6469: Paylocity Integration
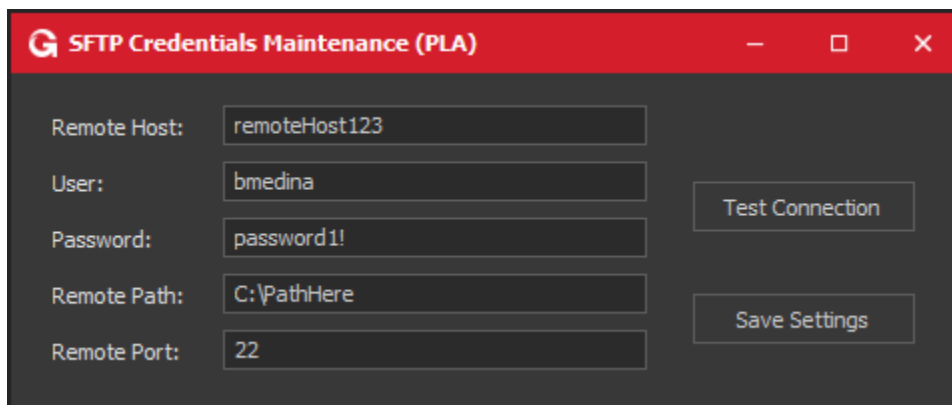
Precision Swiss Products Inc

Overview:

- Payroll export will automatically export time and attendance punches in as close to real time as possible.
- Project checks for new punches in or out every hour, and exports new punches to separate files for in or out punches.
    - Initiate SFTP to Paylocity's file transfer site, this way it will be pick up and import files, and have the punches appear inside Paylocity

Details:

SFTP Credential Maintenance Screen:

Before project export can be done, credentials to Paylocity's server must be entered.

Remote Host, Username, password, and Remote path will all be provided by paylocity rep. Remote port will need to be set up by GSS cloud team. Usually this is port 22, but to request this to be done, a cloud request will need to be submitted via the Service Web.

- Use test connection to test credentials. If an error code is returned, then connection to the server could not be made. Modify as needed until a success code is returned.
- Click "Save Settings" to encrypt credentials and store in custom table
    - ***NOTE***: Only those with permission to view this menu item will be able to modify credentials.

Manual/Automatic Export:

- Export can be done in two ways, via the menu item to run one time, or set up as an hourly unattended task.
- CSV of export containing in or out punches are temporarily contained in the …\Global\Custom\6469 folder
- New export file is created by checking if any new entries have been created in the V_TIME_ATTENDANCE view.

- A 5 min pad is present to account for upload speeds i.e. if the script last ran at 12:01 pm, then that will be recorded, and the next check will go back to 11:56 am, for any changes
- (Paylocity automatically throws out any duplicate entries)
- This time stamp of last time script ran an export is stored in a formatted txt file in the Global\Files directory

- Format of csv that Paylocity expects is as follows

EE ID	Punch Date	Punch Time	Punch Type
3576	6/24/2021	8:00am	In
226	6/24/2021	7:59am	In

- File name will either start with "InPunches" or "OutPunches" followed by the date and time the file was created in the following format "MMDDYYYYHHMMSS"
- As files are successfully submitted to paylocity, script automatically deletes the csv file from the directory folder.
  - If upload was not successful, upload will attempt to take place in the next upload time