

Follow these steps to create a file that can upload time card data into your payroll software.

Step One: Synch to your payroll

Setup menu: Export to Payroll

Choose your payroll company at the top.

Payroll Company:

Filename:

Link Title:

Everything that fills in automatically is formatted for your payroll provider's requirements.

Here are some things to remember for Your Payroll Co:

- Be sure the Employee number matches your Your Payroll Co account
- Be sure the Employee name matches your Your Payroll Co account
- Be sure and enter your Your Payroll Co code for any PTO Categories you use
- If you check the other requirements at the bottom, the time card information will not export for employees that are missing the item

Check the side notes. This section can help you determine:

- How to format usernames and employee numbers
- If any custom information needs to be added to this page
- Other requirements for synching time clock with payroll

Column Headers:

Column codes:

Regular Rate:

Earning codes: Overtime:

Double Time:

Employee #
 Set as required to export time and attendance data: (Enter data [Employee HR Setup](#))

Supervisor or Administrator Approval
 (Set supervisor approval at the bottom of the [General Setup Options](#) page)

Only select these options if you are sure these are the settings you want!

Employee # - An employee's time card data will not appear at all on the payroll export file if they do not have an employee number assigned to them.

Supervisor or Administrator Approval – An employee's time card data will not appear at all on the payroll export file if their time card has not yet been approved by the Admin or a Supervisor.

Step Two: Make sure employee data matches

Setup menu: Employee Setup

| Username | Employee # |
|--|---------------------------------|
| <input type="text" value="David Miller"/> | <input type="text" value="27"/> |
| <input type="text" value="Elizabeth Lee"/> | <input type="text" value="45"/> |

To know whether employee name format or employee number (or both) are required to match in time clock and payroll, check the notes to the right side of your payroll company's setting in **Export to Payroll**.

Step Three: Make sure earnings data matches

Setup menu: Export to Payroll

| | | |
|----------------|---------------|---------------------------------|
| Earning codes: | Regular Rate: | <input type="text" value="01"/> |
| | Overtime: | <input type="text" value="02"/> |
| | Double Time: | <input type="text" value="03"/> |

Standard earnings codes for regular rate, overtime, and double time.

Features menu: PTO Categories

If using PTO, each category will need an export code to match the pay codes in payroll.

When a PTO type has multiple categories for accrual increases, like Vacation, the same export code can be used for each.

| Short Name | Full Name | Internal Note | Export Earning Code |
|---------------------------------------|---|----------------------|---------------------------------|
| <input type="text" value="Holiday"/> | <input type="text" value="Holiday"/> | <input type="text"/> | <input type="text" value="04"/> |
| <input type="text" value="Vaca 1-2"/> | <input type="text" value="Vacation 1-2"/> | <input type="text"/> | <input type="text" value="08"/> |
| <input type="text" value="Vaca 3+"/> | <input type="text" value="Vacation 3+"/> | <input type="text"/> | <input type="text" value="08"/> |

Features menu: Projects

| Full Name for Reports and Clock In Button | Abbreviated Name | Internal Note | RR/Exempt Hours Export Code | Overtime Hours Export Code | Double Time Hours Export Code |
|---|------------------------------------|----------------------|---------------------------------|---------------------------------|---------------------------------|
| <input type="text" value="Project 1"/> | <input type="text" value="Proj1"/> | <input type="text"/> | <input type="text" value="12"/> | <input type="text" value="13"/> | <input type="text" value="14"/> |
| <input type="text" value="Project 2"/> | <input type="text" value="Proj2"/> | <input type="text"/> | <input type="text" value="15"/> | <input type="text" value="16"/> | <input type="text" value="17"/> |

If tracking Project hours, you may need to set up export codes for each Project.

To assign overtime and double time codes to each individual Project, make sure "Report Overtime and Double Time" is set to **Total for Each Project** in **Report Setup**, located in the Setup menu.

**OT/DT codes only compatible with some payroll exports.*

Setup menu: Other Compensations

Some other types of earnings can be exported, such as mileage or bonuses.

**Additional earnings codes only compatible with some payroll exports.*

| Name | Internal Note | Export Code | Type | Mileage |
|--------------|---------------|-------------|--------------|---------|
| Mileage 2023 | | 26 | Mileage Only | 0.655 |

Step Four: Send to Payroll

After verifying time card data is correct, you can pull the payroll export from the Summary Report.

Reports menu: Summary

| People Filter | | Hours Filter | | Export |
|--------------------------|--|---|--|--|
| Date Range 03/15/2023 | Status: Active Department: All Employee: All | Hours: All Project: All PTO: All Approvals: Hide | | Print Report Export to Excel Export to Excel (CSV) \$ Export to Your Payroll Co |

3/9/2023 - 3/15/2023 with 2 people

The first workweek of this pay period started on 3/5/2023

| Employee | Pay Period | Payroll |
|--------------|-----------------|--------------|
| David Miller | 24h 6m Wrk RR | 24h 6m RR |
| | 16h 0m Wrk OT | 16h 0m OT |
| | 40h 6m Total | 40h 6m Total |
| James Smith | 13h 0m Proj1 RR | 33h 16m RR |
| | 20h 16m Wrk RR | |
| | 33h 16m Total | |

Click the link with your payroll company's name.

This will download a file formatted for their specifications. No changes to formatting should be needed, so opening the file is not necessary.

Next, log into your payroll software and upload the file (it will probably be in your Downloads folder).