notifications are used in Approval Circuits to let employees know when one stage has ended and other has begun.

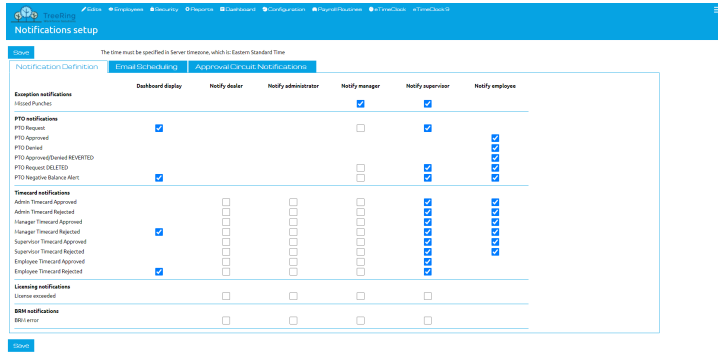
## Creating a Notification

You can create a notification for a number of events.

Follow the steps below to create a notification.

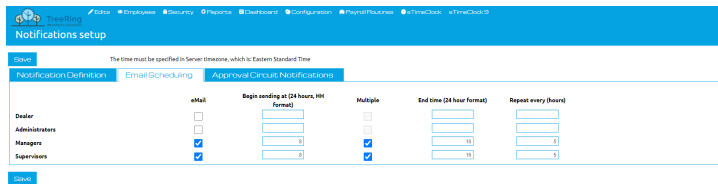
**1. From the Security tab, select Notifications setup.**

The Notifications Setup form displays with the Notification Definition tab displayed.



2. Place a check mark in the check boxes for each event type and the role that should be notified.
3. Click **Save**.
4. Click the **Email Scheduling** tab.

The Email Scheduling tab displays.



5. In the **eMail** column, check who should get an email notification.  
A check mark for a role will make the Begin Sending At column active for that role.
6. In the **Begin Sending At** column, type in a 2 digits number representing the start time hours in a 24 hour clock (01-24) to specify when emails should start being sent.



**Note:**The time must be specified for the timezone that the Server is in. See the top of the screen.

You may want to enter incremental increasing numbers to allow lower levels to be notified. For example, enter 10 for the Supervisor and 12 for the manager to give the Supervisor two hours to take any necessary actions.

7. In the **Multiple** column, check if multiple emails should be sent at an interval with a specified end time.  
A check mark for a role will make the End Time and Repeat Every columns active for that role.
8. In the **End Time** column, type in a two digit number representing the end time hours in a 24 hour clock (01-24) to specify when emails should stop being sent.



**Note:**The time must be specified for the timezone that the Server is in. See the top of the screen.

9. In the **Repeat Every** column, type a whole number to indicate the interval between reminder emails. For example 1= every hour. 2= every 2 hours.
10. Click **Save**.
11. Click the **Approval Circuit Notifications** tab.  
The Approval Circuit Notifications tab displays.

The screenshot shows the 'Notifications setup' page in the TreeRing system. At the top, there is a navigation bar with links for Edits, Employees, Security, Reports, Dashboard, Configuration, Payroll Routines, eTimeClock, and eTimeClock 9. Below the navigation bar, the page title is 'Notifications setup'. There are three tabs: 'Notification Definition', 'Email Scheduling', and 'Approval Circuit Notifications'. A message states: 'The time must be specified in Server timezone, which is: Eastern Standard Time'. Below the tabs, there is an 'Add New' button and a table with the following data:

	Event Name	Recipient	Is Scheduled
Edit Delete	Unapproved Timesheets by Supervisor	Notify administrator	Yes
Edit Delete	Unapproved Timesheets by Supervisor	Notify supervisor	Yes

A 'Save' button is located at the bottom left of the page.

**12.** Set up a Approval Circuit Notification. You have several choices:

1. Edit an existing one. Click the **Edit** link for the desired notification.

•

- Modify the Days after the PP ends.
- Delete the current Event Notification
- Add a New Event notification. Click **Add New**.
- Enter the new Schedule.
- Click **Save**.
- Click **Save**.

2. Delete an existing notification. Click the **Delete** link for the desired notification.



**Note:** There is no warning dialog.

3. Add a new Approval Circuit Notification.

- Click **Add New**.
- In the **Event** field, select the Event from the drop down menu.
- In the **Recipients** field, select the Recipient from the drop down menu.
- Click the radio button for the **Days After the Pay period ends**. Select **Everyday** if the employees work weekends. Otherwise select **Mon-Fri**.
- Click **Add New** to add a New Schedule.
- In the **Number of Days After a Pay Period End** field, enter a number.
- In the **Time** field, enter the time of day.
- Click **Save**.
- Click **Save**.

**13.** Click **Save**.

The notification is configured.



# Chapter 18. Employee Certification

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The Employee Certification feature in TreeRing Time enables the employee to log into the TreeRing Time system with an 'Employee' level login and certify or approve their time sheets at the end of each pay period.

## In This Chapter

[Approval Circuit Overview](#) on page 183

The Approval Circuit feature in TreeRing Time enables the employee to log into the TreeRing Time system with an 'Employee' level login and certify or approve their time sheets at the end of each pay period.

[Supervisor Signoff](#) on page 110

Provides payroll administrators confirmation that each supervisor and if configured, manager, has reviewed their employees' time cards and signed off the time sheets.

## Approval Circuit Overview

The Approval Circuit feature in TreeRing Time enables the employee to log into the TreeRing Time system with an 'Employee' level login and certify or approve their time sheets at the end of each pay period.

The Approval Circuit feature in TreeRing Time enables the employee to log into the TreeRing Time system with an 'Employee' level login or log into eTimeClock and certify or approve their time sheets at the end of each pay period. Since the login is secure and password protected, and the approval is employee-specific, the approval certification can be considered an electronic signature for the time worked. Using this feature facilitates the communication between an employee and supervisor.

In a typical scenario at the end of each pay period, the TreeRing Time Administrator generates the certifications which start the process. This action optionally can send an e-mail to each employee to alert them that their time sheet is ready for approval. Then, the employee logs in to TreeRing Time or eTimeClock and views the Time Sheet. They review their work hours and either click the **Approve** box or, if there is a problem with the time sheet, they click the **Reject** box and add a note pertaining to the problem. The Supervisor then logs into TreeRing Time and checks the TimeSheet form to view the results of the employee's review. If the time sheet is not approved, the Supervisor/Manager can review the note the employee added and make corrections as necessary.

The Approval Circuit is completely configurable in terms of escalations, rejections, approvals, and notifications.

An example process to certify employee time sheets is listed below:

1. The system Administrator sets up a Approval Circuit. See [Configuring an Approval Circuit](#).

2. Employee Certification is activated by the TreeRing Time Administrator in the Employee Details form (check the **Certify** check box) for each employee. See [Setting Up Employee Certification \(Administrator Role\)](#).
3. The administrator creates a login for the employee to gain access to the TreeRing Time system. By default the EmpSelf login role is designed to work with the Employee Certification feature.
4. After the end of each pay period and after all edits have been made, the payroll person generates the employee certifications and may also send e-mail notifications to employees automatically.
5. Employees receive an e-mail notifying them that their time sheet is ready to be reviewed and certified. The e-mail contains the URL that can be used for access. The employee launches this URL and logs in to TreeRing Time with their user name and password.
6. The employee views their time sheet. If changes need to be made, the employee can click **Reject** and enter a description of the problem. If the time sheet is correct the employee can click **Approve** and certify their time.
7. The supervisor logs in to view the results of the employee action. The supervisor can edit the time sheet if changes are necessary and ask the employee for another approval action. Once all of their employees have approved their time, the supervisor's work is done.
8. The manager logs in to view the results of the employee action. The manager can edit the time sheet if changes are necessary and ask the employee for another approval action. Once all of their employees have approved their time, the manager's work is done.
9. If the employee had previously disapproved their time sheet then they will need to login and check to see if the supervisor has made the necessary revisions. Then they can approve their time.

The Approval Circuit feature is used in conjunction with the Supervisor/Manager Signoff function. Supervisor/Manager Signoff is designed to be a communication link between the supervisor/manager and the person running payroll. Once employees sign off on their time sheet, the supervisor/manager can also sign off on their employees, signifying that payroll is ready to be run.

## Configuring an Approval Circuit

You can configure an approval circuit for signing off on employee timesheets.

Before you can have timesheets certified by employees or approved by supervisors or managers, you need to configure an approval circuit that defines if the employee needs to certify the timesheet before it goes to supervisor or manager. You also need to define rejection routing and escalation mechanisms.

Follow the instructions below to set up an approval circuit.

1. From the **Security** tab, select **Companies**.  
The Companies form displays.
2. For the desired company, in the **Company Approval Circuit** column, click **Edit Approval Circuit**.  
The Company Approval Circuit form displays.

	Who	Proxy	Revert Allowed	Reject Goes To	Can Approve Circuit	Resolution Required (App/Res)	Blocks Timecard Edits
First:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Second:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Third:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fourth:	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. For each step in the approval circuit, specify the following parameters for as many as four stages (employee, supervisor, manager, payroll/admin)
  - **Who:** The role is either Employee, Supervisor, Manager, Payroll/Admin.



- **Proxy:** A backup role in case the primary is not available. If an employee was not available, the proxy should be the supervisor. The role is either Supervisor, Manager, Payroll/Admin.
- **Revert Allowed:** Check if the role will be able to reopen (revert) the status.
- **Reject Goes To:** Indicates the role the approval will go to if it is rejected. A supervisor might reject and employees timesheet so it would go back to the employee. The role is either Employee, Supervisor, Manager, Payroll/Admin.
- **Can Approve Circuit:** Indicate if the role that gets a rejected timesheet can approve it
- **Resolution Required (App/Rej):** Indicate if resolution is required if rejected.
- **Blocks Timecard Edits:** Select if you do not want the employee to edit the timesheet while it is in approval.

4. Click **Save**.

Complete procedure: [Setting Up Employee Certification \(Administrator Role\)](#) on page 185

## Setting Up Employee Certification (Administrator Role)

You can setup employee certification for timesheets.

The Certification feature can be activated for specific employees. The first step is to qualify the employee for the feature.

Follow the instructions below to do this.

1. From the **Employees** tab, select **Company Members**.  
The Company Members form displays.
2. Click the link **Edit** for the desired employee.  
The Employee Details form displays.
3. Mark the **Certify** box in the bottom right.
4. If the e-mail notification feature will be used, then you must enter a valid e-mail address for the employee as well.
5. Click **Save**.

The changes to the employee's information are saved.

## Certifying an Employee's Time Sheet (Employee Role)

Once the Tree Ring Time administrator generates the certifications, the employee can log in to approve his or her time.

Once the Tree Ring Time administrator generates the certifications, the employee can log in to approve his or her time.

- If you are using a computer or mobile device, each employee needs to have his or her own login and password in order to access the Tree Ring Time system. Usually, these are EmpSelf login roles that provide limited access to the Tree Ring Time system. Login Security can be configured so that each employee can only view his or her own information, and not the information of coworkers.
- If you are using a time clock, you will not see a message until your next punch.

The following instructions are for employees for viewing and approving a time sheet.

1. Log into eTimeclock.
  - If using the eTimeclock on your computer, after you receive a notification e-mail, or any other notification that the certification is ready, you can either click the link in the message or open your browser and go to the Tree Ring Time login page. Enter your user name and password and click **Log On**.
  - If using a time clock, enter your ID using the touch screen or bar code reader.
2. From the **eTimeClock** tab, select **My TimeSheets**.  
The Time Sheet Certification form displays.



**Note:** If you have older date ranges to certify in addition to the current one, a drop down list displays in the upper left hand corner of the screen. If there is only one pay period to certify, the drop down list will not appear on this form.

- If your time sheet is not already displayed, then from the **Select a Pay Period** drop down list, select the pay period whose time sheet you want to view.

The time sheet for that period displays.

