



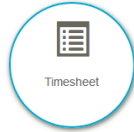
Quick Guide to Import Formats

Imports and Exports	3
Export	4
Import Files	5
Employees	5
Leave Balance	7
Pay Stubs	8
Charge Code	8
Authorized Charge	9
Hours Worked	10
Task#	10
Group Task#	11
Group	12
Groups to Employees	13
Pay Types	13

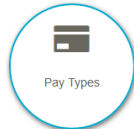
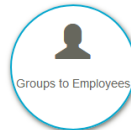
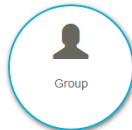
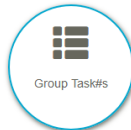
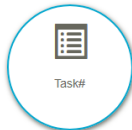
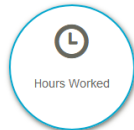
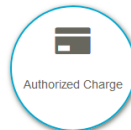
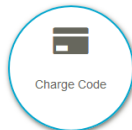
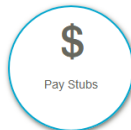
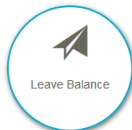
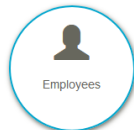
Imports and Exports

The Import | Export page allows the Accountant user to quickly add or export large files of information that can correlate to your accounting or payroll system.

Exports



Imports



Exports:

- Timesheet

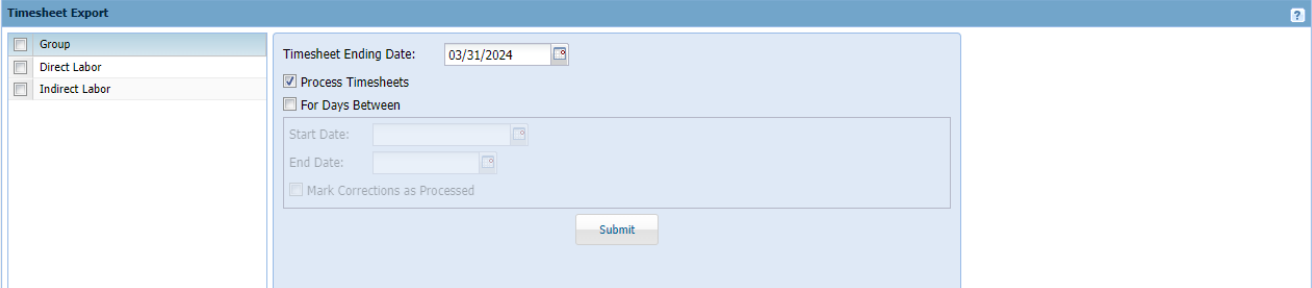
Imports:

- Employee
- Leave Balance
- Pay Stubs
- Charge Code
- Authorized Charge
- Hours Worked
- Task#
- Group Task#s
- Group
- Groups to Employees
- Pay Types

NOTE: Charge Code, Task#, Group Task#, Group, Groups to Employees and Pay Types are labels that can be changed upon request. See "Field Labels" on page 6.

Export

This page will allow you to access the custom export written for your accounting or payroll software. There is no standard export automatically loaded to this page – if you need to add an export or make changes to an existing one, contact Technical Support (go to the General tab and click on “Help Desk”).



1. Select at least one group of employees to be included in the export. To select all the groups, check the box beside the Group header.
 - a. The export file will look for the employees in that group not just the hours worked/leave available in that group. If an employee is in multiple groups, their time will only be exported once.
2. For the timesheet period selection you have 2 options – choose Timesheet End Date or For Days Between.
 - a. We recommend “For Days Between” because it is very specific to only include hours worked within that time frame. Timesheet Ending Date will bring in all timesheets from the beginning of the site until that end date that are not processed. (Processed means that they have already been exported and are not eligible for editing or exporting again.)
3. Until you are sure the data has exported properly and is saved in the accounting or payroll software correctly, uncheck the box “Process Timesheets”.
4. When you enter the criteria, click “Submit” and a text file will download or open (depending on your browser settings).
5. Save the file on your computer and import into your software.

