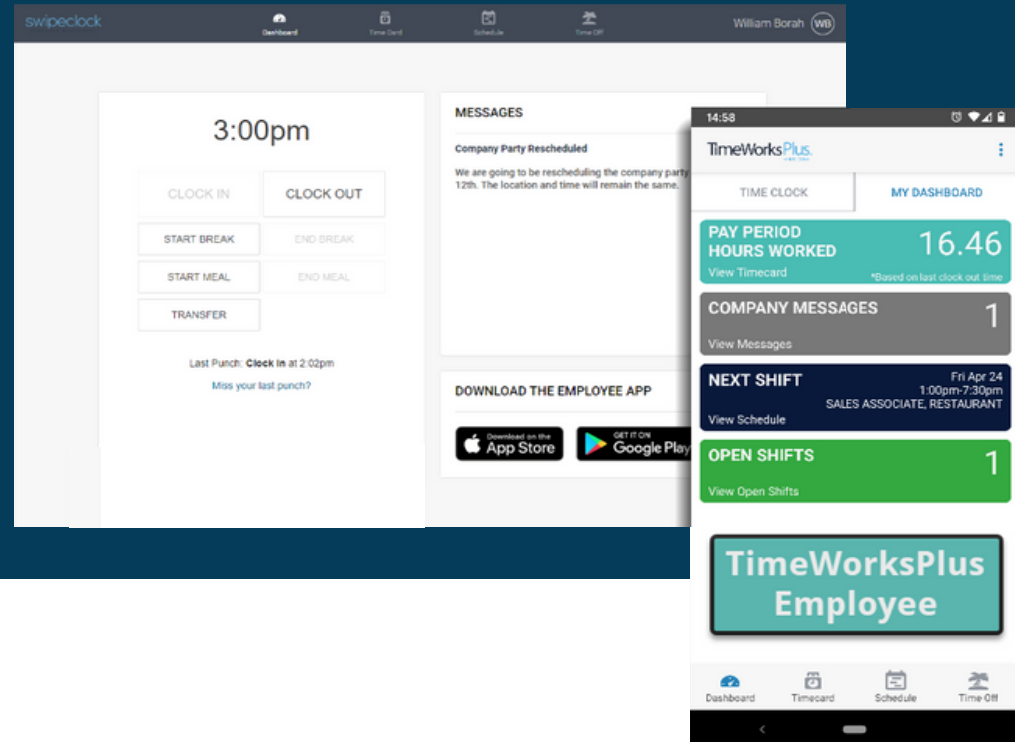


# Admin How-To Training Guide



**EBC**  
PAYROLL • HR SERVICES

## TimeWorks Plus

# Admin How-To Training Guide

SwipeClock simplifies time tracking so you can spend less time processing payroll. As your employees log time on their tablets, mobile phones, computers, or with a WebClock, you'll eliminate messy time sheets by dumping workforce data directly into your payroll processing platform. This course will review the basics of using SwipeClock so you can streamline your payroll process, eliminate errors, and save time.

Section	Topic	Page
Getting Started	Dashboard and Menu Navigation	Page 3
Using SwipeClock	Calendar	Page 6
	Manage Time Off Requests	Page 7
	Employee Set-up	Pages 8-9
	Time Card Views	Pages 10-12
	Supervisor Account Employee Visibility	Pages 13-18
	Time Card Approval Sub-Filtering	Pages 19-21
	Supervisor Permissions	Pages 22-23
Payroll Imports	Setup	Pages 24-29
	Import	Pages 30-33

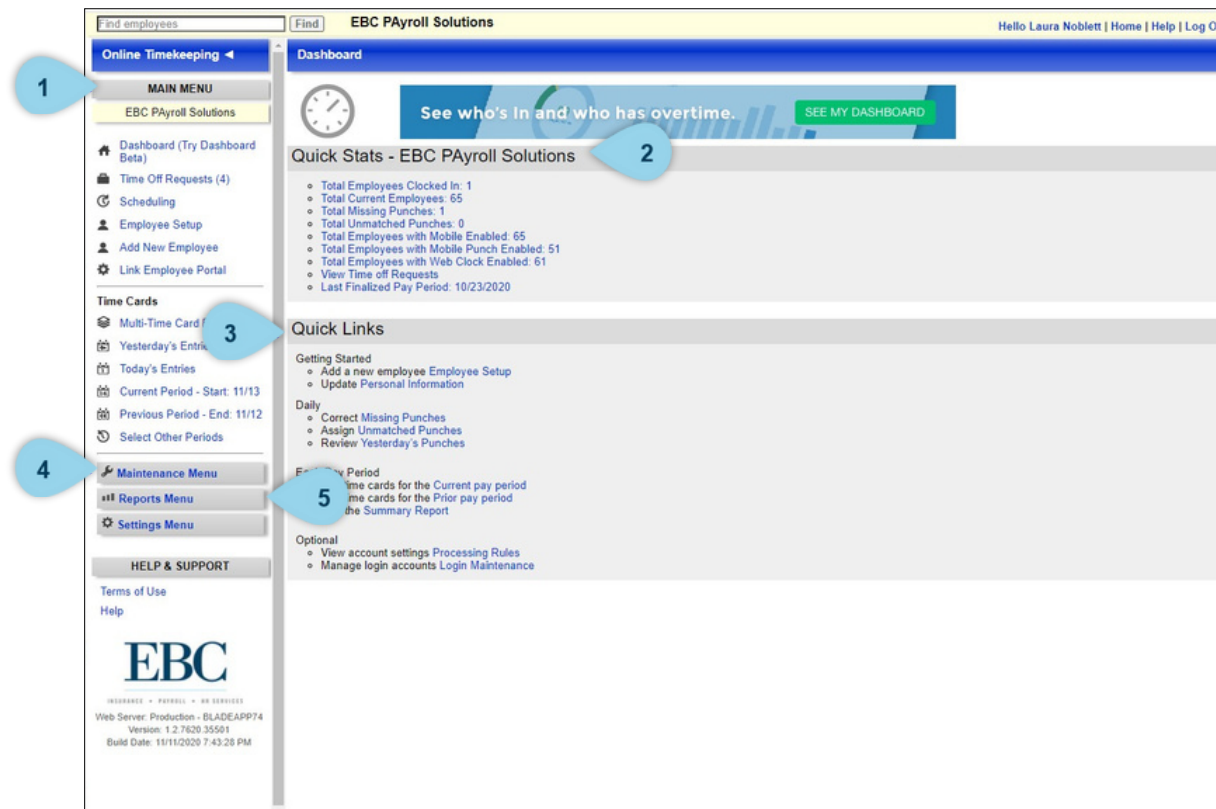
# Getting Started

This section will review the basic navigation elements accessed through the Dashboard and Main Menu.

# Dashboard and Menu Navigation

Each time you log into Swipeclock, you will be directed to your Dashboard.

1. Main Menu includes categories for employee information and setup, time off, and scheduling.
2. Quick Stats gives quick access to your daily functions (e.g. see who is currently punched in).
3. Quick Links gives easier access to items within the main menu.
4. Maintenance Menu is where you will find your Supervisor maintenance.
5. Reports Menu provides a list of defined reports as well as the option to create a custom report.



# Using SwipeClock

This section will review the components of Swipeclock you will access to:

- Review and reply to time off requests
- Set up employee profiles
- View and edit time cards

# Calendar

To see your time off requests in a calendar view, click Time Off requests in the main menu.

