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HR & Payroll for Growing Companies

Time and Attendance
Buyer's Guide

A comprehensive roadmap to selecting a best-fit solution

Introduction

You're thinking about taking timekeeping to the next level, but where do you start? In today's competitive business environment, effective time and attendance management is critical for managing costs and compliance while improving workforce productivity and engagement. You know your current approach doesn't cut it anymore, but fully automating time and attendance processes for the first time — or replacing an outdated system — can seem overwhelming. And because budget and resources are often limited, the pressure is on to choose the right solution at the right cost from the right vendor— one that will stand by you through implementation and beyond.

This buyer's guide helps you navigate the road to selecting a best-fit time and attendance system. It maps out an easy-to-follow route and guides you through each key step along the way — from upfront planning and requirements gathering to solution evaluation and implementation. Just follow the directions to avoid roadblocks, hit key milestones, and reach your final destination with confidence.

> It's time to hit the road, so pack your bags, fill your tank, and get ready for a smooth ride!
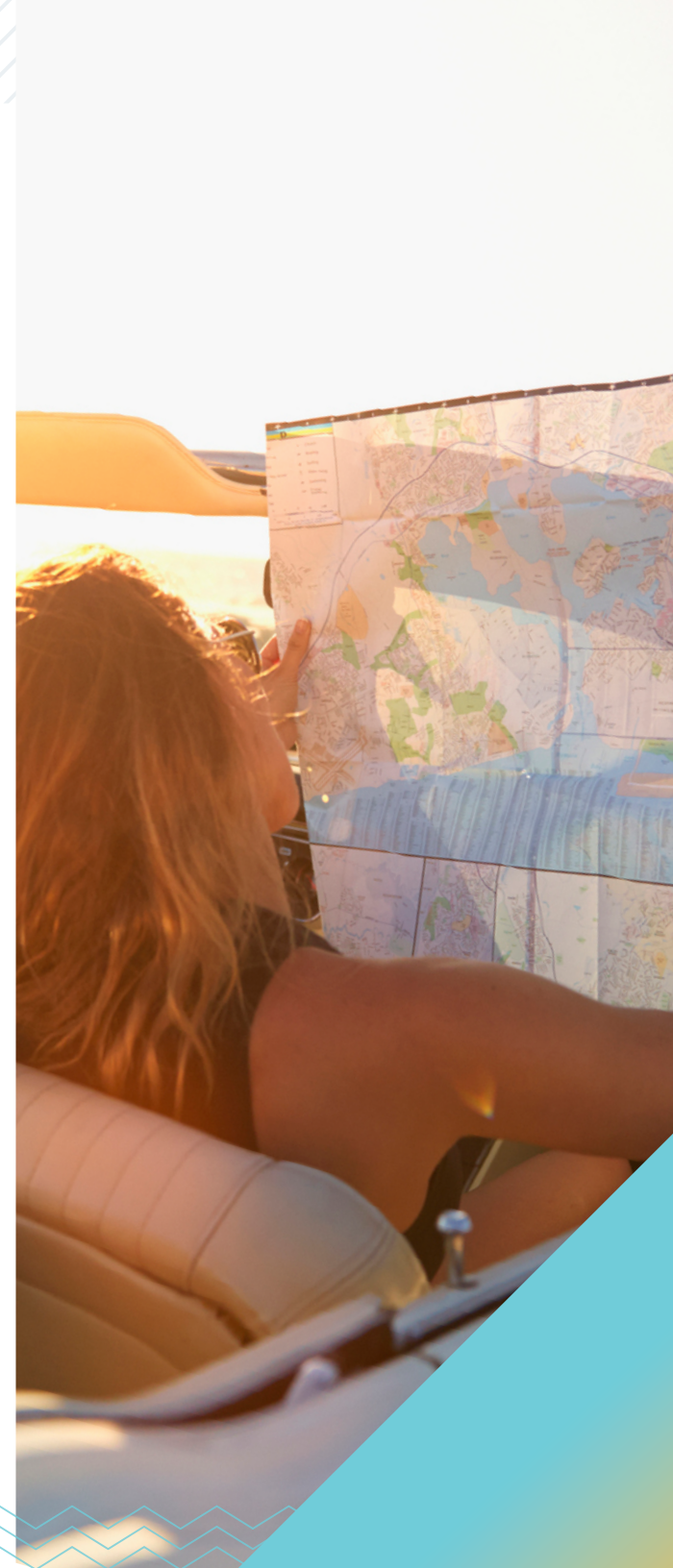
Why time and attendance management matters

Great businesses are powered by great people. But when you rely on manual, semi-automated, or disparate systems, inefficient processes can frustrate your people and lead to retention issues. After all, managing time and attendance using outdated methods can be downright painful — resulting in duplicate data entry, calculation errors, and hours wasted tracking down information — and can negatively affect employee engagement.

A fully automated time and attendance solution eliminates these problems by streamlining routine tasks — from labor data capture to timecard management to labor cost tracking — to save you valuable time and effort. Real-time visibility makes it easy to enforce work and pay rules and manage exceptions for ongoing compliance and cost control. And because time and attendance automation increases payroll accuracy and simplifies information access, your employees are more productive and engaged.

You need every advantage you can get to improve performance and achieve sustained success. By choosing the right time and attendance solution, you'll gain the intuitive tools, configurable workflows, and instant insights you need to stay competitive and profitable — even as your organization and challenges change over time.

82 million

An estimated 82 million Americans — **more than half of the U.S. workforce** — have experienced a problem with their paycheck during their career.[1]

5.7%

The average total cost of overtime due to absences as a percentage of payroll is 5.7% for U.S. businesses.[2]

1. Kronos Incorporated, *New Workforce Institute at Kronos Survey: Payroll Problems Affect 82 Million American Workers* (March 27, 2017).
2. SHRM, *Total Financial Impact of Employee Absences in the U.S.*, (2014) at 1.

