

Managing banked time

TimeControl[®] allows you to manage many banks of time at once





Banked Time

- ✓ TimeControl contains extensive capabilities to manage banked time.
- ✓ While by default TimeControl includes banks for Vacation, Sick Leave and Personal Time, Administrators can use banked time for almost anything.
- ✓ Administrators can use banks and remaining allowances in reports, dashboards and validation rules



How does it work?

- ✓ By default, there are 9 banks in each employee record. This is where the total allowance is entered
- ✓ Each charge code can be flagged to count against a particular bank
- ✓ Dashboards count the total from the last Fiscal Year Start defined in System Preferences until now and compare that to the amount in the bank

Default Dashboard with 3 banks

TimeControl® Joseph Gardner Dashboard My Account Logout Help

Home Timesheet Reports Tables Links Tools Administrator Documentation Maintenance

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Navigation

HMS Default

Vacation/Sick/Personal time remaining

Employee Full Name Gardner, Joseph

Bank	Allotted	Taken	Remaining
Vacation Hours	80.00	0.00	80.00
Illness Hours	24.00	0.00	24.00
Personal Hours	40.00	0.00	40.00

8/17/2011 - 9/17/2011

Timesheets Awaiting Release

Period Start Date	Week Ending Date	Quantity
At this time, you have no timesheets awaiting release for the past 2 weeks.		

Personal Timesheet Status

Employee Full Name Gardner, Joseph

Period Start Date	Week Ending Date	Timesheet Status
8/20/2011	8/26/2011	MISSING

Announcements

Staff documents
8/9/2010
All staff are reminded that they must keep client confidential documents under lock and key. Confidential document soft copies must be password protected. Please contact security for coaching on keeping client files safe!
[more >>](#)

All-staff meeting
8/1/2010
All staff meeting in conference center on Dec 15
[more >>](#)

100%

Employee table: Bank allowance

The screenshot displays the TimeControl web application interface. The browser address bar shows the URL: <http://docs.timecontrol.org/Application/Tables/Emplo>. The application header includes the user name "Joseph Gardner" and navigation links for "Dashboard", "My Account", "Logout", and "Help". The main navigation menu includes "Home", "Timesheet", "Reports", "Tables", "Links", "Tools", "Administrator", "Documentation", and "Maintenance".

The "Employee" table configuration is shown, with a search results table on the left:

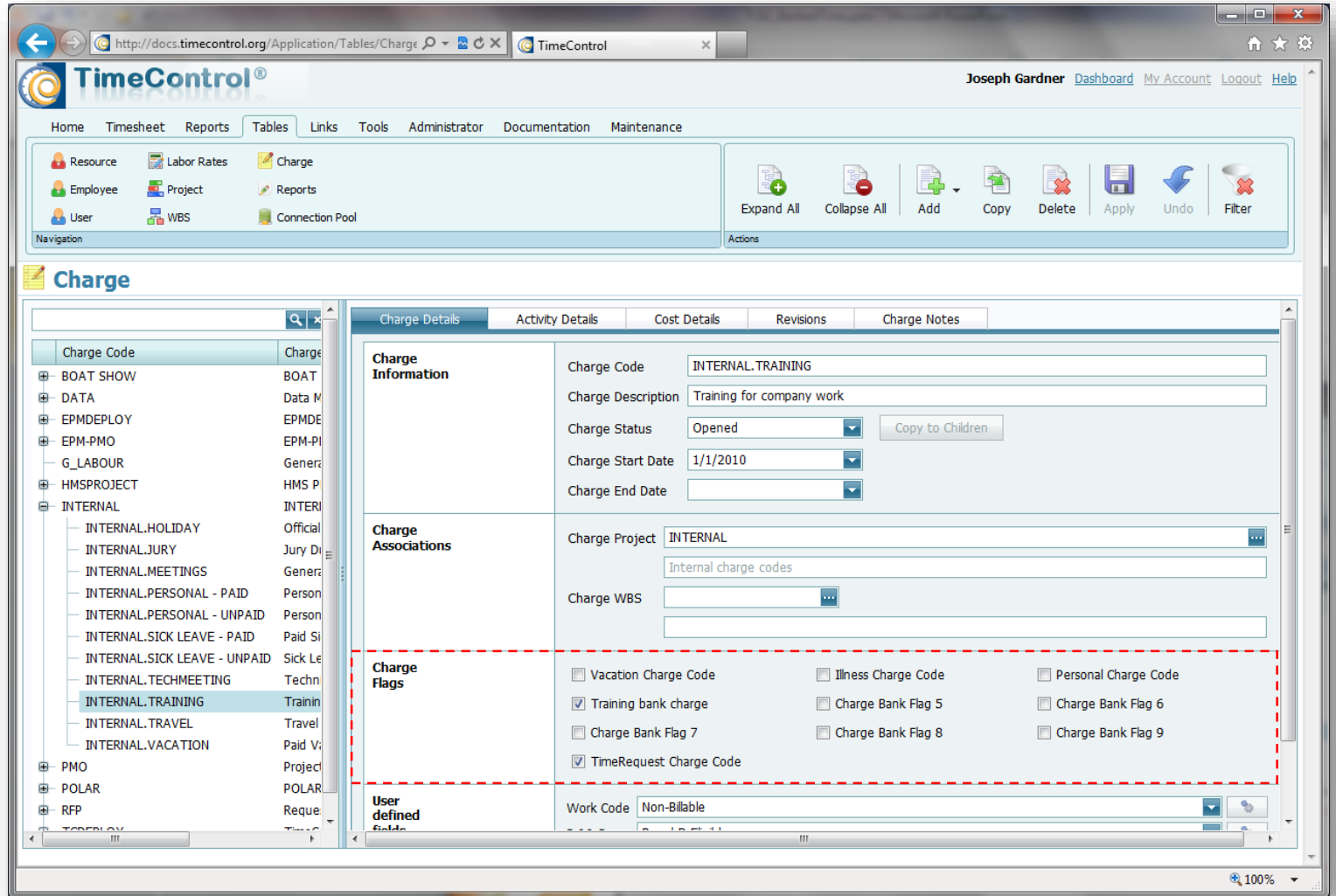
Employee Code	Employee Full Name
ALEXL	Lang, Alex
BARBD	Donovan, Barbara
DAVIDT	Taylor, David
GAILR	Robinson, Gail
JOEG	Gardner, Joseph
SALLYT	Thompson, Sally