Punch Type	Date In	Time In	Date Out	Time Out	Lunch	Total	Notes
E	08/08/2017	09:00 a.m.	08/08/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/09/2017	09:00 a.m.	08/09/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/10/2017	09:00 a.m.	08/10/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
C	08/11/2017	04:19 a.m.	08/11/2017	04:33 a.m.	0.00	0.23	
C	08/11/2017	04:33 a.m.	08/11/2017	04:34 a.m.	0.00	0.02	
C	08/11/2017	04:34 a.m.	08/11/2017	04:35 a.m.	0.00	0.02	
C	08/11/2017	04:35 a.m.	08/11/2017	04:36 a.m.	0.00	0.02	
E	08/11/2017	09:00 a.m.	08/11/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/14/2017	09:00 a.m.	08/14/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/15/2017	09:00 a.m.	08/15/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/16/2017	09:00 a.m.	08/16/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/17/2017	09:00 a.m.	08/17/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/18/2017	09:00 a.m.	08/18/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/21/2017	09:00 a.m.	08/21/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/22/2017	09:00 a.m.	08/22/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet
E	08/23/2017	09:00 a.m.	08/23/2017	05:00 p.m.	0.00	8.00	Auto-Generated Timesheet

- Use the scroll bar on the right hand side of the time sheet to view the contents. Verify all time information for the pay period.
- Approve, Disapprove, or Reject the pay period.
  - If the time information for the pay period is correct, click the **Approve** button at the bottom of the form. It is not necessary to enter any comments in the text box, but the field is available if you need it.
  - If any time information is incorrect, click in the **Rejected** box and enter a note regarding the reason for the action. These comments will be reviewed by the supervisor. The time sheet can come back to the employee with the corrections.
  - If the time sheet is not approved, click in the **Not Approved** box and enter a note regarding the reason for the action. These comments will be reviewed by the supervisor.
- You may be asked to **Accept Terms And Conditions**. Click **OK**.

**Note:** If you have not approved the time sheet, it is necessary to continue to periodically log in and check for updates to the time sheet until you are able to approve the time. This process can be coordinated with the supervisor or administrator responsible for correcting the information on the time sheet.

## Employee Certification Reports

You can view employee certification information reports.

The following reports show employee certification information.

- Edit > Approvals** form provides a list of employee time sheet approvals and comments for editing purposes.

- The Supervisor Exceptions Report (**Reports > Supervisory > Supervisor Exceptions**) provides a listing of supervisors who have completed all employee certifications for the current time period. If the list is blank, then all supervisors have signed off.

## Supervisor Signoff

Provides payroll administrators confirmation that each supervisor and if configured, manager, has reviewed their employees' time cards and signed off the time sheets.

The Supervisor Signoff feature provides payroll administrators confirmation that each supervisor has reviewed their employees' time cards and signed off that the time sheets are in order and are ready for payroll. The Manager can also be configured to do this function in addition to the supervisor. The Signoff function is designed to be performed at the end of each pay period and before the administrator runs payroll. This procedure works well in organizations where the supervisor is responsible for editing their employees' time records. The employee's time-card is appended with a note indicating which Supervisor and Manager approved the time card. An administrator can then run the Supervisor Signoff Exception report and determine if there are employees whose time cards have not yet been approved by a supervisor.

The Supervisor Signoff feature can be used in conjunction with the Employee Certification feature or independently. If it is used with the Employee Certification feature, that function should be performed first by the employee before the supervisor signs off on the time sheet.

## Supervisor Signoff Prerequisites

Prerequisites for a supervisor to be able to signoff a timesheet.

For a supervisor to use supervisor signoff, the following criteria must be met:

- The Supervisor must be entered in the Supervisors form (accessed from the **Security** tab by selecting **Supervisors**)
- The supervisor must be assigned to the employee on the Employee Details form (accessed from the **Security** tab by selecting **Supervisors** and then clicking the **Assign Employees** link for the desired supervisor).
- The supervisor must have the correct login security rights to view the employees assigned to him or her.

## Using the Supervisor Approval Form for Supervisor Signoff

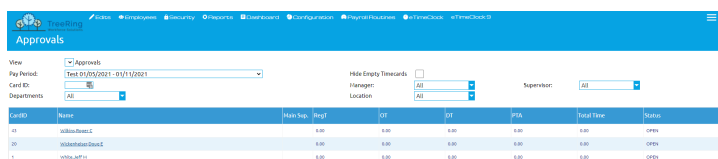
You can sign off on an employee's time using the Supervisor Approval form.

When employees view their time sheets, they have the option to approve or to disapprove their time. An employee can add comments to the time sheet regardless of the certification status, but it is assumed that if they disapprove their time, they will enter a note explaining the reason. The Approvals form allows the person responsible for editing employee time sheets to see who has not certified their time sheet and the reason why. This information can be used to make any changes to employee time sheets before payroll to ensure payroll is complete.

Follow the instructions below to sign off on an employee's time using the Supervisor Approval form.

- From the **Edits** tab, select **Payroll/Admin Approvals**.

The Approvals form displays showing all of the employees who have been assigned to that supervisor.



EmpID	Name	Hourly Rate	Reg	OTR	OT	OTR	Total Time	Status
10	Wahlestein,David	0.00	0.00	0.00	0.00	0.00	0.00	OPEN
20	Wahlestein,David	0.00	0.00	0.00	0.00	0.00	0.00	OPEN
1	Wahlestein,David	0.00	0.00	0.00	0.00	0.00	0.00	OPEN

- Select all the employees that you wish to approve by click the check box for their row.
- Click the **Sign Off** button or the **Sign Off** link in the last column for an individual row.

4. Click the **OK** button to confirm.

The Approvals form should now be blank.

## Using the Timesheet Tab for Supervisor Signoff

Sign off on an employee's time via the Edit Timesheet tab.

Follow the instructions below to sign off on an employee's time using the Timesheet form.



**Note:** Once a supervisor signs off on an employee's time sheet, all forms that allow that employee to enter a time record are locked. A supervisor cannot undo the signoff once it is completed; only an administrator can override this signoff.

1. From the **Edits** tab, select **Time Management** then select the **Timesheet** tab.  
The Timesheet tab displays.
2. From the **Employee** drop down list, select the name of the employee whose time you wish to sign off on.  
The employee's time sheet displays.
3. Click the **Show Approvals** check box.
4. Click the **Sign Off** on the task bar.  
A confirmation box will appear.
5. Click **OK**.

## Rejecting a Request for Supervisor Signoff

You can reject an employee's timesheet submission.

Follow the instructions below to reject a request for supervisor's signoff on an employee's time and unlock the employee's time record.

1. From the **Edits** tab, select **Approvals**.  
The Approvals form displays showing all of the employees who have been assigned to that supervisor.
2. Select all the employees that you wish to reject a sign off by clicking the check box for their row.
3. Click the **Reject** button (if multiple selections) or click the **Reject** link for the row.
4. Click the **OK** button to confirm.

## Rejecting a Request for Supervisor Signoff in the Timesheet Tab

You can reject a request for sign off on an employee's time using the Timesheet tab.

Follow the instructions below to reject a sign off request on an employee's time using the Timesheet Tab.



**Note:** Once a supervisor signs off on an employee's time sheet, all forms that allow that employee to enter a time record are locked. A supervisor cannot undo the signoff once it is completed; only an administrator can override this signoff.

1. From the **Edits** tab, select **Time Management** then select the **Timesheet** tab.  
The Timesheet tab displays.
2. From the **Employee** drop down list, select the name of the employee whose time you wish to sign off on.  
The employee's time sheet displays.
3. Click the **Show Approvals** check box.
4. Click the **Reject** on the task bar.  
A confirmation box will appear.

5. Click **OK**.

## Undoing a Supervisor Signoff

You can undo a supervisor's signoff on an employee's time and unlock the employee's time record.

Follow the instructions below to undo a supervisor's signoff on an employee's time and unlock the employee's time record.



**Note:** Only a TreeRing Time administrator can undo the supervisor signoff and unlock an employee's time.

1. From the **Edits** tab, select **Approvals**.

The Approvals form displays showing all of the employees who have been assigned to that supervisor.

2. Select all the employees that you wish to revert by clicking the check box for their row.
3. Click the **Revert** button.
4. Click the **OK** button to confirm.

## Printing the Supervisor Signoff Exception Report

For your reference, print the Supervisor Signoff Exception Report.

The Supervisor Exception Report lists all supervisors and shows the time sheet signoff status of each employee.



**Note:** This report can only be run by a TreeRing Time administrator.

Once the period end routine is run, all employee sign off check boxes are cleared.

1. From the **Reports** tab, select **Supervisory** and then **Supervisor Exception**.
2. Click the **Print** button.
3. Click **Print** icon on the upper task bar.  
The information displays in a print ready format.
4. Click the **Print** button.

The Signoff Exception report prints.



# Chapter 19. Time Clocks

Time Clocks need to be set up so that employees can use them.

## In This Chapter

[Biometric Templates](#) on page 191

Biometric templates are used for temporary worker status.

[Validation Groups](#) on page 192

Validation Groups organize groups of employees by time clocks.

[Company Configuration](#) on page 194

Company Configuration has miscellaneous settings related to Time Clock Server.

[Mobile Profiles for Employees](#) on page 194

Settings to make TreeRing Time mobile friendly for employees.

## Biometric Templates

Biometric templates are used for temporary worker status.

Biometric templates are used for non-employees. Contractors or temp employees are frequent visitors do not have a corresponding employee record, because if they did, their punch in times would require unnecessarily complicate payroll management. Also, new employees would use a biometric template until their employee record is created.

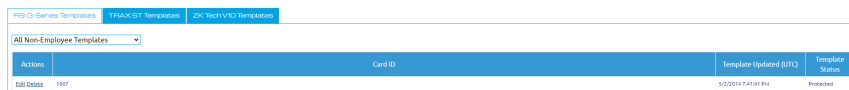
## Editing Biometric Templates

You can edit the biometric templates for the time clocks used in your organization.

Follow these steps to edit the biometric templates for your time clocks.

1. From the **Configuration** tab, select **Time Clocks**, and then **Biometric Templates**.

The Biometric Templates form displays.



Actions	Card ID	Template Updated (UTC)	Template Status
Full Dates	1007	5/2/2014 7:41:01 PM	Protected

2. Click the **Tab** for the type of biometric time clock you want to edit.
3. Click the **Edit** link for the Time Clock.

The Template Status Column becomes active.

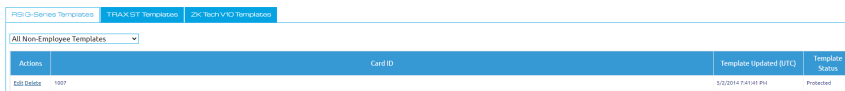
- In the **Template Status** column, use the drop down menu to select from these options.
  - Allowed:** Sends information to the time clocks during the “grace period” set under **Configuration > Company Setup**. This setting allows employees to punch in before their employee record is created.
  - Protected:** Will always be sent to clocks. Used for “enrolling” supervisors who do not (and will not) have an employee record in the system. Usually a salaried employee or someone who works on-site but is an employee of another company, such as a temp agency.
  - Disabled:** Will never be sent to clocks. Used when it is desired to retain the template but not allow that user to access the clocks.

## Deleting a Biometric Templates

You can delete the biometric templates for the time clocks used in your organization.

Follow these steps to edit the biometric templates for your time clocks.

- From the **Configuration** tab, select **Time Clocks**, and then **Biometric Templates**. The Biometric Templates form displays.



Actions	Card ID	Template Updated (UTC)	Template Status
Edit/Delete	1007	5/2/2014 7:45:01 PM	Protected

- Click the **Tab** for the type of biometric time clock you want to edit.
- Click the **Delete** link for the Time Clock. A confirmation dialog displays.
- Click **OK** to delete the template.

## Validation Groups

Validation Groups organize groups of employees by time clocks.

Validation groups allow setup of groups of employees and organizational level codes so only a subset are sent to the associated clocks. This makes it easier to manage the clocks.

To Add a validation group, you must:

- Enable the validation group features (for first time use of this feature. See [Enabling a Validation Group](#) on page 192.
- Add a Validation Group. See [Adding a Validation Group](#) on page 193.

## Enabling a Validation Group

You can enable the Validation Group feature to be associated with a time clock.

Follow these steps to enable Validation Groups for the first time.

- From the **Configuration** tab, select **Timeclocks**, and then select **Company Config**. The Company TCS Configuration form displays.



- In the **Validation and Template Synchronization Settings** section, check the **Use Validation Groups** field.
- Click **Save**.

The Validation Group form now appears when you select **Configuration > Time Clocks > Validation Groups**.

You will likely want to configure a Validation Group. See [Adding a Validation Group](#) on page 193.

## Adding a Validation Group

You can add a Validation Group to be associated with a time clock.

Follow these steps to add a Validation Group.

- From the **Configuration** tab, select **Timeclock**, and then select **Validation Groups**.

The Validations Group form displays.

- In the **Clocks** tab, **Name** field, type a name for the validation group.
- From the **Available Clocks** section, check the check box for the desired clock in the validation group.
- Click the **Move >** icon.  
If you accidentally move the incorrect clock, just check it in the Assigned Clocks section, and click the < button.  
The clock moves to the Assigned Clocks section.
- Click the **Tracking Levels** tab.
- For each category listed in the **Available Tracking Levels**, check those that you wish to move to the **Assigned Tracking Levels**.
- Click **Save**.