1. Click the arrow to expand the calendar section.
2. Approved time off will be displayed with a green check within the day.
3. To show rejected time off, check the box *Show Rejected Requests*.
4. Rejected time off will be displayed with a red X within the day.
5. Click on the month in the upper left corner to toggle to a previous month.
6. Click on the month in the upper right corner to toggle to a future month.

The screenshot shows the 'Time Off Requests' interface in the EBC Payroll Solutions system. The interface includes a sidebar menu on the left, a main content area with a calendar, and a summary section at the bottom.

**Callout 1:** Points to the 'Time Off Requests (2)' link in the sidebar menu.

**Callout 2:** Points to a green checkmark in the calendar grid, indicating an approved time off request.

**Callout 3:** Points to the 'Show Rejected Requests' checkbox, which is currently checked.

**Callout 4:** Points to a red X in the calendar grid, indicating a rejected time off request.

**Callout 5:** Points to the 'October' month header in the calendar.

**Callout 6:** Points to the 'December' month header in the calendar.

The calendar displays a grid for October, November 2020, and December. The grid shows days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates. Green checkmarks are visible on several days in October and November, and red X's are visible on several days in November and December.

The summary section at the bottom shows the following counts:

- Pending (2)
- Approved (1)
- Conditionally Approved (1)
- Rejected (1)

The EBC logo is visible in the bottom left corner of the interface.

# Time Off Requests

Below the calendar is a list of pending, approved, conditionally approved, and rejected time off requests that you can approve or reject. Click on a request to show greater detail about the time off request. Click again to close the detailed view.

1. Clicking the green check will **approve the request**. This can be performed on pending and rejected requests.

a. This request will move to the *Approved* section, displayed in green.


2. Clicking the red x will **reject the request**. This can be performed on pending and approved requests.

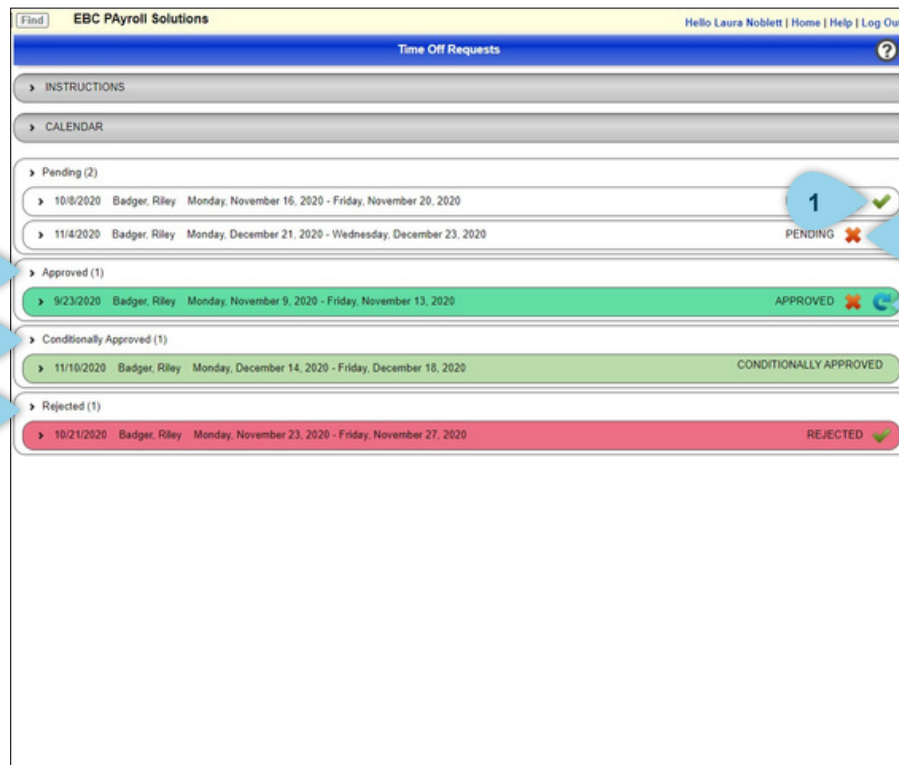
b. This request will move to the *Rejected* section, displayed in red.

3. Clicking the blue refresh icon will return the request to the pending state. This can be performed on approved requests. The approval will be cleared.

4. **Conditionally Approved Time Off Requests:** Pending time off requests that were changed, then conditionally approved by a supervisor and need the employee's review. Employees can still reject the changes made on these records. Conditionally approved time off requests are not applied to the employee's time card unless the employee accepts them in the Employee Self Service portal.

5. A yellow warning icon indicates other employees in the same department who have approved time off on the same day, or during the same time frame. Hovering over the yellow icon will show which employees have approved time off on the same day, or during the same time frame.

6. A blue information icon indicates that a change was made to an approved time off request. Hover over the icon to view details of the  change(s) made.



The screenshot displays the 'Time Off Requests' page in the EBC Payroll Solutions system. The page header includes a search bar, the user's name 'Hello Laura Noblett', and navigation links for Home, Help, and Log Out. The main content area is divided into sections for INSTRUCTIONS, CALENDAR, and a list of requests. The requests are categorized into Pending (2), Approved (1), Conditionally Approved (1), and Rejected (1). Each request entry shows the date, employee name, and the time frame. Callouts 1a, 2, 3, 4, and 2a point to specific icons: a green checkmark, a red X, a blue refresh icon, a yellow warning icon, and a blue information icon, respectively.

Status	Date	Employee	Time Frame	Actions
Pending (2)	10/8/2020	Badger, Riley	Monday, November 16, 2020 - Friday, November 20, 2020	1 (Green Check)
Pending (2)	11/4/2020	Badger, Riley	Monday, December 21, 2020 - Wednesday, December 23, 2020	2 (Red X)
Approved (1)	9/23/2020	Badger, Riley	Monday, November 9, 2020 - Friday, November 13, 2020	3 (Blue Refresh)
Conditionally Approved (1)	11/10/2020	Badger, Riley	Monday, December 14, 2020 - Friday, December 18, 2020	4 (Yellow Warning)
Rejected (1)	10/21/2020	Badger, Riley	Monday, November 23, 2020 - Friday, November 27, 2020	2a (Blue Information)

# Employee Set Up

Through the Employee Setup list, you can add new employees or edit information for one or more employees:

1. Click an employee's name to edit their individual information.
2. Filter the visible employee list by clicking the **Employee List Filter** link.
3. Make changes to multiple employees at a time with the checkboxes on the left of the list then choose **Work with Selected Employees** under the **Employee Setup Options** menu.
4. Right click the column headers to add, remove and filter columns.

The screenshot displays the 'Employee Setup List' interface within the EBC Payroll Solutions application. The interface includes a sidebar menu on the left with options like 'Online Timekeeping', 'MAIN MENU', 'EBC Payroll Solutions', 'Dashboard (Try Dashboard Beta)', 'Time Off Request', 'Scheduling', 'Employee Setup', 'Add New Employee', and 'Link Employee Portal'. The main content area shows a list of employees with columns for Employee Name, ID, Password Status, Supervisor, Department, and Email. A 'Total Employees: 65 (Active: 65, Inactive: 0)' summary is displayed above the list. A 'Filter' dropdown menu is open, showing options like 'All active employees', 'All employees (including inactive)', 'Specific employees', 'All employees in group', and 'Select by criteria'. A 'Work with Selected Employees' button is visible above the list. The interface also includes a 'Find' bar at the top and a 'Hello Laura Noblett | Home | Help | Log Out' header.

