

TreeRing
Workforce Solutions

TreeRing Time[®] Updated Pages

Enterprise
Time, Attendance and
Workforce Management

September 28, 2024

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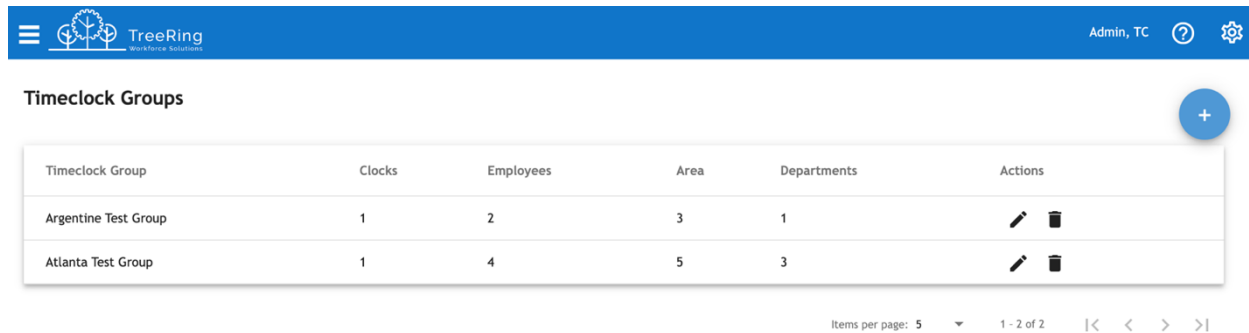
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TimeClock Groups

TimeClock Groups organize groups of employees by time clocks.

TimeClock groups allow setup of groups of employees and organizational level codes so only a subset are sent to the associated clocks. This makes it easier to manage the clocks.

> Configuration > TimeClock > TimeClock Groups



Timeclock Group	Clocks	Employees	Area	Departments	Actions
Argentine Test Group	1	2	3	1	 
Atlanta Test Group	1	4	5	3	 

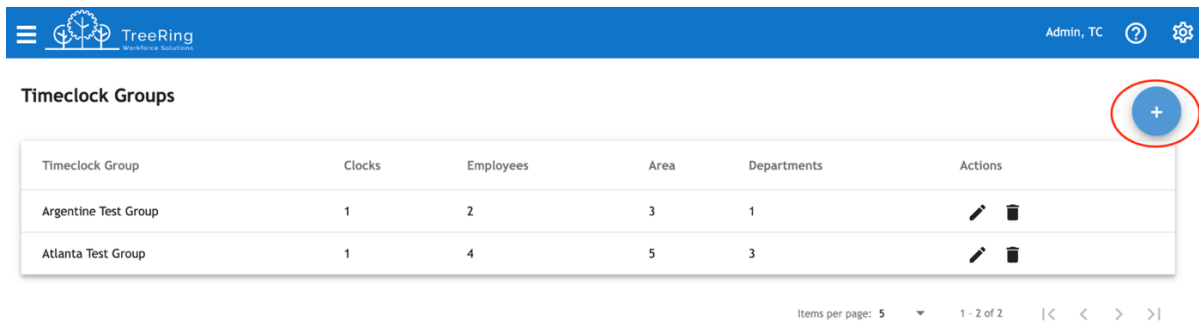
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Adding a TimeClock Group

You can add a TimeClock Group to be associated with a time clock.

Follow these steps to add a TimeClock Group.