NOTES:

- If you unchecked the box Process Timesheets, make sure to go back after the import is complete and process the timesheets.
- For an error message, contact Technical Support at 281-488-8806 ext 2.
- Corrected Timesheets can be processed by checking the box under the calendar box “For Days Between”.

Import Files

TeamKeeper has standard import formats to make mass creation and assignment easier for Accountants.

Employees

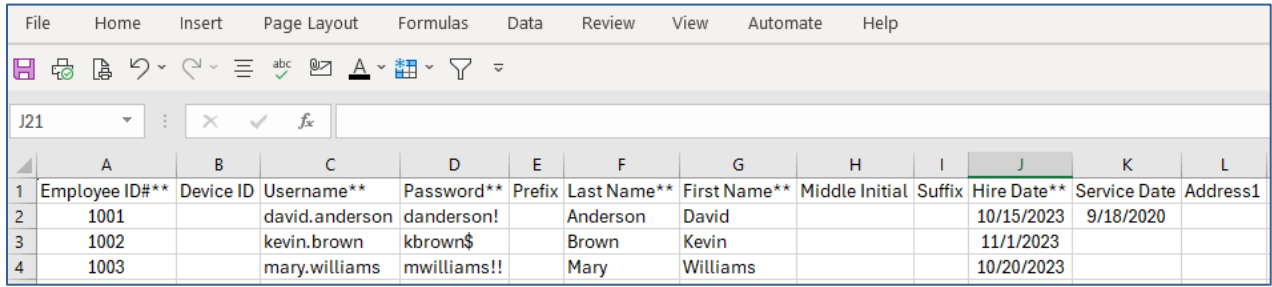
Description: Accountant can only create new employee profiles via import.

Format:

Header	Description	Required?	Format	Options
A	Employee ID#	Yes		
B	Device ID			
C	Username	Yes		
D	Password	Yes		
E	Prefix			
F	Last Name	Yes		
G	First Name	Yes		
H	Middle Initial			
I	Suffix			
J	Hire Date	Yes	MM/DD/YYYY	
K	Service Date		MM/DD/YYYY	
L	Address1			
M	Address2			
N	City			
O	State			
P	Zip			
Q	Time Zone			
R	Country			
S	Gender			Male Female
T	Birthday		MM/DD/YYYY	
U	Email			
V	Alt Email			
W	Login Type	Yes		Login Only Web Clock Only Web Clock/Activity Only Login and Web Clock
X	Cell Phone#			
Y	Pager#			
Z	Office Phone#			

AA	Home Phone#			
AB	SSN		XXX-XX-XXXX	
AC	Citizenship			
AD	Imm Status			US Citizen Green Card H1B F1 T1 Other Temporary Authorization
AE	Imm Status Expire Date		MM/DD/YYYY	
AF	Ethnicity			See Employee Management profile
AG	Exempt Status	Yes		Exempt Non-Exempt
AH	Organization			
AI	Employee Type	Yes		Consultant Contractor Full Time Benefited Full Time Unbenefited Part Time Temporary
AJ	Emergency Contact			
AK	Emergency Contact Phone#			
AL	Office Location			
AM	Veteran Status			Disable Veteran Newly Separated Veteran Other Veteran Vietnam Veteran
AN	Disabled			Y N
AO	Referring Employee			
AP	Union			
AQ	Termination Date		MM/DD/YYYY	
AR	Group			
AS	Blank			
AT	Vendor Name			
AU	Job Title			

Example:



	A	B	C	D	E	F	G	H	I	J	K	L
1	Employee ID#**	Device ID	Username**	Password**	Prefix	Last Name**	First Name**	Middle Initial	Suffix	Hire Date**	Service Date	Address1
2	1001		david.anderson	danderson!		Anderson	David			10/15/2023	9/18/2020	
3	1002		kevin.brown	kbrown\$		Brown	Kevin			11/1/2023		
4	1003		mary.williams	mwilliams!!		Mary	Williams			10/20/2023		

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Employees page. Click “Import” under the browse button.

