TimeControl® Online

User Guide

Version 8.6

Last update: February, 2025

Copyright

Heuristic Management Systems Inc. (HMS Software)
189 boul. Hymus, Suite 402
Pointe-Claire, Quebec H9R 1E9
Canada
Tel: +1 514-695-8122
Fax: +1 514-695-8121
Web: www.timecontrol.com
Email: info@hms.ca

Table of Contents

Copyright **2**
Table of Contents **3**
Introduction **6**
About this Guide 6
Assumptions 6
Stylistic Conventions 6
TimeControl Overview 7
Using TimeControl for the Visually Impaired 7
Logging into TimeControl 7
Password recovery 10
Logging Out of TimeControl 12
Exiting TimeControl 12
Timesheets **13**
Creating a New Timesheet 13
About Timesheet Entry 15
Navigating to a particular timesheet 16
Entering Timesheet Data 17
Timesheet Details 17
Adding Timesheet Lines 19
Adding multiple timesheet lines at once 19
Copying timesheet lines 21
Attachments 22
Start / Stop 23
The Worksheet button 25
Additional Timesheet Line Actions 29
Line Item Notes 30
The Charge Details Tab 30
The Activity Details Tab 31
Expenses Tab 32
Expense Entry Dialog view 34
Activity Steps tab 35
Timesheet Notes 35
Freezing timesheet columns 36
Grouping Timesheet Lines 37
Releasing your Timesheet for Approval 39
UnReleasing your Timesheet 39
Post-Processing Adjustments and Debit/Credits 40
Validation Rules 40
Checking Validation Rules before you release with Analyze 42
What if the Timesheet is Rejected? 42

The Timesheet List......44
Filtering the Timesheet Lists......45
Printing your Timesheet......46
Options to Customize the Timesheet view......46
Timesheet Grid Lines......47
TimeControl Reports......48
TimeRequest™......49
TimeRequest List......49
Add a TimeRequest......52
TimeRequest Approvals......53
Calendar View......54
Executing TimeRequests......55
Other functions......56
MyAccount / Options......56
Users Tab......56
Alternate Users Tab......58
Employee Tab......58
Timesheet Preloaded Charges......59
Resource Assignments Tab......59
API Key Tab......61
Creating an API Key......62
Logging Out of TimeControl......64
Exiting TimeControl......64
The TimeControl Mobile App......65
Multi-device support......66
Connection and Login......68
Corporate Login......69
Timesheet List......71
Filters......71
Creating a new timesheet......72
Timesheet Entry......74
Editing hours......74
Timesheet Secondary fields......75
Timesheet More Edit Options......76
Timesheet Editing......79
Edit Line......80
Edit Line Notes......81
Edit Line Expenses......82
Delete Line......87
Copy Line......87
Release Timesheet for Approval......87
Approving Timesheets......90

Timesheet Options....93
Viewing Posted Timesheets....94
Summary View....98
TimeControl Mobile TimeRequest™....102
TimeControl Mobile TimeRequest Approvals....109
Account / Logout....110
Offline....111
Views....112
Help Topics....115
Getting Technical Support for TimeControl....115

Introduction

About this Guide

The *TimeControl User's Guide* is designed to assist new users in entering their first timesheets and in learning the basic features of the application. The features described in this guide are those that are included with the default Individual user profile. Administrators and Supervisors who will be responsible for the authorization of timesheets and for the maintenance of TimeControl, including linking TimeControl to other systems, should also consult the *TimeControl Reference Guide*.

Assumptions

This guide assumes that you will be using TimeControl primarily for entering timesheets. It also assumes that you are familiar with basic browser based commands.

Stylistic Conventions

Be advised, the colors and contents of the screenshots in this guide may not necessarily be identical to those on your computer; this varies according to your desktop theme and your particular TimeControl configuration.

Commands are expressed by the | symbol. For instance, to indicate the process of selecting the **Tools** folder in the main menu, followed by **Options** in the submenu, the following would be used:

Select **Tools** | **Options**

Please take into account that all menus and fields within the application are translatable and, therefore, certain menu selections mentioned herein may not apply in your case.

The following font distinctions are also used:

Bold-Arial: expresses a menu, field, tab, command or other item as it appears in the application

`Bold-Courier:` denotes a key command such as **`Ctrl`** or **`Tab`**

Times Roman-Italics: used for file and document names

TimeControl Overview

There are several types of timesheet systems on the market today. Most common among timesheet systems are 'Time and Attendance' systems. These systems are finance driven and often provide the source data for the payroll system as well as tracking sick days, vacations etc. These systems are usually either part of an integrated financial package or, are custom-written for the organization. Another popular type of timesheets are 'Time and Billing' systems for the professional market designed in particular for professionals who bill for their services by the hour. Accountants, lawyers and consultants who typically spend a short amount of time in each incident with a client will often track and invoice the time by filling out a small billing or timesheet.

