

# Time Clock Imports

The screenshot displays the ComputerSearch payroll system interface. The top section, 'Payroll Today', shows a list of payroll batches with status indicators: 'Processed' (green), 'Past Due' (red), and 'Pending' (orange). Below this is an 'Agenda' section with a date range from Wednesday, November 18, 2020, to Wednesday, November 25, 2020. The bottom section, 'Payroll Timeline', shows a detailed view of a payroll batch for 11/20/2020, including a table of employee data and a summary of totals.

Type	EE Code	Name	Seq	Total Hrs	Gross Pay	EST Hrs Salary	EST Amt Salary	EST Hrs Regul.	EST Amt Regular
R	4	Ripley, Ellen	1	0.00	\$680.00		\$680.00		
R	1	Smith, Joe	1	0.00	\$800.00		\$800.00		
R	2	Jones, Danna M.	1	0.00	\$1,000.00		\$1,000.00		
R	5	Pfeffercorn, Wendy	1	40.00	\$720.00			40.00	\$720.00
Totals				40.00	\$3,200.00		\$2,480.00	40.00	\$720.00

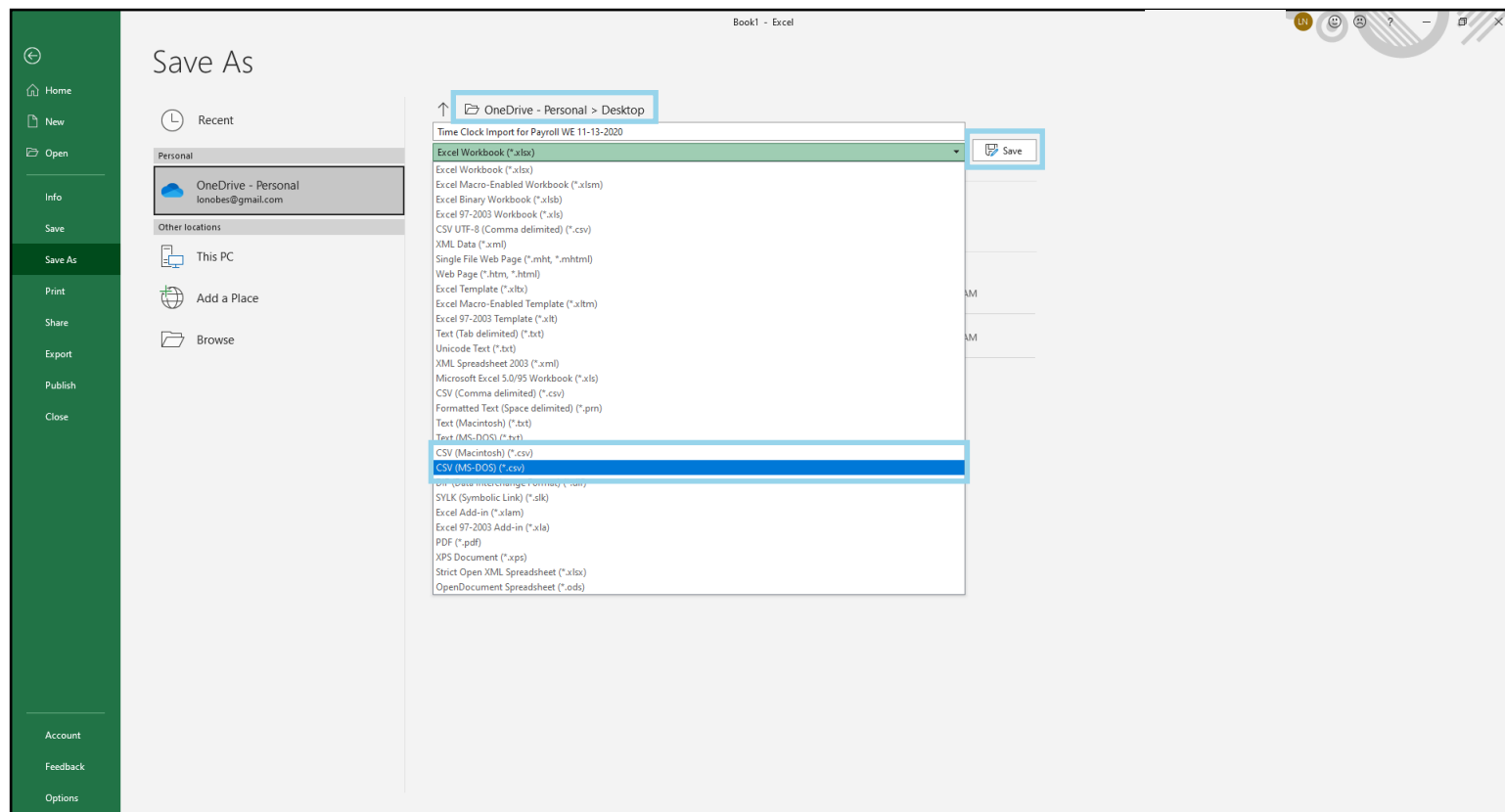
This document will provide visual instruction for importing time clock files into Evolution Payroll. Please be aware that there are exceptions to these guidelines. Contact your Payroll Assistant to discuss variations that may apply to you.