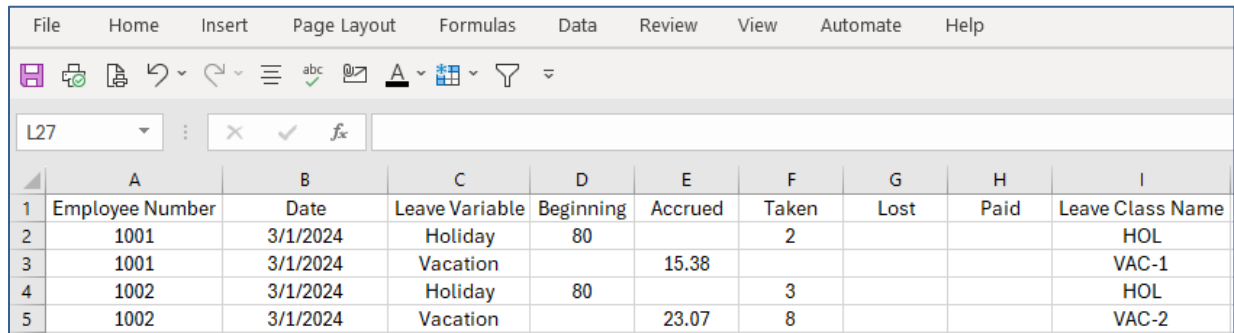
Leave Balance

Description: Spreadsheet file will allow user to import multiple types of balances for multiple employees. If fields D-H are left blank, they will have a 0 hour balance.

Format:

Column Header	Description	Required?
A	Employee Number	Yes
B	Date	Yes
C	Leave Variable	Yes
D	Beginning Balance	
E	Accrued	
F	Taken	
G	Lost	
H	Paid	
I	Leave Class Name	Yes

Example:



	A	B	C	D	E	F	G	H	I
1	Employee Number	Date	Leave Variable	Beginning	Accrued	Taken	Lost	Paid	Leave Class Name
2	1001	3/1/2024	Holiday	80		2			HOL
3	1001	3/1/2024	Vacation		15.38				VAC-1
4	1002	3/1/2024	Holiday	80		3			HOL
5	1002	3/1/2024	Vacation		23.07	8			VAC-2

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Leave Balance page. Click “Upload Leave Balance File” under the browse button.

Pay Stubs

Description: If you have elected to import Pay Stubs and/or W2s, your setup will include a parser fill and possibly a macro file to help convert Pay Stub data.

After exporting from your accounting or payroll software, save the file and browse for it on the Import Pay Stubs page. Click “Upload Pay Stub Advisory File” under the browse button.

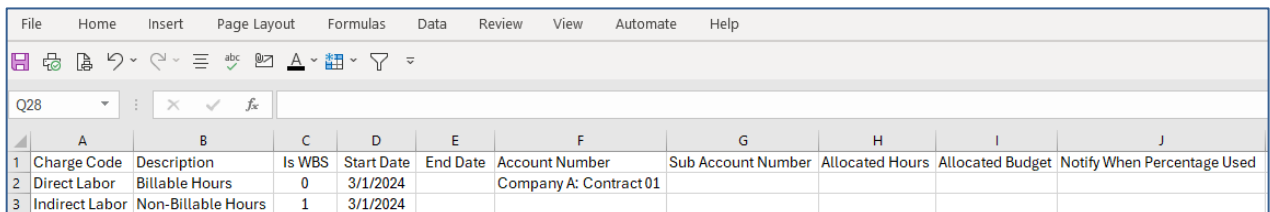
Charge Code

Description: Spreadsheet file will allow user to import charge codes instead of manually creating them on Charge Code Management.

