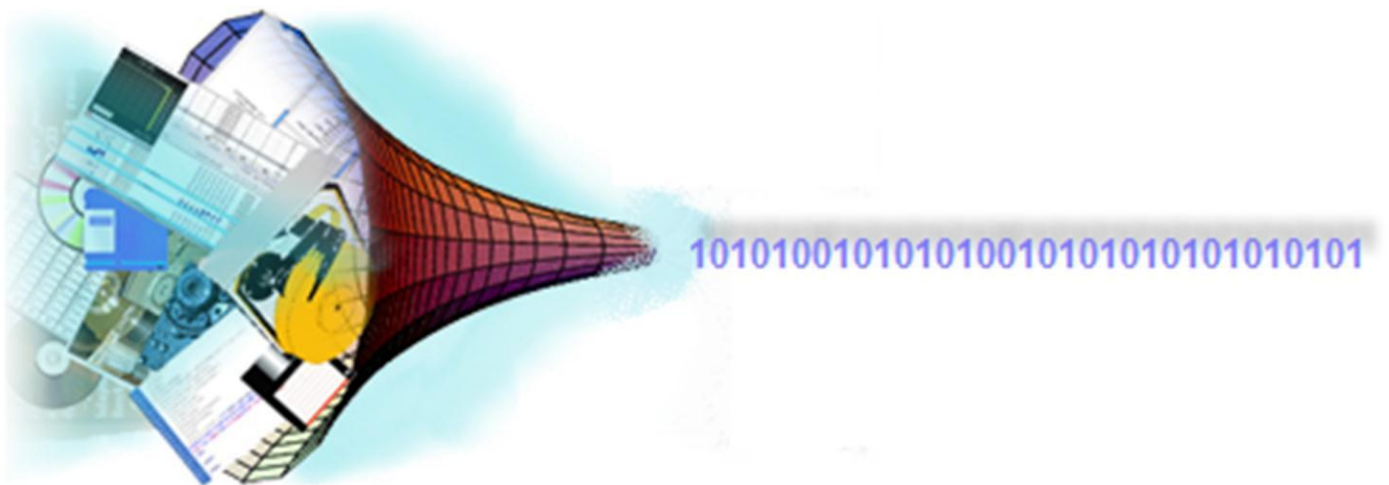


# The Ultimate Guide to Automating Payroll Timesheets

How to convert  
payroll timesheets  
into usable data



**PACIFIC** TIMESHEET

[www.pacifictimesheet.com](http://www.pacifictimesheet.com) or <http://blog.pacifictimesheet.com>

## Manual Payroll timesheet systems have four challenges:

- *Employees submit timesheets on time.*
- *Timesheet data must be validated.*
- *Timesheets must be approved on time.*
- *Getting hours and pay data into your payroll system*

## There are four ways to address these challenges:

**1**

### **Paper Timesheets**

Old-fashioned paper can work best: it's cheaper, documents corrections, and it's what you know.

**2**

### **Excel Timesheets**

MS Excel spreadsheets work well for data entry and consolidating timesheets.

**3**

### **In-house System**

Sometimes it's best to develop software in-house to get exactly what you need

**4**

### **Buy Timesheet Software**

Provides continuity, long-term support, and allows you to use software to implement best practices.

Challenge	Options	Results
<p><b>Distributing and controlling</b> Setting up paper Payroll timesheets. Can this be streamlined?</p>	<p><b>1</b> <b>Paper Timesheets</b></p>	<p>Administrative staff create and distribute paper Payroll timesheets with valid pay code assignments. Employees receive paper timesheet by email, or hard copies from their supervisor. Blocking out holidays or scheduled leave must be prepared manually by administrative staff.</p>
<p><b>Enter, validate data</b></p>	<p><b>2</b> <b>Excel Timesheets</b></p>	<p>Excel Payroll timesheets can be setup by administrative staff or supervisors. Its advantage over paper is that timesheets can be consolidated into one pay data sheet using macros. Once setup, Excel timesheets can be distributed by disk, flash drive, email, or printed to paper.</p>
<p><b>Approvals</b></p>	<p><b>3</b> <b>In-house System</b></p>	<p>An in-house system can have a database of valid pay codes, pay classes and supervisor assignments. It automatically sets up timesheets. This system can be designed to match the exact needs for automatically setting up Payroll timesheet templates.</p>
<p><b>Get data into payroll</b></p>	<p><b>4</b> <b>Buy System</b></p>	<p>Software must be flexible to handle changing setup needs over time. Should synch with payroll, accounting and ERP systems to automate setup of Payroll timesheet workflow. Should validate time entries timesheets, be easy to use and take no longer than one business quarter to implement.</p>