Guiding you to your destination

Click below to navigate your route

1 Get ready to go!

2 Where are you now?

3 Identify goals and opportunities for value

4 Define your requirements

5 Do your research

6 Evaluate vendors

7 Implement your solution

1

Get ready to go!

The first order of business is deciding who you're going to take along for the ride — key stakeholders who will add value and help drive the best decision. Then you need a plan that outlines who is responsible for what, key milestones you need to reach, and when you aim to arrive at your destination. So let's go!

Assemble the right team

Selecting the right solution starts with assembling the right project team. Since time and attendance is a function that affects every department, it's important to get cross-functional participation and support from the get-go.

Establishing a project team of three or four key players from different functional areas ensures the range of expertise and perspectives required to make an informed choice that will benefit your whole organization. You should appoint a chairperson to coordinate the team's activities and oversee the selection process. Then seek out participants who have a vested interest in the solution's success as well as the bandwidth and motivation to give the project the attention it needs.

Team members will collaborate to uncover and organize information about your current time and attendance processes and the needs of various departments. Then they'll use that insight to define selection criteria, evaluate options, and make an informed selection.

Some businesses also form an employee advisory group to encourage and incorporate a wide range of ideas from everyday users. This strategy can also help foster acceptance of the solution upon implementation.

When establishing a project team, identify key stakeholders and their top timekeeping-related concerns. **Potential team members might include:**

Human Resources

- Maintaining a single source of employee data
- Simplifying reporting and data visibility
- Managing workforce compliance
- Cultivating a great employee experience

Finance

- Improving payroll efficiencies and accuracy
- Evaluating and measuring ROI
- Providing visibility into labor costs

Operations

- Optimizing productivity
- Driving productivity and employee engagement
- Controlling labor costs

Payroll

- Increasing payroll efficiencies
- Calculating accurate tax payments
- Minimizing off-cycle paychecks
- Managing compliance risk

Information Technology

- Achieving seamless system integration
- Ensuring data security and integrity
- Supporting end-users

Frontline Managers

- Optimizing workforce productivity
- Scheduling to align staffing to demand and budget
- Streamlining workflows and administration

Develop a project plan
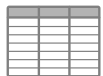
Once your project team is in place, members should hold a kickoff meeting and develop a project plan complete with deadlines and assigned responsibilities.

See **Appendix 1** for a sample automation project plan.

2

Where are you now?

One of the most helpful markers on a map is the "You are here" symbol. After all, you can't plan a successful journey without knowing your starting point. That's why one of the first tasks for your project team is defining your "current state." In other words, you need to review your existing timekeeping processes and pay policies to figure out what's working and what's not. This exercise will enable you to:

- Learn exactly how your timekeeping processes work now
- Identify opportunities for time- and cost-saving benefits
- Uncover processes that might be causing employee disengagement
- Pinpoint problems that automation can solve, such as:
    - Redundant data entry
    - Unacceptable payroll error rates
    - Semi-automated processes that drive inefficiencies
    - High administrative costs
   - Employee and/or manager dissatisfaction with the process

Review your time and attendance processes

As you review your existing processes, make sure you consider the entire workforce — hourly, salaried, part-time, and full-time employees. For example, do you have both on-site and off-site workers? Do some employees work at multiple locations? And what about remote operations, field offices, and telecommuters? Get the lay of the land by interviewing department heads and payroll staff. Then create a document or flowchart detailing your current time and attendance processes and highlighting specific problem areas.

Next, talk directly with hourly employees to understand what they like and don't like about your current solution. Are they able to record their hours quickly and easily? How often are paychecks late or incorrect? Ask about features, such as visibility into accrued paid time off (PTO) or the ability to submit time-off requests from a mobile device, that they would like to see in an automated solution. If you have salaried employees who work on multiple projects, find out what they think about current processes for capturing and tracking their time. Gathering employee feedback upfront helps you select a solution that creates a more engaging workforce experience and enjoys higher end-user adoption rates.
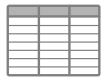
We've provided some sample questions lists in **Appendix 2** to guide you through the interview process and get an accurate view of your current state.
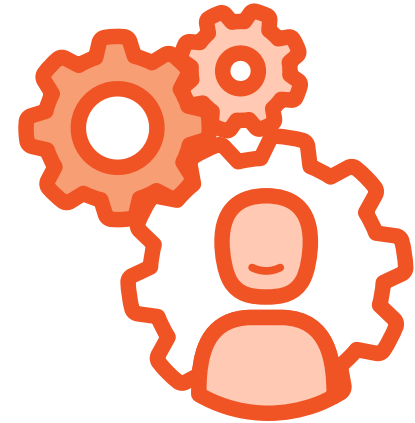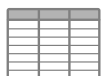
Evaluate your pay policies

The next step is to examine your payroll policies. You'll need a complete set of documented and approved policies for system implementation, so capturing your requirements upfront will mean less effort down the road. It will also enable you to engage in better informed discussions with potential vendors.

In an effort to attract and keep top talent, employers are coming up with more creative ways to incentivize and reward their employees. Innovative incentive pay and reward programs are effective recruiting and retention tools, but they can complicate pay policies even more. As your pay policies become more complex, you run a greater risk of inconsistent application across departments, pay grades, and locations.

Uncovering and resolving policy inconsistencies will help drive a smooth transition from manual or semi-automated processes to a fully automated system. If you're like most organizations, you have pay policy discrepancies that have gone unnoticed, potentially resulting in payroll errors, wage and hour compliance issues, and wasted administrative time. Root causes may include:

- Lack of understanding of complex pay rules
- Different interpretations of pay policies from department to department
- Communication breakdowns
- Intentional errors such as buddy punching and gaming the clock

We've provided a worksheet in **Appendix 3** to help you review your pay policies, identify issues and inconsistencies, and arrive at a common set of policies to be enforced — consistently and accurately — by your fully automated time and attendance solution.

