



TreeRing Time v8.0
Timekeeper User Guide

Enterprise
Time, Attendance and
Workforce Management

Notices

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Contents

Introduction	7
TreeRing Time Overview	7
Benefits of Tracking Time and Attendance	7
Creating Workflow Roles	9
System Administrator	9
Administrator	10
Payroll Administrator	10
Manager	11
Supervisor	11
Timekeeper	11
Employee	11
Navigation Tips	13
Navigating TreeRing Time	13
The TreeRing Time Window	13
Technical Requirements	15
Dashboards	17
Dashboard Overview	17
Setting Up Your Dashboard	18
Viewing Your Dashboard	19
Filters	21
Filters Overview	21
Personalizing Your Filters	21
Edits and Processes	25
Edits Tab Overview	26
Edits Tab Procedures	26
Missed Punches	26
Completing a Punch	27
Adding a New In Punch	27
Switching an In Punch	28
Adding a Lunch Leave Punch	29
Adding a Break Leave Punch	30
Delete a Missed Punch	30
Producing the Punch Detail Report	31

Printing the Missed Punched Report	31
Duplicate and Overlapping Punches	31
Viewing Punch Detail Data for a Specific Employee	32
Viewing the Duplicates/Overlap Report	32
Deleting Overlap Punches in Bulk	32
Unknown IDs	33
Correcting Unknown IDs Exceptions	33
Adding the Employee	34
Correcting the Employee ID Number	34
Deleting the Unknown ID Punch	34
Over 24 Hours	35
Editing an Over 24 Hour Punch	35
Deleting an Over 24 Hour Punch	35
Printing the Punch Detail Report for a Specific Employee	36
Printing the Over 24 Hours Report	36
Edit Timesheet Form	36
Editing a Timesheet	37
Adding a New Transaction to a Time Sheet	37
Deleting a Transaction From a Time Sheet	38
Assigning Hours	38
Printing From the Edit Timesheet	39
Working with PTO Requests	39
Edit Timesheets Without Signoff	41
Redistributing Hours	42
Clock Location Exceptions	42
Adding a New Clock Location from the Punch Location Form	43
Bulk Transaction Entry Form	43
Editing an Entry After It Has Been Saved	44
Adjust Daylight Saving Time	44
Running Daylight Saving Time Adjustment Automatically	45
Adjusting Transactions for a Change in Daylight Saving Time	46
Creating a Holiday Exemption for an Employee	47
Reports	49
Report Overview	49
Report Navigation	49
Report Description	50
Customizing a Report	53
Deleting a Customized Report	53

Sharing a Customized Report	53
Automating Reports	54
Pay Period End	57
Closing the Pay Period	57
Additional Optional Processes for Users of Advanced Features	58
Import PTO Balances	58
Autogenerating Time Sheets	58
Export to Payroll	59
Running the Pay Period End Routine	59
Scheduling and Attendance	61
Scheduling Overview	61
Setting Up Scheduling	62
Assigning the Schedule to the Employee	62
Automating Schedule Building	63
Changing an Existing Schedule	63
Changing an Employee’s Schedule Temporarily	64
Printing a Employee’s Schedule	65
Schedule-Based Rounding and Exceptions Reporting	66
Defining the Schedule Template	66
Creating a New Schedule Template	67
Editing a Schedule Template	69
Copying a Schedule Template	70
Deleting a Schedule Template	71
Dynamic Scheduling	72
Dynamic Schedules Setup	72
Adding a New Position	72
Adding a New Skill	73
Configure a Schedule Definition	74
Schedule and Attendance Reports	76
Employee Expense System	79
Employee Expense System Overview	79
Working with Expense Types	79
Adding a New Expense Type	79
Deleting an Expense Type	80
Entering Actual Employee Expenses	80
Employee Certification	81
Approval Circuit Overview	81

Configuring an Approval Circuit	82
Setting Up Employee Certification (Administrator Role)	83
Certifying an Employee's Time Sheet (Employee Role)	83
Employee Certification Reports	84
Supervisor Signoff	85
Supervisor Signoff Prerequisites	85
Using the Supervisor Approval Form for Supervisor Signoff	85
Using the Timesheet Tab for Supervisor Signoff	86
Rejecting a Request for Supervisor Signoff	86
Rejecting a Request for Supervisor Signoff in the Timesheet Tab	86
Undoing a Supervisor Signoff	87
Printing the Supervisor Signoff Exception Report	87
Appendix A: Conversion Charts	89
Minute-to-Decimal Conversion Chart	90
Minute-to-Hour Conversion Chart	91

Chapter 1. Introduction

Discusses the product, its benefits, and roles.

In This Chapter

[TreeRing Time Overview](#) on page 7

Overview of TreeRing Time features.