Challenge	Options	Details
<p><b>Setting up timesheets</b></p>	<p><b>1</b></p> <p><b>Paper Timesheets</b></p>	<p>Employees enter data by hand. Supervisor rejections or corrections must be validated by payroll staff or as part the approval process. Policies and rules must be validated manually by supervisors and payroll staff.</p>
<p><b>Enter, validate data</b></p> <p>Is the timesheet setup correctly for the Payroll's work? Are the billing codes and pay classes valid?</p>	<p><b>2</b></p> <p><b>Excel Timesheets</b></p>	<p>The above comments apply, however, electronic spreadsheets are easier to modify and correct than paper. However, an audit trail of corrections must be kept using comments in any hours cells. They still might be printed out for physical signatures.</p>
<p><b>Approvals</b></p>	<p><b>3</b></p> <p><b>In-house System</b></p>	<p>An in-house system can assign employees and other resources to Payrolls. It can validate hours entered according certain rules and policies.</p>
<p><b>Get data into payroll</b></p>	<p><b>4</b></p> <p><b>Buy System</b></p>	<p>Should be web- based and highly configurable to match changing rules and policies over time. Should be easy to use and implementation should take no longer than one business quarter.</p>

Challenge	Options	Results
<p><b>Setting up timesheets</b></p>	<p><b>1</b></p> <p><b>Paper Timesheets</b></p>	<p>If approvals require a physical signature, this is where paper really shines. However, if employees and supervisors are in different locations, timesheets must be faxed or fedexed to other offices for approval signatures.</p>
<p><b>Enter, validate data</b></p>	<p><b>2</b></p> <p><b>Excel Timesheets</b></p>	<p>Excel Payroll timesheets can accumulate unauthenticated “electronic” submission and approval signatures by passing Excel timesheets by email. They can also be printed for physical signatures.</p>
<p><b>Approvals</b> Is there a different approval process for different employees? Different templates or dashboards? Different time periods?</p>	<p><b>3</b></p> <p><b>In-house System</b></p>	<p>In-house software can electronically capture authenticated approvals from supervisors. The login and password security required by an online session is usually enough proof of an authenticated approval.</p>
<p><b>Get data into payroll</b></p>	<p><b>4</b></p> <p><b>Buy System</b></p>	<p>Purchased timesheet software will have electronic signature features, and LDAP/Active Directory authentication. It should allow for different approval processes, dashboards and reporting for different clients. It should have an active feature road map; evidence it will evolve as standards change over time.</p>

Challenge	Options	Results
<p><b>Setting up timesheets</b></p>	<p><b>1</b></p> <p><b>Paper Timesheets</b></p>	<p>Processing paper timesheets is labor intensive. They must be collected centrally, timesheet hours can be entered into master data sheets and then into payroll data entry screens. This manual work can add several days to the payroll and billing process.</p>
<p><b>Enter, validate data</b></p>	<p><b>2</b></p> <p><b>Excel Timesheets</b></p>	<p>Unlike paper timesheets, Excel timesheets can be sent electronically and, if they use standardized templates and macros, can be consolidated into one file for payroll processing. Corrections, however, can be more cumbersome to track and process than paper.</p>
<p><b>Approvals</b></p>	<p><b>3</b></p> <p><b>In-house System</b></p>	<p>In-house software can be designed to export timesheet data to payroll by matching required flat file formats. In-house developers will have to support changing requirements as payroll data requirements change.</p>
<p><b>Get data into payroll &amp; ERP systems</b></p>	<p><b>4</b></p> <p><b>Buy System</b></p>	<p>Purchased timesheet software should have multiple integration options with a large number of payroll systems. This software should be flexible to modify integration specifications or even support and new payroll or accounting system.</p>

# How to evaluate automating paper timesheets?

## Step **1**

**Address The First Challenge:**  
Processing Payroll timesheets  
takes too long!

**Ask this challenge question:**  
How would you process Payroll  
timesheets in 1/10 the time?



How to evaluate automating paper timesheets?