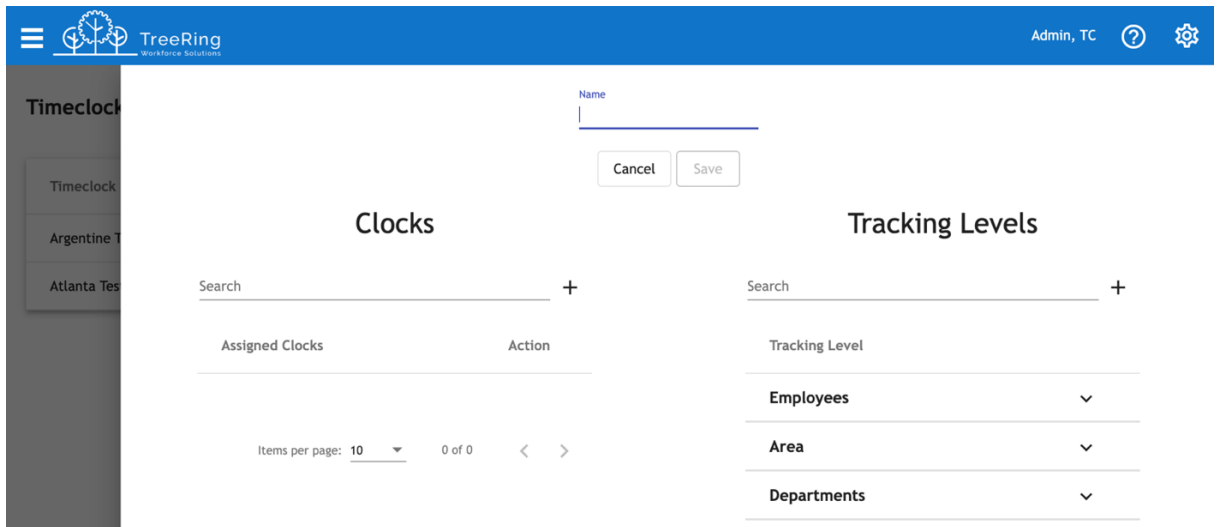
1. From the **Configuration** tab, select **Timeclock**, and then select **TimeClock Groups**. The TimeClocks Group form displays.



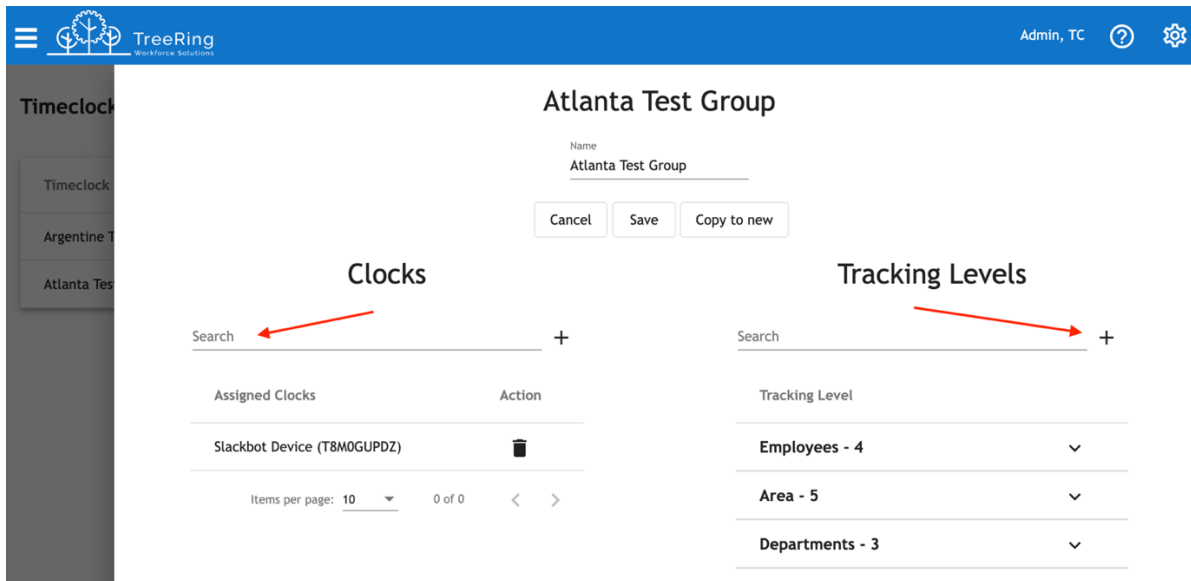
Timeclock Group	Clocks	Employees	Area	Departments	Actions
Argentine Test Group	1	2	3	1	 
Atlanta Test Group	1	4	5	3	 