The Validation Group appears in the Validation Groups section.

## Deleting a Validation Group

You can delete a Validation Group so that it is no longer associated with a time clock.

Follow these steps to delete a Validation Group.

1. From the **Configuration** tab, select **Timeclock**, and then select **Validation Groups**.  
The Validations Group form displays.
2. From the **Available Clocks** section, click the Validation Group you wish to delete.
3. Click the **Delete** button.  
A confirmation dialog displays.
4. Click **OK**.

The Validation group disappears from the Validation Groups section.

## Company Configuration

Company Configuration has miscellaneous settings related to Time Clock Server.

Company configuration contains miscellaneous settings for the operation of Time Clock Server related to validation and biometric data downloads.

### Configuring the Company Timeclock Server Configuration

You must configure the Company Timeclock server configuration.

Follow these steps to configure the company Timeclock configuration.

1. From the **Configuration** tab, select **Timeclock**, and then select **Company Configuration**.  
The Company TCS Configuration form displays.

2. To configure Validation Groups for specific associated time clocks, in the **Validation and Template Synchronization Settings** section, check the **Use Validation Groups** check box.  
This setting enables the groups defined in this section to be sent to specific associated clocks, instead of the entire employee and level code tables. You will need to configure your Validation Groups next. See [Adding a Validation Group](#) on page 193.
3. To synchronize miscellaneous settings for schedule templates, in the **Template Synchronization Settings** section, check **Use Non-Employee Templates**.  
This setting enables the templates seen under that section to be sent to clocks, subject to the “Template Status” settings.
4. If desired, change the value for the **Non-Employee Grace Period**.  
This setting controls how long a non-employee template set to “Allowed” will be sent to clocks.
5. Click **Save**.

## Mobile Profiles for Employees

Settings to make TreeRing Time mobile friendly for employees.

Mobile employees such as sales people, tend to use their mobile devices more than physical time clocks or computers. TreeRing Time offers a mobile friendly version of the software. You will need to configure which elements of the web page appear and how the employee will interact with it.

## Adding a New Mobile Profile for Employees

You can add a new mobile profile for employees.

Follow these steps to add a new mobile profile for employees.

1. From the **Configuration** tab, select **Timeclock**, and then select **Mobile Profile for Employees**.

The Mobile Profile for Employees form displays.

2. Click **Add New Profile** to add a new mobile profile.

The Add New Mobile Profile form displays.

Level	Description	Required	Level Prompt
Level1	Area	<input type="checkbox"/>	<input type="text"/>
Level2	Departments	<input type="checkbox"/>	<input type="text"/>
Level3	Location	<input type="checkbox"/>	<input type="text"/>
Level4	Job	<input type="checkbox"/>	<input type="text"/>

3. Type a **Profile Code** and **Description**.
4. Check the check boxes for the features you want to have display for mobile devices. Some check boxes, when checked, allow you to enter a prompt message.
5. Click **Save**.

The new profile appears on the form.

## Adding Employees to a Mobile Profile for Employees

You can add employees to a mobile profile for employees.

Follow these steps to add employees to a mobile profile for employees.

1. From the **Configuration** tab, select **Timeclock**, and then select **Mobile Profile for Employees**.  
The Mobile Profile for Employees form displays.
2. Click the link **Assign Employees** for the desired profile.  
The Employee Assignment form displays.
3. Check the check boxes for the employees you want to add.
4. Click **Confirm**.

## Editing a Mobile Profile for Employees

You can edit a mobile profile for employees.

Follow these steps to edit a mobile profile for employees.

1. From the **Configuration** tab, select **Timeclock**, and then select **Mobile Profile for Employees**.  
The Mobile Profile for Employees form displays.
2. Click the link **Edit** for the desired profile.  
The Edit Profile form displays.
3. Make the desired changes.
4. Click **Save**.

## Editing a Mobile Profile for Employees

You can edit a mobile profile for employees.

Follow these steps to edit a mobile profile for employees.

1. From the **Configuration** tab, select **Timeclock**, and then select **Mobile Profile for Employees**.  
The Mobile Profile for Employees form displays.
2. Click the link **Edit** for the desired profile.  
The Edit Profile form displays.
3. Make the desired changes.
4. Click **Save**.

## Chapter 20. eTimeClock v9.0

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eTimeClock™ is an easy to use application that allows employees to record work hours, department, job, level 4, and level 5 labor information.

### In This Chapter

[eTimeClock Overview v9.0](#) on page 197

You can use the eTimeClock to log your time online.

[eTimeClock Set Up](#) on page 198

You must complete this task flow to set up the eTimeClock.

[Entering Time v9.0](#) on page 201

You can enter your time using the eTimeClock.

[eTimeClock Employee Time Reports v9.0](#) on page 206

You can review reports available for employees to view their work hours

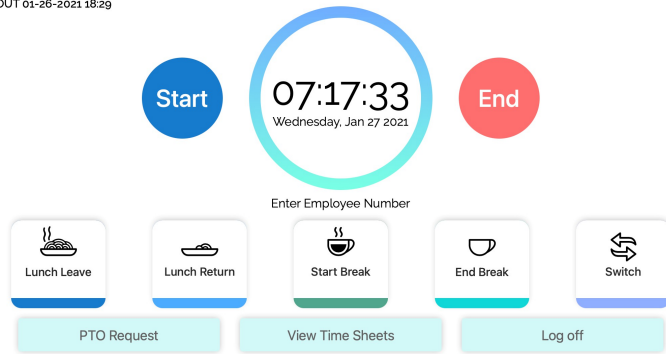
## eTimeClock Overview v9.0

You can use the eTimeClock to log your time online.

eTimeClock v9, offers the ease of clocking in and out through a standard web browser. With no software to install and no hardware to maintain, tracking your employee's punches in real-time has never been simpler. Whether you're accessing from the comfort of your home or in the hustle and bustle of an office, eTimeClock allows full control of when and where you take care of business. All that's needed is a URL, and you're set to go. eTimeClock is part of our 'unified clock operations' design - Same process to clock in and clock out or approve time across all devices. eTimeClock is an easy- to-use application that allows employees to record work hours and have them categorized by organizational level such as department, job, or other configurable labor categories.

Welcome Samuel,Saju T

OUT 01-26-2021 18:29



Essentially, eTimeClock is a software version of our hardware time clocks. It operates at its own Web address just like a regular website. Employees do not need TreeRing Time user names or passwords to use eTimeClock. Employees only need their Card ID and the URL (Internet address) of eTimeClock.

## eTimeClock Set Up

You must complete this task flow to set up the eTimeClock.

Setting Up the E Timeclock requires that you complete these two procedures:

### 1. Create an eTimeClock profile.

The eTimeClock Profile defines the behavior of eTimeClock as the employee uses it. It determines variables such as:

- Which action buttons it will display, and therefore which actions it will allow the employee to perform (See [Changing eTimeClock Button Images](#))
- Which labor tracking levels will be prompted for when an employee punches in.
- What messages, if any, will scroll up the page for the employee to read. (See [Posting Announcements for Employees in eTimeclock](#))

Multiple profiles can be defined for each group of employees that have different labor tracking needs or different company policies.

### 2. Assign the eTimeClock profile to the employee in the Employee Rules form. (See [Entering Employee Rules](#))

This activates eTimeClock for the employee so they can begin to use it.

## Setting Up eTimeClock

You can set up eTimeClock for employees to punch in.

Follow the instructions below to set up eTimeClock.

### 1. From the **Configuration** tab, select **Time Clocks** and then **eTimeClock**.

The eTimeClock Profiles form displays.

	Code	Description
Details	ES01	TIME_SHEET Timesheet Entry
Details	ES02	Text with health and break alterations
Details	ES03	Text without health and break alterations
Details	ES04	Regular Work Example
Details	ES05	Lunch clock out
Details	ES06	View and sign off

- Click **Add New eTimeClock Profile** on the task bar to create a new eTimeClock profile. The New eTimeClock Profile form displays.

**New eTimeClock Profile**

Save

Profile Code:  Description:

Action Prompt:

Require PIN:  PIN Code Prompt:

Require Tip:  Tip Prompt:

Require Count:  Count Prompt:

View Timesheet:  View PTO Requests:  View PTO Banks:  Sign Off if inactive by:  seconds

Enable Start & End

Enable Switch:  Enable Break:  Enable Lunch:  Automatically Sign Off after action:

View Last Punch:  Reject Unknown Locations:  Duplicate Punch Tolerance:

Minimum Lunch Time:  Ask COVID Questions:

Timesheet Entry

Edit previous pay period's timecards:  Show previous pay period timecard after it ended by:  days

In & Out Transactions:  Lunch:  Bulk Transactions:  Unpaid Transactions:  Award Transactions:  PTO Transactions:


BE  Bulk  Absent  Adj   
 Edit  TBulk  LWOP  B   
 Lunch  TOL  TOL  CM

Attestation Questions:  Off  On  On w/default Yes Attestation Question Group Code:

Announcement:  Terms & Conditions:

Level	Description	Enabled	Level Prompt
Level1	Area	<input type="checkbox"/>	<input type="text"/>
Level2	Departments	<input type="checkbox"/>	<input type="text"/>
Level3	Location	<input type="checkbox"/>	<input type="text"/>
Level4	Job	<input type="checkbox"/>	<input type="text"/>

Save

- In the **Profile Code** field, enter a name for the new profile. This will be displayed in the drop down for eTimeClock profile in the Employee Rules form.
  - In the **Description** field, enter a description for the new profile.
  - In the **Card ID Prompt** field, enter the text you wish to display to prompt the user to enter their Card ID.
  - Action Prompt:** The idle prompt may be changed. This message appears in the message window of eTimeClock during periods of inactivity.
  - Check the **Require PIN** check box, if you want to require that the employee enter a PIN in order to use eTimeClock. The PIN will have a 10 characters maximum. The PIN prompt is designed to prevent “buddy punching,” which is when one employee punches in for numerous employees. Requiring the PIN when using eTimeClock makes buddy punching more difficult since there are two numbers for each employee to input every time they use eTimeClock. The PIN value is assigned by the administrator and entered into the PIN field of the Employee Rules form and it cannot be changed by the employee. The PIN is not the same as a login or password and it is used exclusively with eTimeClock.
-  **Note:** If **Require PIN Code** is checked, ensure to enter the PIN number in the Employee Rules Form
- PIN Code Prompt:** The PIN code prompt may be changed. This message will appear after the employee has entered their card ID number and prompt for them to enter the secondary number.

9. Check the **View TimeSheet** box to allow the employee to view Current Pay Period Hours and Previous Pay Period Hours on their time sheets. After entering their ID number, the employee can click a link to view and print their own time sheet for the current pay period and for the previous pay period, for times when the period hasn't been closed out yet but the current pay period in TreeRing Time looks at dates in the past.
10. Check the **View PTO Requests** box to allow the employee to view their PTO requests. After entering their ID number, the employee can click a link to view and print their own PTO Requests.
11. Check the **View PTO Banks** box to allow the employee to view their PTO Bank. After entering their ID number, the employee can click a link to view and print their own PTO Bank.
12. Use the **Require Count** field to track a numerical count.  
The user will be prompted during an End/Out, Lunch Leave, or Switch punch.
13. When the **Require Count** check box is selected, in the **Count Prompt** field, enter a prompt message.
14. In the **Enable Start & End** check box, place a check in the box.  
This will activate check boxes for Enable Switch, Enable Break, and Enable Lunch. This will also determine which buttons they see on their version of eTimeClock since disabled punch types are hidden.
  - Check **Enable Switch** check box, if the employee will need to switch job types during a shift.
  - Check **Enable Break** check box, if the employee will need enter time for breaks.
  - Check **Enable Lunch check** box, if the employee will need to enter time for lunch.
  - Check **View Last Punch**, if the employee will want to see their last punch.
  - Check **Reject Unknown Locations**, if you want to prevent the employee from punching in at non-designated locations.
  - Check **Automatically Sign Off After Action**, if you want to automatically end the session with TreeRing Time after the employee has done their punch. This prevents employees from forgetting to log off.
  - Enter a value for the **Duplicate Punch Tolerance**.
  - Enter a value in minutes for the **Minimum Lunch Time** before an employee can punch back in from lunch.
15. In the **Timesheet Entry** check box, check if the employee will need to need to edit their timesheet.  
This will activate check boxes for:
  - **In & Out Transactions**, if the employee will need to punch both in and out for all activities.
  - **Lunch**, if the employee will have to punch both in and out for lunch.
  - **Bulk Transactions**, if the employee can make bulk transactions.
  - **PTO Transactions**, if the employee can make PTO transactions.
  - **Unpaid Transactions**, if the employee can make Unpaid transactions.
  - **Award Transactions**, if the employee can make Award transactions.
  - **Edit previous pay periods time cards**, if the employee can edit previous pay periods.
16. In the **Attestation Questions**, select an option:
  - `Off`, Default. No attestation will occur.
  - Check the `On` check box if you want to ask an attestation question when the employee clicks **End** at the end of a shift.
  - Check the `On w/default Yes` check box if you want to answer an automatic "Yes" to ask an attestation question when the employee clicks **End** at the end of a shift.
17. In the **Duplicate Punch Tolerance Minutes** field, specify the number of minutes you wish eTimeClock to wait before accepting a second punch from the same Card ID.
18. Check the **View Last Punch** box to allow the user the see their previous punch displayed on the left side of the eTimeClock Web page. This is convenient when the employee wants to view the time of their last punch, or if the employee needs to verify that they punched in properly at the beginning of the shift.
19. Enter the number of days in the **Show Previous Pay Period Time Card After It Ended By** for the number of days after a pay period ends.
20. In the **Terms & Conditions** text box, enter text if you want to display any terms and conditions.