[Benefits of Tracking Time and Attendance](#) on page 7

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

[Creating Workflow Roles](#) on page 9

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

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 13

Navigation overview in TreeRing Time.

[The TreeRing Time Window](#) on page 13

The TreeRing Time Enterprise window elements.


[Technical Requirements](#) on page 15

The TreeRing Time technical requirements.

Navigating TreeRing Time

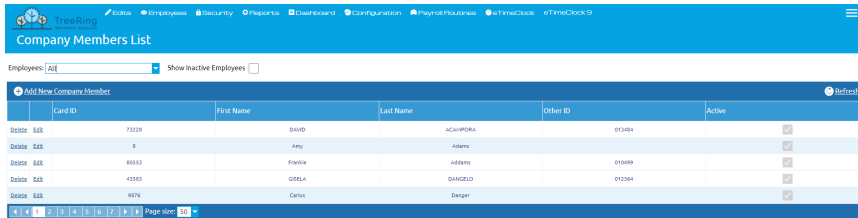
Navigation overview in TreeRing Time.

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.

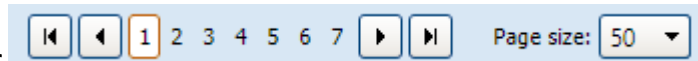
Help

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. Dashboards

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 17

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 18

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

[Viewing Your Dashboard](#) on page 19

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.

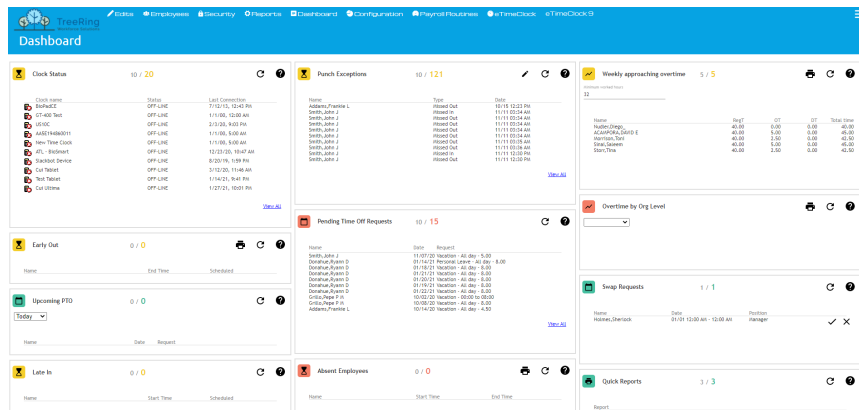
The Dashboard form displays information important to your daily schedule and attendance management. This way you only need focus on the exceptions to your schedule plan. You can quickly see if all scheduled employees are present as schedule, late, early, or forgot to punch in or are missing. You can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

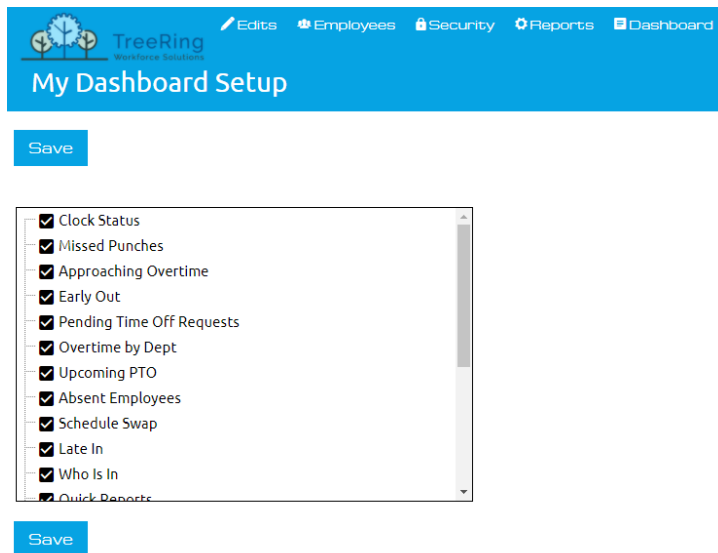
Before you can see data on your dashboard, you must set it up

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 4. 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 21

An overview to the filter settings.

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

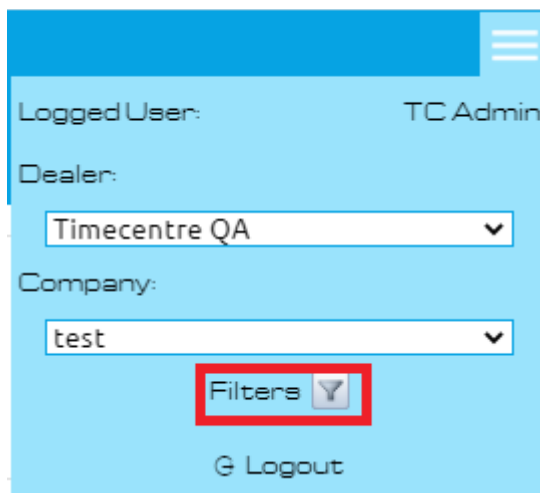
- Available groups are: Divisions, Bushiness Unit, Job, Projects, or Location.
- To select/deselect all departments at once, click the **Check/Uncheck All** button.
- To select a particular department, locate it in the **Managers** list, then click on the department.