Items per page: 5 | 1 - 2 of 2 | < > >|

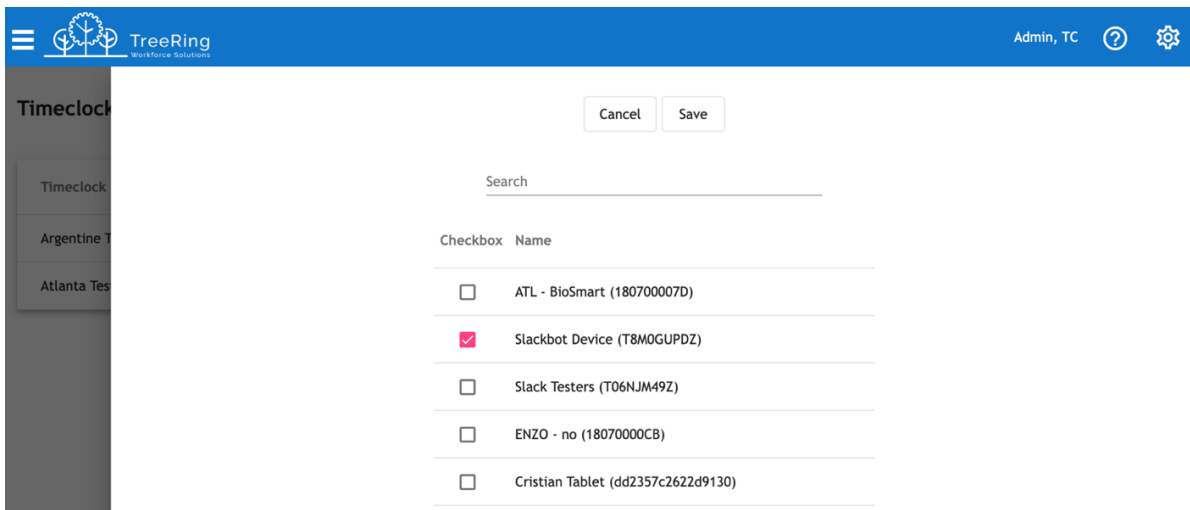
2. Click plus button to add a new TimeClock Group.



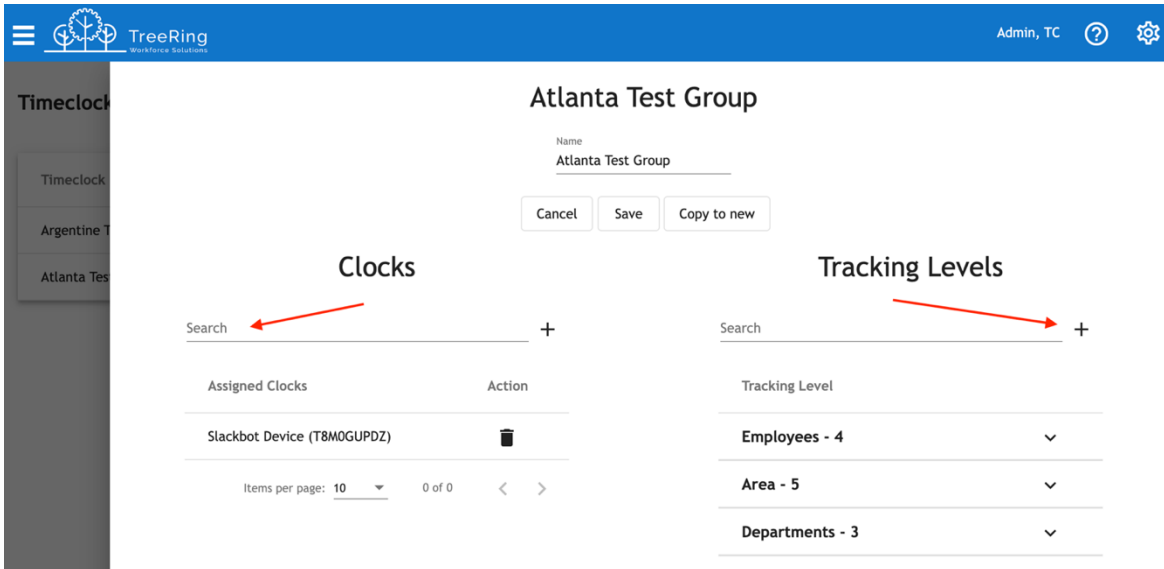
3. Enter a name for this TimeClock Group
4. Click on plus to see available clocks



5. From the **Available Clocks** section, check the check box for the desired clock.



6. Click the plus to see available **Tracking Levels**.



7. For each category listed in the **Available Tracking Levels**, check those that you wish to move to the **Assigned Tracking Levels**.