21. In the **Announcement** text box, enter any announcement you wish to display upon login.



**Note:** You can have different announcement for different groups of employees. However, if you have a common message for everyone, you will have to edit each eTimeClock Profile.

22. Place a check in the **Enabled** column for a labor tracking level and the employee will be prompted for that information when they punch Start, Break, Lunch (in and Out), or Switch.

- **Level 1:** This is used for Card/Badge ID. The user will be prompted during a Start/In, Lunch Return, Break Return or Switch punch.
- **Level 2:** This is used for Department tracking. The user will be prompted during a Start/In, Lunch Return, or Switch punch.
- **Level 3:** This is used for Job tracking. The user will be prompted during a Start/In, Lunch Return, or Switch punch.
- **Level 4:** This is used for Level 4 tracking. The user will be prompted during a Start/In, Lunch Return, or Switch punch.
- **Level 5:** This is used for Level 5 tracking. The user will be prompted during a Start/In, Lunch Return, or Switch punch.

23. In the **Level Prompt** field, enter the prompt that will appear in the message window for each level prompt. You may change this message by editing the text in this window.

24. In the **Default Value** field, enter a default value for any of the level prompts.

This value will be automatically added to each punch coming from a user with the selected profile. If a default value is entered, the user will not be prompted for this level, regardless of whether or not the Prompt Enable box is checked.

25. Click **Save**.

## Posting Announcements for Employees in eTimeclock

You can send announcements through eTimeClock that employees will see when they punch in.

You can use eTimeClock to post general announcements to your employees which they will see when they login.

Follow the instructions below to enter an announcement.

1. From the **Configuration** tab, select **Time Clocks** and then **eTimeClock**.  
The eTimeClock Profiles form displays.
2. Click the link **Edit** for the profile you want to the messages on this form to be associated with.  
The Ne eTimeClock Profile form displays.
3. Click in the **Announcement** box and enter the text you wish to appear when the employee logs in.
4. Click **Save** on the task bar.

## Entering Time v9.0

You can enter your time using the eTimeClock.

Employees access eTimeClock through their Web browser. Depending on the installation and configuration of the eTimeClock, employees may be able to access eTimeClock only from a location within the company Intranet (within a restricted private network), a specific job location, or if setup, from anywhere in the world (with a public IP address). Employees will need their Card ID number and the URL (Internet address) of the eTimeClock.

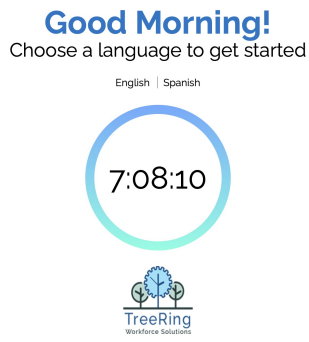
Employees may use:

- A mouse to click on the buttons on the screen
- The touch screen

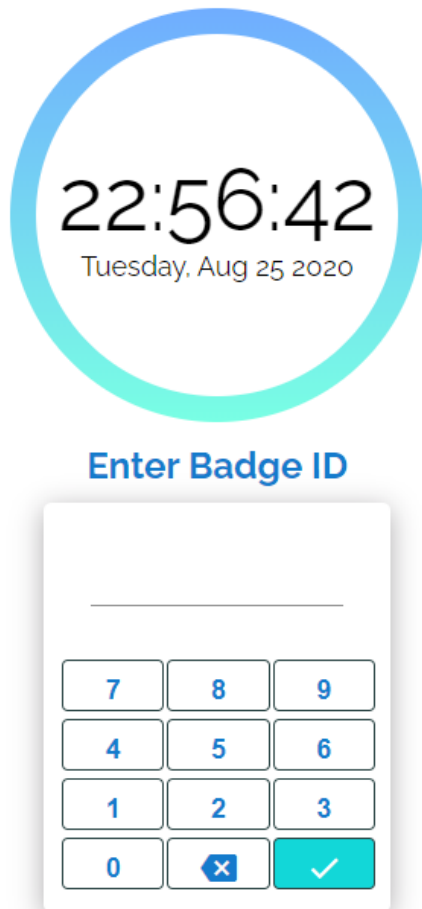
**Note:** To use eTimeClock, click on the button with your mouse, or touch the screen.



1. Go to the eTimeClock website address provided by your employer.  
The eTimeClock displays.



2. Select a Language to get started.  
The login page displays.



3. Enter your `employee` (badge) ID and click the green check mark or scan your bar code ID.
4. Enter your `PIN`. It must match the PIN in your employee profile.
  - a) Forgotten your PIN? Click the **Forgot PIN** link.



Welcome Addams, Frankie L

Enter Your PIN

Forgot your PIN?

The **Forgot PIN?** dialog box displays.

Forgot your PIN?

Enter your email address

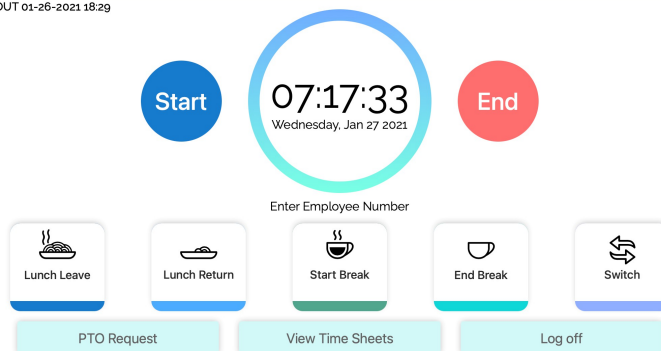
Reset Pin

Cancel

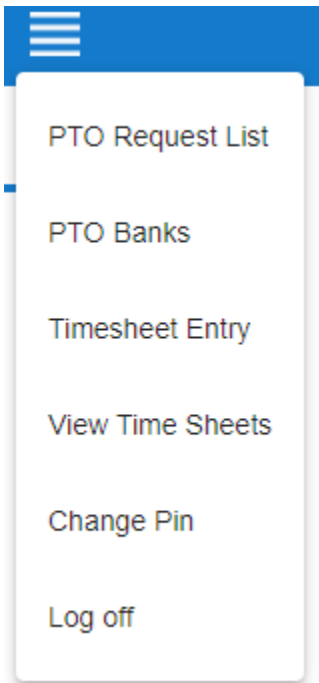
- b) In the **Forgot PIN?** dialog, enter your email address.  
You will receive an email with a temporary PIN.
- c) Enter your temporary PIN in the PIN dialog box.  
The clock console appears. The area under the green **Start** button may display a message or note (see the orange box in the figure below).

Welcome Samuel, Saju T

OUT 01-26-2021 18:29



- d) To change the temporary PIN to one that you will remember, click the **Settings** icon in the top right and select **Change PIN**.



The **Change PIN** dialog box displays.

A screenshot of the 'Change Pin' dialog box. It features a title 'Change Pin' with a blue underline. Below the title are three input fields: 'Current Pin', 'New Pin', and 'Confirm Pin', each with a horizontal line underneath. At the bottom of the dialog is a blue button with the text 'Change Pin' in white.

- e) Enter your current Temporary PIN and your new PIN twice.
- f) Click **Save**.

5. Select a Function button for the appropriate part of the work day:

- **Start**



- **Note:** If 'Health Attestation' is configured for your organization, then you must answer attestation questions before you can proceed.



- **Note:**You may be asked for Department, Job, or any other organizational level codes if they have been configured for your organization.

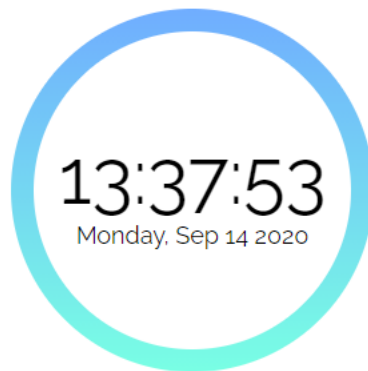
- **End**
- **Lunch Leave**
- **Lunch Return**



- **Note:**If a Minimum Lunch Time is configured for your organization, and you try to punch in for a Lunch Return before that time is up, you will be prevented from punching back in until the Minimum Lunch Time has passed.

- **Start Break**
- **End Break**
- **Switch**

6. If prompted, enter the number of hours for the shift or select from the options provided.
7. If you are prompted for Department, Job, or any other organizational level codes, select from the drop-down list provided or enter the code and click **OK** or scan the bar code for the level.



Select Project

008 - Vermack Road Improvements  
 003 - Pedestrian Safety Improvements  
 006 - Mount Vernon Road Improvements  
 009 - Peeler Road Improvements  
 001 - Mount Vernon Road Infrastructure Improvements  
 010 - DeKalb Water Main Replacement Program  
 002 - Sidewalk Construction  
 004 - North Peachtree Road Improvements  
 011 - Spalding Drive Improvements  
 005 - Tilly Mill Road Improvements  
 007 - Dunwoody Village Main Street  
 400 - Travel for Work

**Count Option:** This is used to track a numerical count. If necessary, you will be prompted during an End/Out, Lunch Leave, or Switch punch to enter a Count value.

Your punch will be accepted. After a few seconds the browser will refresh and return you to the default screen.

IN 09-14-2020 13:46

The interface features three circular buttons: a blue 'Start' button on the left, a large cyan circle in the center containing the time '13:42:42' and the date 'Monday, Sep 14 2020', and a red 'End' button on the right.

Punch Accepted: 09/14/2020 13:45



**Note:** You only need to click **Log Off** if you want to exit eTimeClock and you haven't selected a function key. You can also log off by refreshing the browser.

## eTimeClock Employee Time Reports v9.0

You can review reports available for employees to view their work hours

There is one report called My Timesheets available for employees to view their work hours with the current pay period shown as the default. You can use a drop down menu to toggle between past Pay Periods.

Timecard for Period: 01/16/2021-01/31/2021

Pay Period  
01/16/2021 - 01/31/2021

Punch Type	Date In	Time In	Date Out	Time Out	Lunch	Total	Notes
AB	01/18/2021	08:00			0.00	9.00	
AB	01/19/2021	08:00			0.00	9.00	
AB	01/20/2021	08:00			0.00	9.00	
AB	01/21/2021	08:00			0.00	9.00	
AB	01/22/2021	08:00			0.00	9.00	
AB	01/25/2021	08:30			0.00	11.50	
C	01/26/2021	16:07	01/26/2021	16:58	0.00	0.85	
C	01/26/2021	16:48	01/26/2021	16:58	0.00	0.17	
C	01/26/2021	18:20	01/26/2021	18:24	0.00	0.07	
X	01/26/2021	18:20			0.00	0.00	
X	01/26/2021	18:24			0.00	0.00	
C	01/26/2021	18:24	01/26/2021	18:28	0.00	0.07	

Total	Week 1. 1/16-1/16	Week 2. 1/17-1/23	Week 3. 1/24-1/30	Week 4. 1/31-1/31
Total Paid Hours: 116		Unpaid: 56.50		Dollars: 16.00
Worked: 116				
Not Worked: 0.00				

## Accessing Employee eTimeClock Reports v9.0

Access employee time reports in eTimeClock.

Follow the instructions below to access employee time reports.

1. Launch Internet Explorer and enter the eTimeClock URL. Before a transaction begins, the idle prompt is displayed with the current date and time. The message box will prompt the user for information.
2. At the **Enter Badge ID** prompt, enter your TreeRing Time Card ID number and press **Enter** on the keyboard or click **Enter** on the screen. The eTimeClock time entry form displays.
3. Click **View Time Sheets**.

The My TimeSheets form displays.