# 1.

**The First Challenge: Processing Payroll timesheets takes too long!**

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**Solution: Create 3 – 5 days of lag time to give more time for processing**

### ***Worst Method:***

**Have employees submit timesheets a few too many days before the pay period ends to gain more processing time.**

**Rating:** No rating

**Concern:** This practice, though a common one, creates needed “built-in” adjustments and corrections due to employees having to submit certain estimated leave and work hours in advance.

### ***Best Method:***

**Delay pay date by one period, have employees submit timesheets after period ends to ensure accuracy, and give payroll more time for processing.**

**Rating:** Low/Medium

**Positives:** Company gets benefit of retaining payroll cash longer

**Concerns:** Might not be acceptable to many employees to have their pay day delayed for an entire pay period.

**Gain:** +5-10% in time and cost saving.

**Evaluation:** In age of automation, becoming less and less acceptable over time.

How to evaluate automating paper timesheets?

# 1.

**The First Challenge: Processing Payroll timesheets takes too long!**

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**Solution: Use standardized Excel payroll timesheet templates**

***Recommended Method:***

**Have employees fill out Excel timesheets and submit to supervisors by email. In parallel, employees print timesheets for their own signature and the supervisor's signature.**

**Rating:** Medium

**Positives:** Payroll can automate consolidation of employee payroll timesheets into a master Excel sheet formatted for electronic entry into payroll.

**Concerns:**

1. Excel templates can be difficult to use.
2. Timesheets "stuck" in email, spam filtered, "lost."
3. Email time/date stamp not sufficient or reportable for submission and approval on-time performance.
4. Paper-based timesheet signatures still required, does little to tame "the paper monster."
5. Does nothing to address time off requests and approvals if they are required.

**Gain: +10-15%** in time and cost savings

**Evaluation:** too much effort for minimal gain;  
Excel productivity better for electronic  
processing of hours data, but not for tracking  
submissions and approvals.

# 1.

**The First Challenge: Setting up daily Payroll timesheets takes too long!**

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**Best Solution: Capture and process payroll timesheets with in-house or purchased software**

***Best Method:***

**Have electronic Payroll timesheets completed and submitted by employees. Supervisors approve or reject timesheets with comments.**

**Rating:** High

**Positives:**

1. Electronic audit trails of all submissions, approvals and rejections.
2. Best visibility of employee timesheet progress and status at every step of workflow.
3. Payroll can automatically run pay data summary and details reports to check validity of data.
4. Payroll can automatically consolidate employee pay data into electronic format for quick transmission to payroll.
5. Rapid capture, submissions, approval and processing of hours data eliminates need for built-in lags and corrections.

**Cons:**

1. Needed bandwidth to evaluate in-house or purchased software options.
2. Upfront system requirements definition requires level of effort.
3. Implementation of new system will require re-training of employees.

**Gain: +80% in time and cost savings**

**Evaluation: Significant reduction in workflow and processing time.**

# How to evaluate automating paper timesheets?

## Step 2

**Address the Second Challenge:**  
Entering and validating data – making  
sure it's correct.

**Ask this challenge question:**  
Can you enter and validate data in  
real time? What would you gain?

How to evaluate automating paper timesheets?

## 2.

**The Second Challenge: Entering and validating data – making sure it's correct.**

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## **Solution: Manually validating paper timesheets**

### ***Worst Method:***

**Leave validation to approval process.**

**Rating:** Poor

**Concerns:** Puts too much error checking on supervisors; high number of errors and corrections likely

### ***Best Method:***

**Require daily timesheets to ensure daily validation of time entry.**

**Rating:** Low

**Concerns:**

1. Daily paper timesheet submission and approval not always feasible for office environments.
2. Supervisors might not have bandwidth for daily approvals and validation.
3. Process might not work well for weekend or night shift work.