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.

3. 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.)



The screenshot shows a light blue user interface. At the top right, there is a blue header bar with a white hamburger menu icon. Below the header, the text "Logged User: TC Admin" is displayed. Underneath, there are two dropdown menus: "Dealer:" with "Timecentre QA" selected, and "Company:" with "test" selected. Below these menus is a button labeled "Filters" with a small downward-pointing triangle icon to its right. This button is highlighted with a red square. At the bottom of the interface, there is a "Logout" button with a circular icon to its left.

4. 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.

Chapter 5. Edits and Processes

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

In This Chapter

[Edits Tab Overview](#) on page 26

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

[Missed Punches](#) on page 26

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

[Duplicate and Overlapping Punches](#) on page 31

Work with Duplicate and Overlapping punches.

[Unknown IDs](#) on page 33

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

[Over 24 Hours](#) on page 35

You can display punches over 24 hours in duration.

[Edit Timesheet Form](#) on page 36

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

[Working with PTO Requests](#) on page 39

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

[Edit Timesheets Without Signoff](#) on page 41

You can do everything that Edit Timesheet can do except for signing off on time.

[Redistributing Hours](#) on page 42

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

[Clock Location Exceptions](#) on page 42

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

[Bulk Transaction Entry Form](#) on page 43

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

[Adjust Daylight Saving Time](#) on page 44

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 47

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	In	Punch Type	Out	Break	Break In	Time Out	Date	In/Out Location
8000	John Doe		I					11/11/2020	08:00 AM
8000	John Doe		O					11/11/2020	03:00 PM
8000	John Doe		LO					11/11/2020	12:00 PM
8000	John Doe		LI					11/11/2020	09:00 AM
8000	John Doe		BO					11/11/2020	03:00 PM
8000	John Doe		BI					11/11/2020	08:00 AM

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.

3. From the drop down list, select the employee who is to receive the new punch.
4. Under **Punch Type**, choose the correct punch type.
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.
8. 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.
9. 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.

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.

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

- 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.

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

- 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.

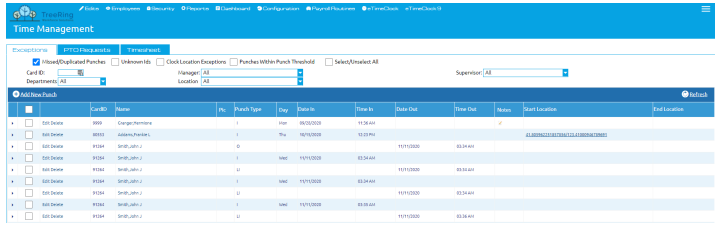
Follow the instructions below to work with duplicate and overlapping punches.



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.



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.

2. 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.
3. Click in any of the rows or the edit link to edit and correct the data.
4. 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.
5. 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.

1. From the **Reports** tab, select **Management**, and then select **Punch Exceptions**.
The Punch Exceptions form displays.
2. 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.

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

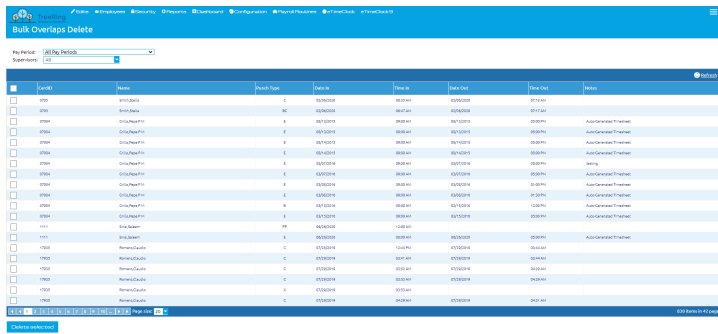
The timesheet prints.

Deleting Overlap Punches in Bulk

You can delete overlap punches in bulk.

Follow the instructions below to delete overlap punches in bulk.

1. 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.