1. Click an employee's name to edit their individual information.

2. Filter the visible employee list by clicking the **Employee List Filter** link.

3. Make changes to multiple employees at a time with the checkboxes on the left of the list then choose **Work with Selected Employees** under the **Employee Setup Options** menu.

4. Right click the column headers to add, remove and filter columns.



# Employee Setup

Find EBC Payroll Solutions Hello Laura Noblett | Home | Help | Log Out

### Employee Setup

Identity [Edit](#) 1

Employee Code  
First Name Riley  
Middle Name  
Last Name Badger  
Designation  
Phone 716-674-7900  
E-mail dcarlson@ebcinc.net  
Start Date 2016-03-12  
Separation Date  
Export Block Not blocked  
Web Clock Enabled Yes  
Enforce Schedule Do not enforce  
Mobile Punch Enabled Yes  
Add GPS to Mobile Punch (If Available) Yes  
Enforce geofence(s) No  
Options

Identifiers for punching the clock (card numbers, Web logins, PINs) - NOTE: Only the first three are usable as Web logins. [Edit](#) 2

Logins / Numbers 1001 (rbadger)  
Self-service password Password has been changed by employee

Employee Data [Expand History](#) [Edit](#) 3

Employee Type Full Time  
Title Server  
Department Front  
Location  
Supervisor Dave Carlson 2, David CarlsonSup  
Home 1  
Home 2  
Home 3  
Default Pay Rate \$12.57  
AutoLunch Threshold (hrs)  
AutoLunch Deduct (mins)  
Max Weekly Hours 40  
[Return to list of employees](#)

On employee's page, there are three sections. You must click the edit button within the section header to edit the information within:

1. Identity
2. Identifiers for punching the clock
3. Employee Data: information in this section must match exactly as other descriptions and policies are built

**Note:** If you have clicked to edit a section, you will be able to edit only that section.

### Employee Setup

Identity

Employee Code 1001  
First Name Riley  
Middle Name  
Last Name Badger  
Designation  
Phone 716-674-7900  
E-mail dcarlson@ebcinc.net  
Start Date 2016-03-12  
Separation Date  
Export Block Not blocked  
Web Clock Enabled Yes  
Enforce Schedule Do not enforce  
Mobile Punch Enabled Yes  
Add GPS to Mobile Punch (If Available) Yes  
Enforce geofence(s) No  
Options

Identifiers for punching the clock (card numbers, Web logins, PINs) - NOTE: Only the first three are usable as Web logins. [Edit](#)

Logins / Numbers 1001 (rbadger)  
Self-service password Password has been changed by employee

Employee Data [Expand History](#) [Edit](#)

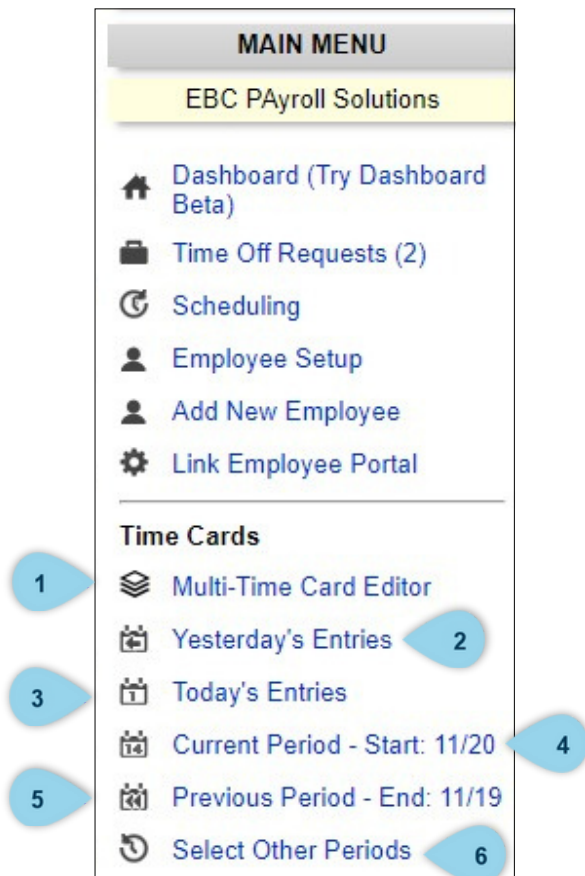
Employee Type Full Time  
Title Server  
Department Front  
Location  
Supervisor Dave Carlson 2, David CarlsonSup  
Home 1  
Home 2  
Home 3  
Default Pay Rate \$12.57  
AutoLunch Threshold (hrs)  
AutoLunch Deduct (mins)  
Max Weekly Hours 40  
[Return to list of employees](#)

1 2 3

Once you edit information within the section, click one of the following options to close out of editing:

1. Save and Remain
2. Save and Exit
3. Cancel

# Time Card Views



In the Main Menu, you will see the category Time Cards. Each of the links listed allows you to view and edit time for a selected employee during the specific pay period.

1. **Multi-Time Card Edit** enables you to make edits and/or create time card entries for employees by day and save all at once.

2. **Yesterday's Entries** shows the punches for the previous day.

3. **Today's Entries** will show the status of punches for the current day: Punches in and out, lunch breaks, location of punches, etc.

4. **Current Period** shows punch data for the current pay period.

5. **Previous Period** shows punch data for the previous pay period.

6. **Select Other Periods** allows you to find and edit a specific pay period

# Time Card Views

1

Multiple Time Cards for 11/20/2020

Change Date: [Calendar Icon] [Date] Employee Search: [Text] Sort List: [Dropdown]

< Previous Day | Next Day >

Time Card Options: [Dropdown] Show Mobile Punches: [Dropdown]

Name	In	In Type	Out	Out Type	Deducted Time	Category	Hours	Amount	Location	COVID 1	Shift	Pay Rate	Wage
Anderson, Emma													
Badger, Riley	8:10:00a	In							100 West	No		\$12.57/hr	\$0.00
Baldwin, Laura	8:00a	In										\$10.00/hr	\$0.00
Becher, Daniela	7:00a	In										\$0.00/hr	\$0.00
Bergman, Tina	8:00a	In										\$0.00/hr	\$0.00
Billeg, Billy B													
Black, Yvonne	8:00a	In										\$0.00/hr	\$0.00
Blow, Joe	8:00a	In										\$0.00/hr	\$0.00
Bonthe, Shirley	7:00a	In										\$0.00/hr	\$0.00
Boyd, Charles	7:00a	In										\$0.00/hr	\$0.00
Brown, Anita	8:00a	In										\$0.00/hr	\$0.00
Brown, Sue	8:00a	In										\$0.00/hr	\$0.00
Brown, Willie													
Call, George	7:00a	In										\$0.00/hr	\$0.00
Carpenter, Chris													
Clark, Sara	7:00a	In										\$0.00/hr	\$0.00
Culver, Tammy													
D'Amico, Jeff	7:00a	In										\$0.00/hr	\$0.00
Duffy, Thomas													
Don, Davis	7:00a	In										\$0.00/hr	\$0.00
Down, Patty	7:00a	In										\$0.00/hr	\$0.00
Foster, Libby													
Fuller, George													
Gonzalez, Lucy													
Good, Roger													
Green, Mary													
Hansen, Roger													
Harger, JR													
Johnson, Sally													

2

3

To add or edit a timecard, select a link from the Time Cards list in the Main Menu.

1. Change to any date by entering or selecting the desired date from the calendar button. This will reload the page and populate the entries for the selected day.

2. Edit time by clicking on the corresponding Edit or Add button on the line.

3. Location of punch can be viewed by clicking the location marker next to the employee's punch. This will open location details related to that punch.

