Sync Timecards

TaiRox Sync Timecards provides a practical mechanism for using the timecard functionality in Sage 300 Payroll. (Sage 300 Payroll maintains information in both timecard and employee tables but provides no mechanism to keep them in sync.)

In many situations, the data (rate of pay, distribution code) in timecards needs to be synchronized with changes made to an employee's master record. This is especially true of recurring timecards and when using Sage HRMS for Sage 300, when employee records are updated remotely.

Sync Timecards provides a "one-click" way to update timecards, with the ability to select ranges of employees, timecards, periods and deductions, as well as timecard types and categories of deduction. You can also select particular timecard entry fields.

The program helps you avoid time-consuming and mistake-prone duplicate data entry – crucial for maintaining large payroll sites.

> **Important Note:** Sync Timecards <u>assumes</u> that the employee table is correct and that the timecards are to be updated from this information.
>
> You should do all editing at the employee level, as edits to the timecard data can be overwritten.

Sync Timecards is written using Sage 300 business objects and has the Sage 300 look-and-feel, with finders and selection mechanisms.

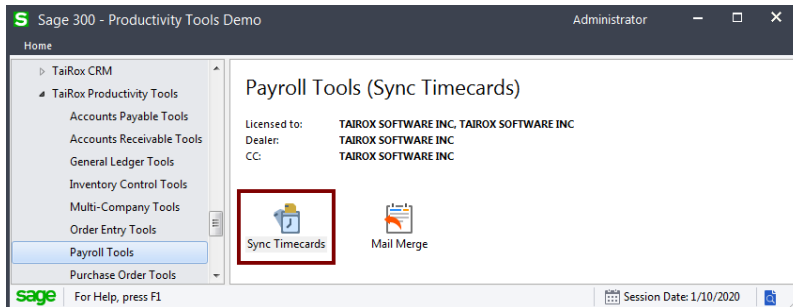The program supports both US and Canadian Payroll products.

Sync Timecards features:

- Updates timecards with new information such as rates of pay or distribution codes from the employee master records.

- Works with US Payroll or Canadian Payroll employees, depending upon the payroll selection. If both US and Canadian Payroll products are active for a company, Sync Timecards provides a drop-down payroll selection box.

- Lets you select timecards by range of employees, timecard IDs, period end dates, timecard type, timecard category, and earnings/deductions code.

- Lets you specify which information is updated: employee rate/amt/pct, distribution code, workers comp group, workers' compensation group, work classification code, shift differential schedule, and/or overtime schedule.

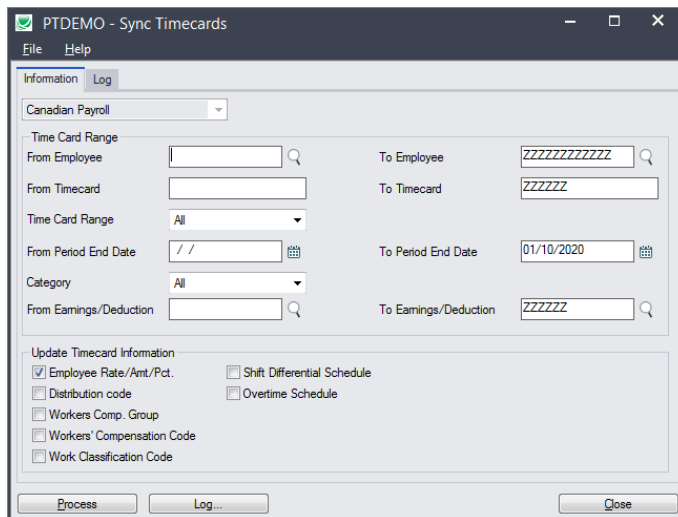- Retains settings from the last time information was updated and keeps a detailed log of all changes.

  These features help minimize mistakes and aid in the recovery of data if they occur.

Using Sync Timecards

The Sync Timecards icon appears under **TaiRox Productivity Tools > Payroll Tools** on the Sage 300 desktop and can be copied to other menu locations.
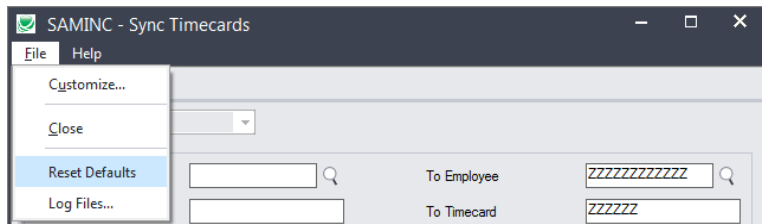

- Click the Sync Timecards icon in the Payroll Tools folder to open the Sync Timecards form, shown below.

Prior settings appear as the default settings for the next run

The settings that appear when you open Sync Timecards are the ones that were used for the last synchronization.

To reset settings to the default state, with ALL timecards selected for updates, choose **File > Reset Defaults** from the Sync Timecards menu.

Choose Canadian or US Payroll

If you have activated Sage 300 Canadian and US Payroll systems, you must first select the payroll system where you are synchronizing timecards.

Specify the range of timecards that need to be updated

- Prior settings appear by default. The screen above shows that ALL timecards will be updated with changes from the employee records.

- Choose a range of employees and the range, type and category of timecards that you want to update.

  - Note dropdowns for the timecard range (type) and category.

- Choose the range of period end dates for timecards that you want to update.