TimeControl is an electronic timekeeping system designed as a multi-purpose system to accommodate not only the needs of time and attendance and time and billing but also to serve project-oriented environments. 'Management by Project' is accepted as one of the most effective ways to manage an organization. References to this type of management style can be found throughout current business literature. 'Management by Project', 'Activity-based-costing (ABC)', 'Management by Accountability' and so on all point to a move towards tracking the budget and actual costs by identifiable task and managing the progress against that task at the same time. TimeControl has been designed to serve these multiple needs within the organization at the same time.

TimeControl's flexible interface also allows Administrators to tailor each component to suit the needs of individuals or groups of users. This allows end users to quickly create, enter, and edit timesheets. For more information on TimeControl, please visit our website at www.timecontrol.com.

Using TimeControl for the Visually Impaired

TimeControl's functionality for individual users has been adjusted to make it useable by non-visual access software such as NVDA (www.nvaccess.org). When using a product such as NVDA, hovering over an element of TimeControl will cause that element to be described out loud by a synthetic voice. So, hovering over the login field will cause the words "Login clickable". This will make it easier for those with visual impairments to enter and release their timesheet as well as create a TimeRequest entry or look at their MyAccount options.

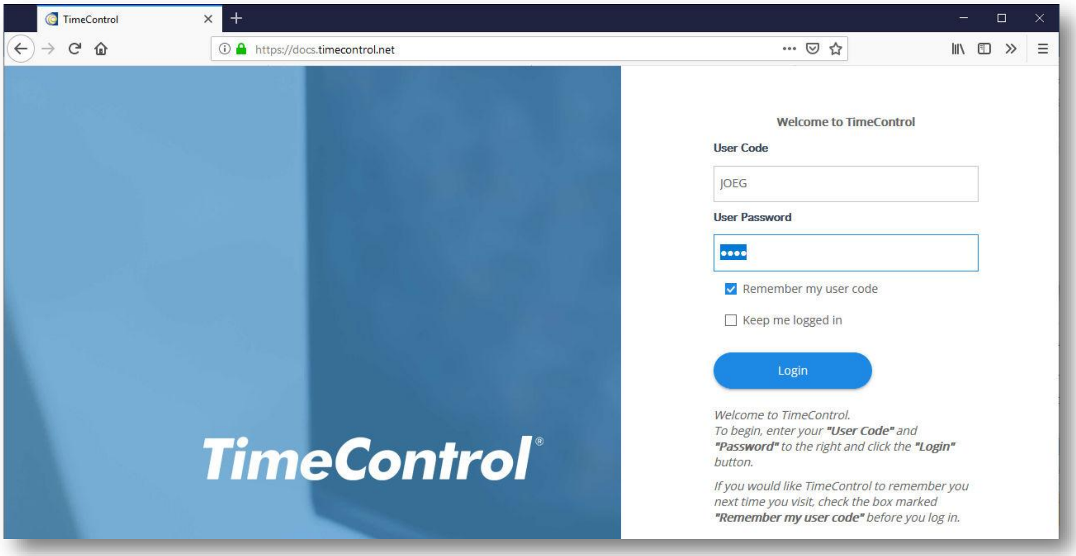
While this accessibility aspect of TimeControl might work on many different visual reader packages, we used NVDA for our testing because it is open source and readily available to anyone.

