

Please Read through document and follow the steps when entering time

### Paylocity Mobile Timesheets – Modernization and Construction

1. Mechanics and Apprentice enter their time individually at the end of **EVERY WORKDAY** together before leaving the job. Time, Zone, Mileage, Expenses
2. Submit a time off request directly in Paylocity App. Can select PTO in request.
3. Reimbursed Expenses entered in Expense area and required a receipt for approval.
4. Review pay, time off, tax information and update any information directly in app.
5. Can also manage your profile from a desktop if you wish.
6. Paylocity is replacing doforms for All timesheets, expenses, time off request for Construction and Modernization.

### **Getting Started- Quick Guide**

1. Open Paylocity mobile app (need to download if accessing on personal phone, Stanley phones already have app downloaded).
2. Enter Stanley company ID in Passcode **301926**.
3. Your email is stanley email for mechanics and personal email provided to the office for apprentices.

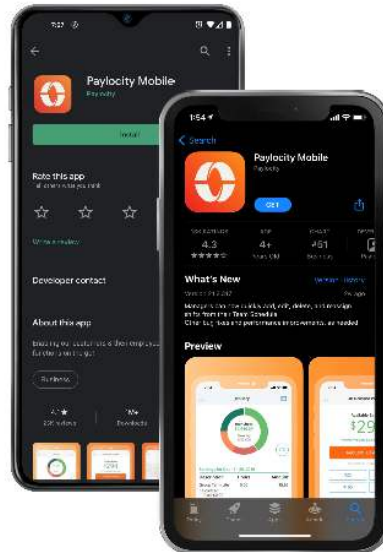
**\*\*PLEASE NOTE – Until you get a notice from the office on the last week of October please put all reimbursed expenses in doforms expense receipt.**

## Registering for Paylocity Web or Mobile and set up

- If using a Stanley issued phone the app will already be on your phone. Search for the app and open it.
- If using a personal phone, Download the Paylocity Mobile App from the Apple App Store or Google Play:

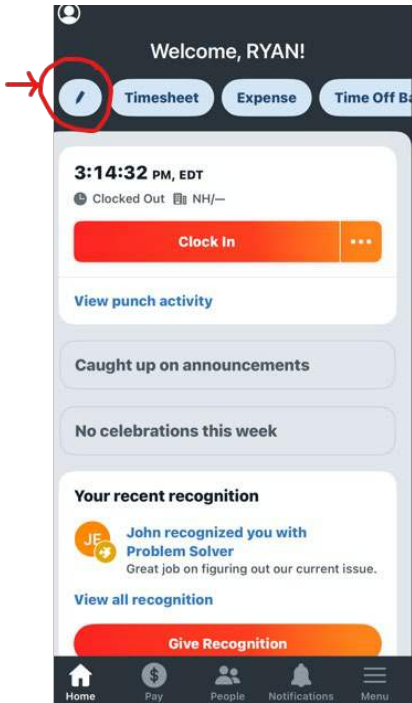
### Download the Paylocity Mobile App

It's easy to get the app. Just download it from your favorite app store with the links below or scan the QR code with your mobile device.

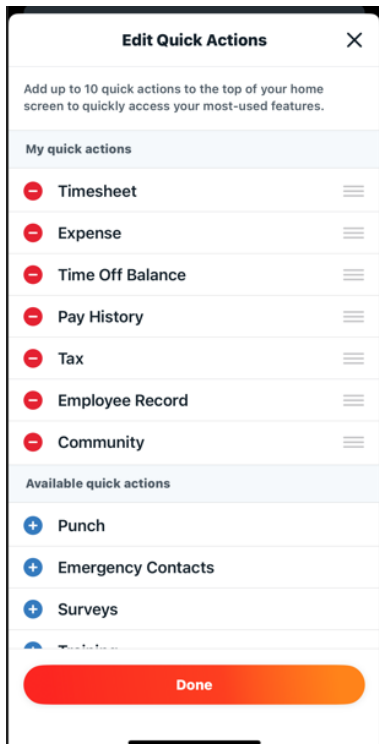


- To register via Mobile, follow the prompts in the APP.
  - Your Company ID is **301926**