There may be valid operational or legal reasons for pay policy inconsistencies, which must be accounted for in your automated time and attendance solution.

Examples include:

- *California state labor laws mandate a minimum 30-minute meal break for employees, but in Oregon employers don't get penalized if workers take a 28-minute break.*

- *Because employees at one location or facility are required to wear special uniforms for their work, they must be given extra paid time on the clock — outside of their scheduled start and end times — for donning and doffing, under the Fair Labor Standards Act.*

3

Identify goals and opportunities for value

Your destination is automation, but what value do you expect your time and attendance solution to deliver? Figure that out now by setting goals that will guide your choice of products, services, and vendors. After all, you'll evaluate vendors based on their ability to help you meet your goals — from cost savings and process improvements to seamless integration and real-time reporting. It's also helpful to identify the potential for savings so you can build a business case for automation based on expected return on investment.

Setting your automation goals
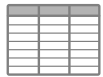
We've provided a goal-setting checklist in **Appendix 4**. Check off the relevant corporate, technology, and process goals listed, and add others that apply to your time and attendance automation project.

Identify potential for savings

To evaluate the time and attendance project from a financial perspective and prioritize it against other key investments, the project team should determine the potential for savings — both direct and indirect.

Where can savings come from?

Direct savings

- **Fewer payroll errors:** Manual or semi-automated processes are inefficient and error-prone. Automation reduces errors and the effort involved in correcting them, including time spent cutting manual checks.

- **Faster payroll processing:** Automation streamlines the entire process — capturing time, applying work and pay rules, reviewing and approving timecards, managing exceptions, and calculating hours — for timely, accurate paychecks.

- **Less unauthorized time off:** Employees may neglect to code time off on their paper timecards, or they may take more vacation, sick time, or other leave than they're allowed. A fully automated system tracks time off and enforces policies to reduce unauthorized leave and its impact on costs and productivity.

- **Reduced unplanned overtime and nonproductive hours:** When you're not sure how many hours an employee has worked, you're more likely to overstaff and overpay. By providing real-time insight into labor hours, an automated timekeeping system helps you create more accurate schedules to avoid unnecessary overtime and idle time.

- **Lower incidence of time theft:** Time fraud and system gaming — buddy punching, rounding to the next hour, and more — can cost your organization big bucks. Automated timekeeping provides visibility into time theft, with tools for spotting and managing irregularities.

- **Improved labor reporting:** Cobbling together information from multiple systems, spreadsheets, and paper files is a frustrating hassle. A fully automated system lets you easily access accurate timekeeping data and create ad hoc reports for real-time insights.

Indirect savings

- **Redeployed payroll full-time employees:** By eliminating the data entry process, automation enables you to reassign payroll staff to higher-value tasks.

- **Better labor management:** With real-time access to employee information, managers can proactively manage workforce attendance, absenteeism, and productivity for more efficient operations and better customer service.

- **Improved compliance:** Businesses of all sizes must comply with labor laws and union rules. Using an automated system to enforce policies and demonstrate compliance efforts can minimize risks and costs related to audits, grievances, and fines.

4

Define your requirements

Before you can select a best-fit time and attendance system with the right features and capabilities, you need to define your detailed requirements for data collection devices, time and attendance software, mobility options, self-service, reporting, and more. You must also determine what you need in terms of ease of use, configurability, security, system integration, and ease of ownership.

In the following pages, we address the key elements of an automated time and attendance solution and provide some questions to guide you in defining your requirements.

Areas to think about include:

- Data collection
- Ease of use
- Data visibility and reporting
- Time and attendance software
- Mobility
- Self-service
- System integration
- Security and data integrity
- Configurability
- Ease of ownership

Data collection

Automated time and attendance begins with accurate data collection via time clock, interactive voice response (IVR) system, web entry, or mobile device. By automating data collection, you can eliminate manual errors, cut down on time theft, and reduce the time managers spend processing timesheets and preparing payroll data.

Ease of use

An automated time and attendance system reduces costs and increases efficiency only if it is widely adopted and used. High adoption starts with ease of use, so evaluate what features will make the system simple to learn and operate. In addition, determine what resources will help end-users gain greater proficiency over time.

- For which type(s) of employees will you need to capture time and attendance data (hourly, salaried, remote, those who work across multiple locations, etc.)?

- What method of data collection would work best for your various employee segments (time clock, IVR, web, mobile, etc.)?

- Do you have employees who hold different jobs under different cost centers, pay grades, or pay policies?

- Are time fraud and system gaming persistent problems?

- Would you like to provide self-service features directly at the data collection point?

- Will a consumer-grade interface drive system adoption among all segments of the employee population?

- What usability features do end-users appreciate most (intuitive design, easy navigation, one-click access to key information and function, automated workflows, etc.)?

- Do you want to give users ready access to online help, tutorials, and other resources instead of having them turn to an IT help desk for assistance?

- Do your end-users expect a consistent experience across web and mobile applications?

Data visibility and reporting

Standard reports with rows and columns of numbers just don't cut it anymore. To be useful, data must be highly visual, simple to access, and easy to digest. Take stock of what your department heads and supervisors need in order to manage their people and budgets more effectively. Identify capabilities that will help them gain actionable insights for faster data-driven decision making.
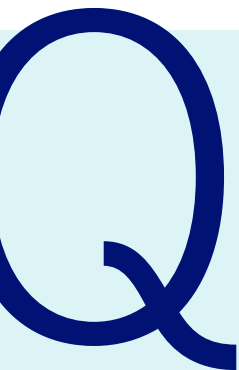
- Would a single source of employee data updated in real time help your managers make better decisions?