Geofence Punch for Riley Badger

ALL PUNCHES OUT OF FENCE All Fences

Map Satellite

Employee: Riley Badger  
Fence Status: Not Enforced  
Time: 11:20:2020 In @ 11:00 am  
GPS: 43.3079992, -78.8258528  
Accuracy: 4.91m

Map data ©2020 Terms of Use Report a map error

Select All Deselect All

Date	GPS	Punch Time	Punch Type	Punch Location	Latitude	Longitude	Accuracy
Fri, Nov 20th	<input checked="" type="checkbox"/>	11:00 am	In	356 Lake St Wilson, NY 14172, USA	43.308	-78.82585	4.91m

3

The edits will not be applied to time cards until the Save All Changes button is clicked. Changes can also be canceled by navigating away from the page or clicking the Cancel All button.

# Time Card Views

The Multi-Time Card Editor page includes the ability to apply In and Out Punches, Hours, Amounts and Comments to multiple selected employees at once. To do this,

1. Select any date by entering or selecting the desired date from the calendar button. This will reload the page and populate the entries for the selected day.
2. Select the desired employees by checking the box next to their name (or select the top box for all employees).
3. Choose the Bulk Entry for Selected Employees option under the Time Card Options menu, this will display the Set Multiple Time Cards page.
4. In addition to the In and Out Punches, Hours or Amount fields, the applicable Category and Labor Prompt fields will also need to be entered (as applicable) before the edits can be saved.
5. Choose how the hours should be added. To replace all selected entries for the day with the new entry, select the "Replace" option. To add the new entry to existing entries, select the "Add" option (this is the default option). Comments can be added for the entries, which will appear as a comment attached to the entry on the time card.
6. When you click on the "Create Entries" button, the entry on this page will be added to the Multi-Time Card Edit page table.
7. To save all of your edits for this transaction, click on the "Save All Changes" button at the top of the page. This will finalize all of your changes to Employee Time Cards.

Time Cards for 11/20/2020

INSTRUCTIONS

Employee Filter

Time Card Options: Change Date: 11/20/2020 Save All Changes Cancel All

Show Only Missing Punches

Bulk Entry for Selected Employees

	In	Out	Break	Hours	Amount	Category	Location
<input checked="" type="checkbox"/> Badger, Riley	10:00a	12:00p		2.00		Regular	100 West
<input type="checkbox"/> Baldwin, Laura	8:00a	Missing					
<input type="checkbox"/> Beecher, Danielle	7:00a	Missing					
<input type="checkbox"/> Benjamine, Tina	8:00a	Missing					
<input type="checkbox"/> Billings, Billy B						Regular	
<input type="checkbox"/> Block, Yvonne	8:00a	Missing					
<input type="checkbox"/> Blow, Joe	8:00a	Missing					
<input type="checkbox"/> Boothe, Shirley	7:00a	Missing					
<input type="checkbox"/> Broc, Charles	7:00a	Missing					
<input type="checkbox"/> Brower, Anika	8:00a	Missing					
<input type="checkbox"/> Brown, Sue	8:00a	Missing					
<input type="checkbox"/> Brown, Willie						Regular	
<input type="checkbox"/> Call, George	7:00a	Missing					
<input type="checkbox"/> Carpenter, Chris						Regular	
<input type="checkbox"/> Clark, Sara	7:00a	Missing					
<input type="checkbox"/> Culver, Tammy						Regular	

Save All Changes Cancel All

Set Multiple Time Cards

Input the time Card entries to be applied to all selected employees.

In	Out	Break	Hours	Amount	Category	Location
					Regular	

☐ Replace ☒ Add

Comments (Optional, submitted comments are viewable only on the individual time card)

Cancel Create Entries

# SwipeClock - Supervisor Account Employee Visibility

- Once a Supervisor User Account has been created, the next step is to define which employees the supervisor sees.
  - If you are using 'Time Card Approvals,' you can also select which timecards the supervisor can approve.
- From the Maintenance Menu - Select LOGIN MAINTENANCE – Select the Supervisor you want to modify.

# Employee Visibility Options

**The following list explains the options available for configuring the employee visibility:**

- **All active employees** will show all current employees. When viewing historical time cards, supervisors will still see terminated employees during periods in which they were active.
- **All employees including inactive** shows current employees and employees past their separation date.
- **Specific employees** - A checklist of employees will appear where you can handpick the employees the supervisor will view. If you have a large employee list, a dropdown will appear which can filter the list by your Employee Groups.
- **All employees in group(s)** - If you have created any Employee Groups, you can select a group for the supervisor's visibility. Only one group can be assigned to a supervisor.
- **Select by criteria** - This method bases the visible employees on data from Employee Setup. You determine the criteria (such as a department or location) and the system will evaluate the employees and set the visibility.

# Select By Criteria Examples

## **Example: For each employee, include if Department = Operations**

Will only allow the supervisor to view former and current employees who have “Operations” entered in their Department field in Employee Setup.

**SUPERVISOR ACCOUNT EMPLOYEE VISIBILITY**

Which employees is this supervisor allowed to see?  
If you select by group or criteria, the specific employees that can be seen are determined by the employee setup.

☐ All active employees  
☐ All employees (including inactive)  
☐ Specific employees  
☐ All employees in group  
☒ Select by criteria

For each  , include if...

=

[Advanced Custom Selection Help](#)

Configuring a Supervisor to only see employees in the Operations Department



# Select By Criteria Examples

## **Example: For each active employee, include if Supervisor = Tom Reed**

Will only allow the supervisor to view current employees who have “Tom Reed” entered in the Supervisor field of Employee Setup.

**Change Password**

**SUPERVISOR ACCOUNT EMPLOYEE VISIBILITY**

Which employees is this supervisor allowed to see?  
If you select by group or criteria, the specific employees that can

☐ All active employees  
☐ All employees (including inactive)  
☐ Specific employees  
☐ All employees in group  
☒ Select by criteria

For each  , include if...

=

...

[Advanced Custom Selection Help](#)

Will this supervisor login need to view employee time cards when they work in their group, but are not direc  
A common example is an employee covering a shift at an alternate location than their usual assigned "Hom

**Employee Data** [Expand History](#) [Edit](#)

Employee Type	Full Time
Title	Server
Department	Clothing
Location	Hailey
Supervisor	Tom Reed
Home 1	
Home 2	

By using the Supervisor criteria, the system chooses employees based on the value in Employee Setup.



# Select By Criteria Examples

**Example: Filter by Multiple Criteria.** You can click the "Advanced" button, below the filter, to use multiple levels of criteria.

Change Password

### SUPERVISOR ACCOUNT EMPLOYEE VISIBILITY

Which employees is this supervisor allowed to see?  
If you select by group or criteria, the specific employees that can be seen will automatically follow cl

- ☐ All active employees
- ☐ All employees (including inactive)
- ☐ Specific employees
- ☐ All employees in group
- ☒ Select by criteria

For each  , include if...