4. Once signed in edit the home screen. Click the pencil on the top bar.

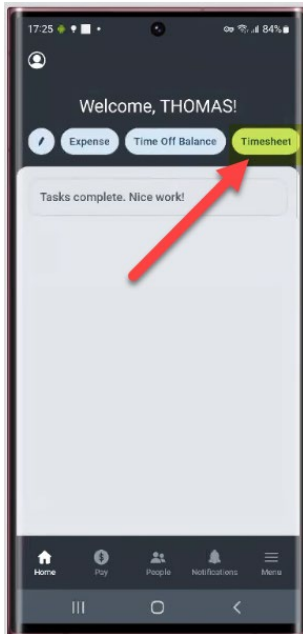


5. Move the icons around to match the following.

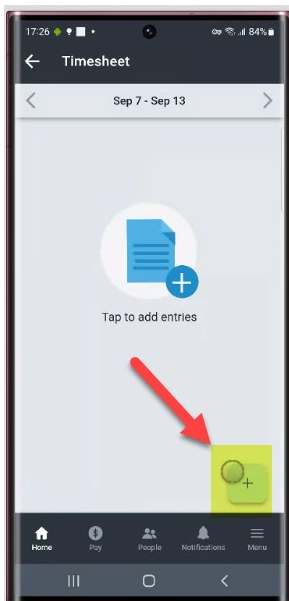


## Timesheets Entry in Paylocity Mobile- Daily Process

- Click on 'Timesheets' to input your hours



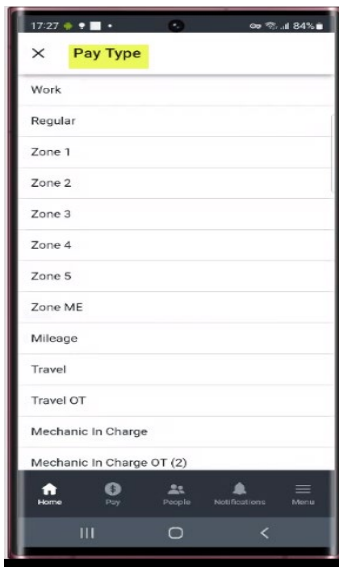
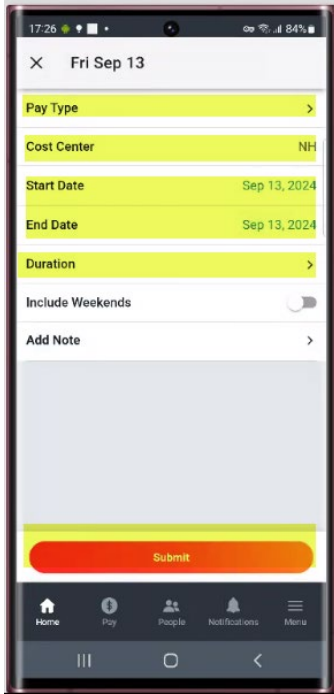
- To add a new timesheet entry, click on the '+'



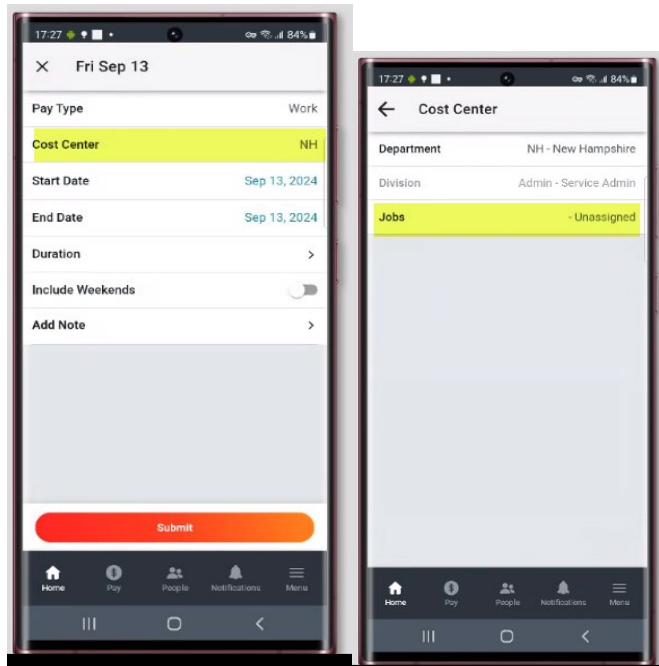
# Stanley Paylocity User Guide

Elevator Company, Inc.