Format:

Column Header	Description	Required?	Format
A	Charge Code	Yes	
B	Description	Yes	
C	Is WBS	Yes	0 = no, 1 = yes
D	Start Date	Yes	MM/DD/YYYY
E	End Date		MM/DD/YYYY
F	Account Number		
G	Sub Account Number		
H	Allocated Hours		
I	Allocated Budget		
J	Notify When Percentage Used		

Example:



	A	B	C	D	E	F	G	H	I	J
1	Charge Code	Description	Is WBS	Start Date	End Date	Account Number	Sub Account Number	Allocated Hours	Allocated Budget	Notify When Percentage Used
2	Direct Labor	Billable Hours	0	3/1/2024		Company A: Contract 01				
3	Indirect Labor	Non-Billable Hours	1	3/1/2024						

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Charge Code page. Click “Import” under the browse button.

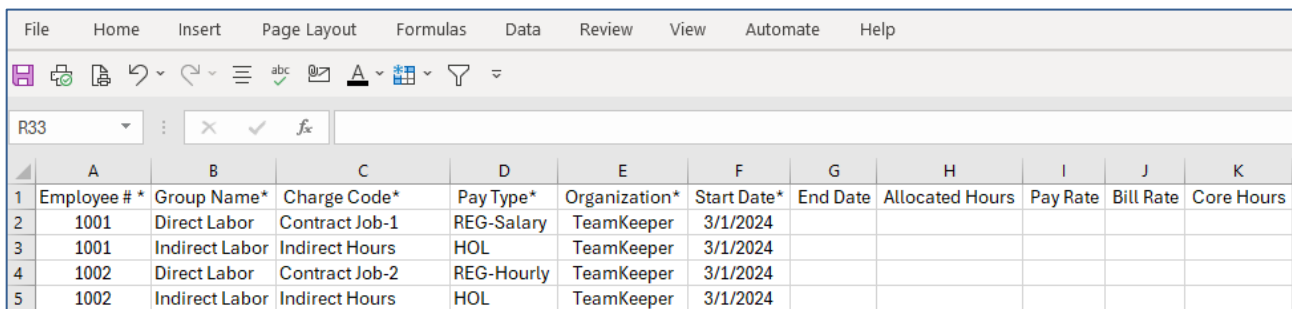
Authorized Charge

Description: Authorized charge is an employee assignment to a Charge Code Pay Type combination that is in a group. Employee, Charge Code, Pay Type and Group must already be created or the import will fail.

Format:

Column Header	Description	Required?	Format
A	Employee #	Yes	
B	Group Name	Yes	
C	Charge Code	Yes	
D	Pay Type	Yes	
E	Organization	Yes	
F	Start Date	Yes	MM/DD/YYYY
G	End Date		MM/DD/YYYY
H	Allocated Hours		
I	Pay Rate		
J	Bill Rate		
K	Core Hours		

Example:



	A	B	C	D	E	F	G	H	I	J	K
1	Employee # *	Group Name*	Charge Code*	Pay Type*	Organization*	Start Date*	End Date	Allocated Hours	Pay Rate	Bill Rate	Core Hours
2	1001	Direct Labor	Contract Job-1	REG-Salary	TeamKeeper	3/1/2024					
3	1001	Indirect Labor	Indirect Hours	HOL	TeamKeeper	3/1/2024					
4	1002	Direct Labor	Contract Job-2	REG-Hourly	TeamKeeper	3/1/2024					
5	1002	Indirect Labor	Indirect Hours	HOL	TeamKeeper	3/1/2024					

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Authorized Charge page. Click “Import Employee Authorized Charge” under the browse button.