Timecard for Period: 01/16/2021-01/31/2021

Pay Period

01/16/2021 - 01/31/2021

Punch Type	Date In	Time In	Date Out	Time Out	Lunch	Total	Notes
AB	01/18/2021	08:00			0.00	9.00	
AB	01/19/2021	08:00			0.00	9.00	
AB	01/20/2021	08:00			0.00	9.00	
AB	01/21/2021	08:00			0.00	9.00	
AB	01/22/2021	08:00			0.00	9.00	
AB	01/25/2021	06:30			0.00	11.50	
C	01/26/2021	16:07	01/26/2021	16:58	0.00	0.85	
C	01/26/2021	16:48	01/26/2021	16:58	0.00	0.17	
C	01/26/2021	18:20	01/26/2021	18:24	0.00	0.07	
X	01/26/2021	18:20			0.00	0.00	
X	01/26/2021	18:24			0.00	0.00	
C	01/26/2021	18:24	01/26/2021	18:28	0.00	0.07	

Total	Week 1. 1/16-1/16	Week 2. 1/17-1/23	Week 3. 1/24-1/30	Week 4. 1/31-1/31
Total Paid Hours: 116				
Worked: 116				
Not Worked: 0.00				
		Unpaid: \$6.50		Dollars: 16.00





# Chapter 21. TreeRing Time Attestation

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## In This Chapter

[Attestation Overview](#) on page 209

Overview of the Attestation feature in TreeRing Time for compliance.

[Setting up TreeRing Time Attestation](#) on page 210

Set up TreeRing Time Attestation for compliance.

[Adding a Clock Question Group for Attestation](#) on page 210

You can add a clock question group for attestation.

[Adding a Clock Question for Attestation](#) on page 211

You can add a clock question for attestation.

## Attestation Overview

Overview of the Attestation feature in TreeRing Time for compliance.

TreeRing Time® Attestation solutions simplify and streamline adherence with state, local, union, and other policies to minimize compliance risk.

- **Capture employee attestation of meal and rest breaks:** As more states pass labor laws related to meal and rest breaks, employee attestation is critical for minimizing compliance risk. With TreeRing Time® Attestation, employees can receive a prompt asking them to attest to whether they've taken mandated meal or rest breaks. It's simple to customize the prompts to reflect applicable laws and policies, or to send automated notifications that alert employees of missed attestations.
- **Capture employee attestation of safety:** With TreeRing Time® Attestation, employees can receive a prompt asking them to attest to whether they had an injury free workday.
- **Capture employee attestation of health conditions:** The widespread reach of the COVID-19 pandemic has prompted businesses and organizations to think carefully about how they're managing their people. While some can work from just about anywhere, others work in positions that require them to be physically present. As COVID-19 continues to progress, the need to properly support and manage these brave, benevolent, and hardworking people has become top of mind for organizations. With TreeRing Time® Attestation solutions you can gather important health and safety information and provide insight into your workforce as everyone adapts to life during this pandemic.

## Compliance Reporting

TreeRing Time® Attestation offers powerful reporting to help managers monitor employee attestation, identify trends, and demonstrate compliance. Easy access to comprehensive attestation data empowers managers to process employee timesheets

more effectively and stay up to date with employee status. And the Full Audit Report provides a detailed record of all employee prompts and captured responses, which clearly demonstrates compliance efforts in the event of an audit.

- **Daily Approval and Pay Period Compliance:** Shows at a glance which employees have approved, rejected, or not taken action within a pay period or specified time frame.
- **Meal Compliance:** Shows at a glance how employees have answered the meal question and calculates the percentage of missing meals.
- **Detail Reports:** Shows all questions and responses as well as the time taken to respond. Punch restrictions can also be recorded.
- **Summary Reports:** Show the questions and answers with the counts and Shows all questions with the counts and ratios of responses — allowing managers to take action as trends develop.

## Setting up TreeRing Time Attestation

Set up TreeRing Time Attestation for compliance.

To set up Attestation for compliance, you will to complete the following steps.

1. You will need a configure Clock Question Group. there should be one for each attestation category i.e. one for meals, one for health and so on. See [Adding a Clock Question Group](#).
2. You will need to add the questions to the appropriate Question Group. See [Adding a Clock Question](#)
3. Edit the TimeClock profile to turn on attestation. From the **Configuration** tab, select **Time Clocks** and then **eTimeClock**.
4. For the desired profile, click **Edit**.
5. In the **Attestation Questions**, select an option:
  - `Off`, Default. No attestation will occur.
  - Check the `On` check box if you want to ask an attestation question when the employee clicks **End** at the end of a shift.
  - Check the `On w/default Yes` check box if you want to answer an automatic “Yes” to ask an attestation question when the employee clicks **End** at the end of a shift.
6. Click **Save**.

## Adding a Clock Question Group for Attestation

You can add a clock question group for attestation.

Follow these steps to set up a question group for attestation.

1. From the **Configuration** tab, select **Clock Questions** and then **Question Groups**.  
The Clock Question Group form displays.

Group Tag	Level Code	Level Description	Action
0000 California	0000	Administration	<input checked="" type="checkbox"/>
Level 1000	1000	Finance	<input checked="" type="checkbox"/>

2. Click **Add New Clock Question Group** on the task bar to create a new question group.  
The New Clock Question Group form displays.

3. In the **Group Tag** field, enter a name for the group.
4. In the **Active** check box, check if the question group is active.
5. In the **Level Codes** drop down menu, leave as **Yes** if you want the employee to pick form codes or select a preset code.
6. Click **Add New Clock Question**.

The New Clock Question Group Detail form displays.

7. In the **Clock Question** field, enter the question text.
8. In the **Active** check box, check if the question is active.
9. Click **Save**.

You return to the New Clock Question Group form.

10. Click **Save**.

You return to the Clock Questions Group form.

## Adding a Clock Question for Attestation

You can add a clock question for attestation.

You will need a configure Clock Question Group. See [Adding a Clock Question Group](#).

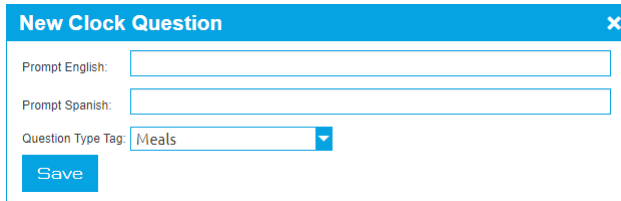
Follow these steps to set up a question group for attestation.

1. From the **Configuration** tab, select **Clock Questions** and then **Questions**.

The Clock Questions form displays.

2. Click **Add New Clock Question** on the task bar to create a new question.

The New Clock Question form displays.



**New Clock Question** x

Prompt English:

Prompt Spanish:

Question Type Tag:

Save

3. In the **Prompt English** field, enter the English question.
4. In the **Prompt Spanish** field, enter the corresponding question in Spanish.
5. In the **Question Type Tag** drop down menu, select the Question Group this question applies to.
6. Click **Save**.

You return to the Clock Question form.

# Chapter 22. TreeRing Time Utilities

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The utility section of TreeRing Time supports administrative and maintenance activities in the application.

## In This Chapter

[Utilities Overview](#) on page 213

This section of the Administrator User Guide will cover aspects of the application that are not part of the core time tracking, or are more specialized functions.

[Viewing the Audit Report](#) on page 214

The audit report provides an information trail of all changed, added, and deleted records reported by date range.

[Automating Reports](#) on page 126

You can automate reports to generate on a schedule.

[Changing Business Rules](#) on page 216

You can make changes to business rules.

[Changing an Employee's Card ID](#) on page 217

You can change an employees Card ID.

[Setting the Punch Match Threshold](#) on page 217

You can define the punch match threshold for in/out, lunch, and break punches.

[Reprocessing Time Records](#) on page 218

You can reprocess Data (ID cards).

[Obtaining TreeRing Time Licenses](#) on page 218

You can get additional TreeRing Time Licenses.

## Utilities Overview

This section of the Administrator User Guide will cover aspects of the application that are not part of the core time tracking, or are more specialized functions.

The Utility section of TreeRing Time supports administrative and maintenance activities in the application. This section of the User Guide will cover aspects of the application that are not part of the core time tracking, or are more specialized functions. Some of these functions discuss technical aspects of the application and do not normally need user intervention. Only the Administrator login role has full access to the **Configuration** tab, with the Payroll Admin login role accessing a portion of the menu.

# Viewing the Audit Report

The audit report provides an information trail of all changed, added, and deleted records reported by date range.

The audit report provides an information trail of all changed, added, and deleted records reported by date range. It includes any edits made to the data through all editing and exceptions forms. The Audit report tracks changes made to the following forms: Edit Time, Duplicates/Overlaps, Missed Punches, and Over 24 Hours.

Follow the instructions below to view the audit report.

1. From the **Reports** tab, select **Administrative** and then the following report types appear:

- **Audit Transactions**
- **Audit Exceptions**
- **Audit Employee Pay Periods**
- **Audit Employee PTO Requests**
- **Audit Employee PTO Banks**
- **Pay Period Approval Audit**
- **Audit Supervisor Signoff w/Hours**

The specific Audit Report Options form displays after taking a few seconds to generate. This is just an example. Each Options form will may have additional options to set.

**Audit Transactions Report Options**

Customized report:

Date Selection:  Pay Period List  Date Range

Pay Period Selection:

Employees Selection:

From:  To:

Supervisors:

Include Secondaries Assigned

Operation From:  Operation To:

Operation:

Punch Type:

2. Select the various options in which you want to limit the outputs of the report.

- **Date Selection**
- **Pay Period selection**
- **Employee Selection**

If you are missing any mandatory fields, you will receive a warning to complete them.

3. Click **Regenerate Report** on the task bar.

4. You can also save this report for future use

- a) Either click the **Save Options** button on the form in or in the **Option** form.
- b) In the **Save Report As** field, enter a name.
- c) Click **Save**.

The custom report will appear in the Report tab to the right of the report type.

# Automating Reports

You can automate reports to generate on a schedule.

The Automate Reports feature can run certain labor reports at a specified time and e-mail these reports to other managers and supervisors automatically. This action can be scheduled to take place as often as many times per day, or as infrequently as once per month or pay period. TreeRing Time's Data Security rules are applied to these reports just as they are in the application to ensure recipients only see the information they're supposed to.

The following reports can be run using the Automate Reports function:

- Approaching OT
- Default Time Sheet
- Detailed Time Sheets
- Employee Time Summary
- Shift Differential Time Sheet
- Daily Report

Follow the instructions below to configure an Automated Report.

**1. From the **Configuration** tab, select **Automate Reports**.**

The Automate Reports form displays.

**2. Click **Add New Configuration Record** on the task bar.**

**3. From the **Report Name** drop down menu, choose the report that you want to run and e-mail automatically.**

**4. From the **Format** drop down menu, select the file format for the report file.**

Currently, only PDF output is supported.

**5. In the **Subject** field type a message to appear in the Subject line of the e-mail message.**

**6. In the **Recipients** box, place a check into the box next to each person that will receive an e-mail message with the report attached.**

For a recipient to be available for selection they must have:

- An e-mail address entered in the Supervisors form.



**Note:** Each person will receive data only for allowed employees, because the report will be generated separately for each selected person so his/her security will be applied.

- A login configured in Login Setup form that has a User ID selected for that manager or supervisor (accessed from the **Security** tab by selecting **User Accounts**).

**7. In the lower box labeled **Scheduling**, select a cycle frequency for this report to be run from the Select Email Cycle drop down menu. There are three options:**

- **Weekly:** Select the weekdays the report will generate and the email will be sent.
- **Monthly:** Select the days of the month the report will generate and the email will be sent.
- **Pay Period:**
  - In the From the **Interval** drop down list box, select the time increment for which this process should happen. drop down menu, select the pay period that will be used for the report generation.
  - In the **Select Pay Period to Use in Report** section: Select if current **Active Pay Period** or **Last Pending Pay Period** should be used to generate the report.
  - Check the days the report will generate and the email will be sent. The amount of available days will be fulfilled according to the pay period duration.

- In the **Run Time Start** field, enter the time of day for the process to first take place. This field is mandatory.
- In the **Run Time End** field, enter the time of day for the process to stop. This field is not mandatory.
- From the **Interval** drop down list box, select the time increment for which this process should happen.

This cycle determines the days that the report will run and the e-mail will be sent. The cycle will repeat as you move through time. Depending on this selection, the appropriate number of days will populate below in the area marked **Select Days During Email Cycle to Send Report**. If Pay Period is chosen and there are multiple pay periods defined in TreeRing Time, then select the correct pay period from the drop down menu that appears (**Active Pay Period** or **Last Pending Pay Period**). Place a check into the box for each day that you would like the report to be e-mailed.