=

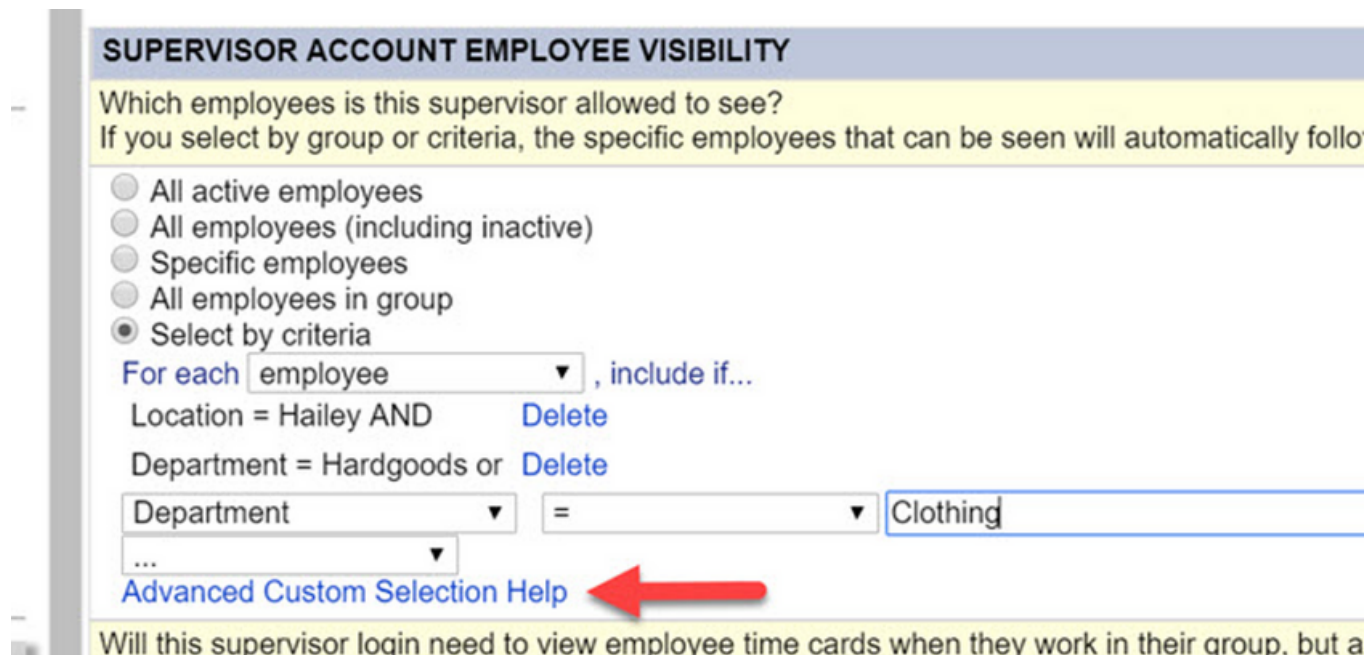
**Advanced** [Advanced Custom Selection Help](#)

Will this supervisor login need to view employee time cards when they work in their group, but are n

The Advanced button allows you to add additional criteria to the filter

# Select By Criteria Examples

In the example pictured here, the filter will look for employees at the Hailey location who work in Hardgoods or Clothing.



**SUPERVISOR ACCOUNT EMPLOYEE VISIBILITY**

Which employees is this supervisor allowed to see?  
If you select by group or criteria, the specific employees that can be seen will automatically follow

- ☐ All active employees
- ☐ All employees (including inactive)
- ☐ Specific employees
- ☐ All employees in group
- ☒ Select by criteria

For each  , include if...

Location = Hailey AND [Delete](#)

Department = Hardgoods or [Delete](#)

=

...

[Advanced Custom Selection Help](#)

Will this supervisor login need to view employee time cards when they work in their group. but a

An example of advanced filtering. The "Advanced Custom Selection Help" provides an explanation of this feature.

# Time Card Approval Sub-Filtering

There is a second set of filters in this section dedicated to creating a subset of employee time cards that the supervisor can approve. If the supervisor has to approve all their visible employees' time cards, leave this filter set to "All Active Employees".

# Sub-Filtering

**SUPERVISOR ACCOUNT EMPLOYEE VISIBILITY**

Which employees is this supervisor allowed to see?  
If you select by group or criteria, the specific employees that can

☐ All active employees  
☐ All employees (including inactive)  
☐ Specific employees  
☐ All employees in group  
☒ Select by criteria

For each  , include if...

Location = Hailey AND [Delete](#)

Department = Hardgoods or [Delete](#)

=

[Advanced Custom Selection Help](#)

Will this supervisor login need to view employee time cards when  
A common example is an employee covering a shift at an alternat

**Alternate employees visible to this login**

☐ This login can view employee time cards if...

=

[Advanced](#)

[Advanced Custom Selection Help](#)

Of the employees this supervisor can see, for which employees is  
cards that can be approved are the same as the time cards this s

☐ No employees  
☒ All active employees  
☐ All employees (including inactive)  
☐ Specific employees  
☐ All employees in group  
☐ Select by criteria

[Update Employee Visibility Settings](#)

The indicated filter is for designated thing time cards the supervisor has to approve.

# Sub-Filtering

## ***Save the Settings***

Once the visibility settings are complete, click **Update Employee Visibility Settings**.



The screenshot shows a software interface with a sidebar on the left. The main content area has a header 'Advanced Custom Selection Help' in blue. Below it is a yellow-highlighted text box containing the text: 'Of the employees this supervisor can see, for which employees is the cards that can be approved are the same as the time cards this supervisor'. Below the text box is a list of radio button options: 'No employees', 'All active employees' (which is selected), 'All employees (including inactive)', 'Specific employees', 'All employees in group', and 'Select by criteria'. At the bottom of the main content area is a button labeled 'Update Employee Visibility Settings'. A large red arrow points from the right towards this button. Below the button is a blue bar with the text 'SUPERVISOR ACCOUNT PERMISSIONS'.

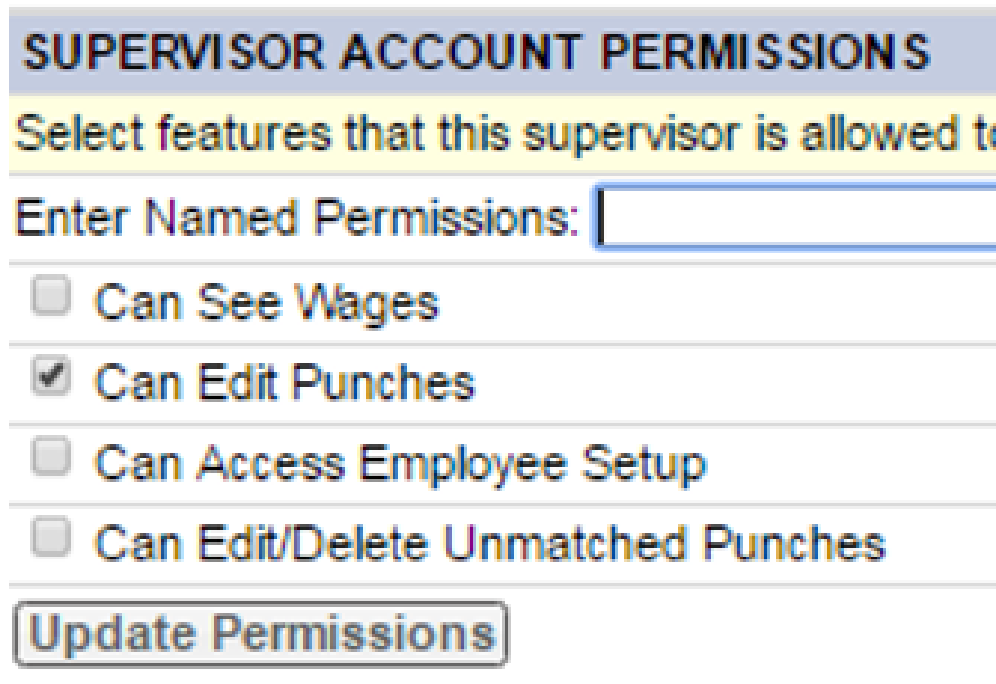
After editing or configuring the visibility settings, you have to click the "Update" button

# Supervisor Permissions

Next, determine which permissions the supervisor will have access to from the list of options in the “Supervisor Account Permissions

# Supervisor Permissions

- **Can See Wages** will show pay rates and wage data (if enabled) for the supervisors selected employees.
- **Can Edit Punches** allows them to alter their employee time cards and, if used, edit their schedules.