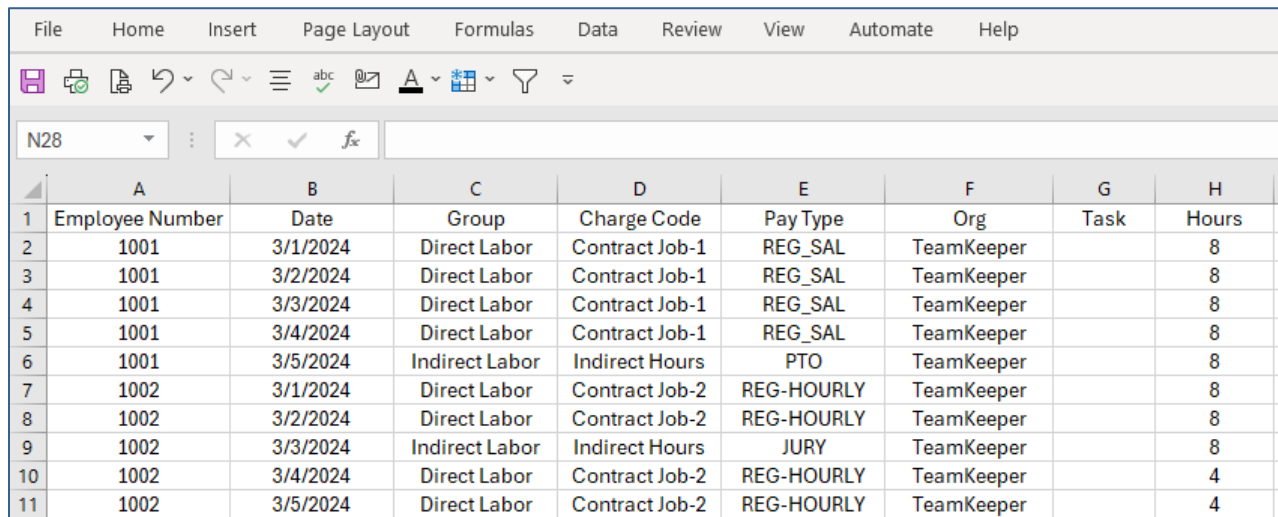
Hours Worked

Description: A user can import hours worked if they have timesheets already filled out
 Authorized charge is an employee assignment to a Charge Code Pay Type combination that is in a group. Employee, Charge Code, Pay Type and Group must already be created but the Authorized Charges do not have to be assigned before importing.

Format:

Column Header	Description	Required?	Format
A	Employee Number	Yes	
B	Date	Yes	MM/DD/YYYY
C	Group	Yes	
D	Charge Code	Yes	
E	Pay Type	Yes	
F	Organization	Yes	
G	Task#		
H	Hours	Yes	

Example:



	A	B	C	D	E	F	G	H
1	Employee Number	Date	Group	Charge Code	Pay Type	Org	Task	Hours
2	1001	3/1/2024	Direct Labor	Contract Job-1	REG_SAL	TeamKeeper		8
3	1001	3/2/2024	Direct Labor	Contract Job-1	REG_SAL	TeamKeeper		8
4	1001	3/3/2024	Direct Labor	Contract Job-1	REG_SAL	TeamKeeper		8
5	1001	3/4/2024	Direct Labor	Contract Job-1	REG_SAL	TeamKeeper		8
6	1001	3/5/2024	Indirect Labor	Indirect Hours	PTO	TeamKeeper		8
7	1002	3/1/2024	Direct Labor	Contract Job-2	REG-HOURLY	TeamKeeper		8
8	1002	3/2/2024	Direct Labor	Contract Job-2	REG-HOURLY	TeamKeeper		8
9	1002	3/3/2024	Indirect Labor	Indirect Hours	JURY	TeamKeeper		8
10	1002	3/4/2024	Direct Labor	Contract Job-2	REG-HOURLY	TeamKeeper		4
11	1002	3/5/2024	Direct Labor	Contract Job-2	REG-HOURLY	TeamKeeper		4

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Hours Worked page. Click "Import" under the browse button.