8. Click **Save**.

The TimeClock Group appears in the TimeClock Groups section.

Deleting a TimeClock Group

You can delete a TimeClock Group so that it is no longer associated with a time clock.

1. From the **Configuration** tab, select **Timeclock**, and then select **TimeClock Groups**. The TimeClocks Group form displays.
2. Click trash icon to delete an used TimeClock Group

Timeclock Groups



Timeclock Group	Clocks	Employees	Area	Departments	Actions
Argentine Test Group	1	2	3	1	
Atlanta Test Group	1	4	5	3	

Geofencing Locations

Geofencing allows users to map areas where the software allows Employee Mobile Application operations. This ensures that employees will not perform clock operations from home, on the road to work, or elsewhere.

Note: Individual areas where the software allows clock operations are geofences. Generally, these will be individually mapped locations.

> Configuration > Company Setup > Geofencing Locations

Code	Description	Latitude	Longitude	Allowed Radius		
BS AS	Home location	-34.576648	-58.46862	0.0001 miles		
UK	United Kingdom location	51.72964	0.484685	0 miles		
ATL	Saju's Office	33.9342203	-84.3272247	4 miles		
AVD	Avondal	31.3452801	-82.0748622	100 miles		
223	Buddy	33.4906958	-112.3449411	0.05 miles		
224	Office	33.4659689	-111.9356954	0.02 miles		

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- 1) Search
- 2) Sortable Fields
- 3) Add a new item
- 4) Edit an item
- 5) Delete an item

Follow these steps to add a Geofencing Location.

1. From the **Configuration** tab, select **Company Setup**, and then select **Geofencing Locations**. The list of Geofencing Locations displays.

Pay Types

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

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



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

> Configuration > Company Setup > Pay Types

This is an example of the Pay Types form.

Pay Types

Q Search... ← 1

2 ↓

3 → +

4 ↓ 5 ↓

Punch Type	Pay Type	Description	Time	Standard	Accrue To OT	Map To HR	Map To PayRoll	Is Active	Include In Threshold	Include In Blended	4 ↓	5 ↓
AB	Absent	Absence	4	✓	✗		A	✗	✓	✗	✎	✕
X	Mileage	Mileage	3	✓	✗			✓	✗	✗	✎	
PP	Bereav	Bereavement	2	✗	✗		B	✓	✓	✗	✎	
BC	Break	Break	4	✓	✗			✓	✓	✗	✎	
BE	BE	Break Edited	4	✓	✗			✓	✓	✗	✎	
B	Bulk	Bulk Time	1	✗	✓	CE	CE	✗	✓	✗	✎	
PP	Compt	Comp Time	2	✗	✗		C	✓	✓	✗	✎	

- 1) Search
- 2) Sortable Fields
- 3) Add a new item
- 4) Edit an item
- 5) Delete an item

Setting Up Pay Types

You can set up a pay type.

Follow the instructions below to set up a pay types.



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

1. From the **Configuration** tab, select **Company Setup** and then **Pay Types**. The Pay Types form displays.
2. Click in the **Code** field and enter a code for this pay type.
3. Click in the **Description** field and enter a new description for this pay type, if necessary (up to 20 characters in length). **Punch Type:** The punch type code is dependent on the pay type. Punch type refers to the standard punch type coming in from a data capture device such as a time clock. The Pay Type marked as Standard Punch type is the Pay Type (i.e. Work) that the Punch Type (i.e. C) will default to when it comes over from the clock. Standard punch types are already set up as part of the system installation and they include:

- A = Advance Entry

- AB = Absence Punch
- B = Bulk Time Punch
- BC = Break Complete Punch
- BE = Break Edited Punch
- BI = Break In Punch
- BO = Break Out Punch
- C = Closed Punch
- E = Edited Closed Punch
- H = Holiday Punch
- I = In Punch
- LC = Lunch Deduction Punch
- LE = Lunch Edited Punch
- LI = Lunch Return Punch
- LO = Lunch Out Punch
- O = Out Punch
- PP = Personal Time Paid
- PU = Personal Time Unpaid
- S = Sick Time Punch
- T = Tip Entry
- V = Vacation Punch
- X = Other Entry
- LPC = Lunch Paid Punch
- LPE = Lunch Paid Edited Punch

Pay Types

Search...