- Select: Pay Type (Regular is your standard pay rate)



- Select: Cost Center It is critical to fill in each field per below for every entry (including zone)



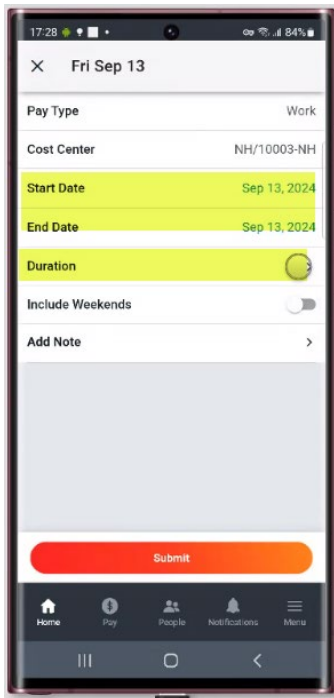
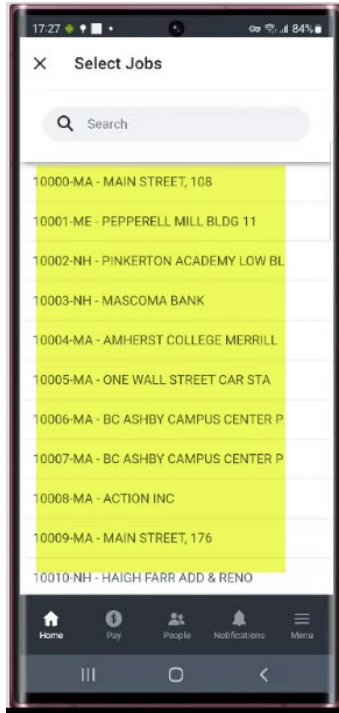
**DEPARTMENT**- MUST FILL OUT- Pick the State you are working.

**DIVISION**- Pick the type of job you are on Construction or Modernization.

**JOB**- Select the job you are working and confirm job #

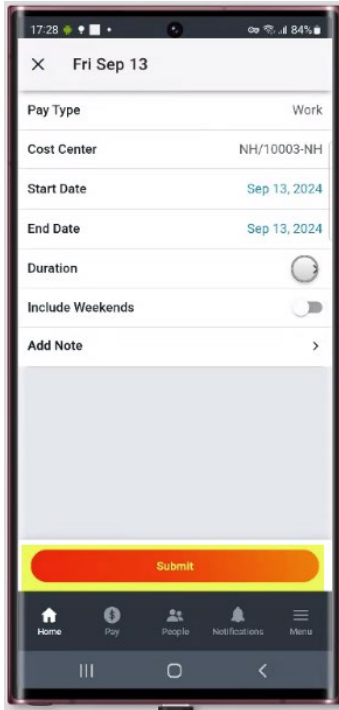
# Stanley Paylocity User Guide

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- Select: Start and End Date (Date for the entry)
- Select: Duration (Hours for the Entry)
- Once you've confirmed all information looks accurate, click 'Submit'



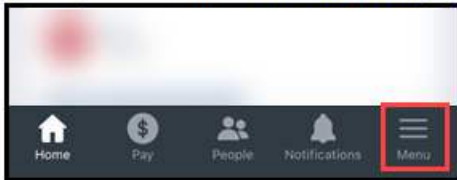
- REPEAT STEPS FOR ENTERING DAYS ZONE EXPENSE (note that the zone expense says duration and you should always **enter 1 in duration for zone**. It will calculate that zone rate x 1 automatically.



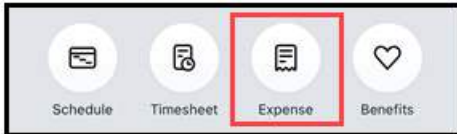
## Submit a Reimbursement Expense in Mobile App

- Access Expense in the Mobile App (Please note\*\* Enter reimburse expenses on Doforms until notified)

1. Navigate to **Menu** in the [Global Navigation Bar](#).



2. Select **Expense**.




- Submit an Expense in Mobile App – Follow the Steps below- please note a clear picture of the receipt is required for reimbursement. Any expenses without a clear picture of receipt will not be reimbursed until a clear picture is received.



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To create Expenses:

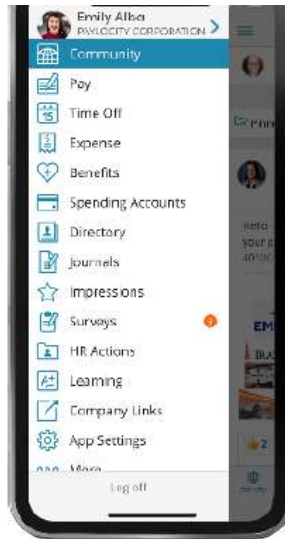
1. [Log in](#) to the Paylocity Mobile Application.
2. [Access Expense](#).
3. Navigate to the **Expenses** section.
4. Tap **+** in the bottom-right corner.
5. Enter a **Title**.
6. Select **Add Expense**.
  - Select **Add Existing Expense** if having already created an expense with a receipt image.
  - Select **Create New Expense** to create a new expense with a new receipt image.
7. Tap the **\$0.00** figure.
8. Enter the amount of the expense and tap **Save**.
9. Tap the  icon in the top-left corner to [add a receipt](#).
  - If more than one receipt is necessary, then tap the picture of the receipt added and tap **Add Another**.
  - The number indicator next to the receipt image displays the number of attached receipts for the expense.
10. Tap **Title** to give the expense a unique name, then tap **Save**.
11. Tap **Transaction Date** and select the date of the expense from the calendar.
12. Tap **Category** to choose an available category. Complete the custom fields, if applicable.
  - If **Mileage** is the category, then tap **Calculate Mileage** and then tap **Route Map** to enter the route stops.
  - Tap **Calculate Mileage**. The route for the expense displays on the map, and the number of miles along with dollar amount appears above the map.
  - The calculated dollar amount automatically populates the expense's amount field after tapping **Save**.
13. Tap **Payment Method** to choose the payment method.
14. Tap **Add Note** to input any additional detail, then tap **Done**.
15. Override Cost Centers, if applicable and necessary:
  - If Cost Centers can be overridden per the expense policy and need changing, then enable the **Cost Center Override** toggle.
  - If jobs are active for the assigned expense policy, then **Cost Center / Job Override** appears.
  - Cost Centers that users cannot edit appear gray. This depends on the configuration of the assigned expense policy.
  - Tap any applicable and editable Cost Centers to make selections as necessary.
16. Tap **Save** to save the expense to the **Expenses** page.
17. Tap **OK** once the **Expense Saved** window appears to direct to the **Expenses** page.

## General Overview






### ■ Paylocity Mobile App Overview

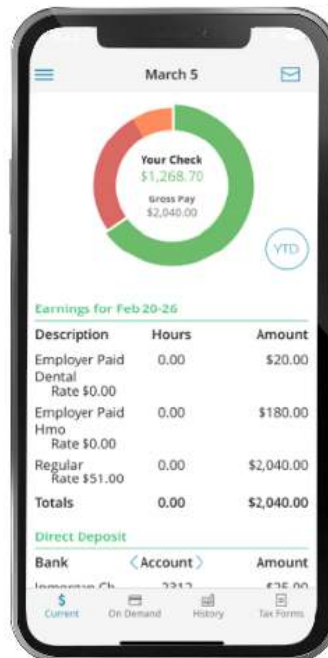
Let's take a brief tour of what you can find in the app.

-  To move between products, tap the hamburger button to open the menu.
-  Tap your name to view and edit your profile, personal info, and emergency contacts.
-  Tap App Settings to set your language preference, or toggle your Biometric Login, and Stay Logged In settings.
-  Tap More to access Paylocity Education and Knowledge (PEAK), our helpful knowledge base.



### ■ Access Pay Information in Paylocity Mobile

-  Open the Paylocity app and tap Pay to view your most recent pay stub.
-  Tap on the interactive chart to view earnings, deductions, benefits, or tax amounts.
-  Tap History to view your previous pay stubs.
-  Tap Tax Forms to review your W-2s or other year-end forms.
-  Tap the envelop to securely email pay stub information electronically.



## ■ View Personal Information in Paylocity Mobile

It's simple to request time off with the Paylocity mobile app or your Self Service Portal!

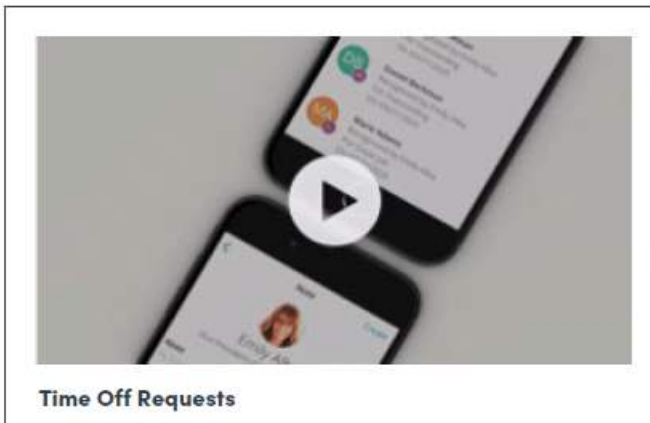


In the Paylocity mobile app tap Time Off to view your balances.



Tap Request, fill in the details, then tap Confirm and Submit.

Your request is instantly sent to your supervisor for approval. Check out our quick tutorial on time off requests for both mobile and your Self Service Portal in the below video.



### Learn More

Click the image or scan the QR code for our tutorials on how easy it is to request time off with the mobile app or your Self Service Portal!