The screenshot shows a web form titled "SUPERVISOR ACCOUNT PERMISSIONS". Below the title is a yellow instruction bar that says "Select features that this supervisor is allowed to". Underneath is a text input field labeled "Enter Named Permissions:". Below the input field are four checkboxes with labels: "Can See Wages" (unchecked), "Can Edit Punches" (checked), "Can Access Employee Setup" (unchecked), and "Can Edit/Delete Unmatched Punches" (unchecked). At the bottom of the form is a button labeled "Update Permissions".

Selecting the features a supervisor can use

- **Can Access Employee Setup** will give the supervisor the ability to add new employees or change existing employee information. If unchecked, the supervisor will not be able to view Employee Setup.
- **Can Edit/Delete Unmatched Punches** will allow the supervisor to use the Unmatched Punch feature. These are punches recorded at the clock which cannot be associated with any employee in the timekeeping system. This generally applies only to system's using wall mounted clocks.

**Click Update Permissions to save the settings.**

# Payroll Imports

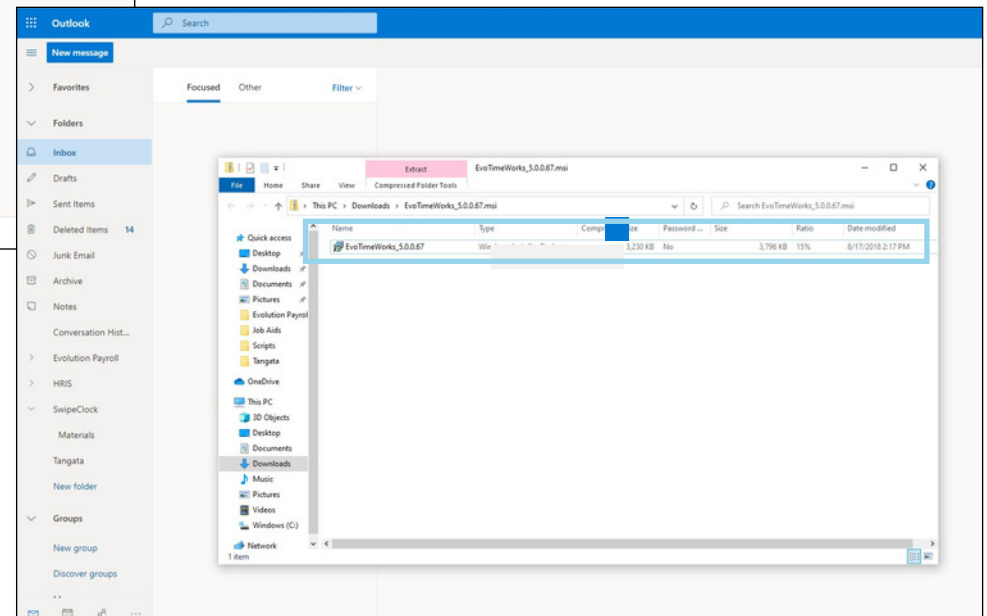
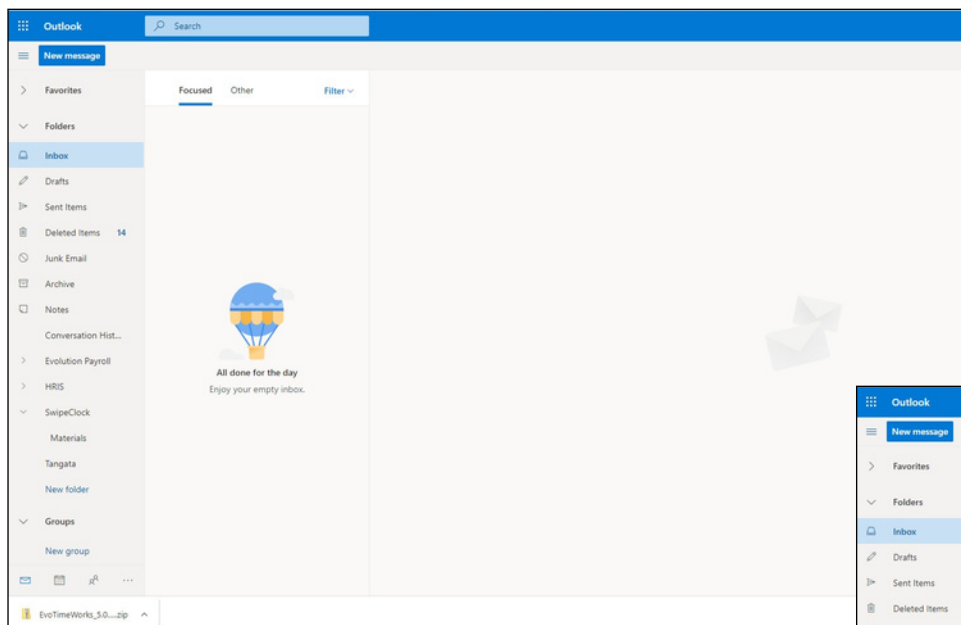
This section will provide instruction for using setting up Evolution TimeWorks Plus and importing hours into Evolution Payroll.



