Enhanced Integration Merge into Existing Payroll

QUICK STEPS GUIDE

<u>WEBTIME: TRANSFER OF HOURS TO WEBPAY</u>

1. **Home Tab->Supervisor Dashboard**
    a. Quick View – Click Missed Punches to see and correct all missed punches for pay period you are processing (click on "**Paired With**" link to sort by date)
        i. Click on Name of Employee with missed punch to go directly to their timesheet and correct missed punch
2. **Home Tab->Supervisor Dashboard**
    a. Quick View – Click Pending Time Off Requests to see and approve/deny all time off requests for pay period you are processing (click on "**Request Start**" link to sort by date)
3. **Employees Tab->Timecard Approvals**
    a. Bring up correct date range in middle of page to approve (click on green play button to make sure pay period is completely refreshed)
    b. Check to see if all boxes are checked and approved by Supervisor
        i. If an issue with employee's hours click on their name to go directly to their timecard
        ii. If not approved click on box to the left of employee name or **Approve** in upper left for everyone, then click **Save** button with disc next to it on right
4. **Reports Tab**
    a. Select Employee Time Card Report from either Reports Library or Scheduled Reports
    b. Verify report settings, make sure dates are correct for your date range, go to bottom and click **Generate Report**
    c. Find report in the **Report Pickup** section (refresh until you see report is ready)
    d. Click to open and then minimize on your computer
5. **Payroll Tab->Payroll Data Transfer**
    a. On "Payroll Data Transfer" line go over to far right and click **Transfer** button
    b. Make sure date range is correct
    c. On bottom left corner click **Transfer Payroll Data link** (this sends hours to WebPay)
6. **Payroll Tab->Close Pay Periods**
    a. Follow the 3 step wizard process to close pay period for your company code only!
    b. Be sure to visually check that "Enable Payroll Lockout during Closing" is checked.
    c. When you have completed all the steps, click "Finish" to complete the closing.
7. **Go to WEB PAY –Applications-Web Pay**
8. **Go to Payroll Tab->Payroll Entry**
    a. Make sure dates are correct for pay period & check date. With **Batch Type** set to **Regular**, click **Add Batch**
    b. Make batch name the check date, ensure Auto-Pay Employees box is checked, click **Start Batch**
    c. Go Back to the Payroll Tab < Payroll Entry. From the drop down that says **Batch Type** Select **TimeImprt.**
    d. Click **Add Batch** button below to the left
9. Under **Batch Type: TimeImprt** section on left
    a. **Select "Merge Into Existing" option** and select the Regular Batch name from the drop down.
10. Under **Time Import File** section on right

a. From the drop down box that states **Select** choose the file created today

11. Bottom left corner click **Import** button

i. If Green click **Continue** button
ii. If Red/Yellow click on **Status Report** button to see issues

12. On the **WebTime** batch line go to the far right under **Action**, click **Approve Batch Totals** link

a. Bring up Web Time time card report, scroll to bottom where it shows totals
b. Make sure all the totals match
   i. Regular and Memo lines for particular Pay Types need to be added in WebPay screen to equal total on Timecard Report
      1. PTO + PTOM (WebPay) = PTO (Timecard Report)
      2. REG + REGM (WebPay) = Work (Timecard Report)