## ■ Request Time Off in Paylocity Mobile

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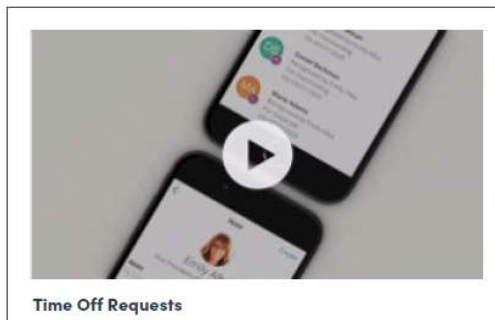


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- Access Paylocity Education and Knowledge Base (PEAK) in Paylocity Mobile

Browse self-help resources that provide dynamic, deep, accurate, up-to-date information in an easy-to-access format. Search or browse to find step-by-step instructions and answers to critical questions.



From the mobile menu, tap ... More at the bottom to view more options.



Tap Knowledge Base to access resources.



Explore topics of interest to find instructions or information you need.



## Paylocity Self Service Portal General Overview

- Access Paylocity Self Service Portal



# Stanley Paylocity User Guide

Get easy access to your info anytime! With your Self Service Portal, you have secure 24/7 access in one convenient place. From your desktop, navigate to <https://access.paylocity.com/> and use the same credentials used for the Paylocity mobile app. Info is grouped in cards that make it easy to find.



In the Pay card, click Go Paperless to get your pay stubs and W-2s sooner!



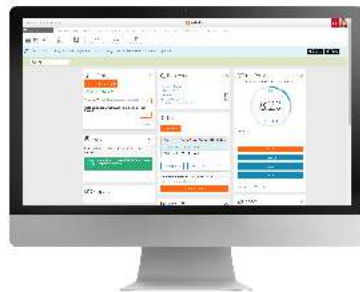
View recent pay stubs and details in the Pay card.



Manage your dependents from the Benefits card. Click More, then Dependents.



Check your balances and request time off from the Time Off card.



Work on tasks to complete such as assigned surveys or courses.



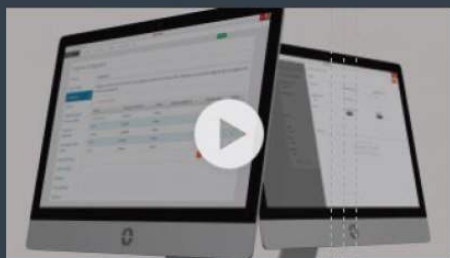
Access your company's policy documents like your employee handbook and other important resources.

## ■ Add Direct Deposit

Avoid lines at the bank and never worry about a lost or delayed paycheck. It's quick and easy to sign up for direct deposit! You can even direct money to multiple accounts.



To get started, locate the Pay file in your [Self Service Portal](#), click More., then click Direct Deposit Accounts.



SSP: Adding or Editing Direct Deposit

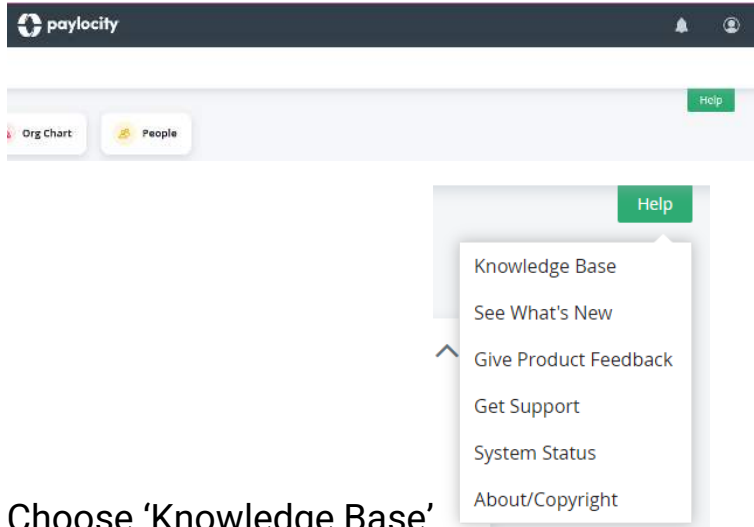
### Learn More

Click on the image to the left or scan the QR code below to see how easy it is to add or edit your direct deposit info!



 **Paylocity User Guide**  
FAQs/Paylocity HELP

- Login to your Self Service portal on Mobile App or Web Browser
- Navigate to green 'Help' in top right corner



- Choose 'Knowledge Base'
- Type your question or topic in the search bar – press search for articles, step-by-step guides and training videos