# Setup

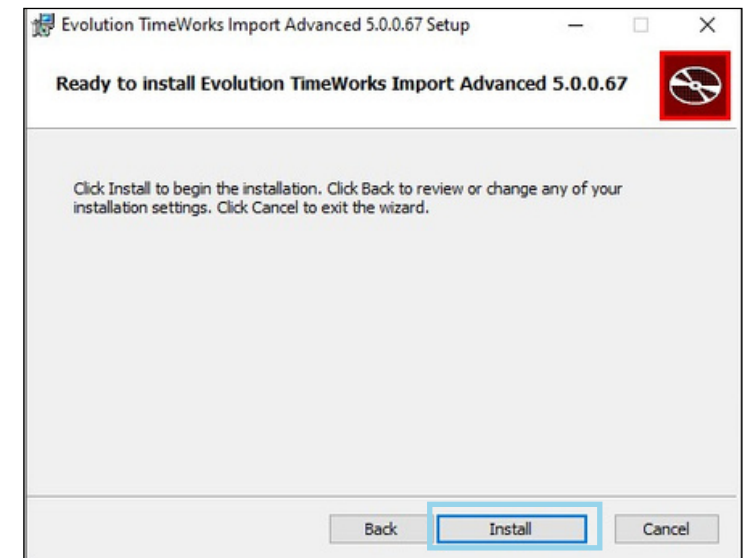
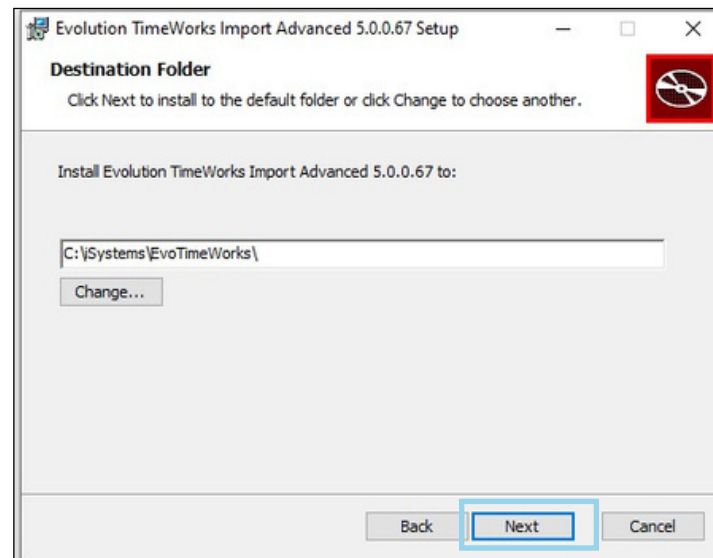
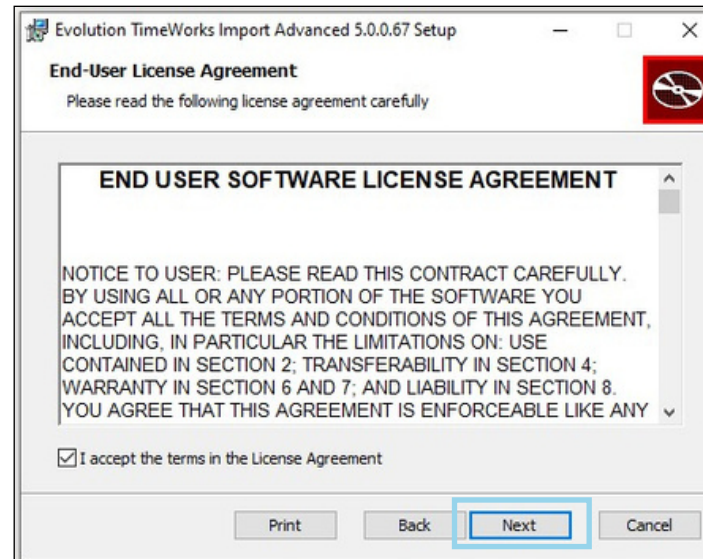
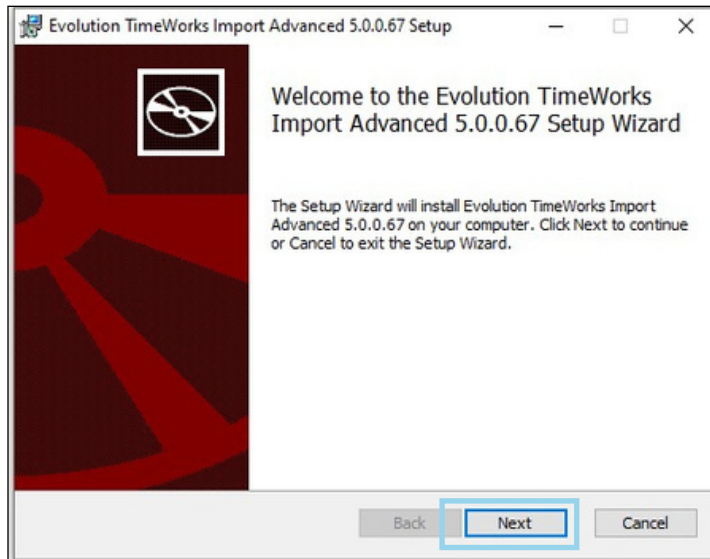
Your Payroll Representative will provide you with your credentials and a direct link to download EvoTimeWorks. Double click on the link. You will be prompted to enter your credentials.

1. Once you enter the provided credentials, a ZipFile will begin to download.
2. Once the ZipFile is done downloading, click to open. You will see a Windows Installer Package named *EvoTime-Works\_5.0.0.67*. Double click to open.



# Setup

Follow the prompts to install the software.



# Setup

Once the file has been installed, you will see a new program on your desktop called *Evolution TimeWorks Import Advanced*. Double click to open.



# Setup

To enter your Connection Settings,

1. Enter our API adapter address and your Evolution Payroll credentials into the appropriate spaces.
2. Check the box to save your password.
3. Click Get Data.

If you do not know our API adapter address or credentials, contact your Payroll Representative for help.

The screenshot shows the 'Evolution TimeWorks&Plus Import 5.0.0.67 Advanced' application window. The 'Connection settings' tab is selected. The 'Get data' button is highlighted with a blue circle and the number 3. The 'API adapter address' field is highlighted with a blue circle and the number 1. The 'Evolution username' and 'Evolution password' fields are highlighted with a blue circle and the number 3. The 'Save password (mandatory for scheduling tasks)' checkbox is also highlighted with a blue circle and the number 3.

# Setup

Connect your SwipeClock settings on the Company Settings tab,

1. Enter your Client # as provided to you by your client service rep and your SwipeClock Username and Password.
2. Check the box to save your password.
3. Click Refresh Data.

If you do not know your client # or credentials, contact your Payroll Representative for help.

Evolution TimeWorks&Plus Import 5.0.0.67 Advanced

Refresh data Evolution client Demo | Demo Company Demo | Demo

Connection settings Company settings Employee export Timeclock data import Scheduled tasks Scheduler settings Log

TimeWorks connection

Client #

Username

Password

Save password (mandatory for scheduling tasks)

Consolidated database

# Import

Before importing time, you need to create a payroll into which the hours can import. Log into Evolution Payroll then,

1. Click on the Payrolls tab.
2. Click the big plus sign to create a new payroll or click the edit icon to open an existing payroll week.
3. If everything looks correct, click Create Checks.
4. An alert box will appear that states “Status: checks successfully created”, click OK.

The screenshot displays the EBC Evolution Payroll interface. On the left, a sidebar contains navigation links: Home, Employees, Check Calculator, Payrolls (highlighted with a blue circle and the number 1), Check Finder, and Reports. The main area is titled 'Payroll Timeline' and shows a grid of payroll weeks. A large blue plus sign is located at the top left of the timeline grid, with a blue circle and the number 2 next to it. The timeline grid shows several weeks with dates and status indicators. At the bottom right of the timeline grid, there is a blue circle with the number 2 and a small icon. To the right of the timeline grid, there is a 'Create Checks' button, with a blue circle and the number 3 next to it. Below the timeline grid, there is a 'Task Queue' section. At the bottom right, there is a 'Status' alert box that says 'Checks successfully created.' with an 'OK' button, and a blue circle with the number 4 next to it.

# Import

Switch back to the Evolution TimeWorks Plus Import. Refresh data then,

1. Click on the Timeclock data import tab, then click Refresh Data.
2. Select Check Date—this will be the same payroll date for the payroll you just created in Evolution Payroll.
3. For Pay Rates—select *Use Evolution D/B/D/T rate override*. After making this selection the first time, it will save as your default setting.
4. Check all three of the following boxes—Summarize, Auto import job codes, Allow import to batches that already have checks with earnings. After making these selections the first time, they will save as your default settings.
5. Click Run Report.