- What kinds of preconfigured reports do you want to receive out of the box?

- How frequently do you create ad hoc and customized reports? Can managers do this on their own, or do they rely on others with specialized expertise?

- Would managers benefit from configurable dashboards that display exceptions, employees approaching overtime, employees absent at the start of their shift, to-do lists, etc.?

- Do you do a lot of batch reporting, or do you typically run reports individually?

- Would widgets that streamline reporting tasks save you time and effort?

- How often do you pull in data from other systems to gain needed visibility into the workforce?

- Do you need a complete audit trail for demonstrating your compliance efforts?

Time and attendance software

Time and attendance software totals and categorizes hours worked, applies work and pay rules, and consolidates data for distribution and reporting. Consider complexities, such as pay policies, staffing programs, overtime rates, shift differentials, and employee types, you need to address. Plus, take into account features like alerting and self-service that drive productivity and engagement.

- Which types of employee time do you need to track (hourly, salaried, remote, those who work across multiple locations, etc.)?

- What work and pay rules do you need to apply (shift differentials, multiple jobs/pay rates, etc.)?

- Do you use both regular and flexible pay periods?

- What types of exceptions do you need to manage (missed punches, missed breaks, unauthorized rounding, etc.)?

- What types of real-time alerts would help streamline tasks for managers (employees approaching overtime, time-off request or timecard approvals, expiring certifications or licenses, etc.)?

- What types of alerts and notifications would your employees appreciate receiving (scheduling requests, PTO status, etc.)?

- What are your needs with regard to labor costing and tracking?

- Do you track points for attendance occurrences such as tardiness, absenteeism, or misuse of meal and rest breaks?

- Do you need to manage leave and track accruals?

- Are your employees eligible for meal and rest breaks? If so, would you benefit from employee attestation capabilities?

- Would you like the ability to assign and track schedules from within the time and attendance solution?

Mobility

In today's hyperconnected world, the workforce expects to be able to get things done anytime, anywhere. When defining your requirements, think about empowering employees by letting them punch in/out and gain access to information — timecards, schedules, accruals, and more — from a mobile device. Similarly, consider how you can enable supervisors to manage in the moment using mobile tools.

- Do your employees and managers use smartphones? If so, what type (iOS, Android, or Windows)?

- Do managers use tablet devices on the job? If so, what type (iOS or Android)?

- Would you like to enable employees to punch in/out using GPS coordinates? If so, what kinds of safeguards would you like to put in place to prevent punching in from elsewhere?

- What kinds of tasks would you like employees to be able to perform on their mobile device (submit timesheets, view time-off and accrual balances, change cost centers, etc.)?

- What kinds of tasks would you like managers to be able to perform on their mobile device (manage exceptions, approve timesheets, approve time-off and leave requests, view reports, etc.)?

- Do you need offline capabilities?

- Would managers benefit from real-time alerts and notifications of approval or required actions sent to any device?

Self-service

Think about how you can drive employee engagement through self-service. Self-service tools can empower hourly employees to submit timesheets; request leave or time off; or view schedules from a time clock, computer, or mobile device. They can also allow salaried employees to request time off or check PTO accrual balances — anytime, anywhere — without involving human resources (HR).

- Is your organization looking for innovative ways to drive employee engagement?

- Does your HR department receive a high volume of employee inquiries about PTO, leave, and other timekeeping-related issues? If so, what are the most common questions it receives?

- Do managers spend a lot of time responding to employee questions about schedules and requested time off?

- Do employees get frustrated when they have to wait for timekeeping and schedule information because they can't access it on their own?

System integration

Relying on multiple, disparate systems can make it difficult to get a holistic view of the workforce and how it impacts overall business performance. Figure out whether your time and attendance system needs to integrate with other internal solutions, business partners, or third-party services so you can quickly pull together the information you need to make critical business decisions.
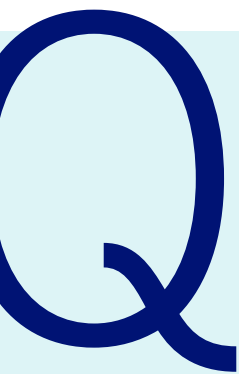
- Does your time and attendance system need to integrate with other business systems? If so, which ones (payroll, HR, ERP, finance, etc.)?

- Will you need to export/import data between internal departments or with third parties?

- What are your expectations around speed and ease of integration?

- Would you benefit from prebuilt connectors to popular industry-standard business systems?

- Would you like to be able to manage and schedule integration processes internally with nontechnical staff?

- Do you use any proprietary systems that will require a custom interface?

Security and data integrity

With data breaches on the rise, security is a top priority. That's why you need to ensure that your system provider takes security as seriously as you do. Consider industry-specific security compliance requirements, how you expect your vendor to safeguard your software and data in the cloud, and how you want to limit system access and privileges.

- What capabilities and policies do you want in place for protecting your data (both physically and procedurally)?

- Do you require the secure data center to have a robust disaster recovery plan complete with a secondary site?

- Does your organization need to comply with industry-specific security requirements (e.g., HIPAA)?

- Do you require vendors to share information about security testing methodologies?

- Do you require software to undergo third-party security assessments?

- Will you need to implement role-based access and privileges?

- Does your IT department require two-factor authentication?

Configurability

You want your time and attendance system to be up and running quickly for rapid time to value. And once it's implemented, you don't want to rely on your software vendor to make every little change. Some systems are more configurable than others, so list out features that will speed the configuration process and simplify changes over time.
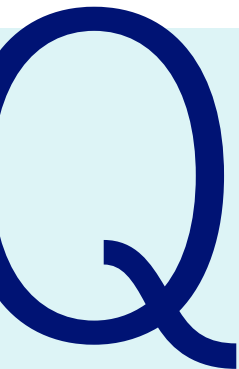
- Do you want the ability to configure work and pay rules on your own instead of relying on your software vendor?