**Gain: +50% gain in accuracy**

**Evaluation: best you can do with paper**



## 2.

The Second Challenge: Entering and validating data – making sure it's correct.

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### **Solution:** Excel Payroll timesheets with built-in validation rules

#### **Best Method:**

**Built-in Excel macros can validate entries.**

**Rating:** Medium

**Positives:** Simplifies approval task

**Concerns:** Break between logic of individual timesheet validations and overall summary reports.

**Gain:** +50% in accuracy

**Evaluation:** Excel timesheets with built-in validation affordable solution with limitations.

## 2.

**The Second Challenge: Entering and validating data – making sure it's correct.**

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**Best Solution: Automatically validate timesheet entries with in-house or purchased software**

***Best Method:***

**Have Payroll timesheets automatically validate all codes, policies and rules in real time.**

**Rating:** High

**Process:**

1. Policies and rules validate entries when they are made.
2. Supervisors can override certain rules when permitted.

**Gain: +100% gain in time and cost savings for validation tasks**

**Evaluation:** Timesheet entries made in real time; significant increases in accuracy; management monitoring through the day now possible; admin staff can focus on other tasks.

# How to evaluate automating paper timesheets?

## Step **3**

### **Address The Third Challenge:**

Having timesheets approved by supervisors.

### **Ask this challenge question:**

How much time and cost can you squeeze out of the payroll timesheet submission and approval process?

How to evaluate automating paper timesheets?

### 3.

**The Third Challenge: Having data approved by Supervisors.**

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## **Paper-based Solution:**

**Submission and approvals of paper timesheets requires manual collection, faxing and/or fedexing paper timesheets**

### ***Only Method:***

**Employees fill out paper timesheets and submit to Supervisors for approval. Multiple sites require timesheets faxed or fedexed for daily or weekly approval and processing.**

**Rating:** Low

**Positives:** Low visible costs

**Concerns:**

1. High friction and cost of faxing and fedexing
2. Missing or lost timesheets
3. Timesheets languishing on approvers desk
3. Slow and tedious corrections process

**Gain:** limited; significant inefficiencies in approvals can slow payroll processing

**Evaluation:** best you can do with paper

How to evaluate automating paper timesheets?

**3. The Third Challenge: Having data approved by supervisors.**

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**Solution: Excel payroll timesheets submitted, approved and rejected by email**

***Individual Timesheets Method:***

**Email individual Excel timesheets to supervisors for approval.**

**Rating:** Low

**Concerns:** Opening up individual emails is slow and tedious; Approvers might have to create a PDF version of Excel timesheet for signatures, or print timesheet, sign, create PDF file and email back, or print and fax back. This is a poor process for corrections and re-approvals of timesheets.

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***Packaging Timesheets Method:***

**Once approved, supervisor packages Excel timesheets into a zip file, sends on by email or FTPs zip file to secure directory where it is accessed by another system for processing.**

**Rating:** Low-Medium

**Concerns:** Only improvement is reducing number of emails for client to open; above issues remain.

How to evaluate automating paper timesheets?

### **3** ■ The Third Challenge: Having data approved by supervisors.

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#### ***Consolidation Method:***

Consolidate individual Excel timesheets into one master Excel sheet for higher levels approvals and processing. Supervisors send on consolidated Excel sheets using same methods as above.

**Rating:** Medium

**Concerns:** Reduces number of emails and the number of Excel timesheets to be handled for processing and approvals; above issues remain.

**Gain:** +50% improvement in time and cost over paper-based methods.

**Evaluation:** Significant improvement, but still cumbersome for corrections and re-approvals.

How to evaluate automating paper timesheets?

**3. The Third Challenge: Having data approved by supervisors.**

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**Best Solution: In-house or purchased software automatically consolidates submitted timesheets into approval dashboard**

**Best Method:**

**Have Payroll timesheets submitted electronically and consolidate an approval dashboard.**

**Rating:** High

**Process:**

1. Employees submit timesheet electronically.
2. Supervisors are reminded with email notices when it is time to begin approving submitted timesheets.
3. Supervisors can see which timesheets are not submitted and take action.
4. Supervisors can reject with comments submitted timesheets needing corrections, or approve valid timesheets.