The main configuration area is divided into several sections:

- General:** Employee Code (GAILR), Employee First Name (Gail), Employee Last Name (Robinson), Employee Submit Start (6/30/2010), Employee Submit Finish.
- Associations:** Employee Resource (GAILR), Employee Preloading (checked).
- Time Banks:** A section highlighted with a red dashed border, containing fields for Vacation Hours (80.00), Illness Hours (24.00), Personal Hours (40.00), Training Bank (40.00), Employee Bank 5 Hours (0.00), Employee Bank 6 Hours (0.00), Employee Bank 7 Hours (0.00), Employee Bank 8 Hours (0.00), and Employee Bank 9 Hours (0.00).
- User defined fields:** Department (TECH), Location (TORONTO), Type (CONTRACTOR).

The bottom right corner of the application shows a search icon and a zoom level of 100%.

Charge table: Flag for which bank



The screenshot displays the TimeControl web application interface. The browser address bar shows the URL: <http://docs.timecontrol.org/Application/Tables/Charge>. The user is logged in as Joseph Gardner, with links to Dashboard, My Account, Logout, and Help.

The navigation menu includes: Home, Timesheet, Reports, Tables, Links, Tools, Administrator, Documentation, and Maintenance. The 'Tables' menu is expanded, showing options for Resource, Labor Rates, Charge, Employee, Project, Reports, User, WBS, and Connection Pool.

The 'Charge' table configuration is shown with the following details:

- Charge Code:** INTERNAL.TRAINING
- Charge Description:** Training for company work
- Charge Status:** Opened
- Charge Start Date:** 1/1/2010
- Charge End Date:** (empty)
- Charge Project:** INTERNAL
- Charge WBS:** (empty)
- Charge Flags:**
 - Vacation Charge Code
 - Training bank charge
 - Charge Bank Flag 7
 - TimeRequest Charge Code
 - Illness Charge Code
 - Charge Bank Flag 5
 - Charge Bank Flag 8
 - Personal Charge Code
 - Charge Bank Flag 6
 - Charge Bank Flag 9
- User defined fields:**
 - Work Code:** Non-Billable

Rename with Manage Languages

- ✓ Change in:
- ✓ Employee table
- ✓ Charge table
- ✓ Dashboard Template

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Home Timesheet Reports Tables Links Tools Administrator Documentation Maintenance

