



The TimePilot system: Paylocity Export

If you use Paylocity to process payroll and cut payroll checks, you can set up your TimePilot software to work with it.

Here's how the process works: At the end of a pay period, you'll have the TimePilot system create a file containing the employee time and attendance data it collected in a format that Paylocity can understand. You'll save that file, and then start Paylocity and tell it to import the file. Once imported, all the data collected in TimePilot will be available in Paylocity.

First, however, you'll need to install and set up the Paylocity Export, a small software program created by TimePilot that will prepare the data collected by your timeclock system.

To confirm that Paylocity is configured the way you want, we recommend that you set up your employees and process a couple of payrolls through Paylocity manually before using TimePilot's Paylocity Export.

1. Downloading and installing the Paylocity Export software

Here's how to download and install TimePilot's Paylocity Export software:

1. Make sure you have an active internet connection.
2. Start TimePilot Central.
3. Click the "File" menu, then "Export to Payroll..." then "Download Payroll Exports." A browser window will open to a page on the TimePilot.com web site. Click the "Paylocity" link.
4. The next step depends upon the browser you're using:
 - A. Users of Internet Explorer will be asked if they want to "Run" or "Save" the file. Click "Run."
 - B. Users of Mozilla Firefox will be asked if they want to save the file. Click "Save the file." The downloads box will pop up; double-click the file to run it.
3. Follow the instructions to install the export.
4. When you're done, close the browser window.

2. Setting up TimePilot

Now you'll enter the employee ID numbers from Paylocity into the TimePilot software. This connects an employee in TimePilot with an employee in Paylocity and ensures that employees will be identified correctly.

1. Have a list of your Paylocity employee ID numbers ready. (Consult your Paylocity representative if you don't have the ID numbers.)
2. In TimePilot Central, click the "Setup" menu, then "Profile Setup..."

Continued on next page

3. The Profile Setup box will open. Highlight the first name in the list of employees on the left side, then click the “Edit Profile” button.

4. The “Edit an Existing Profile” box will open. Click the “Options” tab at the top of the box. (See screenshot at right.)

5. Enter the employee’s Paylocity ID number in the “Alternate ID” field.

6. Click “Save.”

7. Repeat steps 3-6 for each employee.

8. When you’re done, close the Profile Setup box.

Congratulations! Your setup is complete. See the next page for instructions on how to use the export.

The screenshot shows a window titled "Edit an existing Payroll Profile". At the top, there are two tabs: "Profile" and "Options". The "Options" tab is selected and circled in red. Below the tabs, there are several input fields. The "Alternate ID" field contains the value "3541" and is circled in red. Other fields include "First Name" (Elba), "Middle Name", "Last Name" (Distler), "Title" (Office Manager), "Pay Rate" (\$15.35), "Address" (340 McKee St., Batavia, IL 60510), "Phone" (630-879-6400), "Date of Birth", "Date of Hire" (10/15/2002), and "End Date". At the bottom of the window, there are three buttons: "Help", "Save", and "Cancel".

3. Using the Export software

Now that the setup is done, it's a simple process to use the export. Here's how:

1. In TimePilot Central, extract your pay period and make any corrections, changes etc., as described in the "Getting ready for payroll, step by step" section of the chapter on TimePilot Central in your TimePilot manual.
2. With the extracted pay period on your TimePilot Central screen (there will be a yellow bar across the top, indicating you're in an extracted pay period—if it's green, you're still in Current Transactions), click the "File" menu, then Export to Payroll > Paylocity.

3. The Paylocity Export screen will appear (shown at right). Make sure your company name and pay period are listed correctly. If not, choose the correct ones from the dropdown menus.

4. Choose a location where the software should save the file containing the TimePilot data and a name for the file.

The default location will be in a folder called "Export" in the "tpData" folder, which is the folder that holds the clock-in and clock-out data collected by TimePilot.

Don't know where you keep your TimePilot data? Here's how to find out:

- A. In TimePilot Central, click the "Help" menu, then "About."
 - B. Look for "Data Path." That's where your data is.
5. Enter your Paylocity Earning Codes (available from your Paylocity representative). Once the codes are entered, they will appear automatically the next time you use the Export.

Paylocity Export Version: 4.0.1001

Export your payroll data to Paylocity

Pay Period to Export

Company: Acme Corp.

Pay Period: 2010-07-12 to 2010-07-19

Exported File Location: C:\tpData\Export

File Name: Export.csv

Earning Codes

Regular: R1 Holiday: H1

Overtime 1: O1 Sick: S1

Overtime 2: O2 Personal Time Off (PTO): P1

Overtime 3: O3 Jury Duty: J1

Vacation: V1 Bereavement: B1

Export

Check for Updates...

User Guide...

Close

Continued on next page

6. Click the “Export” button to create the Export file.
7. Click the “Close” button. Congratulations! You’ve created a file with your TimePilot data in a format that Paylocity can understand.
8. Import the file (See Step 4 for information on where to find it) into Paylocity. For details on Paylocity’s import function, contact your Paylocity representative.