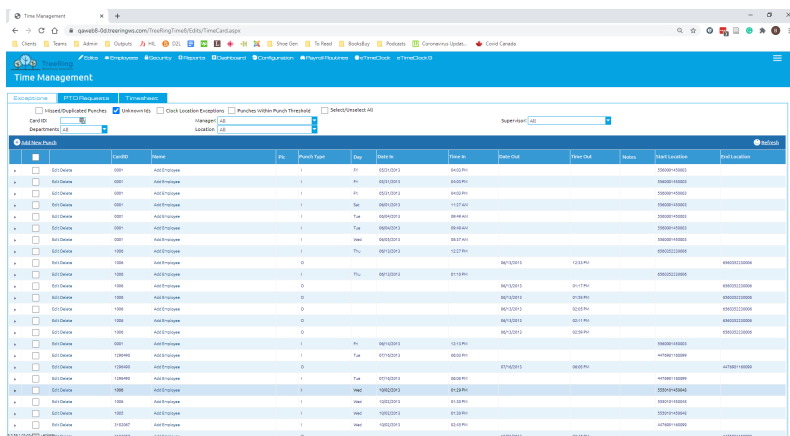
Correcting Unknown IDs Exceptions

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 33.

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.

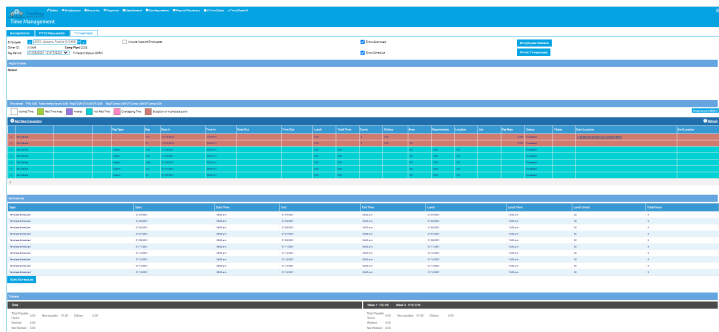
This form is useful for editing existing time records, adding labor tracking data to existing time records, or for creating new time records. For audit trail purposes, when editing punches, the “E” Pay Type is automatically entered when modifying existing punch data. The Audit Report is available to 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
1000	ADMINISTRATOR	Mon	10/15/2020	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert
1000	ADMINISTRATOR	Mon	10/15/2020	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert
1000	ADMINISTRATOR	Mon	10/15/2020	All Day	0.00	0.00	10.00	10:00:00 AM	Approved	Revert
1000	ADMINISTRATOR	Mon	10/15/2020	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.

Edit Timesheets Without Signoff

You can do everything that Edit Timesheet can do except for signing off on time.

This form is essentially the same of Edit Timesheet. You can use it to do everything that Edit Timesheet can do except for signing off on time. Use this time sheet for employees (such as salaried ones) who have access to fill out their own time sheets, but you don’t want them to sign off on their own time. You could also use it when only the Administrator has signoff privileges and not the Supervisors or when you need to make sure that a particular set of Supervisors can’t sign off on employee time.

This is an example of the Edit Timesheet Without Signoff form.

The screenshot displays the 'Edit Timesheet Without Signoff' form in the TreeRing Time Management system. The interface includes a navigation bar at the top with various icons and a header section with the title 'Time Management'. Below the header, there are tabs for 'Exceptions', 'PTO Requests', and 'Timesheets', with 'Timesheets' being the active tab. The main content area shows a form for editing timesheets, including fields for Employee, Other ID, Pay Period, and Timecard Status. There are also checkboxes for 'Show Approvals' and 'Show Schedule'. Below the form, there is a 'Notes' section and a 'Time sheet' summary. The main part of the interface is a large table with columns for Date In, Date Out, Time In, Time Out, Lunch, Total Time, Count, Dollars, Area, Departments, Location, Job, Pay Rate, Status, and Notes. Below this table is a 'Schedule' section with columns for Type, Start, Start Time, End, End Time, and Lunch Time. At the bottom, there is a 'Totals' section with a table showing 'Total Possible Hours', 'Non payable', 'Dollars', and 'Total Possible Hours', 'Non payable', 'Dollars' for two weeks.

See [EditTimesheet](#) for instructions on how to use all of the features available from the Edit Timesheet Without Signoff form.

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.

01/04/2021

Original Transaction

Start Time: 01/04/2021 08:00 End Time: 01/04/2021 17:00
 RegT: 9.00 OT: 0.00
 Lunch Time: 0.00 Total Time: 9.00 DT: 0.00

Redistribute Hours

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 T1

Save Cancel

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

01/04/2021

Original Transaction

Start Time: 01/04/2021 08:00 End Time: 01/04/2021 17:00
 RegT: 9.00 OT: 0.00
 Lunch Time: 0.00 Total Time: 9.00 DT: 0.00

Redistribute Hours

Start Time	RegT	OT	RegT Comp	OT Comp	LunchT	Total	End Time	Area	Departments	Location	Job	Notes
01/04/2021 08:00	9.00	0.00	0.00	0.00	0.00	9.00	01/04/2021 17:00	001 - Mount Vernon Road Infrastructure Improvements	1000 - Finance	100 - 100 - Job 100		Auto-Generated T1

Save Cancel

6. Click in the time fields and adjust the redistribution of hours.
7. Enter in the **Notes** field for any memos regarding the action taken if necessary.
8. 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.