8. In the **Run Time Start** field, enter the time of day for the process to first take place. Enter the time in 24 hour format or append PM to the end of the time if necessary.
9. From the **Interval** drop down list box, select the time increment for which this process should happen. If the report should be e-mailed only once per day then leave this field blank.
10. Click the **Send Now** to send this report on demand.  
Note that the report must first be saved. This can be useful for testing or for running the report at additional times other than those scheduled.
11. Click **Save**.

## Stopping an Automated Report and Halting E-mails

You can stop automated reports and the associated emails.

You need to delete an Automated Report to stop the recipients from receiving e-mails:

1. From the **Configuration** tab, select **Automate Reports**.  
The Automate Reports form displays.
2. Click the link **Delete** to delete the report.

This report will no longer be run by the server and the e-mails will no longer be sent.

## Changing Business Rules

You can make changes to business rules.



**Important:** Do not make any changes to the business rule setup unless instructed to do so by a TreeRing Time technical support. The following documentation is for informational purposes only.

The Business Rule Manager applies the business rules, such as time rounding, overtime rules, automatic lunch deductions, holidays, shift differentials, and so forth, to the time records in the database. Once it is set up and running, it takes time records from a queue and processes them. Every business rule that has been marked “active” in the Business Rule Setup form will be applied to that specific time record and all accompanying punches in the totals table, when it passes through. When the Business Rule Manager has been started, it runs in the background and processes the time records quickly and transparently.



**WARNING:** Do not make any changes to the business rule setup unless instructed to do so by a TreeRing Time technical support. The following documentation is for informational purposes only.

The following instructions explain how to make changes to business rules.

1. From the **Security** tab, select **Companies** and then for the desired company, click the **Edit BRM List**.



**WARNING:** Do not make any changes to the business rule setup unless instructed to do so by a TreeRing Time technical support. The following documentation is for informational purposes only.

- **Rule Name:** This field contains a descriptive name of the business rule.



The BRM Rule List form displays listing each business rule.

2. Click in the **Active** check box beside a rule to make it active.  
A rule is only in effect if it is active.
3. Click **Save and Compile Procedure**.

## Changing an Employee's Card ID

You can change an employees Card ID.

The Employee Card ID is unique to each employee and used to track data throughout the system. The Change Card ID function reassigns the ID number on all employee time records, including historical data. These functions can be useful for two purposes:

- If an employee loses their swipe card and needs a new one. You can assign a new card to that person and change the ID number in TreeRing Time to match that new number. Using this method, it will transfer all of their historical labor information to the new number for a seamless historical record.
- If you have a limited number of swipe cards then when employees leave the company you can reuse the cards. When an employee leaves, you can change their card ID to a number out of the normal range of ID numbers, track this new number in an external spreadsheet or other system, then the swipe card is ready to be reused. Using this method, the historical information of two employees will not intermingle.



**Note:** This function affects all global information, including historical time records.

Follow the instructions below to change a card ID number.

1. From the **Employees** tab, select **Company Members**.  
The Company Member List form displays.
2. Click the link **Edit** for the desired employee.
3. Enter the new Card ID number in the **Card ID** field.
4. Click **Save**.

All of the employee's time records, including their entire work history are now reassigned to the new ID number.

## Setting the Punch Match Threshold

You can define the punch match threshold for in/out, lunch, and break punches.

Configuration Setup defines the punch match threshold for in/out, lunch, and break punches. The Facility Code, used by certain time clock models, is also stored in this form. This enables you to define the point at which a punch is considered outside the normal limit for a day worked, lunch, or break. Punches longer in duration than this threshold amount will not be matched together by TreeRing Time and will be flagged as exception punches. The punch match threshold is indicated in minutes.

Example: Lunch = 90 minutes (1.5 hours) If an employee punches Lunch Leave at the clock and returns to punch Lunch Return 2 hours later, these lunch punches will not be matched by TreeRing Time and will be flagged in the Missed Punches form.

Follow the instructions below to set the punch match threshold.

1. From the **Security** tab, select **Companies**.  
The Companies form displays.
2. Click the link **Edit** for the company you wish to configure.  
The Edit Company form displays.
3. Click in the field for the threshold that you want to set and enter the number in minutes.

**Company Threshold in Minutes:** Displayed in minutes format, this threshold controls the duration of a set of work punches (In and Out punches, Lunch Leave and Return punches, or Break Leave and Return punches) that TreeRing Time will match together. For best results, set this number to a value slightly higher than the standard durations for your company. Any set of punches longer than this duration will not be matched together and will be considered a punch exception.

4. Click **Save**.

## Reprocessing Time Records

You can reprocess Data (ID cards).

This utility is intended for use only when there is a technical problem or a business rule is changed and the time records need to be reprocessed. If there is a technical problem total time, overtime, rounding, etc. will not be accurate, and oftentimes the Pay Type field of the Edit Timesheet form is yellow.



**Note:** This process will not remove certain punch type records such as Autolunch and Holiday.

Follow the instructions below to reprocess Data (ID cards).

1. From the **Security** menu, select **Companies**.  
The Companies from displays.
2. In the row for the desired company, click the link in the far right column **BRM Run BRM**.  
A Confirmation dialog displays.
3. Click **OK**.  
The rules run.

## Obtaining TreeRing Time Licenses

You can get additional TreeRing Time Licenses.

TreeRing Time uses licenses keys for each user. If you have additional employees requiring access, you will need additional license keys.

Follow these steps to obtain additional licenses and update them.

1. From the **Security** tab, select **Licensing**.  
The License form displays.

TreeRing Time  
Licensing Status

Current company DBs count: 1  
Current active employees count: 316  
Current licensed employees count: 100000

If you require a different amount of licensed employees, please fill in the next field and send this information to TreeRing Time by clicking on the "Send license requirement" button. This will send an email to TreeRing Time with all of your information. TreeRing Time will send you back an email with a new license key. Thank you.

New licensed employees count:  [Send license requirement](#)

Copy the license key you received by email from TreeRing Time and click "Update key" to update your licensed employee count.

Update license key:  [Update key](#)

2. After examining the **Current Active Employee Count** and your **Current Licenses Employee Count**, enter in the **New Licensed Employee Count** field the number of employees that need licenses.
3. Click **Send License Requirement**.

A confirmation dialog appears.

**4.** Click **OK**.

An email goes to TreeRing Workforce Solutions asking for additional license requirements.

**5.** TreeRing Workforce Solutions will generate a new license key and email it to the registered System Administrator.

**6.** In the **Update License Key** field, copy and paste the license key you received by email.

**7.** Click **Update Key**.

The Current Licensed Employees Count should now display the requested number.



# Chapter 23. Data Import Functions

This chapter covers how to import data from other systems into TreeRing Time.

## In This Chapter

[Defining a Data Import](#) on page 221

You can define a data import.

[Running an Import](#) on page 222

You can run an import.

## Defining a Data Import

You can define a data import.

Follow these steps to define a data import.

1. From the **Payroll Routines** tab, select **Import**.

The Imports form displays.



The screenshot shows the TreeRing web interface with the 'Imports' form. The form has a table with the following columns: 'Import type' and 'Description'. The table contains several rows of data, including 'TEST', 'PTO - COA', 'Empmp', 'OrgLevelImport', 'Arkery ClockData Import', 'Arkery Import', 'PTOImport', 'CymeltoOutImport', and 'OCNP'. Each row has a 'Date' field on the left and an 'Export' button on the right. The interface also includes a navigation bar at the top and 'Add new record' and 'Refresh' buttons at the bottom of the table.

Date	Import type	Description	Export
Date	Employees	TEST	Export
Date	EmployeePFOBanks	PTO - COA	Export
Date	Employees	Empmp	Export
Date	N_LevelCodes	OrgLevelImport	Export
Date	ClockData	Arkery ClockData Import	Export
Date	ClockData	Arkery Import	Export
Date	EmployeePFOBanks	PTOImport	Export
Date	Employees	CymeltoOutImport	Export
Date	Employees	OCNP	Export

2. Click **Add New Record** to define the new import.

The New Import form displays.

**New Import** [X]

Description:

Import type:

File type:  Delimited  Fixed length

Delimiter:  Field qualifier:

Start import at row:

Special formats

Decimal separator:  ? Date format:  ?

File structure

Field	Required	Position	Field Start Position	Field Length	Value When Empty	Translations	
						Translate	Otherwise assign

Save

### 3. Complete the Import parameters:

- **Description:** Type a description for the import.
- **Import Type:** Use the drop down menu to select an import type.
- **File Type:** Chose Delimited or Fixed Length.
- **Delimiter:** If Delimited, type the delimiter character (comma, semi-colon, etc.)
- **Field Qualifier:** If Delimited, type the field qualifier.
- **Start Import at Row:** Type the row number to start at.
- **Decimal Separator:** Type a decimal separator. Click the ? button to see the allowed formats.
- **Data Format:** Type a date format. Click the ? button to see the allowed formats.
- File Structure: Enter values for **Position**, **Field Start Position**, **Field Length**, **Value when Empty**, and if **Translation** is needed.

### 4. Type Save.

## Running an Import

You can run an import.

Follow these steps to define a data import.

#### 1. From the **Payroll Routines** tab, select **Import**.

The Imports form displays.

The screenshot shows the 'Imports' page in the TreeRing system. At the top, there is a navigation bar with the TreeRing logo and several menu items: Home, Employees, Security, Reports, Dashboard, Configuration, Payroll Functions, eTimeClock, and eTimeClock ID. Below the navigation bar, the page title 'Imports' is displayed. The main content area contains a table with the following columns: 'Add new record', 'Import type', 'Description', and 'Refresh'. The table lists various import types such as 'TEST', 'PTO - ODA', 'EmpImpt', 'OriginalImport', 'Agency ChildData Import', 'Directs Import', 'PTOImport', 'CypressChildImport', and 'OOChE'. Each row has a 'Refresh' link in the rightmost column.

	Import type	Description	
Date	000	Employees	TEST
Date	000	EmployeePTOBanks	PTO - ODA
Date	000	Employees	EmpImpt
Date	000	N_JavaCode	OriginalImport
Date	000	ChildData	Agency ChildData Import
Date	000	ChildData	Directs Import
Date	000	EmployeePTOBanks	PTOImport
Date	000	Employees	CypressChildImport
Date	000	Employees	OOChE

2. In the far right column, for the import you wish to run, click the link **Execute**.  
The Upload File form displays.
3. Click the **Choose File** button to specify the data file you will import.
4. Click **Upload**.





# Chapter 24. Data Export Functions

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TreeRing Time includes stock ASCII text exports of labor data.

## In This Chapter

[Data Export Overview](#) on page 225

You can export data for a variety of reasons to be used in third party applications.

[Defining Exports](#) on page 225

You can define data exports.

[Creating a New Data Source](#) on page 227

You can create a new data source for your exports.

[Running an Export Engine](#) on page 228

You can run your export.

## Data Export Overview

You can export data for a variety of reasons to be used in third party applications.

TreeRing Time includes stock ASCII text exports of labor data. These export files can be manipulated and used for a variety of reasons. Custom exports are available to suit many payroll and human resource needs. This chapter contains information on general data exports only.

The data export procedure should be done before the period end routine.

In addition to the dedicated payroll export function in TreeRing Time, many reports feature a Save As function that allows specific report data to be saved in various data formats such as Microsoft Word or Excel.

## Defining Exports

You can define data exports.

Follow the following steps to define a data export.

1. From the **Payroll Routine** tab, select **Export Engine** and then **Exports Configuration**.  
The Exports form displays.