Punch Type	Pay Type	Description	Time	Standard	Accrue To OT	Map To HR	Map To PayRoll	Is Active
AB	Absent	Absence	4	✓	✗		A	✗
X	Mileage	Mileage	3	✓	✗			✓
PP	Bereav	Bereavement	2	✗	✗		B	✓
BC	Break	Break	4	✓	✗			✓
BE	BE	Break Edited	4	✓	✗			✓
B	Bulk	Bulk Time	1	✗	✓	CE	CE	✗
PP	Cmpt	Comp Time	2	✗	✗		C	✓
E	Edit	Edited Paid	1	✓	✓	CE		✓

Edit PayType

Cancel Save

Pay Type Code *

Absent

Description

Absence

Punch Type

AB - Absence Punch - 4

Multiplier

OT Multiplier

Map To HR

Pay Types

Search...

Punch Type	Pay Type	Description	Time	Standard	Accrue To OT	Map To HR	Map To PayRoll	Is Active
AB	Absent	Absence	4	✓	✗		A	✗
X	Mileage	Mileage	3	✓	✗			✓
PP	Bereav	Bereavement	2	✗	✗		B	✓
BC	Break	Break	4	✓	✗			✓
BE	BE	Break Edited	4	✓	✗			✓
B	Bulk	Bulk Time	1	✗	✓	CE	CE	✗
PP	Cmpt	Comp Time	2	✗	✗		C	✓
E	Edit	Edited Paid	1	✓	✓	CE		✓

Edit PayType

Cancel Save

Map To HR

Map To Payroll

A

Accrue To OT

Include In Threshold

PT Protect

Include In Blended OT

Standard Punch Type

Is Active

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



Note: If you have questions about this field, do not make any changes without prior approval from you TreeRing Time representative. You can have more than one pay type for each punch type, but only one can be a Standard punch type

Editing Pay Types

You can modify a pay types.

Follow the instructions below to modify a pay types.



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

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

Deleting Pay Type

You can only delete a pay types that is not in use.

Follow the instructions below to delete pay types.



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

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

Auto Lunch

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

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

AutoLunch are assigned to employees in the Auto Lunch form.

> Configuration > Rule Setup > Auto Lunch

This is an example of the Auto Lunch form.

Auto Lunch

Q Search... ← 1

2 ↓

3 → +

Lunch Code	Minimum Time	Lunch Deduction	Lunch Time	Deduct Difference	Deduct Multiple Lunches	Deduct If Punched	4	5	6
asdas	0	0	44	✓	✓	✓	✎	✕	👤
500	0	0	08:31	✓	✓	✓	✎	✕	👤
500a	2	23	14:50	✓	✓	✓	✎	✕	👤
TestAIM	0	0	14	✓	✓	✓	✎	✕	👤
asdas34234	0	0	75654	✓	✕	✓	✎	✕	👤

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- 1) Search
- 2) Sortable Fields
- 3) Add a new item
- 4) Edit an item
- 5) Delete an item
- 6) Assign Employees

Entering a New Lunch Rule

You can enter a new AutoLunch rule.

Follow the instructions below to enter a new lunch rule.

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

The AutoLunch form displays.

Auto Lunch

Q Search... 1

2

3

4 5 6

Lunch Code	Minimum Time	Lunch Deduction	Lunch Time	Deduct Difference	Deduct Multiple Lunches	Deduct If Punched			
asdas	0	0	44	✓	✓	✓			
500	0	0	08:31	✓	✓	✓			
500a	2	23	14:50	✓	✓	✓			
TestAIM	0	0	14	✓	✓	✓			
asdas34234	0	0	75654	✓	✗	✓			

Items per page: 10 1 - 5 of 5 < > >>

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



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

8. Check the **Deduct Multiple Lunches** check box for employees that have multiple meal breaks for longer shifts.
9. Check the **Deduct if Punched** check box to have the automatic lunch deduction taken even if the employee punches out for lunch* at the time clock.
10. Click **Save** on the task bar.