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

The Add New Punch Location dialog box displays.

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

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

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 45

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 46.

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.

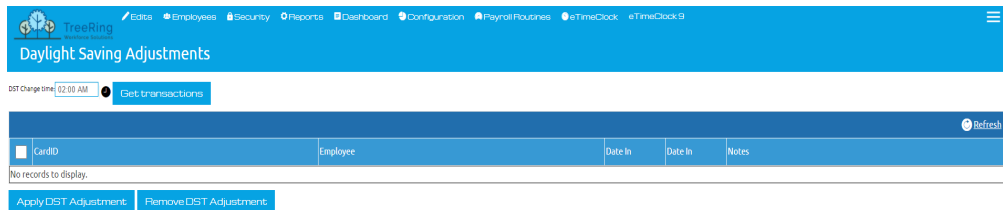
Adjusting Transactions for a Change in Daylight Saving Time

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 45)

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

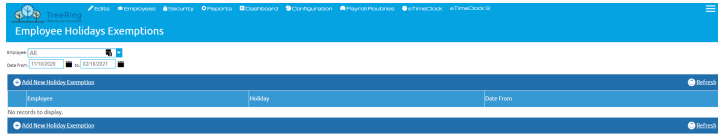
You can create a holiday exemption for an employee that will not be paid holiday rates.

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 6. Reports

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 49

Time and attendance reports, schedules, and summary reports are available from the Reports tab bar.

[Report Description](#) on page 50

The available reports.

[Customizing a Report](#) on page 53

You can customize a report type, save it, and share it with others.

[Deleting a Customized Report](#) on page 53

You can delete a customized report type.

[Sharing a Customized Report](#) on page 53

You can share a customized report type..

[Automating Reports](#) on page 54

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.



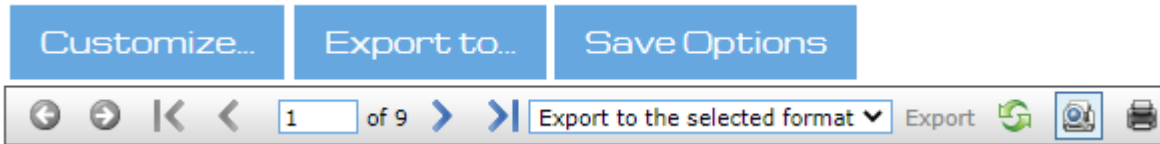
Note: Report access is dependent upon login role, user rights, and security configurations.

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 7. Pay Period End

Processes needing completion at the end of the pay period.

In This Chapter

[Closing the Pay Period](#) on page 57

You need to complete processes to finalize a pay period.

[Additional Optional Processes for Users of Advanced Features](#) on page 58

You may need to run optional advanced processes if using advanced features.

[Export to Payroll](#) on page 59

You export the time data for import into third party applications.

[Running the Pay Period End Routine](#) on page 59

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**.

- Click **Rebuild starting on a specific date** and enter the **Starting Date**.

4. Click **Save**.

Export to Payroll

You export the time data for import into third party applications.

The TreeRing Time payroll export allows for the automated electronic transfer of compiled data to another software application for further processing, HR analysis, and paycheck preparation.

Most likely, exports specific to your company’s requirements have been implemented in your TreeRing Time Enterprise installation.

Running the Pay Period End Routine

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.

The period end routine closes out and archives the open pay period, opens a new payroll period, clears all supervisor and manager signoff forms and, if schedules are in use, builds a new set of schedules. TreeRing Time focuses on the time data within the current pay period, regardless of where those dates fall on the calendar. A delay when closing a pay period presents absolutely no problem to the mechanics of the application or the time data being collected at the time clocks. When the pay period in TreeRing Time is looking at a date range in the past, simply use the Filters function to temporarily view any time data up to the present day.



Note:The Period End Routine should be run as the very last step at the end of each pay period. It is not normally reversible.

1. From the **Payroll Routines** tab, select **Pay Period End**.

The Pay Period End form displays.