1. Refresh data

2. Check Date

3. Pay rates

4. Summarize, Auto import job codes, Allow import to batches that already have checks with earnings

5. Run import

Check Date	Run Number	Type	Status	Internal Pmt
11/20/2020	1	R	W	15
9/11/2020	1	R	W	152
8/7/2020	1	R	W	150
7/24/2020	1	R	W	153
7/3/2020	1	R	W	149
5/15/2020	1	R	W	148
5/8/2020	1	R	W	147
3/6/2020	1	R	W	146
1/3/2020	3	R	W	144
12/30/2019	1	R	W	141
12/6/2019	1	R	W	139
11/15/2019	1	R	W	136
12/21/2018	1	R	W	117

Period Begin Date	Period End Date	Batch
11/8/2020	11/14/2020	202

Pay rates:

- ☐ Use Swipeclock rates
- ☒ Use Evolution D/B/D/T rate override
- ☐ Use Evolution employee pay rates
- ☐ Use Evolution E/D rate override

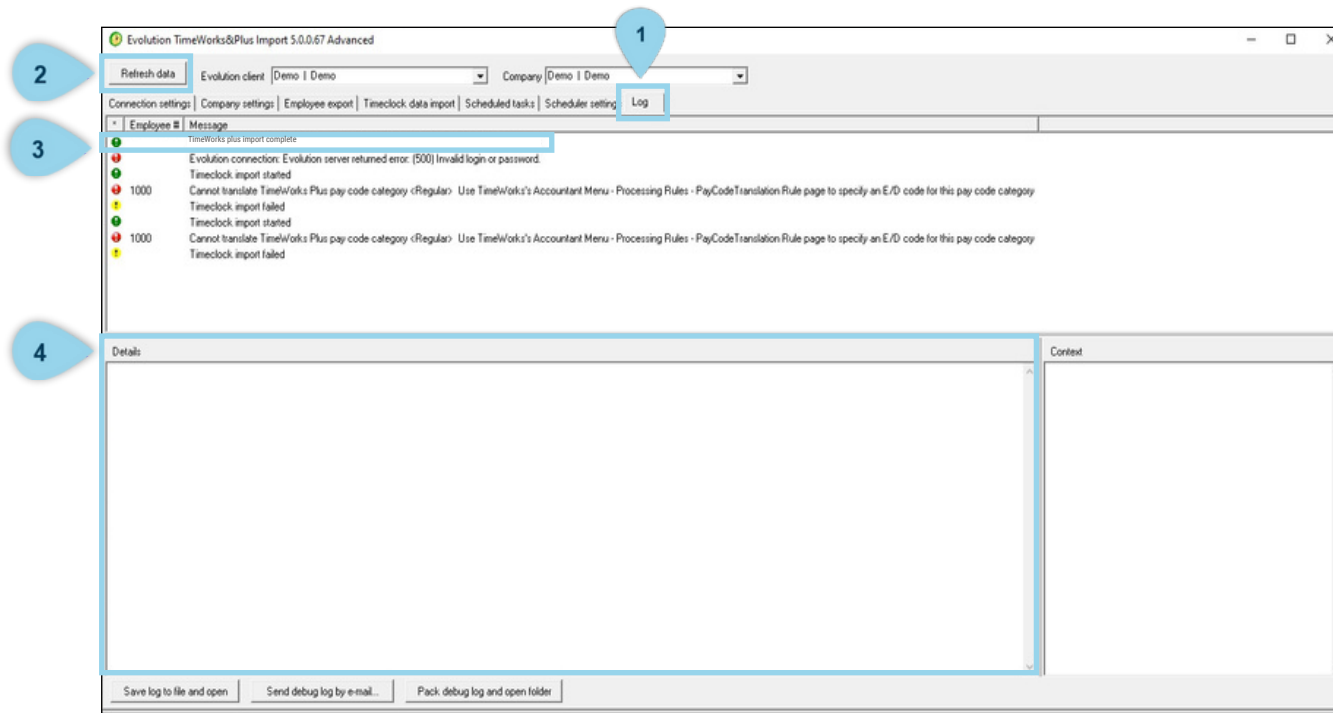
Employee filter:

- ☒ No filtering
- ☐ Branch (Location)
- ☐ Department

Summarize, Auto import job codes, Allow import to batches that already have checks with earnings

# Import

1. Click on the Log tab,
2. Click refresh data.
3. You should see a message stating the timeworks plus import is complete. Double click on this message to review an errors (i.e. having a termed employee with hours due to being termed during the pay period).
4. Error details will be displayed in the Details box.

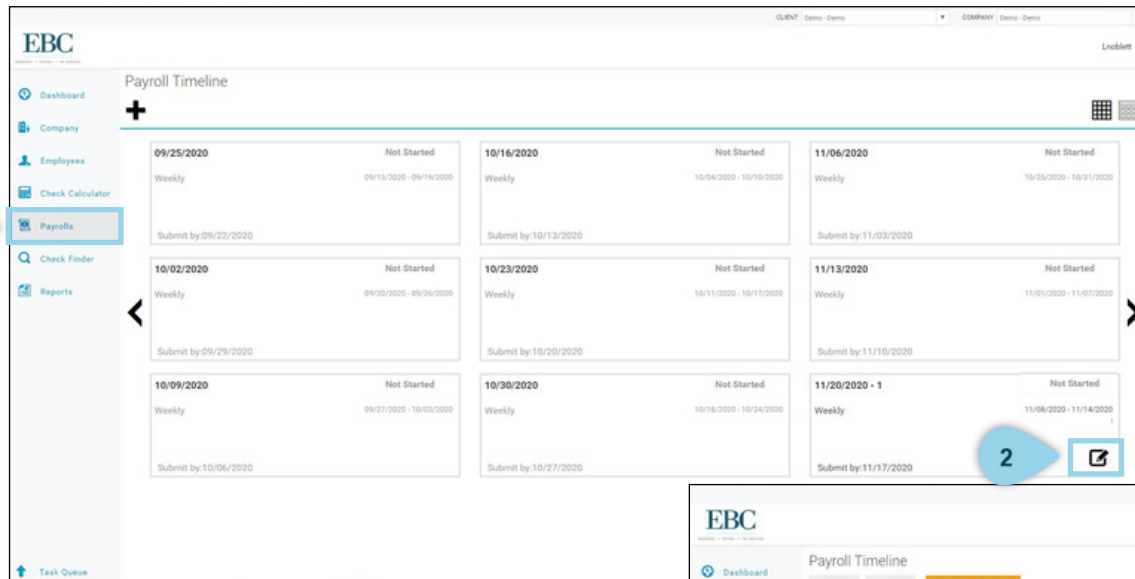




# Import

Go back into Evolution Payroll.

1. Click the Payrolls tab.
2. Locate the payroll week you created, then click the edit icon to open.
3. Here you will see the list of active employees as usual. Hours that were imported will now be listed for the employees who earned hours during that payroll week.



**EBC Payroll Timeline**

Payroll 11/20/2020 - 1 Batch 1: 11/08/2020 - 11/14/2020 Regular | 99998724 | 1 of 1

1 paycheck exceeds the maximum of 60 hours per paycheck.

Type	ES Code	Name	Seq	Total Hrs	Gross Pay	ED1 Hrs Salary	ED1 Amt Salary	ED2 Hrs Regular	ED2 Amt Regular	M07 Hrs Memo Earnings	M07 Amt Memo Earnings
R	6	Miller, John	1	0.00	\$2,000.00		\$2,000.00				
R	3	Phillips, Tommy	1	0.00	\$0.00						
R	9	Smith, Steve	1	0.00	\$0.00						
R	1	Billings, Billy B.	1	40.00	\$400.00			40.00	\$400.00		
R	5	Smith, Susan	1	0.00	\$0.00						
R	8	Johnson, Mary	1	0.00	\$200.00		\$200.00				
R	11	Ortiz, John	1	0.00	\$0.00						
R	4	Smith, Joe M.	1	120.00	\$1,200.00			120.00	\$1,200.00		
<b>Totals</b>				160.00	\$4,000.00		\$2,200.00	160.00	\$1,600.00		