The new lunch rule is added to the list.

Making Changes to a Lunch Rule

You can make changes to an AutoLunch rule.

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

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

The changes are saved to the list.

Deleting a Lunch Rule

You can delete an AutoLunch rule.

Follow the instructions below to delete a lunch rule.

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

Rounding Policies

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

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

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

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



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

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

> Configuration > Rule Setup > Rounding Policies

This is an example of the Rounding Policies form.

Name	Description	Actions
Nearest15	Nearest15	
N6	Nearest 6	
City of Ankeny	City of Annkeny 15 start and end	
johnson	johnson	

- 1) Search
- 2) Sortable Fields
- 3) Add a new item
- 4) Edit an item
- 5) Delete an item
- 6) Assign Employees

Entering a New Rounding Policy

You can enter a new Rounding Policy.

Follow the instructions below to enter a new rounding policy.

1. From the **Configuration** tab, select **Rule Settings** and then **Rounding Policy**. The Rounding Policy form displays.
2. Click **plus button** on the taskbar. The New Rounding Policy form displays.
3. In the **Rounding policy name** field, enter a unique number (up to 20 digits).
4. In the **Policy Description** field, enter a descriptive name (up to fifteen characters) for this rounding policy.

5. Click **OK**.

The Rounding Policies form displays.

6. Specify the rounding rule for each punch type described below.

- **Start:** This rounding will apply to the work starting time only. Click on either forward, nearest or backward and select the number of minutes.
- **End:** This rounding will apply to the work ending time only. Click on either forward, nearest or backward and select the number of minutes.
- **Transfer/Switch:** This rounding will apply to the Switch type punch. The Switch punch is used when an employee presses the special Switch key on a data collection device to change the department or job that they're working on. Click on either forward, nearest or backward and select the number of minutes.
- **Lunch Start:** This rounding will apply to the lunch starting time only. Click on either forward, nearest or backward and select the number of minutes.
- **Lunch End:** This rounding will apply to the lunch ending time only. Click on either forward, nearest or backward and select the number of minutes.
- **Lunch Duration:**

The screenshot shows a software interface for managing rounding policies. On the left, a table titled 'Rounding Policies' lists existing policies. On the right, a form titled 'Create a new Rounding Policy' allows for creating a new policy with various settings.

Name	Description
Nearest15	Nearest15
N6	Nearest 6
City of Ankeny	City of Annkeny 15 start and end
Johnson	Johnson

Create a new Rounding Policy

Cancel Save

Rounding Policy name *

Rounding Policy descriptio...

	Forward	Nearest	Backward	Minutes	Lunch Duration Minutes
Start	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	___	
End	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	___	

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

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

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



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

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

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

Editing a Rounding Policy

You can edit a Rounding Policy.

Follow the instructions below to edit a rounding policy.

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

Deleting a Rounding Policy

You can delete a Rounding Policy.

Follow the instructions below to delete a rounding policy.

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

The Rounding Policy form displays.

2. Click the **Trash icon** for the rounding policy that you want to delete.
3. Click **OK** in the dialog box asking to confirm the deletion. The rounding policy is removed from the

Compensatory Plans

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

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

> Configuration > Rule Setup > Compensatory Plans

This is an example of the Compensatory Plans form

Compensatory Plans

Q Search... ← 1

2 ↓

3 → +

Code	Description	4 ↓	5 ↓	6 ↓
CODE	TESTINGss	✎	🗑	👤
CODE2	TESTING2	✎	🗑	👤
CODE_	TESTING3	✎	🗑	👤
Code Diego	Test Diego	✎	🗑	👤
DAO	DAO test	✎	🗑	👤

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- 1) Search
- 2) Sortable Fields
- 3) Add a new item
- 4) Edit an item
- 5) Delete an item
- 6) Assign Employees



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

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

Entering Compensatory Time History for an Employee

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

1. From the **Configuration** tab, select **Rule Setup** and then **Compensatory Time History**.
2. Click **Add New Record** on the task bar.
A new Compensatory Time History form displays.
3. From the **Employee** drop down menu, select the employee for whom you want to enter comp time history.