- Do you have in-house programmers who can customize the solution to your unique needs?

- Do you need to define workflows and checklists within the system?

- Do you anticipate the need to further define increments of work time using descriptive codes such as breaks or driving?

Ease of ownership

When selecting an automated time and attendance system, you need to take into account more than just breadth and depth of functionality. You need to determine whether the solution is easy to support and will continue to meet your evolving requirements. This will help you get the experience you expect — from day one forward.

- How many internal resources can you dedicate to supporting the solution post-implementation?

- Who will be responsible for system administration?

- What are your availability and performance requirements?

- Do you expect automated software updates, including legislative updates?

- Do you want a single unified platform to which you can add other fully integrated solutions, such as HR, payroll, or talent management, as your organization evolves?

Looking ahead

What about your future workforce management requirements beyond time and attendance? Consider partnering with a vendor that can help you address other workforce challenges such as scheduling, absence management, HR, talent management, and analytics. It's smart to think about these future challenges now so you don't lock yourself into a solution that can't meet your evolving business needs.

With your goals and requirements clearly defined and documented, you know what you're looking for in a time and attendance system — and a solution provider. Now it's time to figure out which solutions are a good fit and which vendors will act as a trusted business partner to ensure a successful deployment and deliver long-term value.

> You're making great progress on the road to fully automated time and attendance. Stay focused, avoid distractions, and keep following the roadmap to move closer to your destination.

Start your vendor search

5

Do your research

It's time to narrow down your list to the top three or four potential vendors. While some organizations still issue formal Requests for Proposals to solicit bids, many are taking a different approach to evaluating vendors. You can choose your top vendors by reading analyst reports, consulting peer reviews, and talking to representatives at industry events. These resources can help you gain objective insights from industry experts and actual users to home in on your top vendors faster and more efficiently.

Industry tradeshows and conferences

By attending tradeshows and conferences, such as the American Payroll Association Annual Conference, the SHRM Annual Conference & Exposition, and HR Tech, you'll have the opportunity to talk to vendors, see product demonstrations, and ask your industry peers about their experiences and recommendations.

Analyst reports

Industry analysts like Forrester, Gartner, and IDC offer comparative product and services research based on rigorous analysis backed by highly structured methodologies. These research reports often include use-case scenarios and scoring data that can be used to guide strategic purchase decisions.

Crowdsourced peer reviews

Companies like **G2 Crowd** and **Software Advice** empower buying decisions by highlighting the voice of the customer. These software review sites can offer complimentary buying advice. Access to real-time, unbiased user reviews helps you objectively assess which solutions — and vendors — are best for your business.

Check out employer review sites like **Glassdoor**, **Indeed**, and **Great Place to Work** to learn about the companies you're considering, how they're managed, and how they treat their employees. You want to work with a vendor that has a clear, strategic vision and happy employees who will deliver great service and long-term value.

> Once you've done your research, you'll be ready to choose three or four finalists and start contacting vendors to begin the evaluation process.

6

Evaluate vendors

It's show-and-tell time as you take steps to compare and contrast your top vendors and their solution offerings. Remember, however, that you're not just purchasing software and devices; you're initiating a long-term business partnership. It's important to take into account not only product capabilities, but the vendor's experience, service, and reputation with customers.

Product evaluations

Use your product requirements to evaluate offerings and disqualify vendors that don't meet your requirements. Be sure to determine whether each vendor provides your required features today, will have them by a specified date, or can make them available on a custom basis for an additional cost. This is important information that will help drive your selection decision.
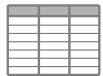
The comparative checklists in **Appendix 5** will help guide you through the evaluation process and document your findings.

The best way to assess a software product is to see it in action. But don't rely on canned marketing demos, which can mask shortcomings or fail to show the complete breadth and depth of the solution.

Ask vendors to work from a demo script you've prepared in advance. Look beyond features alone to evaluate ease of use, workflows, security and access, and how information is displayed. Invite a range of users to get their perspectives and feedback.

Company evaluations

When you partner with a solution provider, you want to make sure the company is up to the job. That's why you should compare vendors' experience, reputation, and financial stability. If you can't find this information in annual reports and other online sources, request it from the vendors. Conduct customer reference checks — and maybe even visit customer sites — to determine whether the vendors deliver on their promises and drive expected results.

Services evaluations

Your relationship with a vendor doesn't stop when you sign the purchase agreement. In fact, it's just beginning. You want to make sure the vendor will be there for your organization throughout the deployment process and beyond. So ask vendors questions about their implementation approach, training and support offerings, and customer satisfaction ratings. Contact customer references to validate vendor claims and check whether the company has been recognized for service excellence.

Select your vendor

Drum roll, please! The time has come to select a vendor. Make your choice, get the necessary approvals, sign on the dotted line, and start putting your automation plan into action!

7

Implement your solution

Now that you have a partner along for the ride, you can start planning for system implementation. Your vendor should provide a proposed implementation plan — complete with an overview of the process and a time frame for each phase — and work closely with you to refine the details.

Consider forming an implementation team, potentially including project team members, to expedite the process. Make sure the vendor's expectations for time and resource commitments are spelled out upfront, especially if you have limited in-house resources to manage the process. The implementation team will:

- Assess the vendor's plan and negotiate any adjustments to the process, milestones, and time frames
- Meet regularly to make sure the project stays on track and deadlines are met
- Manage changes to the project schedule, cost, and scope

While implementation approaches vary by vendor, you should receive a detailed plan with checklists and milestones for each step in the process. Not sure what to expect? We've outlined a typical implementation process on the following page.