My Account Missing TS Notification Announcements
Update License Key Templates Manage Languages
Change TS Ownership Timesheet AutoFill Timesheet Release Log

Navigation

Manage Languages

Previous Next Apply Undo Add Copy Delete

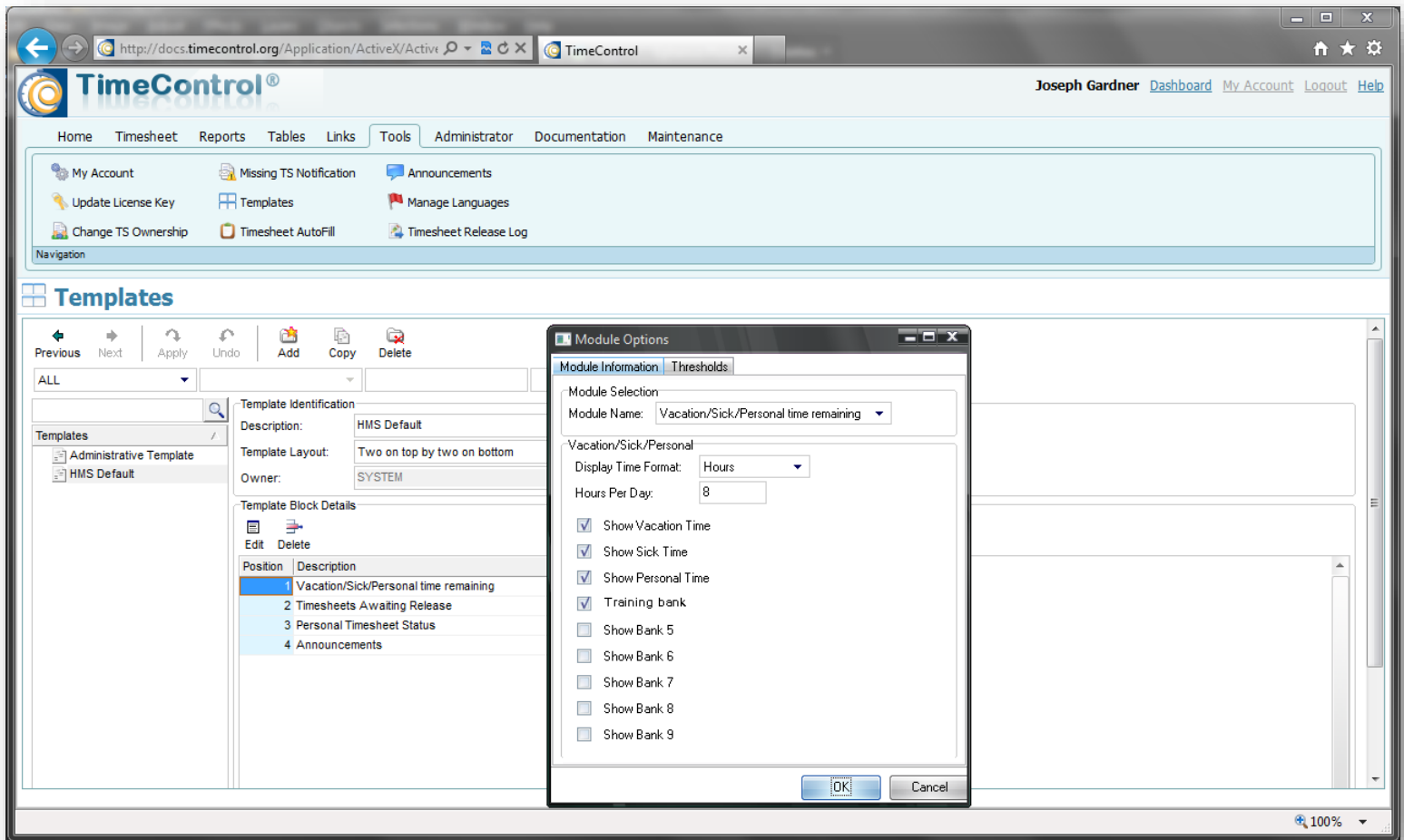
ALL Load

Find/Replace Language Options

Drag a column header here to group by that column

Translation Text	Tag Description	Language Name	Tag Name	Tag Category
Type	Employee User Defined Field 3 Capti	English	EMP_FLD3	EMP
Training Bank	Dictionary: Employee Bank 4 Hours	English	EMP_HRS4	EMP
Employee Bank 5 Hours	Dictionary: Employee Bank 5 Hours	English	EMP_HRS5	EMP
Employee Bank 6 Hours	Dictionary: Employee Bank 6 Hours	English	EMP_HRS6	EMP
Employee Bank 7 Hours	Dictionary: Employee Bank 7 Hours	English	EMP_HRS7	EMP
Employee Bank 8 Hours	Dictionary: Employee Bank 8 Hours	English	EMP_HRS8	EMP