The employees listed in are only those that have not yet been assigned a Comp Time Plan in the Employee Rules form.

4. If the employee has already earned and taken comp time, enter these values in the **Earned** and **Taken** fields.
5. Click **Save**.
6. Select another employee from the drop-down menu to continue.

Organizational Levels (Levels Code)

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

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

TreeRing Time offers two ways to gather labor information:

Organizational Levels

CLICK ON THE LEVEL YOU WANT TO GET ITS LEVEL CODES

Level Code	Description	Default Prompt	Is Active	
Level1	Area	Enter Area	✓	
Level2	Departments	Enter Departments	✓	
Level3	Location	Enter Location	✗	
Level4	Job	Enter Job	✗	
Level5	Location Level 5	Enter Location	✗	
Level6	Cost	Costr Level 6	✗	
Level7	Level 7 Test	Enter Level 7	✗	
Level8	Comments	Comments	✗	

LEVEL CODES FOR LEVEL 5 - LOCATION LEVEL 5

Q Search...

Level Code	Description	Extra Info	Is Active		
DevDB	Development - DB Design		✓		
DevQA	Development - QA		✓		
DevT	Development - testing		✓		
DevCode	Development Coding		✓		
DevProd	Production		✓		

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- 1) Edit an item
- 2) Add a new item
- 3) Search
- 4) Sortable Fields
- 5) Edit an item
- 6) Delete an item

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

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

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



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

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

Configuring Code Settings

You can use codes to define various levels of detail.

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

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

Importing Code Settings

You can import code settings.

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

Adding a New Level Code

You can add a new level code.

Follow the instructions below to add a new level code.

1. From the **Configuration** tab, select **Company Setup** and then **Organization Level**. The Org Level form displays.

2. Click the sideways black triangle on the far left beside the level of the organization you wish to add the code to (Level 1-8). We have included an example company setup
 - Level 1 - Division: For the most general of tracking.
 - Level 2 - Department: Provide an additional level of detail below division codes.
 - Level 3 - Job: Accurate job tracking helps meet profitability goals. Ensure that labor costs are not exceeding budget as a job moves through your organization. Jobs can be work orders, customers, projects, tasks, or other type of labor information that needs to be tracked. Job codes can be entered when the employee clocks in and can be up to 14 digits.
 - Level 4: Provides an additional user-defined tracking level for labor information. Level 4 would be used for more specific labor tracking information than the Job level.
 - Level 5: Reporting provides an additional user-defined tracking level for labor information. Typically, Level 5 data is more detailed than Level 4 data. Use Level 5 tracking for work orders, customers, projects, tasks, or other type of job information.
 - Level 6
 - Level 7
 - Level 8

The Add New Level Code form displays.

- 3) Click **Add New Org Level** on the task bar. A new line is added to the top of the grid.

A new line is added to the top of the grid.
- 4) Click **Add New Org Level** on the task bar. A new line is added to the top of the grid.
- 5) Click in the **Level Code** column and enter alphanumeric code of up to 6 characters.
- 6) Click in the **Extra Info Column** to add optional information.
- 7) Click **Save** to save your new code.

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

Deleting a Level Code

You can delete a Level code.

Follow the instructions below to delete a level code.



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

1. From the **Configuration** tab, select **Company Setup** and then **Organization Level**. The Org Level form displays.
2. Click the sideways black triangle on the far left beside the level of the organization you wish to add the code to (Level 1-8). The Add New Level Code form displays.
3. Click in the row of the code you want to delete.
4. Click **Delete**.

A dialog box displays asking you to confirm the deletion. If any employee is assigned to this level as a Home level, you will be asked to reassign them.
5. Click **Yes** to confirm the deletion.

The code is removed from the list of codes.

6. Click **Save** to save your changes.

Editing a Level Code

You can edit a level code.

Follow the instructions below to edit an existing level code.

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

Getting Assistance

Contact our Technical Support Department with questions and troubleshooting assistance at **1.855.861.4381 option 2** or **support@treeringws.com**.