Implementation process

Step 1: Plan

- Hold kickoff meetings with your vendor team to hammer out details of the project scope, schedule, and responsibilities
- Ensure readiness by setting up a work area for the implementation teams; documenting pay policies and work rules; and preparing employee data, use-case scenarios, and integration requirements

Step 2: Assess and identify

- Finalize all documents defining system configuration requirements
- Complete in-depth discovery on business processes and requirements
- Create training plan
- Develop deployment plan
- Scope and approve any custom work

Step 3: Build a solution

- Configure the applications and data collection devices to meet your organization's needs
- Install data collection devices within your facilities (if applicable)
- Configure and/or develop required interfaces
- Document operational procedures
- Set data transfer schedules (e.g., interface with payroll system)

Step 4: Test and certify

- Review all configured components to ensure rules align with business requirements
- Test separate application functions, including calculation of payroll, with scripted scenarios and review results
- Validate end-to-end system processes to demonstrate that individual work units are working together seamlessly
- Certify the system by signing off that it has been tested for data integrity and configuration accuracy and meets established business requirements
- Move certified software to the production environment

Step 5: Deploy and support

- Begin system rollout across the organization*
- Conduct end-user training to drive employee acceptance
- Monitor programs against the vendor plan, and compile progress reports for key stakeholders
- Transition account from implementation team to support team
- Issue final report evaluating results and recommending future enhancements four to six months post-implementation

*Make sure your vendor's implementation team remains engaged until you have successfully completed at least one full payroll cycle to confirm smooth, accurate system operation.

Working with us

Whether you need a time and attendance system or a complete suite of solutions including HR and payroll, our offering the ideal choice. While customers may have different requirements when it comes to managing their people, they're all looking to achieve better business outcomes by controlling labor costs, increasing workforce productivity, minimizing compliance risk, and creating an exceptional employee experience. Only our human capital management (HCM) platform can help you achieve those results efficiently and cost-effectively with a single, integrated solution that meets all your needs — today and into the future.

Our time and attendance solutions simplify payroll by streamlining the entire process — from punch to paycheck. No more error-prone duplicate data entry. No more manual paychecks. No more complex integrations. Just perfect paychecks — every time.

And with our HCM solution you can have it all — timekeeping, payroll, HR, and talent management — in one unified system. You get one single source of truth to make more strategic hires, onboard employees faster, drive efficiencies, and provide an engaging employee experience. And it's all delivered with a proven implementation approach that gets you up and running fast, and a simple, transparent pricing model that eliminates surprises down the road.
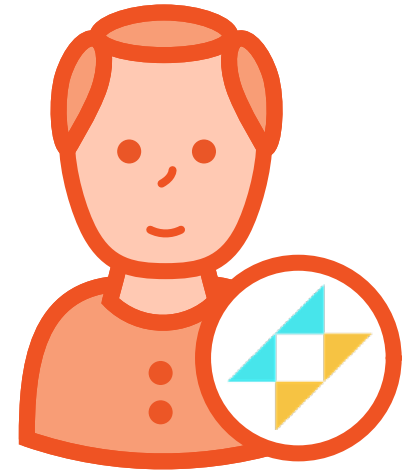
Time and Attendance
Toolkit

Appendix 1 | Sample automation project plan

TASK	THINGS TO CONSIDER	OWNER	REQUIRED RESOURCES	DUE DATE
Define your current state	• *Review your existing manual or semi-automated processes* • *Evaluate your current timekeeping and payroll policies*			
Establish goals for your fully automated time and attendance system	• *Business goals* • *Technology goals* • *Process goals* • *Other goals*			
Prepare preliminary analysis showing potential cost savings	***Direct cost savings:*** • *Reducing payroll errors* • *Reducing total payroll processing time* • *Reducing unauthorized leave time* • *Eliminating unnecessary overtime and nonproductive hours* • *Reducing payroll inflation* ***Indirect cost savings:*** • *Redeployed full-time employees* • *More effective labor management* • *Improved compliance*			
Create a list of potential vendors	• *Conduct online research* • *Read industry publications* • *Attend industry tradeshows and conferences* • *Consult business colleagues and industry peers*			

TASK	THINGS TO CONSIDER	OWNER	REQUIRED RESOURCES	DUE DATE
Define detailed product requirements	• *Data collection* • *Time and attendance* • *Mobility* • *Data visibility and reporting* • *System integration* • *Security and data integration* • *Usability* • *Configurability* • *Ease of ownership*			
Do research to narrow vendor list to two or three finalists	• *Consult analyst reports* • *Read crowdsourced peer reviews*			
Select two or three finalists				
Evaluate vendors	• *Compare and contrast solutions* • *Determine whether vendors' solution portfolio can address future challenges* • *Request in-depth demos* • *Conduct company background checks* • *Evaluate vendors' services offerings* • *Visit customer sites* • *Check references*			
Select vendor	• *Discuss findings* • *Arrive at team consensus*			

TASK	THINGS TO CONSIDER	OWNER	REQUIRED RESOURCES	DUE DATE
Work with vendor to develop an implementation plan	• *Overview of implementation process* • *Time frame for each implementation phase* • *Expectations for internal time and resource commitment*			
Manage implementation	• *Do upfront planning and preparation to ensure readiness* • *Assess process and solution requirements and scope out custom work* • *Build the solution* • *Test and certify that system meets requirements*			
Take the system live!	• *Phased rollout* • *End-user training* • *Transition from implementation to support*			

GENERAL QUESTIONS

Who manages the time and attendance process?	☐ HR	☐ Payroll	☐ Operations	☐ Finance	☐ Other
Who else is involved?					
How many total employees do you need to track?	☐ Less than 50	☐ 50-100	☐ 100+		
At how many locations do you track employee time and attendance?	☐ 1	☐ 1–5	☐ 6–10	☐ >10	
How do you collect timekeeping data?	☐ Paper timesheets	☐ Time clock	☐ Telephony	☐ Web entry	☐ Mobile entry
Is the same data entered into multiple systems?	☐ Yes	☐ No	If yes, which systems?		
How is historical timekeeping information stored?	☐ Paper files	☐ Spreadsheet	☐ Timekeeping database	☐ ERP system	
How long do you store historical timekeeping information?	☐ 1–7 years	☐ 7–20 years	☐ Indefinitely		
What is your timekeeping error rate?					
How do you fix errors?					
What is the cost associated with the process?					