Description	Pay Period	Start Date	Number of Period Type	End Date	Actions
<input type="checkbox"/> Close Annulment Brackets	Br	10/26/2019 00:00	14	Biweekly	11/02/2019 23:59 Start
<input type="checkbox"/> Close Annulment Brackets	Br	11/26/2019 00:00	14	Biweekly	12/02/2019 23:59 Start
<input type="checkbox"/> Close Annulment Brackets	Br	11/02/2019 00:00	14	Biweekly	10/26/2019 23:59 Start
<input type="checkbox"/> Close Annulment Brackets	Br	11/06/2019 00:00	14	Biweekly	11/03/2019 23:59 Start
<input type="checkbox"/> Close Annulment Brackets	Br	10/26/2019 00:00	14	Biweekly	11/03/2019 23:59 Start
<input type="checkbox"/> Close Annulment Brackets	Br	10/13/2019 00:00	14	Biweekly	10/26/2019 23:59 Start
<input type="checkbox"/> Close BT	BT	10/14/2019 00:00	10	Semi-monthly	10/15/2019 23:59 Start
<input type="checkbox"/> Close BT	BT	10/01/2019 00:00	10	Semi-monthly	10/15/2019 23:59 Start
<input type="checkbox"/> Close BT	BT	11/14/2019 00:00	10	Semi-monthly	11/15/2019 23:59 Start
<input type="checkbox"/> Close BT	BT	11/01/2019 00:00	10	Semi-monthly	11/15/2019 23:59 Start
<input type="checkbox"/> Close BT	BT	10/14/2019 00:00	10	Semi-monthly	10/15/2019 23:59 Start
<input type="checkbox"/> Close BT	BT	10/01/2019 00:00	10	Semi-monthly	10/15/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp Test	CSA	10/27/2019 00:00	14	Biweekly	11/04/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp Test	CSA	10/13/2019 00:00	14	Biweekly	10/26/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp Test	CSA	11/26/2019 00:00	14	Biweekly	12/02/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp Test	CSA	11/02/2019 00:00	14	Biweekly	11/09/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp Test	CSA	10/19/2019 00:00	14	Biweekly	11/05/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp Test	CSA	10/16/2019 00:00	14	Biweekly	10/26/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp Test	CSA	10/04/2019 00:00	14	Biweekly	10/17/2019 23:59 Start
<input type="checkbox"/> Close City of Antwerp when time goes where data	CS	10/27/2019 00:00	14	Biweekly	11/04/2019 23:59 End

2. For the pay period that you wish to close:
- If just one pay period, click the link **Close** for the desired time period
 - If multiple pay periods, select the desired time periods by checking the boxes and click the **Close Selected** at the bottom of the form.

A dialog box displays confirming the period end processing request.

3. Click **OK**.

The process runs.

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 8. 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

[Scheduling Overview](#) on page 61

The Scheduling module allows you to specify how to track attendance, punctuality, and rounding..

[Setting Up Scheduling](#) on page 62

Setting up a Schedules follows this flow of tasks.

[Defining the Schedule Template](#) on page 66

The schedule template defines the work times and days.

[Dynamic Scheduling](#) on page 72

Manage your dynamic work schedule.

[Schedule and Attendance Reports](#) on page 76

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](#).

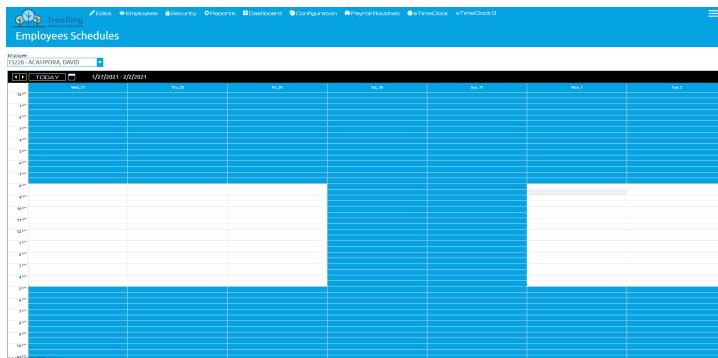
See the sections below for more information including: [Print a Employee’s Schedule](#).

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.

Edit Employee Schedule [X]

Start Time: 02/12/2021 [Calendar] 08:00 AM [Dropdown]

End Time: 02/12/2021 [Calendar] 06:30 PM [Dropdown]

Lunch Start: 11:00 AM [Dropdown]

Minutes: 60

Save

- 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.

Weekly Schedule Report Options [X]

Customized report: None [Dropdown]

From: [Date] [Calendar]

Supervisors: [Dropdown]

Include Secondaries Assigned:

Employees Selection: [Dropdown]

Show Inactive Employees:

Generate Report **Save Options**

- 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.

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.

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: 8am to 5pm

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 72.
2. Create and Add Skills to the position. See [Adding a New Skill](#) on page 73.
3. Create a Dynamic Schedule for the position. See [Configure a Schedule Definition](#) on page 74.

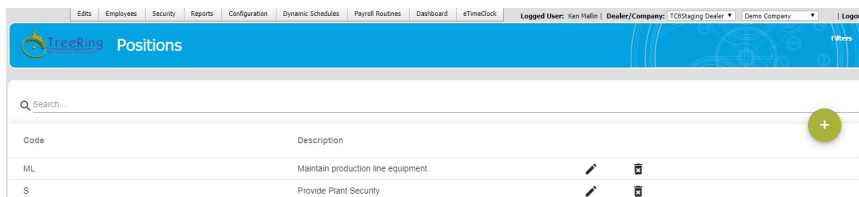
Adding a New Position

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 72.