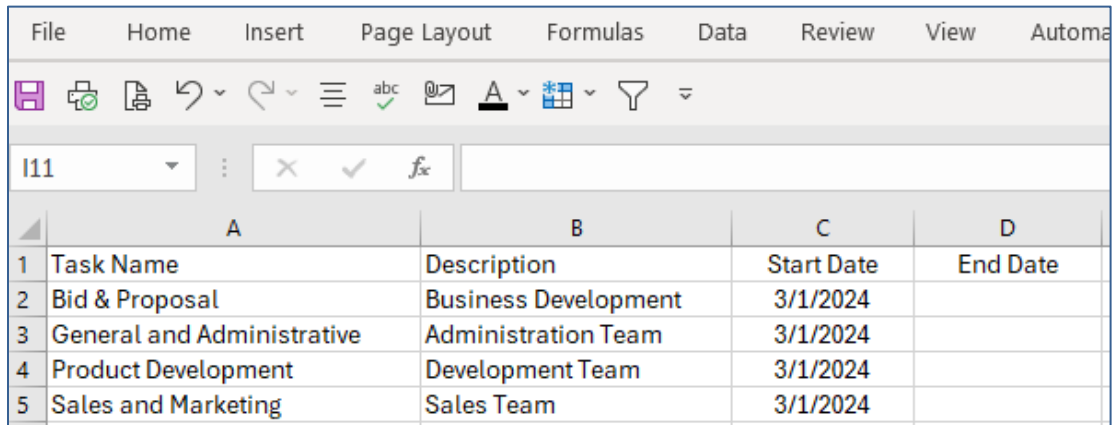
Task#

Description: Spreadsheet file will allow user to import charge codes instead of manually creating them on Task# Management.

Format:

Column Header	Description	Required?	Format
A	Task# Name	Yes	
B	Description	Yes	
C	Start Date	Yes	MM/DD/YYYY
D	End Date		

Example:



	A	B	C	D
1	Task Name	Description	Start Date	End Date
2	Bid & Proposal	Business Development	3/1/2024	
3	General and Administrative	Administration Team	3/1/2024	
4	Product Development	Development Team	3/1/2024	
5	Sales and Marketing	Sales Team	3/1/2024	

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Task# page. Click “Import” under the browse button.

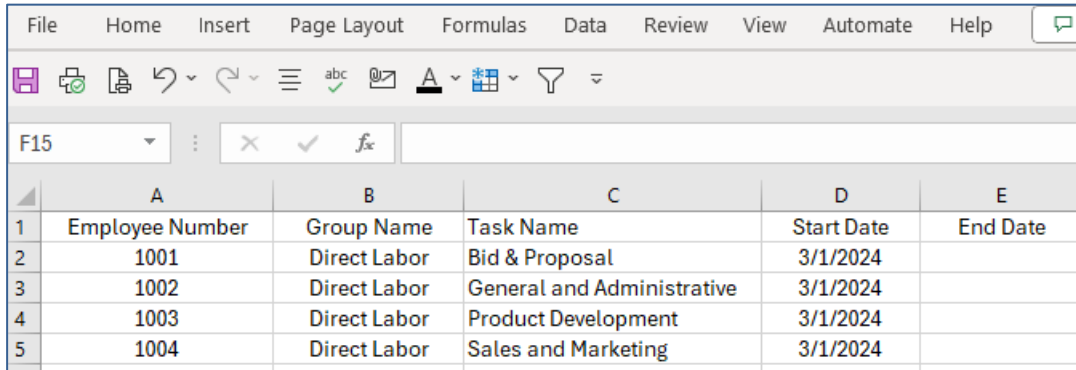
Group Task#

Description: Spreadsheet file allows user to assign Task# to Employees based on their group. If an Employee needs access to the Task# in more than one group, create a new row and list the group. If the Employee needs access to the Task# in any Group they have Authorized Charges, put “Invisible Top” as the Group name.

