

Installing and configuring Evolution

To download and install Evolution:

- Go <http://www.paycoinc.com/client-resources/downloads-32.html>
- Click on the "Evolution Installer" link
- Save the file to your desktop.
- After downloading, double-click on the file that was just saved to your desktop.
- Run the installer as normal, accepting all of the defaults.

Running Evolution:

- Double-click the Evolution icon on your desktop
- At the login window, enter the following information into each field
 - Login Id: provided to you by Payco (contact your Payroll Specialist if you haven't already obtained a login id)
 - Password: enter your password
 - Server: "evolution.paycoinc.com"
 - Compression: "T1", "Cable/DSL", or "Modem" depending on your Internet speed
 - Do not make any changes within the "Settings..." button
- Click the "OK" button or hit "Enter" on your keyboard

Please note: When logging in for the first time, Evolution may go through an update process and then return to the log in screen. If so, enter the above information again and log in after the update is completed.

Troubleshooting tips:

- *Be sure that ports 9901, 9902, and 9903 are open on your firewall.*
- *Be sure you have adequate security rights to the Evolution folder within your computer, or the update process may not complete successfully.*

Miscellaneous Items:

Anytime you install Evolution on a new computer there are a variety of items that will need to be reconfigured. This is because there are some settings within Evolution that are set up for the individual user, and those settings are stored within the individual user's computer registry. When you install Evolution on a different computer, those registry settings are set back to the defaults.

While most of these items are not required, they may be desired by the individual user in order to provide the optimal use of Evolution.

1. Setting the default printer:

- 1.1. Go to Admin - Workstation Settings
- 1.2. Select a default printer in the drop down box for "Reports Printer". It is unnecessary for remote clients to select a Checks Printer, but it will do no harm in selecting one.
- 1.3. Go to any other menu or close Evolution. The settings are changed instantly so there is no Save button.

Note: Within this screen are also useful options such as "Always do report preview", or "Jump to Detail Tab Automatically"

2. Adding columns in the Quick Entry Grid:

- 2.1. Create payroll as normal, and access the quick entry tab within the batch.
- 2.2. Right-Click anywhere in the screen
- 2.3. Select E/D - Add - <earnings code> - Hrs (or Amt) 4. To remove columns Select E/D - Delete - <earnings code> - Hrs (or Amt)

Configuring Evolution for Time keeping imports:

For clients importing hours from PaycoTime, E Sheets, or other time keeping system the following must be performed:

- 1. Create an Exception Report:** This is the file that Evolution uses to log any errors upon importing hours into your batch.
 - 1.1. Browse to a location within your computer that you would like to create this file (ie: My Documents, Desktop, etc)
 - 1.2. Right-click within that location and select New - Text Document.
 - 1.3. Name this new text document anything you wish (ie: "Evolution Import Errors")

- 2. Create payroll, and navigate to the Import tab within the batch:**
 - 2.1. For the "Source File Name" click on the button to the right (it has 3 dots on it). Browse for the file you exported from PaycoTime, E Sheet, or other time keeping system.
 - 2.2. For the "Exception Report File Name" click on the bottom to the right (3 dots). Browse for the file you created in step 1 and hit Save (or double click the file).
 - 2.3. Look EE up by should be "Custom #"
 - 2.4. DBDT Match setting depends on the individual company's setup. Usually "Full (faster)" is sufficient, but if you experience import errors then change the setting to "Partial (slower)"
 - 2.5. File Format will depend on the format that your time keeping system exports. Clients using PaycoTime or E Sheets will use "Comma Delimited"
 - 2.6. None of the other check boxes at the bottom should be checked.

After these steps are completed, you should be able to import your batch as normal.