Dashboard template: Add the bank




The screenshot displays the TimeControl web application interface. The browser address bar shows the URL <http://docs.timecontrol.org/Application/ActiveX/ActiveX>. The page title is "TimeControl®" and the user is logged in as "Joseph Gardner". The navigation menu includes "Home", "Timesheet", "Reports", "Tables", "Links", "Tools", "Administrator", "Documentation", and "Maintenance".

The main content area is titled "Templates" and shows a list of templates. The "HMS Default" template is selected. The "Module Options" dialog box is open, showing the "Thresholds" tab. The "Module Selection" dropdown is set to "Vacation/Sick/Personal time remaining". The "Display Time Format" is set to "Hours" and "Hours Per Day" is set to "8". The "Vacation/Sick/Personal" section has three checked options: "Show Vacation Time", "Show Sick Time", and "Show Personal Time". The "Training bank" option is also checked. The "Show Bank" options (5 through 9) are currently unchecked.

Position	Description
1	Vacation/Sick/Personal time remaining
2	Timesheets Awaiting Release
3	Personal Timesheet Status
4	Announcements

Option	Status
Show Vacation Time	Checked
Show Sick Time	Checked
Show Personal Time	Checked
Training bank	Checked
Show Bank 5	Unchecked
Show Bank 6	Unchecked
Show Bank 7	Unchecked
Show Bank 8	Unchecked
Show Bank 9	Unchecked

Training bank in the dashboard



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Gail Robinson Dashboard My Account Logout Help

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Navigation

HMS Default

Vacation/Sick/Personal time remaining

Employee Full Name Robinson, Gail

Bank	Allotted	Taken	Remaining
Vacation Hours	80h	0h	80h
Illness Hours	24h	0h	24h
Personal Hours	40h	0h	40h
Training Bank	40h	0h	40h

1/1/2011 - 9/2/2011

Timesheets Awaiting Release

Period Start Date	Week Ending Date	Quantity
At this time, you have no timesheets awaiting release for the past 2 weeks.		

Personal Timesheet Status

Employee Full Name Robinson, Gail

Period Start Date	Week Ending Date	Timesheet Status
8/20/2011	8/26/2011	MISSING

Announcements

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Company Holiday gathering

100%

Just add training to the timesheet

The screenshot displays the TimeControl web application interface. The browser address bar shows the URL: <http://docs.timecontrol.org/Application/Timesheet/Tir>. The page title is "Timesheet Entry".

The user is logged in as **Gail Robinson**. The navigation menu includes: Home, Timesheet, Reports, Tools, Documentation.

The main toolbar contains the following actions: Previous, Next, Add, Delete, Release, Reject, Print.