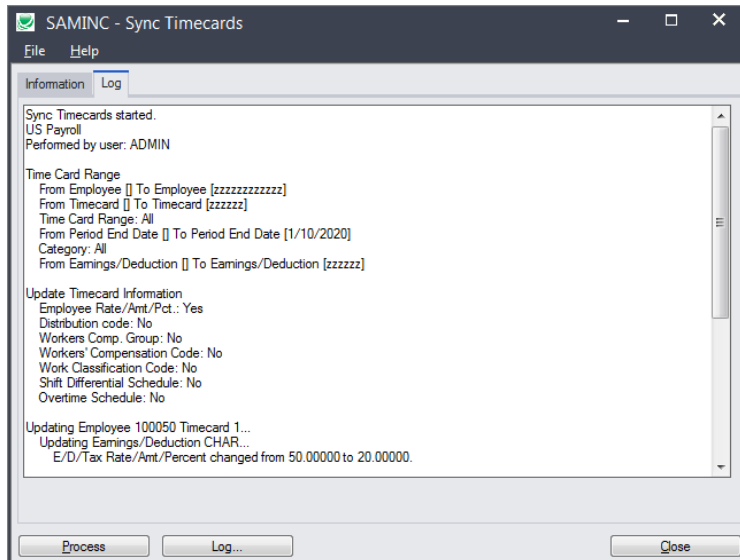- Choose the range of earnings and deduction codes that you want to update.

Select the timecard information that should be updated with changes

Select the information from the employee records that you want copied to employee timecards.

Timecards are updated only if the information differs from the employee records.

Click the Process button to proceed with timecard updates

While Sync Timecards is running, the Log tab will display progress information.

Click the Log button to check what was updated

Synch Timecards keeps a daily log of all changes made. Today's log is accessible by clicking the Log button.

Log files are kept for each Sage 300 company and can be found in the Sage 300 shared folder under the company directory. This directory will always be accessible to Sage 300 business objects and programs. For example, the log file may be in:

"C:\Sage300\COMPANY\SAMLTD\Sync Timecards"

Sample Log file

```
8/15/2020 3:10:58 PM Sync Timecards started.
8/15/2020 3:10:58 PM US Payroll
8/15/2020 3:10:58 PM Performed by user: ADMIN
8/15/2020 3:10:58 PM
8/15/2020 3:10:58 PM Time Card Range
8/15/2020 3:10:58 PM     From Employee [] To Employee [zzzzzzzzzzzz]
8/15/2020 3:10:58 PM     From Timecard [] To Timecard [zzzzzz]
8/15/2020 3:10:58 PM     Time Card Range: All
8/15/2020 3:10:58 PM     From Period End Date [] To Period End Date [1/10/2020]
8/15/2020 3:10:58 PM     Category: All
8/15/2020 3:10:58 PM     From Earnings/Deduction [] To Earnings/Deduction [zzzzzz]
8/15/2020 3:10:58 PM
8/15/2020 3:10:58 PM Update Timecard Information
8/15/2020 3:10:58 PM     Employee Rate/Amt/Pct.: Yes
8/15/2020 3:10:58 PM     Distribution code: No
8/15/2020 3:10:58 PM     Workers Comp. Group: No
8/15/2020 3:10:58 PM     Workers' Compensation Code: No
8/15/2020 3:10:58 PM     Work Classification Code: No
8/15/2020 3:10:58 PM     Shift Differential Schedule: No
8/15/2020 3:10:58 PM     Overtime Schedule: No
8/15/2020 3:10:58 PM
8/15/2020 3:10:59 PM Updating Employee 100050 Timecard 1...
8/15/2020 3:10:59 PM     Updating Earnings/Deduction CHAR...
8/15/2020 3:10:59 PM         E/D/Tax Rate/Amt/Percent changed from 50.00000 to 20.00000.
8/15/2020 3:10:59 PM Updating Employee 100050 Timecard 000001...
8/15/2020 3:10:59 PM     Updating Earnings/Deduction HOURLY...
8/15/2020 3:10:59 PM         E/D/Tax Rate/Amt/Percent changed from 15.00000 to 12.00000.
```

```
8/15/2020 3:10:59 PM     Updating Earnings/Deduction HOURLY...
8/15/2020 3:10:59 PM         E/D/Tax Rate/Amt/Percent changed from 15.00000 to 12.00000.
8/15/2020 3:10:59 PM     Updating Earnings/Deduction HOURLY...
8/15/2020 3:10:59 PM         E/D/Tax Rate/Amt/Percent changed from 15.00000 to 12.00000.
8/15/2020 3:10:59 PM     Updating Earnings/Deduction HOURLY...
8/15/2020 3:10:59 PM         E/D/Tax Rate/Amt/Percent changed from 15.00000 to 12.00000.
8/15/2020 3:10:59 PM
8/15/2020 3:10:59 PM 3 Timecard(s) processed.
8/15/2020 3:10:59 PM 2 Timecard(s) updated.
8/15/2020 3:10:59 PM
8/15/2020 3:10:59 PM 14 Earning(s)/Deduction(s) processed.
8/15/2020 3:10:59 PM 5 Earning(s)/Deduction(s) updated.
8/15/2020 3:10:59 PM
8/15/2020 3:10:59 PM Sync Timecards complete.
===============================================================================
```

The Log lists:

- The user, and the range of timecards specified for the selection.

- The information that was chosen for the update.

- Changes made to each employee timecard.

- Total items processed and total updated.

Note that the log files are located in the folder where the program was installed and can be viewed or edited using any program capable of reading a text file (Microsoft Word for example).