Do you transfer data to other systems?	☐ *HR* ☐ *Payroll* ☐ *Finance* ☐ *ERP*
What interface(s) do you use?	
Do you have security concerns related to data access?	☐ *Yes* ☐ *No* *If yes, what?*
Do your current processes present compliance issues?	☐ *Yes* ☐ *No* *If yes, how?*
SYSTEM USAGE	
What is the annual volume of transactions?	
What is the volume per pay period?	
What is the volume of employee inquiries per pay period?	
How is data updated, changed, and deleted?	
What method(s) are used to access the system?	☐ *Paper* ☐ *Spreadsheets* ☐ *Web* ☐ *Mobile* ☐ *Other*
What features of the current process are most useful?	
What are the limitations of the current process?	

What improvements would you most like to see?	
What are the risks of sticking with the status quo?	
DATA VISIBILITY AND REPORTING	
What reports do you have now?	
What additional reports do you need?	
How are reports generated?	
How often?	
How are they distributed, and to whom?	
How accurate is the information in your reports?	
Is the information available in real time?	
How is that information used?	
Do managers have access to standard reports, ad hoc reports, and analytical tools?	

	DEPARTMENT A	DEPARTMENT B	DEPARTMENT C	DEPARTMENT D
How long does it take to approve time records to send to payroll?				
Can employees access and approve their own time prior to manager approval?				
How long does it take to run payroll?				
What is your current payroll rate?				
What is your overtime policy?				
What is your policy for applying shift differentials?				
What are your process and policy for tracking intermittent leave?				
Do you have a disciplinary policy to track attendance incidents and generate actions?				
What is your policy for calculating leave and paid time off (PTO) accruals?				

	DEPARTMENT A	DEPARTMENT B	DEPARTMENT C	DEPARTMENT D
Do you have rounding rules or grace periods for start and end times?				
How is your pay policy managed?				
What are your scheduling policies and procedures?				

Appendix 4 | Goal setting checklist

CORPORATE GOALS

- ☐   *Decrease overall labor costs*
- ☐   *Shrink the gap between payroll policy and actual practice*
- ☐   *Comply with government regulations and/or union contracts*
- ☐   *Reduce administrative overhead by eliminating time spent on manual timecard calculations*
- ☐   *Find a solution that can expand as the business grows*
- ☐   *Solve anticipated downstream challenges, such as absence management or scheduling*
- ☐

TECHNOLOGY GOALS

- ☐   *Leverage the company's existing IT investment*
- ☐   *Interface with payroll program (or service bureau) as well as other systems such as HR or ERP*
- ☐   *Provide audit trails*
- ☐   *Provide timely and accurate management reports by employee, department, and pay grade for all pay periods*
- ☐   *Improve data security*
- ☐   *Simplify administration and management with easy cloud deployment and automated updates*
- ☐

PROCESS GOALS

☐   *Reduce hours spent on time and attendance management*

☐   *Eliminate redundant data entry*

☐   *Apply complex pay rules consistently and accurately across the organization*

☐   *Accurately record, collect, and report time and rates for standard and incentive pay-rate classes, shift differentials, and productive and noproductive time*

☐   *Provide an effective means of distributing reports for departmental review and editing*

☐

OTHER GOALS

☐   *Enable the organization to shift responsibility for managing labor costs from payroll to department managers*

☐   *Gain universal acceptance of the solution by making it easy for employees and managers to use*

☐   *Empower employees through self-service*

☐   *Extend data collection and timekeeping functions to mobile devices*

☐

DATA COLLECTION

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Time clock punch-in/punch-out										
Touchscreen										
Support for mag stripe, proximity, and barcode badges										
Biometric identification										
Self-service view into timesheet, time-off requests, schedules, etc.										
Remote hardware management										
IVR punch-in/punch-out										
Web time entry										
Self-service view into timesheet, time-off requests, schedules, etc.										
Mobile time entry										
Mobile punch-in/punch-out based on GPS coordinates										
Geofencing										
Offline capabilities										
Self-service view into timesheet, time-off requests, schedules, etc.										

DATA COLLECTION										
FEATURE	**OUR HCM SOLUTION**			**VENDOR 2**			**VENDOR 3**			**NOTES**
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Support for different employee types										
Hourly										
Salaried										
Remote										
Work across multiple locations										
Ability to track a variety of time										
Hours worked on site										
Hours worked in the field										
Hours worked at home (telecommuters)										

EASE OF USE

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Interface										
Intuitive, consumer-grade interface										
Easy navigation										
Ability to find specific information quickly and easily										
Support for single sign-on										
Workflows										
Easy configuration of workflows										
Automated execution of workflows with no operator intervention required										

EASE OF USE										
FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Help										
One-click access to online help										
Online tutorials										
Job aids										
Hands-on simulations										
Administration										
Simple-to-use system administration tools										
Ability to set system privileges and access based on roles										

DATA VISIBILITY AND REPORTING

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Single source of employee data updated in real time										
On-demand access to employee data										
Set of standard, preconfigured reports										
Easy report configuration and customization										
Simple ad hoc reporting										
Configurable, at-a-glance dashboards that display trends, patterns, outliers, KPIs, and more										
Variety of report filters										
Wizards to streamline common reporting tasks										
Export to multiple formats (such as CSV, Excel, PDF, HTML, and XML)										
Fast, intuitive report saving and sharing										
In/out dot board										
Exception reporting										