**Gain: +80% less time and cost**

**Evaluation: Fastest most accurate approvals**

# How to evaluate automating paper timesheets?

## Step 4

**Address The Fourth Challenge:**  
Getting data into your payroll  
or ERP systems.

**Ask this challenge question:**  
Double and triple data entry: how  
much can you eliminate?



How to evaluate automating paper timesheets?

## 4. The Fourth Challenge: Getting data into your payroll or ERP systems.

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**Solution:** Consolidating paper timesheet data into master sheets or data files.

***Worst Method:***

Use standard timesheet template formats, consolidate hours into one master sheet to facilitate more accurate data entry.

**Rating:** Low

**Concerns:**

1. Most paper-based systems are doing this already.
2. Adding consolidated template sheet requires high level of effort for modest gain in data entry accuracy.
3. Still having to live with “double data entry” issue.

***Best Paper-based data entry Method:***

Scanning paper timesheets into electronic format to facilitate data uploads.

**Rating:** Medium

**Concerns:**

1. Requires type-written timesheets, handwriting not recognized.
2. OCR software is still expensive and not always reliable.

How to evaluate automating paper timesheets?

**4.** The Fourth Challenge: Getting data into your payroll or ERP systems.

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**Gain: +5-10% in time and cost savings**

**Evaluation: too much effort for minimal gain**

## 4. The Fourth Challenge: Getting data into your payroll or ERP systems.

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**Solution:** Change to standardized Excel timesheet template allows for easier data consolidation

**Only Method:**

Use standard Excel Payroll timesheet template format; consolidate Excel timesheet data into one master Excel sheet.

**Rating:** Medium

**Positives:**

1. Eliminates one round of data entry.

**Concerns:**

1. Requires strict use of standard Excel template.
2. Same issues described above regarding managing and consolidating Excel timesheet through email.
3. Does not handle corrections well.

**Gain:** +70% in time and cost savings

**Evaluation:** if possible, data consolidation benefits are large as can now export data. No improvement for corrections.

## 4. The Fourth Challenge: Getting data into your payroll or ERP systems.

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### **Best Solution:** Electronically export timesheet data with in-house or purchased software

#### **Best Method:**

Manual/automatic data export marks entries as processed and automates corrections process.

**Rating:** High

**Process:**

1. Submitted and approved Payroll timesheet entries can be exported by SFTP accounting, web services or manually uploaded to payroll
2. All entries can be marked as "processed" so correction entries can be exported and processed in future as new entries.
3. Mirrored pay data reports allow for final data reviews by approvers, payroll.

**Gain:** +100% in time and cost savings

**Evaluation:** Automated exports eliminate 100% of second data entry; admin staff can focus on other tasks; reduces double data entry errors, automates corrections process.

# Appendix:

## Additional Notes on Options

### Paper Payroll Timesheet Built-In Problems

- 1.** For large companies, paper Payroll timesheets will by necessity need to vary by job because of special job requirements. In these cases, it will never be advisable to standardize paper timesheet templates.
- 2.** Companies that do successfully standardize paper Payroll timesheet templates across a variety and jobs divisions can be very busy and difficult to read.
- 3.** Paper timesheets are the gold standard for notating timesheet corrections and adjustments. DCAA and other auditing standards require that electronic systems and software must emulate the audit trail provided by paper systems.
- 4.** Paper timesheets must always be submitted by hand, messenger, fedex or fax.
- 5.** Paper timesheets when completed can be lost or damaged. There only back-up is imaging (e.g. using smartphone cameras) or Xerox copies.