Logging into TimeControl

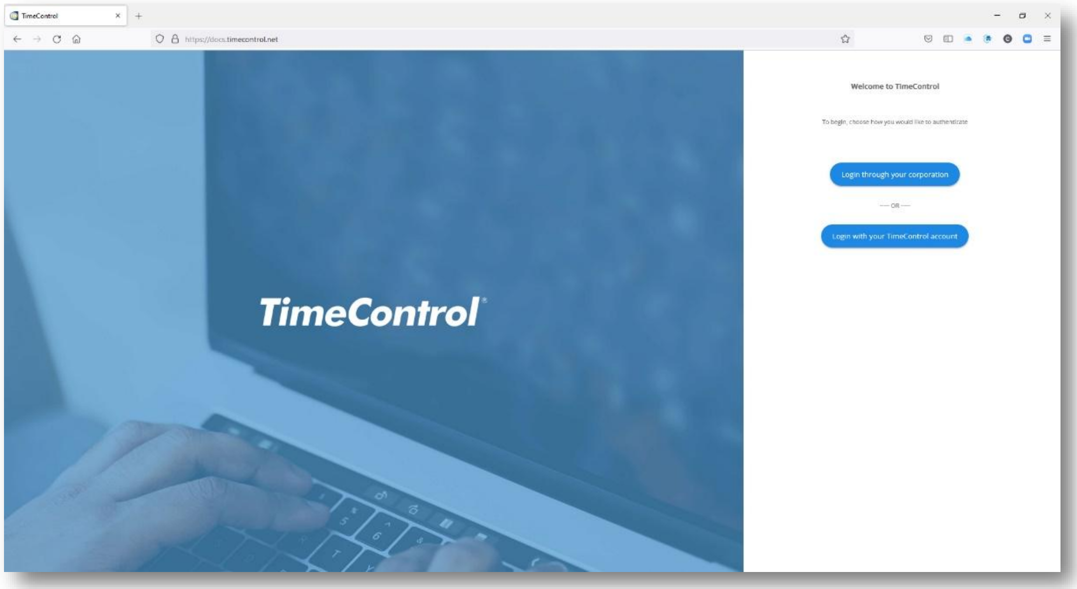
To log into TimeControl, you will need to know your username and password. Your TimeControl Administrator will provide you with these. If you have forgotten your password, the TimeControl Administrator can change it for you. For information on changing your password, see the section on *Options* in this guide.

➢ TimeControl is designed to work with several browsers including Firefox, Chrome, Edge, Mozilla and Safari.

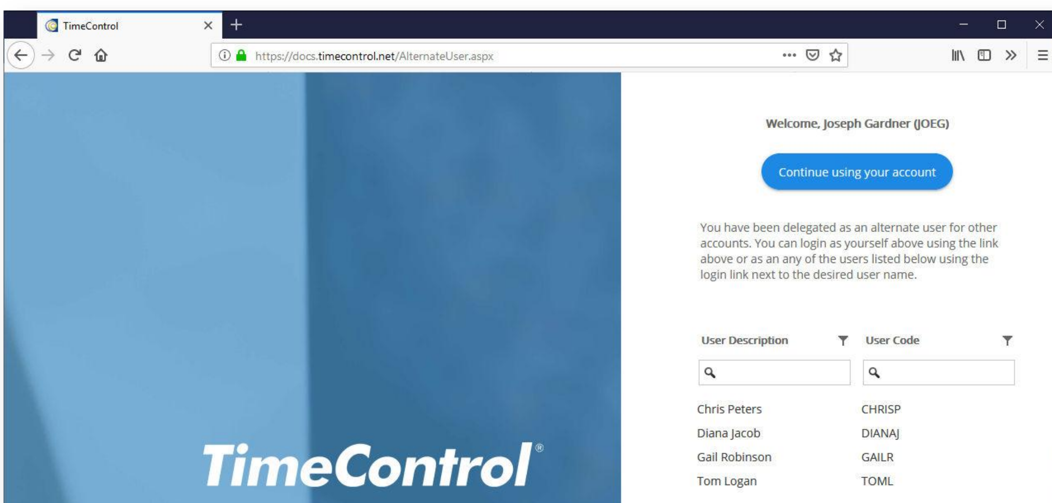
- Your Administrator will supply you with a Web address to point to with your browser, for example, http://timecontrol.mycompany.com. Simply direct your Web browser to this address. The TimeControl Login page appears in your browser window.
- Depending on how your administrator has set up TimeControl, you may see one of several different login screens. The basic screen assumes that your user name and password are located in TimeControl itself.



- Enter your username and password in the login dialog box then click **OK**. This displays the main menu for TimeControl.
- You can elect for TimeControl to save your user name to make it easier to log in next time.
- You can also elect to stay logged in.
- Your Administrator may have established your authentication using corporate credentials kept in a service like Microsoft's Active Directory. In that case, you might be presented with a choice. Click on Logging in through your Corporation if you have been instructed to use your corporate authentication or Login through your TimeControl account if your user credentials are in TimeControl.



