

# TimeWorksPlus™ Timekeeping Migration Request Form

The following form is provided to assist the payroll provider in the migration of an existing client from TimeWorks to TimeWorksPlus. The form will be used to identify the appropriate areas of functionality requested by the client, and determine requirements for migrating the account. Please complete this form in its entirety and in cooperation with your internal timekeeping and client support staff.

## Service Provider Information

Company Name \_\_\_\_\_ Contact Name \_\_\_\_\_

## Current Client Information

Client/Company Name \_\_\_\_\_ Site Code \_\_\_\_\_

What Payroll Software are you using? \_\_\_\_\_

Provide File Format (name) used for payroll processing (or payroll software):

If unsure, please enter "unknown." \_\_\_\_\_

Is an API used to import data from timekeeping into payroll? Yes \_\_\_ No \_\_\_ Unsure \_\_\_

Pay period start date to go "live" on TimeWorks Plus: \_\_\_\_/\_\_\_\_/\_\_\_\_

Client email: to receive an auto email with instructions when the migration process starts  
email \_\_\_\_\_

Note: Manual edits made in TimeWorks will not be reflected in TimeWorksPlus time cards. Please instruct the client to continue to make edits during the current pay period in TimeWorks to complete payroll. Client and Supervisor level logins will have 4 days after the go "live" date to complete their edits in TimeWorks and process payroll. Manual edits should not be made TimeWorksPlus before the go "live" date.

Please note: Single Day report is now Today's Entries in TimeWorksPlus

In order to effectively migrate the client account please complete the following questions about the set-up of the account in TimeWorks

**Custom reports:** Is this client currently using a custom report to run in the Web Formatter or any other commissioned custom report?

List custom report name \_\_\_\_\_

**Note** – Web Formatteer is not available in TimeWorksPlus, this report may need to be converted by support to run through the Download Activity File in TimeWorksPlus. Additional charges may apply.

**1. WebClock Use:** Are employees for this account currently clocking in through a web browser If yes or no , what version?

**2. Existing Scripts:** Does this account have existing scripts that must be converted for TimeWorksPlus? If you are unsure, please indicate. Yes\_\_\_ No\_\_\_ Unsure\_\_\_

**3. Rounding Rules:** Yes\_\_\_ No\_\_\_ Unsure\_\_\_)

(Manual set up is required in TimeWorksPlus, custom rounding scripts may need to be converted by support)

**4. Clock Prompts:** Yes \_\_\_ No\_\_\_ Unsure\_\_\_

X = \_\_\_\_\_ I = \_\_\_\_\_

Y = \_\_\_\_\_ J = \_\_\_\_\_

Z = \_\_\_\_\_ K = \_\_\_\_\_

**Labor Mapping:** Depending on the file format used, Labor Mapping may be required when using Clock Prompts. To view the TimeWorks mapping table, enter the custom file format name in the Download Activity file under Reports. List how the table is mapped for this account: This table allows you to set what labor fields are included in the file format you specify.

X Prompt maps to \_\_\_\_\_

Y Prompt maps to \_\_\_\_\_

Z Prompt maps to \_\_\_\_\_

This table allows you to set what numeric fields are included in the file format you specify.

NS1 maps to \_\_\_\_\_

NS2 maps to \_\_\_\_\_

NS3 maps to \_\_\_\_\_

**5. Scheduling:** Is scheduling activated and/or used for this account? Yes\_\_\_ No\_\_\_

Company Option Alerts are turned on? Yes\_\_\_ No\_\_\_ Unsure (Require manual set up in TWP)

**6. Additional Information** In an effort to fully accommodate the client’s feature requirements, and optimize the client’s experience in migrating to TimeWorksPlus, please explain any additional details that may be relevant, important or requested for a successful migration:

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**7. Employee Self-Service:** Enables employees to: clock in/out; view and/or edit time card; add notes to time card; approve time card; view schedule information; request time off; view accrual balances; and update personal information from a single login portal.

Please indicate below which features should be enabled for employees:

- |  |   |
|--|---|
| <input type="checkbox"/> WebClock punching     | <input type="checkbox"/> View time card                               |
| <input type="checkbox"/> View schedule         | <input type="checkbox"/> Update personal info                         |
| <input type="checkbox"/> View Supervisor Notes | <input type="checkbox"/> Request time off                             |
| <input type="checkbox"/> Accruals Report       | <input type="checkbox"/> Edit personal time cards (employee defined)* |

\* additional setup may be required if only select employees need to have permissions to edit their own time cards.

**8. Tomorrow Rule:** Customize the end of a pay period by a specified time/day or assign hours for “overnight” shifts to the following work day. Please briefly describe below: (may require additional scripting) \_\_\_\_\_

**Migration Period:** Each migration request will be addressed on a case-by-case basis according to the requirements of the client. In situations where a client currently uses advanced settings in the TimeWorks system, a review may take longer.

Thank you for your patience in the process. Each migration case will be reviewed for “compatibility” between platforms with the objective of communicating to the client any areas where a feature may not currently be available or feasible.

**CLIENT NOTICES – PLEASE READ**

Please indicate you have read each notice by checking the provided box.

- 1. Loss of Punch Edits – Any punch edits made in the TimeWorks system will not be reflected on the TimeWorksPlustime cards, and cannot be transferred for reporting or payroll processing. Your client will have limited access to TimeWorks reports in TimeWorksPlus through the “Archived Data Reports” located under the Reports menu.
  
- 2. Permanent Migration – Once the client’s account has fully migrated to TimeWorksPlus, it cannot be reversed back to TimeWorks without losing significant data. However, the account may be configured and tested in TimeWorksPlus prior to making a complete conversion. Once the account is created and tested, you will have the opportunity to accept or cancel the final migration step.

PLEASE MARK YES- for reading the above: \_\_\_\_\_