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

- 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 72 and [Adding a New Skill](#) on page 73.

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.

- 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 9. 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 79

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 10. Employee Certification

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 81

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 85

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 83

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

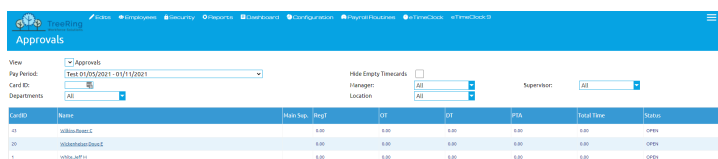
You can sign off on an employee's time using the Supervisor Approval form.

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.

Appendix A: Conversion Charts

In This Appendix

[Minute-to-Decimal Conversion Chart](#) on page 90

Conversion table of minutes to hundredths of an hour.

[Minute-to-Hour Conversion Chart](#) on page 91

Conversion of common blocks of minutes to hours as a decimal equivalent.

Minute-to-Decimal Conversion Chart

Conversion table of minutes to hundredths of an hour.

The following table lists the conversion of minutes to hundredths of an hour.

Minutes	Hundredths	Minutes	Hundredths	Minutes	Hundredths
01	0.02	21	0.35	41	0.68
02	0.03	22	0.37	42	0.70
03	0.05	23	0.38	43	0.72
04	0.07	24	0.40	44	0.73
05	0.08	25	0.42	45	0.75
06	0.10	26	0.43	46	0.77
07	0.12	27	0.45	47	0.78
08	0.13	28	0.47	48	0.80
09	0.15	29	0.48	49	0.82
10	0.17	30	0.50	50	0.83
11	0.18	31	0.52	51	0.85
12	0.20	32	0.53	52	0.87
13	0.22	33	0.55	53	0.88
14	0.23	34	0.57	54	0.90
15	0.25	35	0.58	55	0.92
16	0.27	36	0.60	56	0.93
17	0.28	37	0.62	57	0.95
18	0.30	38	0.63	58	0.97
19	0.32	39	0.65	59	0.98
20	0.33	40	0.67	60	1.0

Minute-to-Hour Conversion Chart

Conversion of common blocks of minutes to hours as a decimal equivalent.

The following table lists the conversion of common blocks of minutes to hours as a decimal equivalent.

Minutes	Hours	Minutes	Hours	Minutes	Hours	Minutes	Hours
15	0.25	450	7.50	885	14.75	1320	22.00
30	0.50	465	7.75	900	15.00	1335	22.25
45	0.75	480	8.00	915	15.25	1350	22.50
60	1.00	495	8.25	930	15.50	1365	22.75
75	1.25	510	8.50	945	15.75	1380	23.00
90	1.50	525	8.75	960	16.00	1395	23.25
105	1.75	540	9.00	975	16.25	1410	23.50
120	2.00	555	9.25	990	16.50	1425	23.75
135	2.25	570	9.50	1005	16.75	1440	24.00
150	2.50	585	9.75	1020	17.00	1455	24.25
165	2.75	600	10.00	1035	17.25	1470	24.50
180	3.00	615	10.25	1050	17.50	1485	24.75
195	3.25	630	10.50	1065	17.75	1500	25.00
210	3.50	645	10.75	1080	18.00	1515	25.25
225	3.75	660	11.00	1095	18.25	1530	25.50
240	4.00	675	11.25	1110	18.50	1545	25.75
255	4.25	690	11.50	1125	18.75	1560	26.00
270	4.50	705	11.75	1140	19.00	1575	26.25
285	4.75	720	12.00	1155	19.25	1590	26.50
300	5.00	735	12.25	1170	19.50	1605	26.75
315	5.25	750	12.50	1185	19.75	1620	27.00
330	5.50	765	12.75	1200	20.00	1635	27.25
345	5.75	780	13.00	1215	20.25	1650	27.50
360	6.00	795	13.25	1230	20.50	1665	27.75

Minutes	Hours	Minutes	Hours	Minutes	Hours	Minutes	Hours
375	6.25	810	13.50	1245	20.75	1680	28.00
390	6.50	825	13.75	1260	21.00	1695	28.25
405	6.75	840	14.00	1275	21.25	1710	28.50
420	7.00	855	14.25	1290	21.50	1725	28.75
435	7.25	870	14.50	1305	21.75	1740	29.00

Index

A

Adding the Employee **34**
Adjust Daylight Saving Time **44**
Administrator **10**
Assigning Hours **38**
Assigning the Schedule to the Employee **62**
Autogenerating Time Sheets **58**
Automatically Running Daylight Saving Time Adjustment **45, 46**
Automating Reports **54**
Automating Schedule Building **63**