Code	Export Code	Export Name	Format	Delimiter	Header Required	DataSource	Multiple Records	File Name	Action
DD01	ASAC/2018/000001	1	Corporate Payroll Exp	Delimited Records	-	InfoExportFixed	No	PayrollExport.txt	Back
DD02	ASAC/2018/000002	ASAC	John Sample	Delimited Records	-	InfoExportFixed	No	ASACExport.txt	Back
DD03	ASAC/2018/000003	AC	AA/CA	FixedLength Records	-	InfoExportCodes	No	CodeExport.txt	Back
DD04	ASAC/2018/000004	ADP	ADP Export	Delimited Records	-	InfoExportADP	No	ADPExport.txt	Back
DD05	ASAC/2018/000005	ADP1	ADP Export - 1001 (DU)	Delimited Records	-	InfoExportADP	No	ADP1001.txt	Back
DD06	ASAC/2018/000006	ADP2	ADP 2 File Export	Delimited Records	-	InfoExportADP2	No	ADP2Export.txt	Back
DD07	ASAC/2018/000007	ADP3	ADP3	Delimited Records	-	InfoExportADP3	No	ADP3Export.txt	Back
DD08	ASAC/2018/000008	ADP4	ADP4	Delimited Records	-	InfoExportADP4	No	ADP4Export.txt	Back
DD09	ASAC/2018/000009	ADP5	ADP5	Delimited Records	-	InfoExportADP5	No	ADP5Export.txt	Back
DD10	ASAC/2018/000010	ADP6	ADP6	Delimited Records	-	InfoExportADP6	No	ADP6Export.txt	Back
DD11	ASAC/2018/000011	ADP7	ADP7	Delimited Records	-	InfoExportADP7	No	ADP7Export.txt	Back
DD12	ASAC/2018/000012	ADP8	ADP8	Delimited Records	-	InfoExportADP8	No	ADP8Export.txt	Back
DD13	ASAC/2018/000013	ADP9	ADP9	Delimited Records	-	InfoExportADP9	No	ADP9Export.txt	Back
DD14	ASAC/2018/000014	ADP10	ADP10	Delimited Records	-	InfoExportADP10	No	ADP10Export.txt	Back
DD15	ASAC/2018/000015	ADP11	ADP11	Delimited Records	-	InfoExportADP11	No	ADP11Export.txt	Back
DD16	ASAC/2018/000016	ADP12	ADP12	Delimited Records	-	InfoExportADP12	No	ADP12Export.txt	Back
DD17	ASAC/2018/000017	ADP13	ADP13	Delimited Records	-	InfoExportADP13	No	ADP13Export.txt	Back
DD18	ASAC/2018/000018	ADP14	ADP14	Delimited Records	-	InfoExportADP14	No	ADP14Export.txt	Back
DD19	ASAC/2018/000019	ADP15	ADP15	Delimited Records	-	InfoExportADP15	No	ADP15Export.txt	Back
DD20	ASAC/2018/000020	ADP16	ADP16	Delimited Records	-	InfoExportADP16	No	ADP16Export.txt	Back
DD21	ASAC/2018/000021	ADP17	ADP17	Delimited Records	-	InfoExportADP17	No	ADP17Export.txt	Back
DD22	ASAC/2018/000022	ADP18	ADP18	Delimited Records	-	InfoExportADP18	No	ADP18Export.txt	Back
DD23	ASAC/2018/000023	ADP19	ADP19	Delimited Records	-	InfoExportADP19	No	ADP19Export.txt	Back
DD24	ASAC/2018/000024	ADP20	ADP20	Delimited Records	-	InfoExportADP20	No	ADP20Export.txt	Back

2. Click **Add New Export** to set up a new export.

The New Export form displays.

**New Export**

Code:

Name:

Format: **Delimited Records**

Export Delimiter:

DataSource:

File Name:

Assembly Name:

Custom Configuration:

Header Record Required:

Date Selection:  Pay Period List  Date Range

Columns:

Column Name	Aggregate Function	Export Position	Column Justify	Padding Character	Column Length	StaticValue	Header Value	String Delimiter	Date Time Format	Decimal Format	Order By
<input type="button" value="+ Add New"/>											

3. Complete the following fields.

- **Code:** The code for this export.
- **Name:** Type the name of the export.
- **Format:** Select *Delimited Records*, *Fixed-Type Records*, or *XML*.
- **Export Delimiter:** Type the delimiter (for example, comma, semi-colon).
- **Data Source:** Use the drop down menu to select *ETD*, *PHNC*, *COAIncode*, *NC*, *PBJ*, or *IBADPDS*.
- **File Name:** Type a file name.
- **Custom Configuration:** Check if this is a custom configuration.
- **Assembly Name:** Select the assembly name.
- **Header Record Required:** Check if a header record (column labels) is needed.
- **Date Selection:** Select *Pay Period List* or *Date Range*

a) Click **New** to define a column.

- **Recordset Number:** Use the drop down menu to select one.
- **Column Name:** Use the drop down menu to select one from the data source.
- **Aggregate Function:** Determines if the values should be summed or not; not valid with non-numeric data. Select *None*, *Num*, *Min*, or *Max*.
- **Export Position:** The position of the column relative to other columns; if non specified, the order will be that which is displayed.
- **Column Justify:** The column justification method.
- **Padding Character:** The padding character added to the value to make it a fixed length.

- **Column Length:** The width of the column for the fixed-length field.
- **Static Value:** If there is a static value assigned to the column, regardless of the actual data.
- **Header Value:** The value of the column heading.
- **String Delimiter:** The character used to distinguish between strings, for example, a comma or semi colon.
- **Date Time Format:** The Date Time format for the column (if a date).
- **Decimal Format:** The decimal format for the column (if a number); i.e. 0.00 yields two decimal places, 0 yields none.
- **Order By:** Determines the ordering of the resulting SQL statement for the export.

b) Click **Save**.

You return to the New Export form.

c) Continue to define the columns.

4. Click **Save**.

You return to the Exports form.

## Creating a New Data Source

You can create a new data source for your exports.

Follow these steps to create a new data source used for exports.

1. From the **Payroll Routine** tab, select **Export Engine** and then **DataSources**.

The Data Sources form displays.

Code	Name	Type
DS01	ET02	Function
DS02	Dexer	Function
DS03	Dex	Function
DS04	HIC	Function
DS05	HIC2	Function
DS06	HIC	Function

2. Click **Add New Record** to create a new record.

The New Export Engine DataSource form displays.

Code:

DataSource Name:

Type:

More than one recordset:

Param Name	Sequence	Data Type	Data Length	Prompt For	Display Name
<input type="button" value="Save"/>					

3. Complete the following fields.

- **Code:** Enter the code for the export.
- **Data Source Name:** Enter the Data Source name.
- **Type:** Enter the Type of Data source, for example, SQL, MySQL, Oracle.
- **More than One Record set::** Check if there is more than one record set in the dataset.

4. Click **Validate DS** to validate the data source.

5. Click **Clear DS** to clear the data source from this setup.
6. Click **Save**.

## Running an Export Engine

You can run your export.

Follow these steps to run your export.

1. From the **Payroll Routine** tab, select **Export Engine** and then **Run Export**.

The Run Export form displays.



Export Name:

**Run export**

2. In the **Export Name** field, use the drop down menu to select your previously configure export.
3. Click **Run Export**.

# Appendix A: Technical Specifications

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This appendix provides information on the TreeRing Time Enterprise table descriptions for the company database, clock data table dictionary and specifications, and clock data record type formats.

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The following lists TT field descriptions and definitions.

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The following lists ClockDataT field descriptions and definitions.

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The following table lists ClockdataT record type formats.

## TreeRing Time Database Table Structures

The following is a list of tables and descriptions for the TreeRing Time Database.

<b>Table Name</b>	<b>Description</b>
ArchClockDataT	Data archived from the ClockDataT table at period end
ArchSchEmployeeT	Archived Employee Schedules
ArchTShiftT	
ArchTT	Data archived from the TT table at period end
AttendanceExceptionT	
AttendanceT	Cumulative posting of time worked and time away
AuditClockDataT	Record of old and new edited transactions in the ClockDataT
AuditPTOEmployeeT	
AuditSupervisorSignoff	
AuditT	Record of old and new edited time transaction records
AuditTShiftT	
AutoLunchT	Defines an autolunch policy used for automatically deducting lunch.
ClockAxessBigTemplateT	Stores templates for Axess time clocks with SU fingerprint reader.
ClockAxessTemplateT	Stores templates for Axess time clocks with SU fingerprint reader.
ClockBellSchedT	Contains bell schedules for download to ATS terminals
ClockDataT	Contains data coming from all external collection devices
ClockDeptAssignT	Specific clock location assignment table for department
ClockEmpAssignT	Specific clock location assignment table for employee
ClockJobAssignT	Specific clock location assignment table for job
ClockLevel4AssignT	Specific clock location assignment table for Level 4
ClockLevel5AssignT	Specific clock location assignment table for Level 5
ClockPollT	Contains polling dial up information
ClockPromptT	Assigning data clocks their prompt information

<b>Table Name</b>	<b>Description</b>
ClockRSITemplateT	Storing information for hand punches
CompEmpHisT	
CompPlanT	
DefaultProfT	
DeptCodeT	For setting up department information (home and worked department)
DeviceTypeT	Stores enumeration for device types.
DivisionT	For setting up division information
dtproperties	Contains database version information
EmpCertT	List of Employees' Certifications
EmployeeT	Stores business rule defaults and assignments.
Error_log	Stores error log for match transaction process
eTimeclockT	Profile information for eTimeClock
ExpenseT	Expense entries for NeTime Sheet
ExpenseTypeT	Expense Categories for NeTime Sheet
ExportColumnT	
ExportDataSourceParmT	
ExportDataSourceT	
ExportFormatT	
ExportT	
HolDelayT	
HolGroupDefT	
HolGroupT	Stores holidays by group
HolidayT	Listing of current available holidays
ImportMapT	
ImportTransT	

Table Name	Description
JobCodeT	Stores job information
Level4T	User definable levels for additional data gathering
Level5T	User definable levels for additional data gathering
PaidByT	Paid Expenses for NETime Sheet
ParameterizeT	The information needed to customize several forms (Edit Time, Employee Rules etc)
ParmT	
PayCodeT	Contains payroll codes for Regular time, OT and DT as well as the location of the export file
PayPeriodT	Contains the Start Date, and duration for the Pay period
PayPolicyT	Covers overtime, Saturday, Sunday and minimum time information
PayTypeGroupT	
PayTypeT	Contains pay code information for payroll, HR, pay modifiers etc.
PPRollBackT	
ProdSvcPunchT	Contains data coming from product/service data collection devices
ProductServiceT	Contains descriptions and information about the products and services
PTOApprovalT	
PTOEmployeeHistoryT	
PTOEmployeeT	
PTOMasterT	
PTOPlanT	
PTOTimeOfServiceT	



Table Name	Description
PunchTypeT	Punch types and descriptions. Used mainly for combo box loading.
RateMatrixT	Contains department and job rate information for each separate rate type offered
ReportNameT	
RoundPolicyT	Used for punch rounding
RuleT	Lists and turns business rule processing on and off
ScheduleDayT	Contains the schedule start and end time and day number (used for generating schedules)
ScheduleTransactionsT	Holds schedules to run processing
SchEmployeeT	Schedule template
SGTemplateT	
ShiftGroupT	
ShiftT	Used to setup shifts for shift differential
SPHSupervisorEmailT	
SubReportNameT	
SupervisorT	Contains supervisor names
TimeClockGroupClockAssignmentsT	Stores relationships between validation groups and time clocks.
TimeClockGroupT	Stores time clock groups.
TimeClockGroupTrackingLevelAssignmentsT	Stores relationships between tracking levels and validation groups.
TShiftT	
TT	Transaction table where all transaction data is stored
TTAccruedT	Contains the transactions that need to accrue to the next pay period for OT calculations

Table Name	Description
UFormMasterT	Lists all the forms in the application (needed for form security)
UFormRoleT	Lists the forms that each role can see
UserCarValuesT	Lists the non – employee based filters defined through the parameter screen
UserEmpListT	Lists all the employees that a user id is allowed to see
UserProfileT	Stores profile for each user (dynamic text scheme, data selection, payrate, & billrate)
UserReadWriteT	Stores read/write privileges for each form for a user
UserRightsDeptT	Stores department level security for each user
UserRightsDivT	Stores division level security for each user
UserRightsEmpT	Stores employee level security for each user
UserRightsSuperT	Stores supervisor level security for each user
UsysAppNavigator	Stores application navigation for users or groups
USysAppNavigatorGroup	Stores application navigator groups for main toolbar
UsysDynamicLabel	Stores dynamic text for forms, reports, navigation, and global text
UsysDynamicText	Stores dynamic text for forms, reports, navigation, and global text
ValPlanDetailt	
ValPlanT	
ValTablesT	
VariablesT	

## Totals Table (TT) Dictionary

The following lists TT field descriptions and definitions.