- 6.** Paper timesheets must always be approved and sent on for further processing by messenger, mail, fax, or converted to an electronic image or data.
- 7.** Where physical signatures must be part of the audit trail, a timesheet image can be imported and attached to an electronic record of the timesheet.
- 8.** Rejections sometimes must be faxed, messengered, or converted into an image and sent back to supervisors.
- 9.** Paper timesheet processes have a built-in slowness factor that makes daily timesheet submission and approval not feasible (unless daily certified payroll is required)

## Excel Payroll Timesheet Built-In Problems

- 1.** For large companies, Excel Payroll timesheets will by necessity need to vary by job, employee type or cost center because of job requirements. In these cases, it will be difficult or impossible to standardize Excel timesheet templates.
- 2.** Companies that do successfully standardize Excel Payroll timesheet templates across a variety and jobs and cost centers are very busy and difficult to read.
- 3.** Excel templates can be used and modified to save time in timesheet preparation, however, this is usually done by administrative staff.
- 4.** Excel timesheets must be printed, obtain physical signatures and stored for safekeeping if they are to match paper timesheets in notating timesheet corrections and adjustments. DCAA and other auditing standards require that electronic systems and software must emulate the audit trail provided by paper systems.

- 5.** Excel timesheet distribution is handled by email, FTP, flash drive media, or in printed versions by hand, messenger, fedex or fax.
- 6.** Excel timesheets when completed can be lost or damaged, and their paper-based versions can be as well. Their back-ups are file backups, and for their paper-based versions imaging (e.g. using smartphone cameras) or Xerox copies.
- 7.** Excel timesheets must always be emailed, faxed, messengered or converted to an electronic image for approvals.
- 8.** Where physical signatures must be part of the audit trail, a paper timesheet image can be copied into the Excel version of the timesheet.
- 9.** If physical signatures are required, rejections must be sent in a printed paper version by fax, messenger, or converted into an image and sent back to supervisors by email or FTP.
- 10.** Excel timesheet processes also have a built-in slowness factor that makes daily timesheet submission and approval not feasible (unless daily certified payroll is required).

## In-House Development Built-in Problems

- 1.** The greatest problem with in-house developed systems is source code control, continuity and support over the long term. Today, development engineers and contractors move from company to company frequently so it is unlikely that continuous support for enhancements and updates should be expected beyond 18 - 24 months for any internally-developed Payroll timesheet application.
- 2.** In all cases, in-house Payroll timesheet software should be able to automatically setup employees with access to the appropriate pay or earnings codes and other data entry properties.
- 3.** An in-house system must have the ability to record physical signatures and have them stored for safekeeping if they are to match paper timesheets in notating timesheet corrections and adjustments. DCAA and other auditing standards require that electronic systems and software must emulate the audit trail provided by paper systems.
- 4.** An in-house system must be able to distribute timesheets by rendering them into a user client such as a browser on-demand. The system must also allow for the electronic printing, submission, approvals, rejections, corrections and reporting of timesheets.
- 5.** An in-house system must provide back-up and disaster recovery to as a backup to physical timesheets that might become lost or damaged. It should also allow for the storage of images of paper-based timesheets (e.g. using smartphone cameras) or PDF files copies.
- 6.** If signatures are required, submissions, approvals and rejections must be authenticated through the systems login and authentication features. The system must have a detailed audit trail recording date and time stamps and authorized users conducting those all audited actions.



- 7.** When developing an in-house system, databases should include MS Access, FoxPro for smaller systems and MS SQL Server or Oracle for larger systems.
- 8.** A design and database development resource can write a program that allows you to update employee, supervisor approval assignments and if needed, pay and earnings security access permissions for different classes or division employees.
- 9.** You can give access to the database by writing a user interface that allows system administrators the ability to assign supervisors to employees.
- 10.** You can write Payroll timesheet templates that can generate Payroll timesheets pre-filled with the employee identifying information, their proper pay or earnings codes, shift, job and other key information.
- 11.** You can write a Payroll timesheet application to allow for time off requests, automated accruals, other labor rules and policies such as overtime, missed meal penalties, and other rules.
- 12.** You can write a holiday scheduler that automatically schedules holidays and populates them on employee payroll timesheets with the correct hours according certain security permissions.