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# Saving File

Before you begin, be sure to save the time clock file to your desktop. Save the file as a CSV file for the following instructions to apply.



# Time Clock Import Options

Start by following the initial steps to create either a scheduled or unscheduled payroll. Time clock import parameters are on the Check Batch Settings screen. To get to the Check Batch Settings screen:

1. Click on the Payroll tab.
  - a. Click the plus sign to add a new payroll, create your payroll as normal.
  - b. Or click to edit an existing payroll.

ComputerSearch payroll services

CLIENT Z\_CS Sales - CS Sales Demo COMPANY Z\_CS Sales Demo - CS Sales Demo Laura

Payroll Timeline

1

a

b

Date	Frequency	Status	Period	Action
10/09/2020 - 1	Weekly	Past Due	09/26/2020 - 10/02/2020 New Batch	Submit by:10/05/2020
10/30/2020 - 1	Weekly	Past Due	10/17/2020 - 10/23/2020 New Batch	Submit by:10/26/2020
11/20/2020 - 1	Weekly	Pending	11/07/2020 - 11/13/2020 New Batch	Submit by:11/16/2020
10/16/2020 - 1	Weekly	Past Due	10/03/2020 - 10/09/2020 New Batch	Submit by:10/12/2020
11/06/2020 - 1	Weekly	Past Due	10/24/2020 - 10/30/2020 New Batch	Submit by:11/02/2020
11/27/2020 - 1	Weekly	Pending	11/14/2020 - 11/20/2020 New Batch	Submit by:11/23/2020
10/23/2020 - 1	Weekly	Past Due	10/10/2020 - 10/16/2020 New Batch	Submit by:10/19/2020
11/13/2020 - 1	Weekly	Processed	10/31/2020 - 11/06/2020	Submitted on: 10/19/2020 11:26 AM
12/04/2020 - 1	Weekly	Pending	11/21/2020 - 11/27/2020 New Batch	Submit by:11/30/2020

Task Queue

# Time Clock Import Options

If you are editing an existing payroll,

1. Click the Batches icon to switch from the Check view,
2. Then click on Check Batch
3. This will open the Payroll Settings page which includes Time Clock Import Options.

The image displays two screenshots of the ComputerSearch payroll system interface, illustrating the steps to access the Time Clock Import Options.