B

Benefits of Time and Attendance Tracking **7**
Bulk Transaction Entry Form **43**

C

Change an Employee's Schedule Temporarily **64**
Clock Location Exceptions **42**
Clock Location Tracking **43**
 Adding a New Clock Location from the Punch Location Form **43**
Code Settings **72-74**
 Adding a New Manager **72-74**
Completing a Punch **27**
Conversion Chart **90, 91**
 Minute-to-Decimal **90**
 Minute-to-Hour Conversion Chart **91**
Correct Unknown IDs exceptions. **33**
Correcting the Employee ID Number **34**

D

Dashboard **17-19**
 Overview **17**
 Setting Up Your Dashboard **18**
 Viewing Your Dashboard **19**
Deleting the Punch **34**
Duplicate and Overlapping Punches **31**

E

Edit Timesheet **37**
Edit Timesheets Without Signoff **41**
Editing an Entry After It Has Been Saved **44**
Edits Menu Form **36**
Edits Tab Overview **26**
Edits Tab Procedures **26**
Employee **11**
Employee Certification **81-84**

Certifying an Employee's Time Sheet (Employee Role) **83**
Configuring an Approval Circuit **82**
 Overview **81**
 Reports **84**
 Setting Up Employee Certification (Administrator Role) **83**
Employee Expense System **79, 80**
 Adding a New Expense Type **79**
 Deleting a New Expense Type **80**
 Entering Actual Employee Expenses **80**
 Overview **79**
 Working with Expense Types **79**

F

Filters **21**
 Overview **21**
 Session Filters Setting **21**

H

Holidays **47**
 Creating a Holiday Exemption for an Employee **47**

I

Import **58**
 PTO Balances **58**

M

Manager **11**
Minimum Technical Requirements **15**
Minute-to-Decimal Conversion Chart **90**
Minute-to-Hour Conversion Chart **91**
Missed Punches **26**

N

Navigating TreeRing Time Enterprise **13**
Navigating TreeRing Time Enterprise Window **13**

O

Over 24 Hours **35**

P

Paid Time Off Request **39**
 Working with PTO Requests using the Time Sheet **39**
Pay Period **57-59**
 Additional Optional Processes for Users of Advanced Features **58**
 Closing the Pay Period **57**
 Export to Payroll **59**
 Running the Pay Period End Routine **59**

Payroll Administrator **10**
Printing From the Edit Timesheet **39**
Printing the Over 24 Hours Report **36**
Printing the Supervisor Signoff Exception Report **87**
PTO **58**
 Import Time Balances **58**
Punches **27-32, 35, 36**
 Adding a Break Leave Punch **30**
 Adding a Lunch Leave Punch **29**
 Adding a New In Punch **27**
 Delete a Punch **30**
 Deleting an Over 24 Hour Punch **35**
 Deleting Overlap Punches in Bulk **32**
 Duplicate and Overlapping Punches Report **32**
 Editing a Punch **35**
 Printing the Missed Punched Report **31**
 Printing the Punch Detail Report **36**
 Punch Detail Report **31**
 Switching an In Punch **28**
 Viewing Punch Detail Data for a Specific Employee **32**

R

Redistribute Hours **42**
Report Description **50**
Reports **49, 53**
 Customizing a Report **53**
 Deleting a Customized Report **53**
 Navigation **49**
 Overview **49**
 Sharing a Customized Report **53**

S

Scheduling **61-63, 65-67, 69-71, 76**
 Changing an Existing Schedule **63**
 Copy a Schedule Template **70**
 Creating a New Schedule Template **67**
 Defining the Schedule Template **66**
 Delete a Schedule Template **71**
 Editing a Schedule Template **69**
 Overview **61**
 Print a Employee's Schedule **65**
 Schedule and Attendance Reports **76**
 Schedule-Based Rounding and Exceptions Reporting **66**
 Setting Up **62**
Supervisor **11**
Supervisor Code **72-74**
 Adding a New Manager **72-74**
Supervisor Signoff **85, 86**
 Prerequisites **85**
 Reject Employee Request for **86**
 Reject Using the Timesheet Tab **86**
 Using the Edit Timesheet Form **86**
 Using the Supervisor Signoff Form **85**
System Administrator **9**

T

Time and Attendance Tracking Benefits **7**
TimeCentre Enterprise Overview **7**
Timekeeper **11**
TimeSheets **58**
 Autogenerating Time Sheets **58**
Transactions **37, 38**
 Adding a New Transaction to a Time Sheet **37**
 Deleting a Transaction From a Time Sheet **38**

U

Undoing a Supervisor Signoff **87**
Unknown IDs **33**

W

Workflow Roles **9**