Instructions for Activating the TimeWorksPlus Integration Feature with TimeSimplicity

To activate the TimeWorksPlus integration feature with TimeSimplicity, please review and follow the steps provided below:

TimeWorksPlus

1. You must first request that your client's TimeSimplicity account be setup by SwipeClock. The ***Client Setup Request Form*** can be accessed from the ***Products*** tab found on your ***Partner Welcome*** screen then select the ***TimeSimplicity*** link. Once the account has been setup, you will receive an email with the login information as well as the Single Sign-On URL.

2. Log into ***TimeWorksPlus*** and select the client from your ***Client List***. Navigate to the ***Accountant Menu***, then ***Client Configuration***, then the ***Processing Rules*** tab. Select the ***Scheduling*** radio button.

   Note: If the TimeWorksPlus Scheduling feature is already active and being utilized, your client can continue use of that feature until a schedule within TimeSimplicity has been Published and Posted to TimeWorksPlus.

3. From the search results, select the ***Integrated Scheduling*** rule which will allow you to implement the rules for the integration in TimeWorksPlus to link to the advanced scheduling feature for TimeSimplicity.

   Note: *Not only does this page enable the integration, it allows exception alerts to be set. If you do not wish to set any alerts, simply click "Save." If your client would like exception alerts, simply switch the indicator from "Off" to "ON" then specify the minutes.*

4. The next feature to activate is also found in the ***Scheduling*** section from the ***Processing Rules***. This rule is titled ***TimeSimplicityOptions*** and is where you will enable the ***Single Sign-On*** (SSO) options for the client and supervisor as well as the employee. To do this, simply check the corresponding boxes. In the ***SSO URL*** field, enter http://ts.payrollservers.us/sso/twlogon. Once entered, click "***Save"***.

5. If the employees should have access to view their schedule though the ***Employee Self-Service*** portal, the next step is to ensure the ***Scheduling*** page is available to them. Navigate to the ***ESS*** tab at the top of the ***Client Configuration*** page and mark the ***Scheduling*** box if needed. Click "***Save***" at the bottom of the page.

6. The next step is to setup a dedicated Client level login which will also be identified within TimeSimplicity to allow the Single Sign-on to take place. Go to the ***Accountant Menu*** then select ***Login Maintenance***. Click ***Add New Login*** found at the top of the page and select the ***Client Login*** option. We recommend using a standard login ID such as TS then the client's Site Code, which can be found in your ***Client List***. If the ID and Password are changed within TimeWorksPlus, the connection to TimeSimplicity will be lost.

Note: *The integration will pull all employee records as well as the Supervisor and Client accounts assigned here. As a result, the Client and Supervisors records need to be as complete as possible with the name, email, and phone number. If the information is not provided, TimeSimplicity will populate the Last Name field with the login ID recognized in TimeWorksPlus. Ask your client to take a moment to ensure the information is provided.*

7. The next step is to ensure the ***Employee Setup*** records are complete with the necessary employee data. The mandatory fields that need to be populated within the ***Identity*** section include:

   Employee Code
   First Name
   Last name
   Start Date
   Phone number (optional)
   Email address (optional)

   These are simply employee demographics that will enable TimeSimplicity to identify active employees that can be added to a schedule.

   Next is the ***Identifiers*** – if the employee will access their schedule through the Employee Self-Service portal, they will need a ***Login*** and ***Password***.

   The last section is the ***Employee Data*** which is where you and/or your client will specify where the employee should be scheduled to work. In most cases, the ***Department*** and ***Location*** fields are standard but if other data is required, the ***Home*** fields can be utilized. You can also add up to 17 additional ***Home*** fields.

   Note: *If your client is currently tracking departments, locations, jobs, etc. through Clock Prompts, please note that clock prompt data will not populate in TimeSimplicity through the integration.*

TimeSimplicity

8. Log into TimeSimplicity with the URL and login credentials provided to you after your client has been setup by a SwipeClock representative. Hover your mouse over ***TimeWorksPlus Integration*** found at the top of the page and choose ***Integration Setup*** from the dropdown menu.

9. The first page you see will be titled ***Connection Information***. The base URL should be pre-populated with https://payrollservers.us/pg/TimeSimplicityAPI.asmx. If it is not populated, you can manually enter the URL. Next you will enter the dedicated ***Client level Login ID*** and ***Password*** that you setup in TimeWorksPlus. And the last box requires the ***Site ID*** you included in the ***Login ID***. Again, the ***Site ID*** is listed on your ***Client List*** within TimeWorksPlus. Click ***Test Connection***. If everything is set up correct, you will see a message stating that the "Connection to TimeWorksPlus is Successful". Click "O***K***".

10. Select the ***Rules*** tab to determine the mapping of fields between the two systems. ***Workgroup*** and ***Position*** MUST have information in order to build schedules. Simply choose the applicable field to map the data from. If more criteria is needed to determine employee schedules, there are four (4) additional ***Schedule Levels*** to utilize. Next, decide if the ***Email Address*** and ***Phone Number*** should be imported. The remaining fields can be left as defaulted.

11. Select the ***Data Push/Pull*** tab to determine how often the integration will run. Click "***Add***" to schedule a time and decide how often it should repeat…***Daily*** or ***Weekly***. Or if you would prefer it to run more often, you can set the amount of minutes. The last section allows you to select which functions will run at the scheduled time…ALL or to specify, uncheck the ***Run All*** box then select "***Add***" to choose from a list. Most common will be to run all functions. Click "***Save***" in the top left corner.

12. Hover your mouse over the ***TimeWorksPlus Integration*** and choose ***Run Integrations***.

13. The first page is titled ***Import Codes*** and displays which fields you have chosen to map and a list of the codes that will import. This will make the codes available when assigning employees to workgroups and positions. Click the ***Import Codes*** button.

14. Next is the ***Import Employees*** tab and displays all employees from the ***Employees Setup Page*** and the Supervisor and Client level logins that will be imported to TimeSimplicity as employees. Your client can then give their Supervisors "Manager" permissions within TimeSimplicity. Click the ***Import Employees*** button.

15. The next tab is ***Import Org Assignments*** which will display the codes that are already assigned to employees within TimeWorksPlus. Click the ***Import Org Assignments*** button.

16. ***Import Time-off Requests*** is the next tab and will import any approved Time-off Requests from TimeWorksPlus and populated them onto the schedule. Click the ***Import Time-off Requests*** button.

17. The last tab titled ***Schedule Post*** allows "published" schedules to be posted within TimeWorksPlus for reporting purposes and allows employees' to view their schedule within the ***Employee Self-Service*** portal. Naturally this last step will take place after your client has built the employee schedules. Click the ***Post Schedules*** button.

18. Test the Single Sign-On from TimeWorksPlus by selecting the ***Scheduling*** link from the left pane within the ***Main Menu***. Once selected, you will see the ***Launch TimeSimplicity*** link at the top of the page. This link will open ***TimeSimplicity*** in a new tab so you must allow pop ups to take place. You can enable this option through your internet browser ***Settings***.

This completes the setup of the TimeWorksPlus integration feature with TimeSimplicity. If you have any questions please submit a support ticket to support@swipeclock.com.