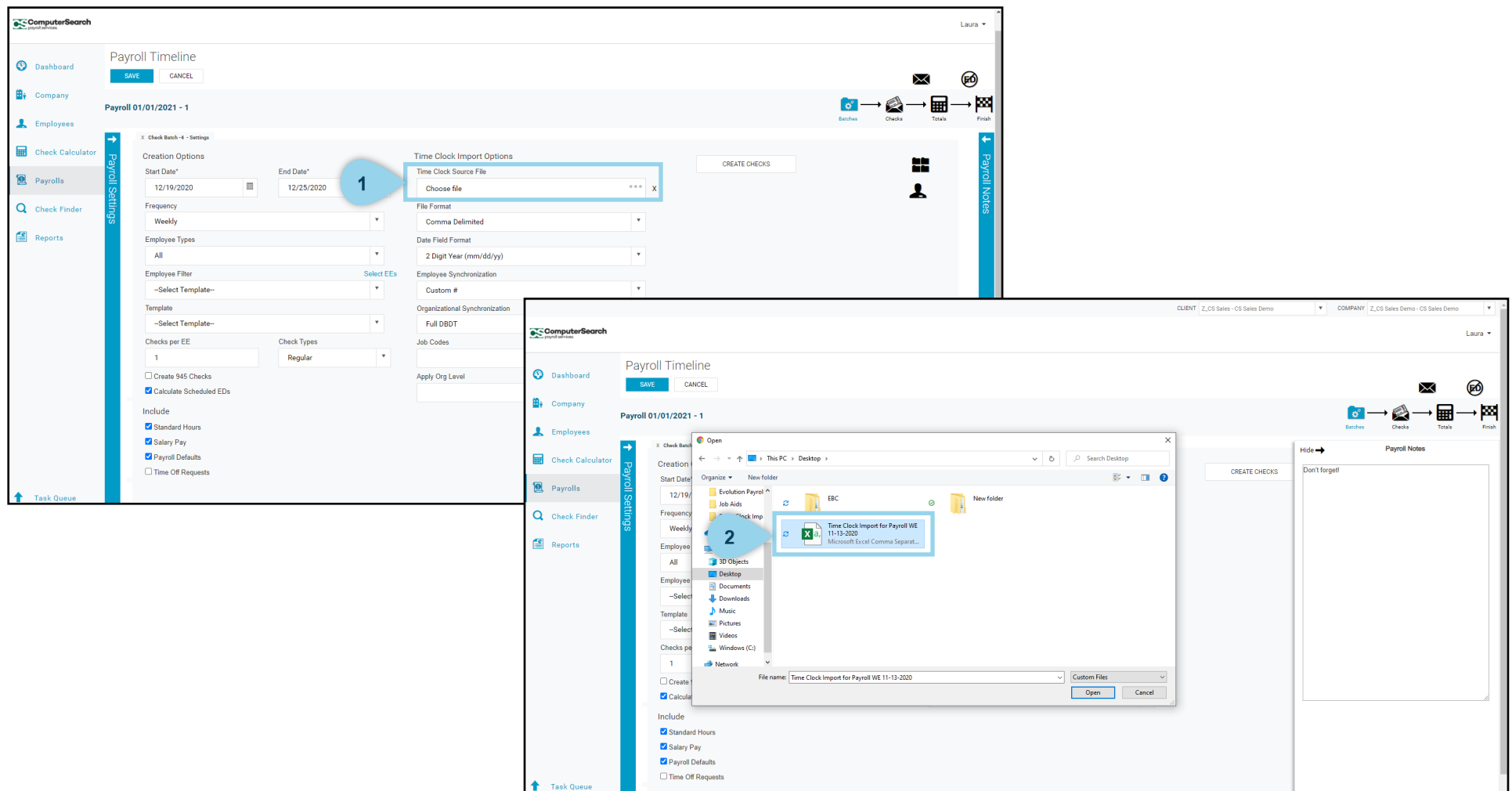
**Left Screenshot:** The 'Payroll Timeline' page for 'Payroll 11/27/2020 - 1'. The status is 'Pending'. A blue callout '1' points to the 'Batches' icon in the top navigation bar. A blue callout '2' points to the 'Check Batch 1' button in the main content area.

**Right Screenshot:** The 'Payroll Settings' page for 'Payroll 01/01/2021 - 1'. A blue callout '3' points to the 'Time Clock Import Options' section on the right side of the page. The 'Time Clock Import Options' section includes fields for 'Time Clock Source File', 'File Format', 'Date Field Format', 'Employee Synchronization', 'Organizational Synchronization', 'Job Codes', and 'Apply Org Level'. There is also a 'CREATE CHECKS' button.

# Time Clock Import Options

To select the file,

1. Click on the ... under Time Clock Source File.
2. Select the CSV file that was saved to your desktop before beginning.



# File Format

Select the file format as CSV since that is the type of file you are importing.

The screenshot displays the 'Payroll Timeline' interface for 'Payroll 01/01/2021 - 1'. The left sidebar contains navigation links: Dashboard, Company, Employees, Check Calculator, Payrolls (selected), Check Finder, and Reports. The main area is titled 'Check Batch - 6 - Settings' and is divided into two columns. The left column, 'Creation Options', includes fields for 'Start Date\*' (12/19/2020) and 'End Date\*' (12/25/2020), a 'Frequency' dropdown (Weekly), 'Employee Types' (All), 'Employee Filter' (-Select Template-), 'Template' (-Select Template-), 'Checks per EE' (1), 'Check Types' (Regular), and checkboxes for 'Create 945 Checks' (unchecked), 'Calculate Scheduled EDs' (checked), and 'Include' (Standard Hours, Salary Pay, Payroll Defaults, Time Off Requests). The right column, 'Time Clock Import Options', includes 'Time Clock Source File' (Time Clock Import for Payroll WE 11-13-2020.csv), a 'File Format' dropdown menu (highlighted with a blue box and showing 'Comma Delimited' as the selected option), 'Employee Synchronization' (Custom #), 'Organizational Synchronization' (Full DBDT), 'Job Codes', and 'Apply Org Level'. A 'CREATE CHECKS' button is located at the top right of the main area. On the far right, there is a 'Payroll Notes' section with a 'Hide' button and a text area containing 'Don't forget!'. The top of the interface shows 'CLIENT' and 'COMPANY' dropdowns, both set to 'Z\_CS Sales - CS Sales Demo', and a user name 'Laura'.