Field Name	SQL Data Type	Length	Description
CardID	varchar	10	Employee Identification number for TreeRing Time
EmployeeName	varchar	50	Last, First MI.
StartTime	datetime	8	Actual Punch In date and time
EndTime	datetime	8	Actual Punch Out date and time
Autolunch	float	8	Minutes of lunch from the Autolunch Business rule or Edit Timesheet form
Punch	smallint	2	Sequence Number from clock upload
PunchType	varchar	2	Record type, identifies the transaction type
PunchClass	tinyint	1	Punch Class is a field indicating the class of punch. This field is only used to communicate with legacy systems.
HomeDivision	varchar	6	Division to which the employee is assigned (code)
HomeDivisionDescript	varchar	30	Home Division name
HomeDepartment	varchar	6	Department to which the employee is assigned (code)
HomeDeptDescript	varchar	30	Home Department name
Department	varchar	20	Department in which the employee worked (code)
DepartmentDescript	varchar	50	Department Name
JobNumber	varchar	20	Job at which the employee worked (code)
JobNumberDescription	varchar	30	Job Name
Level4	varchar	20	Further labor divisions (code)
Level4Description	varchar	30	Level4 name
Level5	varchar	20	Further labor divisions (code)
Level5Description	varchar	30	Level5 name
StartRounded	datetime	8	Rounded In Punch date and time, supplied by rounding rules
EndRounded	datetime	8	Rounded Out Punch date and time, supplied by rounding rules
RegT	float	8	Regular Time, in minutes, for the transaction, supplied by the OT policy
OT	float	8	Over Time, in minutes, for the transaction, supplied by the OT policy
DT	float	8	Double Time, in minutes, for the transaction, supplied by the OT policy
TotalTime	float	8	Total Time, in minutes, on the transaction. It reflects rounded time, if any
Dollars	small-money	4	Monetary amount represented by the record (Only used for PunchTypes T, A and X).

Field Name	SQL Data Type	Length	Description
Quantity	float	8	User enterable count field.
SchedNo	varchar	6	Assigned Schedule number
ShiftGroupDesignator	varchar	20	ShiftG Group Label
ShiftNo	varchar	10	Assigned Shift Number
ShiftNoDescript	varchar	50	ShiftNo name
PayRate	small-money	4	Assigned hourly pay rate
TotalPayDol	small-money	4	Total amount of pay for this transaction - Based on pay rate, overtime, shift differential, Saturday and Sunday premiums, as well as any entered dollar amount in the Dollars field
BillRate	small-money	4	Assigned hourly billing rate
TotalBillDol	small-money	4	Total billing dollars for this transaction - Based on bill rate, over-time, shift differential, Saturday and Sunday premiums, as well as any entered dollar amount in the Dollars field
TotalDol	small-money	4	Reserved for Custom programs
PayType	varchar	6	Describes the transaction
PayTypeDescript	varchar	20	Pay Type Name
ExceptionType	varchar	30	A String containing any exceptions from the scheduled time
OTDescription	varchar	30	Name of the Over Time Policy assigned to the Employee
Notes	varchar	150	Comment field
Counter	int	4	Primary Key -Sequence Number, entered automatically
Status	char	2	Value used by the Denormalization Business rule 2 = apply denor-malization 3 = Denormalized
PayPeriodCode	varchar	2	Pay Period assigned to the employee (code)
PayPeriodDesc	varchar	20	Pay Period Name
LastUpdated	datetime	8	Reserved for future use
OtherID	varchar	50	Alias employee identification code, usually a payroll id
Paid	bit	1	Reserved for future use
AccrueToOT	bit	1	Indicates whether or not the time accrues to over time
TimeType	int	4	Defines the paid and worked status of the transaction
SatPremAmt	money	8	Calculated Saturday premium amount
SunPremAmt	money	8	Calculated Saturday premium amount
RegTComp	float	8	Reserved for future use
OTComp	float	8	Reserved for future use
Premium1	float	8	Reserved for future use
Parentrec	int	4	System use

Field Name	SQL Data Type	Length	Description
Protect	tinyint	1	Indicates
DTComp	float	8	Reserved for future use
StartLocationNo	varchar	80	User defined Individual clock device ID
StartLocationType	Tinyint	1	Class of clock or collection device
StartLocationName	varchar	50	Indicates actual location of the device
EndLocationNo	varchar	80	User defined Individual clock device ID
EndLocationType	Tinyint	1	Class of clock or collection device
EndLocationName	Varchar	50	indicates actual location of the device
Day Group	datetime	8	defines day group for OT and Pay Period calculations
ST	Float		For straight time

# Clock Data Table Dictionary

The following lists ClockDataT field descriptions and definitions.

Column Name	Data Type	Length	Default
ClockID *	char	4	User defined Individual clock device ID - may come from ClockPromptT Table
Punch *	int	(0)	Sequence number from clock upload
PunchType	varchar	2	RecordType designation, identifying the type of data the record holds
PunchClass *	char	1	Punch Class is a field indicating the class of punch: This field is only used to communicate with legacy systems.
CardID	varchar	10	Primary Identification of the employee throughout the system. Should ultimately match to EmployeeT.CardID
Department	varchar	6	Worked Department. This is the department associated with the time or money on the record.
JobNumber	varchar	14	Job associated with the time or money on the record
Level4	varchar	20	Other organizational entity associated with the time or money on the record.
Level5	varchar	20	Other organizational entity associated with the time or money on the record.
TotalTime	float		Time, in minutes, represented by the record (Not used for PunchTypes T, A and X).
Dollars	smallmoney		Monetary amount represented by the record (Only used for PunchTypes T, A and X).
Quantity	real		User entered count field.
Notes	varchar	150	Comment field, may be used by the users or the system.
Status	char	2	This code is used in conjunction with PunchType to direct the various processes applied to records in this table.
Counter	int		Primary Key - Sequence Number, entered automatically
StartTime	smaldatetime		Date and Time, definition variable based on punch type
EndTime	smaldatetime		Date and Time, definition variable based on punch type
PayType	varchar	6	Not currently used.

Column Name	Data Type	Length	Default
DateEntered	datetime		System date, of record creation - entered automatically (getdate()) *Entered by clock devices only.
StartLocationNo	varchar	80	Clock ID number for IN, BREAK LEAVE, and LUNCH LEAVE punch types. Unique number to identify the data collection device.
StartLocation-Type	tinyint		Numeric value representing the data collection device type as assigned by TreeRing Time. 0=time clock, 1=TeleTrak, 2=eTimeClock
EndLocationNo	varchar	80	Clock ID number for OUT, BREAK RETURN, and LUNCH RETURN punch types. Unique number to identify the data collection device.
EndLocationType	tinyint		Numeric value representing the data collection device type as assigned by TreeRing Time. 0=time clock, 1=TeleTrak, 2=eTimeClock

# ClockdataT Record Type Formats

The following table lists ClockdataT record type formats.

- O = Optional
- R = Required
- N = Not entered
- \* This field is used by the system to process the records. It must enter the table as Null

## Punch Type

Table Cell	B	I	O	C	B	BI	BC	BE	LI	LC	LE	AB	H	V	S	P	T	A	X
Punch Type	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R
Punch Class	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Card ID	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R
Department	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Job Number	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Level 4	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Level 5	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Total Time	R	N	N	N	N	N	N	N	N	N	N	N	R	R	R	R	N	N	N
Dollars	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	R	R	R
Quantity	O	N	O	O	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Notes	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O	O
Status*	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
Counter	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R
Start Time	R	R	N	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R	R



**Punch Type**

End Time	N	N	R	R		N	R	R	R		N	R	R	N	N	N		N	N	N	N	N
Pay Type	O	O	O	O		O	O	O	O		O	O	O	O	O	O		O	O	O	O	O
Date Entered	R	R	R	R		R	R	R	R		R	R	R	R	R	R		R	R	R	R	R
Start Location No	O	O	O	O		O	O	O	O		O	O	O	O	O	O		O	O	O	O	O
Start Location Type	O	O	O	O		O	O	O	O		O	O	O	O	O	O		O	O	O	O	O

End Location No	O	O	O	O		O	O	O	O		O	O	O	O	O	O		O	O	O	O	O
End Location Type	O	O	O	O		O	O	O	O		O	O	O	O	O	O		O	O	O	O	O



# Appendix B: Bar Code Information

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Use bar codes to speed up data collection such as an employee identity.

## **In This Appendix**

[Bar Codes Overview](#) on page 244

Scanning a bar code is a means of gathering information quickly and accurately.

[Generating Bar Codes in Microsoft Word](#) on page 246

You can create bar codes with most word processor and spreadsheet applications such as Microsoft Word or Excel.

# Bar Codes Overview

Scanning a bar code is a means of gathering information quickly and accurately.

Scanning a bar code is a means of gathering information quickly and accurately. Many of the TreeRing Time data collection devices have the ability to read bar codes. Many time clocks have integrated readers, and TreeRing Time offers add-on bar code wands to attach to other devices. Using bar codes is oftentimes easier for the employee, since they don't have to memorize code numbers, and it increases data accuracy. Because there is no manual entry, the code number is always read correctly. Bar codes can be used for any labor tracking level from Employee to Level 5. Depending on the data collection device you use, certain limitations may apply with bar codes. Consult the data collection device user manual for exact specifications.

Bar codes are simple to create and easy to print. They are often used for job tracking because new labels can be printed when new jobs are created, and they take advantage of the convenience and accuracy of the bar code reader.

Bar codes can be printed directly on a sheet of paper for scanning with a wand. They can be printed on sticky labels to affix to badges. They can also be printed directly on badges by using a special badge printer.

## Bar Code Specifications

Specifications for the time card reader bar codes.

The following are the specifications for the bar codes.

- The bar code is a 3 of 9 bar code with no Modulus 43 checksum.
- 24 point font size is recommended. The bar code must be no smaller than 24 point size.
- A checksum is used for the TC141 clock software load on certain ZON model clocks only.
- A bar code reader needs to see a quiet zone of white space .25" on each side of the bar code.
- Mobility wands require an extra format character. See [Mobility Bar Codes](#).
- When printing bar code cards or applying bar code labels to cards, the bar code should be located such that it is parallel to one side of the card and the mid-line of the code is .35" from the edge.

## Bar Code Printer Requirements

Printer requirements to print bar codes.

Ideally you should use a laser printer to print bar codes as it will print with the highest clarity and resolution, and produce bar codes that will last longer. Most modern laser printers have sufficient resolution to print legible bar codes. Inkjet printers may suffice but should be tested in your particular environment and with your data collection device. Inkjet printers are not recommended.

## Bar Code Printing Tips

Tips for printing bar codes.

The following are tips for printing bar codes.

- Bar codes printed on plain copy paper are often marginal for readability. You can improve the readability by using high quality laser paper stock. If you intend to use the bar code for repeated reading, it is recommended that you laminate the paper or place the sheet in a protective transparent sleeve to prevent wear.
- Consider the data capture device tolerances before determining the maximum thickness of any bar code card lamination.
- A bar code reader needs to see a quiet zone of white space 0.25" on each side of the bar code.

## Installing the Bar Code Font in Your Operating System

Install bar code font before printing them.

Before the bar codes can be printed, the bar code font must be installed in your operating system. Depending on the version of the operating system, these instructions may differ:



**Note:** If you do not have the TreeRing Time bar code font file, contact TreeRing Time technical support.

1. From the **Start** tab, select **Settings** and then **Control Panel**.
2. Click the **Fonts** icon.
3. From the **File** menu at the top of the window, select **Install New Font**.
4. Navigate to the font file. Select the font **C39P24DmTt** and click **OK**.
5. Exit the Control Panel when the process has finished.

## Generating Bar Codes in Microsoft Word

You can create bar codes with most word processor and spreadsheet applications such as Microsoft Word or Excel.

You can create bar codes with most word processor and spreadsheet applications such as Microsoft Word or Excel. The font named C39P24DmTt can be used to format the standard numbers that you see on your screen into the stripes that make up a bar code.






In some versions of Microsoft Word, surrounding text by asterisks (\*ABC123\*) is a bold format shortcut.

- To remove this option:
  - From the **Tools** menu in Microsoft Word, select **AutoCorrect** then **AutoFormat As You Type**.
  - Use the keyboard shortcut **control-Z** after typing the code and Microsoft Word will undo the bold format.
- Deselect the **\*Bold\*** and **\_italic\_ with real formatting** option.

### Bar Code Chart

Example bar codes.

The following chart illustrates bar codes printed for each of the five labor tracking levels. The length and character format may be limited by your particular data collection device. Consult the data collection device user manual to obtain exact specifications.

Description	Bar Code Font	Length
Employee	*123456* 	1-9 digits for A Series and RSI clocks. 1-6 digits all other clocks.
Department	*123456* 	1-6 digits
Job	*123456ABC* 	up to 13 alphanumeric characters
Level 4 (Work Order)	*12345code* 	up to 20 alphanumeric characters
Level 5 (Task)	*123ABC* 	up to 6 alphanumeric characters

Other bar code information includes:

- Bar Code Font: C39P24dMtT (or '3 of 9' Bar code symbology)

- Font Size: 24 point

The Bar Code Font column in the chart contains the code in a standard font and the same code formatted in 24 point bar code font appearing below it.

When configuring the bar code information for printing, it is often the easiest method to enter the information in a legible, standard font so that the numbers are clear to read. When you are finished entering the information in the document, highlight all of the numbers and format them in the bar code font.





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