<b>Project Phase</b>	<b>Tools</b>
Requirements Analysis	Options: Internal business analyst External consultant
Database Development	Tool Options: MS SQL Server MS Access FoxPro
Business Logic/Interface Development	Tool Options: .NET Java/HTML PHP
Business Intelligence Reporting	Tool Options: Crystal Reports Business Objects Cognos
Export Data	System Options: ADP Payroll Timberline SAP

## Considerations When Buying Software

**1. General Features.** There are certain general features that are the mark of an enterprise-class Payroll time and work tracking system.

**1.1. Cloud and On-premise Software Options.**

Advanced construction Payroll timesheet software should be available in cloud versions or self-hosted versions.

**1.2.** Ability to provide application security using custom **enterprise security permissions** and secure application access using **SSL, LDAP and Active Directory**.

**1.3.** Ability to support **all major operating systems, databases, web servers and browsers**.

**1.4.** Ability to **track employee hours** using any data entry method whether employees are in the office, in a manufacturing plant or in the field.

**1.5. Multiple approval levels** and backup approval levels for Payroll timesheets.

**1.6. Automated email reminders and notices** to enforce timesheet submission and approval deadlines.

**1.7.** Support for **shift differential** regular time, overtime and double time.

**1.8.** Ability to **support multiple time periods** for payroll processing and reporting such as weekly, bi-weekly, semi-monthly, monthly, quarterly, yearly, year to date, fiscal years and more.

**1.9.** Ability to **support multiple holiday schedules** by division, group, state, province, country or country group for multiple employee types.

**1.10.** Ability to support **multiple billing rate options** by union, job, cost code, client, or other variables.

- 1.11.** Ability to support **multiple pay rate options** by union, job, cost code, client, or other variables.
- 1.12.** Ability to support **multiple employee types** for payroll processing such as non-exempt, exempt, contractor, etc.
- 1.13.** Ability to **customize system terminology** to match company's terminology for employees, assets, Payrolls, time off, jobs, phases, cost codes and more.
- 1.14.** Ability to **brand or private label the application** using a company logo and web page names.
- 1.15.** **Global support for multiple locales, languages and time zones.**
- 1.16.** Support for **DCAA compliance including audit trails** of timesheet editing and system administrative changes.
- 1.17.** Support for **daily certified payrolls** including daily submission, approvals and reporting of payroll data.
- 1.18.** **Data Synchronization and Web Services.** If this information resides in an payroll, accounting, ERP system, the Payroll timesheet software should be able to synchronize Payroll timesheets with this information using auto-import utilities and/or web services.

**2. Automatically setup submission and approval workflows.** There are required features to with the ability to automatically setup timesheet workflows.

- 2.1. Automatically assign employees** with proper timesheet template, access to earnings and pay codes.
- 2.2.** Ability to **create Payroll timesheets using assigned templates** allows different template requirements for different jobs, employee types, cost centers or payrolls within the same company.
- 2.3.** Ability **create Payroll timesheet fields** in the templates to track any entry properties such as regular time, overtime, double time, meals, units, conditions, measurements, and other fields. Payroll timesheets will be rendered using this template format automatically.

- 3. Ability to validate data, policies and rules.**
  - 3.1.** Ability to **restrict employees and resources certain approved pay or earnings codes.**
  - 3.2.** Ability to **restrict employees to certain approved pay classes.**
  - 3.3.** Ability to **process rules** such as overtime and double time hours and other entries.
  - 3.4.** Ability to **process time off accruals** and enforce other employee balance and accrual rules.
  - 3.5.** Ability to **enforce required fields** are entered in Payroll timesheets.
  - 3.6.** Ability to **restrict certain data field entry** to managers with assigned security permissions.
  - 3.7.** Ability to **process time entry rules** that prohibit time and units entry policies from being violated.
  - 3.8.** Ability to **process rounding rules** where appropriate to ensure that hours and units data entry is uniform for payroll, accounting and billing.
  - 3.9.** Ability to enforce **rules that prevent data from being entered against inactive** employees or cost centers.
  - 3.10.** Ability to enforce **rules that do not allow time off to be scheduled on non-work days.**
  - 3.11.** Ability to enforce rules that **do not allow time off submissions for past dates** to violate current time off balances.
  - 3.12.** Ability to enforce rules that **do not allow time off submissions for future dates** to violate future time off balances.
  - 3.13.** Ability to support **California rules** such as California daily overtime, double time and consecutive day rules, the meal penalty rule and split shift premiums.
  - 3.14.** Ability to support **9/80 compressed rules.**
  - 3.15.** Ability to enforce **shift differentials** and associated

midnight split rules.