# Employee Synchronization

Select how the employees are grouped in the import file – by name, employee number, etc. This will depend on how your time clock file is set up.

The screenshot displays the ComputerSearch payroll software interface. The top navigation bar includes the logo, client and company dropdowns, and a user profile. The left sidebar contains navigation links for Dashboard, Company, Employees, Check Calculator, Payrolls, Check Finder, and Reports. The main area is titled 'Payroll Timeline' and shows 'Payroll 01/01/2021 - 1'. A 'Check Batch -6 - Settings' window is open, showing various configuration options. The 'Employee Synchronization' dropdown is highlighted, showing options: Name, Custom #, Name, and SSN. The 'Name' option is selected. The 'Payroll Notes' section on the right is empty, with a 'Don't forget!' reminder.

ComputerSearch payroll services

CLIENT Z\_CS Sales - CS Sales Demo COMPANY Z\_CS Sales Demo - CS Sales Demo Laura

Dashboard

Company

Employees

Check Calculator

Payrolls

Check Finder

Reports

Payroll Timeline

SAVE CANCEL

Payroll 01/01/2021 - 1

Check Batch -6 - Settings

Creation Options

Start Date\* 12/19/2020 End Date\* 12/25/2020

Frequency Weekly

Employee Types All

Employee Filter --Select Template-- Select EEs

Template --Select Template--

Checks per EE 1 Check Types Regular

☐ Create 945 Checks ☒ Calculate Scheduled EDs

Include

☒ Standard Hours ☒ Salary Pay ☒ Payroll Defaults ☐ Time Off Requests

Time Clock Import Options

Time Clock Source File Time Clock Import for Payroll WE 11-13-2020.csv X

File Format Comma Delimited

Date Field Format 2 Digit Year (mm/dd/yy)

Employee Synchronization

Name Custom # Name SSN

CREATE CHECKS

Hide → Payroll Notes

Don't forget!



# Job Codes and Org Levels

Optional:

1. Select whether job codes will be imported with the data .
2. Select if keeping the organization level used in the import file .

ComputerSearch  
Payroll Timeline  
SAVE CANCEL  
Payroll 01/01/2021 - 1  
Batches Checks Totals Finish  
Payroll Notes

Check Batch - 0 - Settings

Creation Options  
Start Date\* 12/19/2020 End Date\* 12/25/2020  
Frequency Weekly  
Employee Types All  
Employee Filter --Select EEs--  
Template --Select Template--  
Checks per EE 1  
Check Types Regular  
☐ Create 945 Checks  
☒ Calculate Scheduled EDs  
Include  
☒ Standard Hours  
☒ Salary Pay  
☒ Payroll Defaults  
☐ Time Off Requests

Time Clock Import Options  
Time Clock Source File Time Clock Import for Payroll WE 11-13-2020.csv \*\*\* X  
File Format Comma Delimited  
Date Field Format 2 Digit Year (mm/dd/yy)  
Employee Synchronization Name  
Organizational Synchronization Full DBDT  
Job Codes  
Automatically Import Job Codes  
Do Not Import Job Codes

CREATE CHECKS

ComputerSearch  
Payroll Timeline  
SAVE CANCEL  
Payroll 01/01/2021 - 1  
Batches Checks Totals Finish  
Payroll Notes

Check Batch - 0 - Settings

Creation Options  
Start Date\* 12/19/2020 End Date\* 12/25/2020  
Frequency Weekly  
Employee Types All  
Employee Filter --Select EEs--  
Template --Select Template--  
Checks per EE 1  
Check Types Regular  
☐ Create 945 Checks  
☒ Calculate Scheduled EDs  
Include  
☒ Standard Hours  
☒ Salary Pay  
☒ Payroll Defaults  
☐ Time Off Requests

Time Clock Import Options  
Time Clock Source File Time Clock Import for Payroll WE 11-13-2020.csv \*\*\* X  
File Format Comma Delimited  
Date Field Format 2 Digit Year (mm/dd/yy)  
Employee Synchronization Name  
Organizational Synchronization Full DBDT  
Job Codes  
Apply Org Level  
From EE Rate  
From File

CREATE CHECKS

# Create Checks

Click the Create Checks button. If there is an issue with the file upload, you will receive an error message.