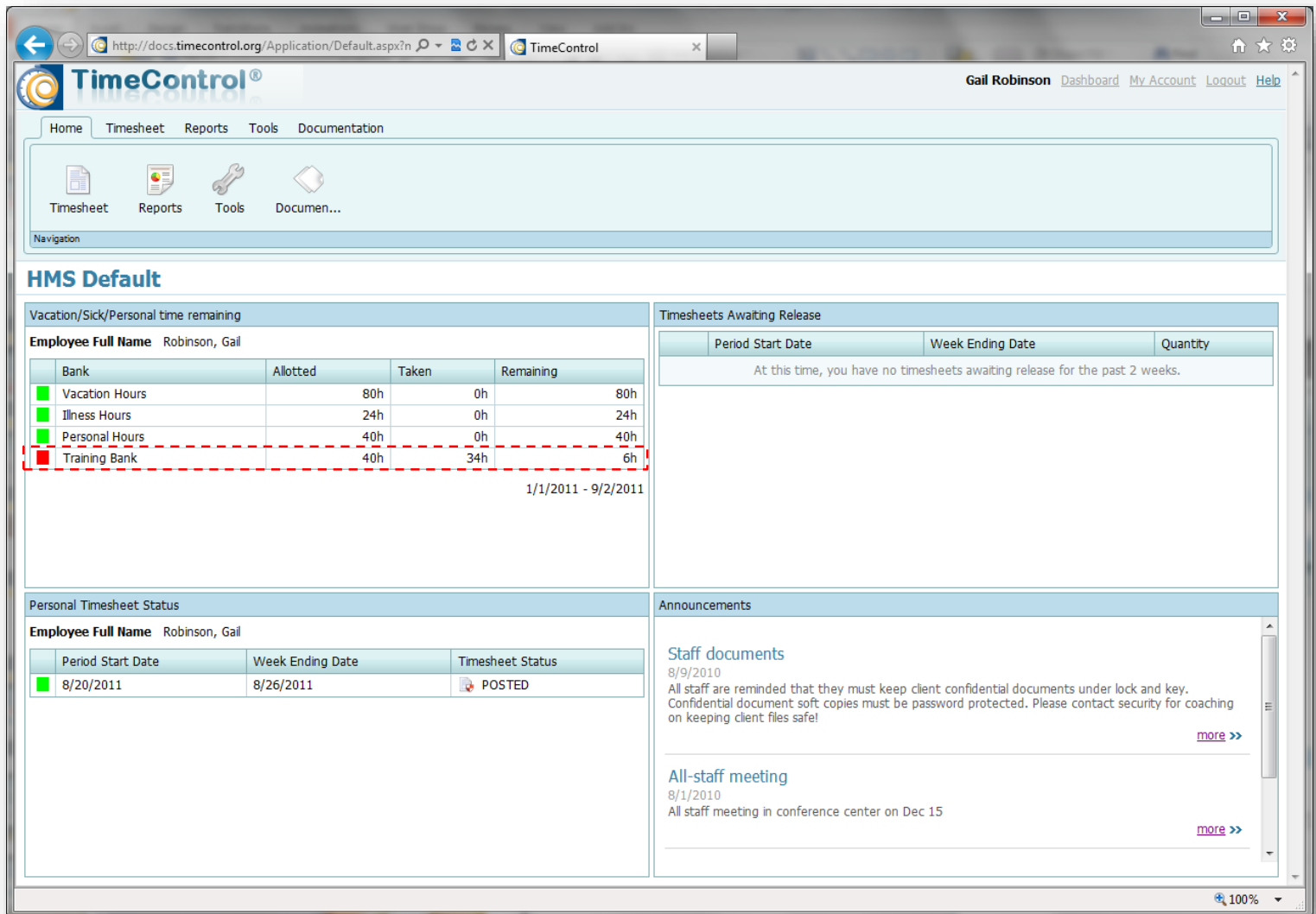
The "Entry" section is divided into two panels:

- Employee Information:**
 - Employee: Robinson, Gail
 - Resource Description: Gail Robinson
- Timesheet Information:**
 - Period: 8/20/2011 - 8/26/2011
 - Timesheet Status: DRAFT
 - Timesheet Header Source: Gail Robinson
 - releasing to: Tom Logan
 - Timesheet Header Owner: Gail Robinson

The main table displays the timesheet entries:

Project Name	Charge Code	Charge Description	Rate Code	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	Sun.	Total
INTERNAL	INTERNAL.MEETINGS	General Meetings	S-GAILR	2h	2h	4h					8h
INTERNAL	INTERNAL.TRAINING	Training for company work	S-GAILR	6h	6h	6h	8h	8h			34h
				8h	8h	10h	8h	8h	0h	0h	42h

...and the dashboard recalculates



TimeControl®

Gail Robinson Dashboard My Account Logout Help

Home Timesheet Reports Tools Documentation

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Navigation

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Vacation/Sick/Personal time remaining

Employee Full Name Robinson, Gail

Bank	Allotted	Taken	Remaining
Vacation Hours	80h	0h	80h
Illness Hours	24h	0h	24h
Personal Hours	40h	0h	40h
Training Bank	40h	34h	6h

1/1/2011 - 9/2/2011

Timesheets Awaiting Release

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Personal Timesheet Status

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100%



Other options

- ✓ Using SQL-based accruals to modify the value in the employee bank field each month or pay period
- ✓ Use TimeControl Validation Rules to warn or prevent someone from taking more time than is in the bank
- ✓ Use banked time reports to show banked time taken and outstanding liability of banked time



Thank you!

For more information:

To find out more about TimeControl:

www.timecontrol.com

To find out more about our hosted TimeControlOnline:

www.timecontrol.net

To try TimeControl for free:

freetrial.timecontrol.com

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