Format:

Column Header	Description	Required?	Format
A	Employee Number	Yes	
B	Group Name	Yes	
C	Task Number	Yes	
D	Start Date	Yes	MM/DD/YYYY

Example:



	A	B	C	D	E
1	Employee Number	Group Name	Task Name	Start Date	End Date
2	1001	Direct Labor	Bid & Proposal	3/1/2024	
3	1002	Direct Labor	General and Administrative	3/1/2024	
4	1003	Direct Labor	Product Development	3/1/2024	
5	1004	Direct Labor	Sales and Marketing	3/1/2024	

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Group Task# page. Click “Import” under the browse button.

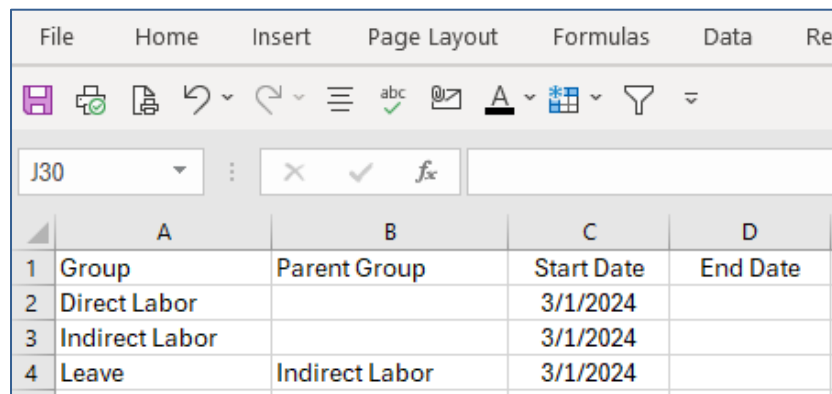
Group

Description: Spreadsheet file will allow user to import charge codes instead of manually creating them on Group Management.

Format:

Column Header	Description	Required?	Format
A	Group	Yes	
B	Parent Group		
C	Start Date	Yes	MM/DD/YYYY
D	End Date		MM/DD/YYYY

Example:



	A	B	C	D
1	Group	Parent Group	Start Date	End Date
2	Direct Labor		3/1/2024	
3	Indirect Labor		3/1/2024	
4	Leave	Indirect Labor	3/1/2024	

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Group page. Click “Import” under the browse button.

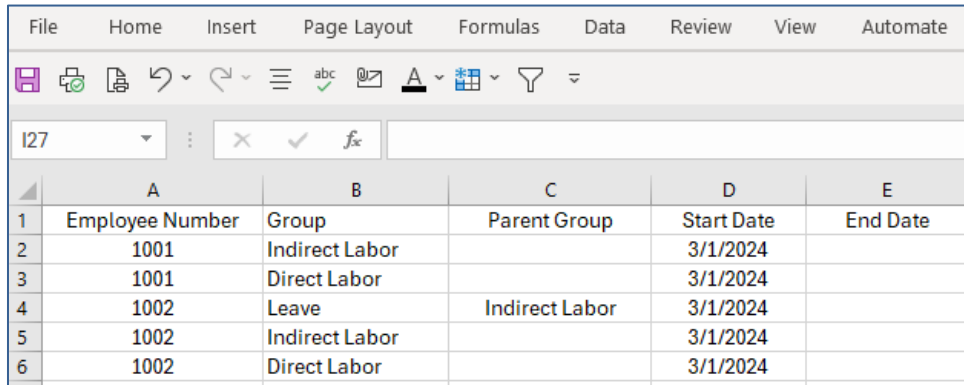
Groups to Employees

Description: A user can mass assign Employees to Groups. The Employees and Groups must already be created.

Format:

Column Header	Description	Required?	Format
A	Employee Number	Yes	
B	Group	Yes	
C	Parent Group		
D	Start Date	Yes	MM/DD/YYYY
E	End Date		MM/DD/YYYY

Example:



	A	B	C	D	E
1	Employee Number	Group	Parent Group	Start Date	End Date
2	1001	Indirect Labor		3/1/2024	
3	1001	Direct Labor		3/1/2024	
4	1002	Leave	Indirect Labor	3/1/2024	
5	1002	Indirect Labor		3/1/2024	
6	1002	Direct Labor		3/1/2024	

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Groups to Employees page. Click "Import" under the browse button.