**3.16.** Ability to support certain **comp time or time in lieu policies**.

**4. Supervisor Features.** Once the electronic Payroll timesheets are setup, supervisors should have several important usability features that are not available in paper or Excel timesheets:

**4.1.** Ability to **search for active employee timesheets** that they have the security permissions to approve, reject, manage, edit, view or print.

**4.2.** Ability to **search for timesheet notes** by keyword.

**4.3.** Ability to **search for employee timesheets using key properties** such as name, ID, employee type, cost center and other key properties.

**4.4.** Payroll timesheet should **memorize frequently used pay or earnings codes** and display them in easy to use pick lists.

**4.5.** **Ability to add multiple pay or earnings codes**, as in a paper Payroll timesheet, on demand, essentially extending the structure of the Payroll timesheet if needed without any administrative assistance.

**4.6.** **Copy previous timesheet setups** from day to day, or time period to time period.

**4.7.** Ability of employee to **record any time off hours** by pay code.

**4.8.** Ability to **schedule time off for employees** they have permission to manage.

**4.9.** Ability to **approve time off requests** from employees who request time off.

**4.10.** Ability to electronically **submit and/or supervisor approve** Payroll timesheets.

**4.11.** Ability to **navigate to any past Payroll timesheet** they have permission to manage, view, edit or print.

**4.12.** Ability to **summary submit or summary**

**supervisor approve** an entire week of Payroll timesheet entries.

**4.13.** Ability to **print Payroll timesheets** for review and to obtain physical signatures if needed.

**5. Payroll Review/Approval Features.** Once the electronic Payroll timesheets are submitted and supervisor-approved, payroll approvers should have several important usability features that are not available in paper or Excel timesheets:

**5.1.** Ability to **login to a simplified approval dashboard** that displays the information needed by department or cost center to complete Payroll timesheet approvals.

**5.2.** Ability to **search for active daily and weekly Payroll timesheets** that they have the security permissions to view, approve or reject.

**5.3.** Ability to **view employee hours by employee type or other subtotals.**

**5.4.** Ability to electronically **approve employee hours, supervisor logs, accident reports** and other submitted forms.

**5.5.** Ability to **send an automated rejection email notice with detailed reasons for the rejection** to employees.

**5.6.** Ability to **payroll approve time off schedules** for employees.

**5.7.** Ability to **navigate to any past Payroll timesheet** you have permission to view or print.

**5.8.** Ability to **payroll approve by day or summary approve** an entire week of Payroll timesheet entries.

**5.9.** Ability to **view custom reports** and publish reports to supervisors.

**5.10.** Ability to grant security permissions to select or all supervisors so they can **create custom reports** which when created are restricted to only their employees' data.

**5.11.** Ability to **print Payroll timesheets** for review and to obtain physical signatures if needed.

**5.12.** Ability to export payroll data in a file format to payroll or ERP systems. They should be able to do this manually or as an automated scheduled event that would SFTP an export file to a defined location for another system.

## **6. Payroll Employee Master File Data Synchronization**

**Features.** Payroll timesheet systems must be always be “in sync” with their payroll or ERP systems that are usually the system of record for all employee and cost center data. Payroll managers should have several important usability features that are not available in paper or Excel timesheets:

**6.1.** Ability to **have employee master file data automatically synchronize with the payroll timesheet system**. This data should include, but is not limited to, employee data, supervisor assignments, cost center assignments, rates, and more.

**6.2.** Ability to **synchronize employee data using web services**.

**6.3.** Ability to **use the payroll timesheet system as a system of record** and create scheduled auto-exports of system object data to third party systems such as HR, payroll, scheduling, ERP or accounting systems.



## Have Payroll Timesheets:

1. Submitted
2. Approved
3. Validated, and
4. Processed

in **1/10<sup>th</sup>** the time!

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