DATA VISIBILITY AND REPORTING

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Security profile settings for controlling data access										
Dynamic drill-down capabilities										
Accrual reporting										
Attestation reporting										
Ability to easily pull in pertinent data from other systems to guide decision making										
Complete audit trail to demonstrate compliance efforts										

TIME AND ATTENDANCE SOFTWARE

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Labor management										
Timesheet approval workflow										
Mass edit capabilities										
Automatic flagging of exceptions										
Easy punch editing										
Import/export utility										
Document storage (receipts, company handbook, etc.)										
Automated points tracking (attendance trends)										
Temporary manager assignment										
Itemized expense tracking										
Employee/manager self-service										

TIME AND ATTENDANCE SOFTWARE										
FEATURE	**OUR HCM SOLUTION**			**VENDOR 2**			**VENDOR 3**			**NOTES**
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Pay rules										
Easy configuration										
Location										
Cost center										
Shift differentials										
Pay rule priority										
Autopopulated holidays										
Multiple pay periods (weekly, monthly, etc.)										
Nonstandard pay periods										
Time zones										
Auto-deductions (breaks, meals, etc.)										
Paid meals										
Flat pay										
Extra time and guaranteed minimum time										
Grace and rounding										

TIME AND ATTENDANCE SOFTWARE										
FEATURE	**OUR HCM SOLUTION**			**VENDOR 2**			**VENDOR 3**			**NOTES**
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Pay rules (cont.)										
Holiday pay										
Overtime										
Rate tracking										
Job costing										
Pay categories (e.g., direct or indirect)										
Multipliers, special rates										
Effective dating										
Piece rate quantity tracking (units, miles, etc.)										
Pay rate per piece/piece rate requirements										

TIME AND ATTENDANCE SOFTWARE

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Accruals										
Track employee eligibility and rate of accrual for benefit time										
– Default										
– Tenure										
– Hours worked										
– Points										
– Waiting period										
– Carryover settings										
Supports a wide range of accrual settings										
Modify, zero out, and import accrual balances										
Modify employee hours taken										
Test accruals										
Provides automated notifications										
Supports negative balances										
– End of a waiting period										

TIME AND ATTENDANCE SOFTWARE

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Attestation										
Availability on time clock or web										
Ability to configure questionnaire										
Cascading prompts										
Generation of email to employees or managers with to-do item										
Employee actions										
— Approve attestation										
— Reject attestation										
— Cancel/postpone attestation										
— Add note										
— Include reason code										
Employee prompts										
— End of shift (daily)										
— Submit timesheet										
— Configurable questions and responses										

TIME AND ATTENDANCE SOFTWARE										
FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Alerts and notifications										
Standard time-off request, rejection, and approval										
Standard timesheet request, rejection, and approval										
Beginning- and end-of-period manager/employee notifications										
Accrual balance notifications										
Exception notifications										
Points notifications										
Support for multiple languages										
English										
Spanish										
Canadian French										
French										
Dutch										
German										
Other										

MOBILITY

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
System access via mobile device										
IOS smartphone or tablet										
Android smartphone or tablet										
Employee capabilities										
Punch in and out										
GPS punch tracking										
Punch offline										
Job/cost center transfers										
Submit timesheet										
Submit time-off request										
View timesheet										
View schedule										
View time-off and leave calendars										
View accrual balances										

MOBILITY

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Manager capabilities										
Approve time-off and leave requests										
Correct timesheets										
Approve timesheets										
View all team members on one display										
View reports										

SELF-SERVICE

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Self-service capabilities										
Time clock										
Web										
Mobile										
Employee capabilities										
Job/cost center transfers										
Submit timesheet										
Submit time-off request										
View timesheet										
View schedule										
View time-off and leave calendars										
View accrual balances										

SELF-SERVICE										
FEATURE	**OUR HCM SOLUTION**			**VENDOR 2**			**VENDOR 3**			**NOTES**
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Manager capabilities										
Approve time-off and leave requests										
Correct timesheets										
Approve timesheets										
View all team members on one display										
View reports										

SYSTEM INTEGRATION

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Ability to interface with key business systems										
− Payroll										
− HR										
− ERP										
− Finance										
− Other										
Easy data import/export to and from other departments or businesses										
Flexible integration platform										
Prebuilt connectors to industry-standard systems										
Part of a single, integrated suite of applications that includes time and attendance, HR, payroll, and other workforce solutions										

SECURITY AND DATA INTEGRITY

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Cloud data center										
Fenced perimeter										
Security guards on duty										
Surveillance										
Secure window and computer room placement										
Authentication process at all access points										
Fire prevention										
Flood protection										
Environmental monitoring										
Backup power										
Data backup policies										
Disaster recovery plan										
– Recovery Time Objective										
– Recovery Point Objective										

SECURITY AND DATA INTEGRITY

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Software										
Data encryption at rest										
99+% system availability										
Scheduled maintenance windows to minimize business disruption										
Independent audits with SOC 2 Type 1 and SOC 2 Type 2 compliance reports										
Penetration testing										
Role-based access and privileges										
Two-factor authentication										
Support for single sign-on										

CONFIGURABILITY

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Easy configuration without programming										
— Work and pay rules										
— Workflows										
— Checklists										
— Dashboards										
— Reports										
Ability to further define increments of work time using descriptive codes such as breaks or driving										
Cloning capabilities										
Mass edit tools										
Multiple timesheet options										

EASE OF OWNERSHIP

FEATURE	OUR HCM SOLUTION			VENDOR 2			VENDOR 3			NOTES
	Current	Future	Custom	Current	Future	Custom	Current	Future	Custom	
Automated software updates (including legislative updates)										
Easy software upgrade process										
Seamless scalability to accommodate processing peaks and future growth										
Ease of administration										
Minimal need for internal resources to support system										