Pay Types

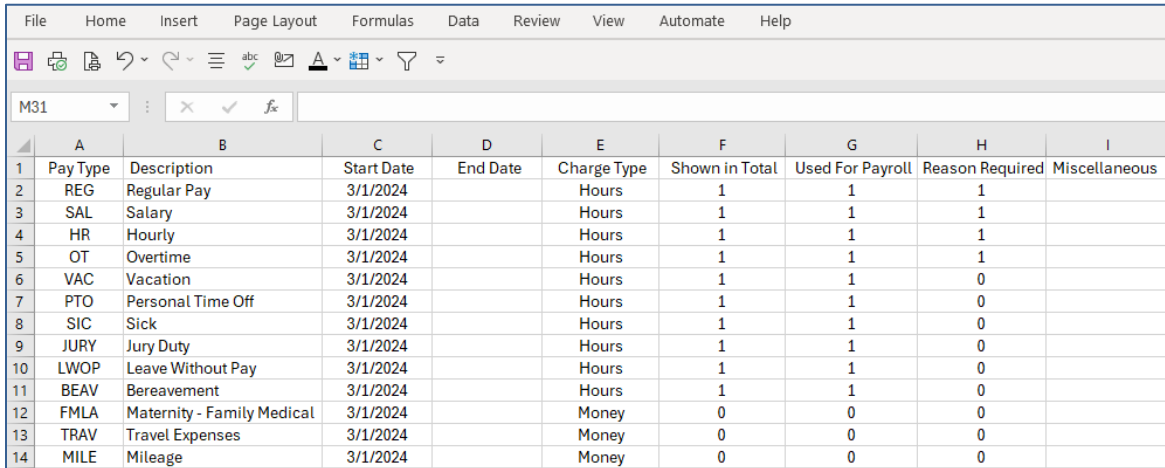
Description: Spreadsheet file will allow user to import charge codes instead of manually creating them on Pay Type Management.

Format:

Column Header	Description	Required?	Format
A	Pay Type	Yes	
B	Description	Yes	
C	Start Date	Yes	MM/DD/YYYY
D	End Date		MM/DD/YYYY
E	Charge Type	Yes	Hours or Money
F	Shown in Total	Yes	0 = no, 1 = yes

G	Used for Payroll	Yes	0 = no, 1 = yes
H	Reason Required	Yes	0 = no, 1 = yes
I	Miscellaneous		

Example:



	A	B	C	D	E	F	G	H	I
1	Pay Type	Description	Start Date	End Date	Charge Type	Shown in Total	Used For Payroll	Reason Required	Miscellaneous
2	REG	Regular Pay	3/1/2024		Hours	1	1	1	
3	SAL	Salary	3/1/2024		Hours	1	1	1	
4	HR	Hourly	3/1/2024		Hours	1	1	1	
5	OT	Overtime	3/1/2024		Hours	1	1	1	
6	VAC	Vacation	3/1/2024		Hours	1	1	0	
7	PTO	Personal Time Off	3/1/2024		Hours	1	1	0	
8	SIC	Sick	3/1/2024		Hours	1	1	0	
9	JURY	Jury Duty	3/1/2024		Hours	1	1	0	
10	LWOP	Leave Without Pay	3/1/2024		Hours	1	1	0	
11	BEAV	Bereavement	3/1/2024		Hours	1	1	0	
12	FMLA	Maternity - Family Medical	3/1/2024		Money	0	0	0	
13	TRAV	Travel Expenses	3/1/2024		Money	0	0	0	
14	MILE	Mileage	3/1/2024		Money	0	0	0	

The top header row will not be imported. Save the spreadsheet as a .CSV and browse for the file on the Import Pay Types page. Click “Import” under the browse button.