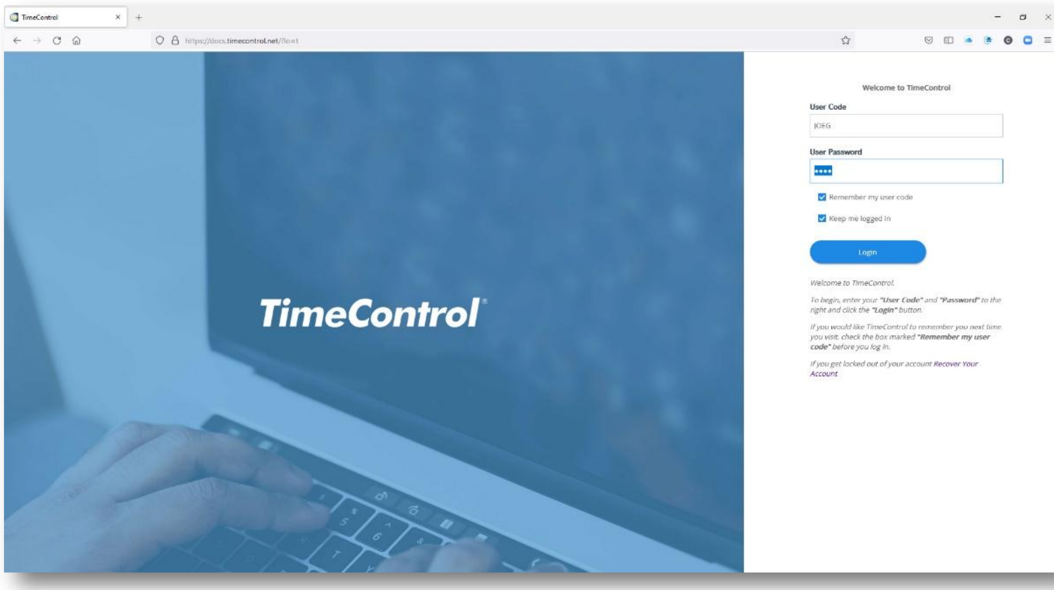
- If you have been listed as an alternate user for someone else, then you will be presented with the option to log in either as yourself or as that user. If you log in as another user, you will have all the privileges and access of that user. It will appear that you have logged in as that user but in the background, TimeControl will be tracking that it is you, not them that is performing these functions.



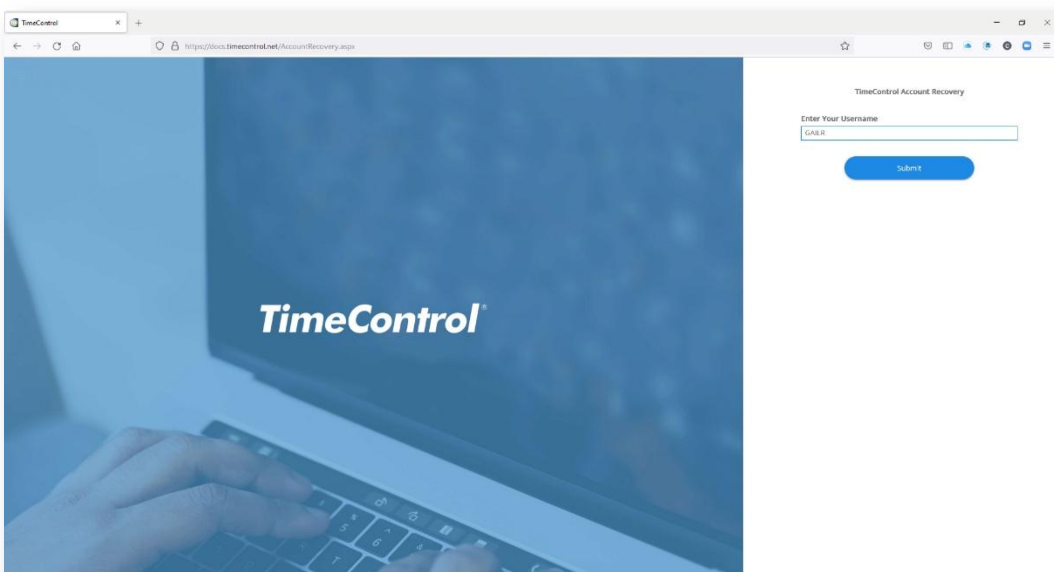
Note: If you have been listed as an alternate user by multiple users as is the case in the above example, you do not need to log out every time. Once logged in, in the header area of TimeControl you will see a down-arrow next to the alternate you have first logged in as. You can then simply select any other alternate user to which you have rights and you will immediately be re-logged in as that user. This will be reflected at the top of the screen.

Password recovery

If you have forgotten your TimeControl Password or you have received a message that you are blocked from TimeControl because of too many login attempts, you can reset your password.

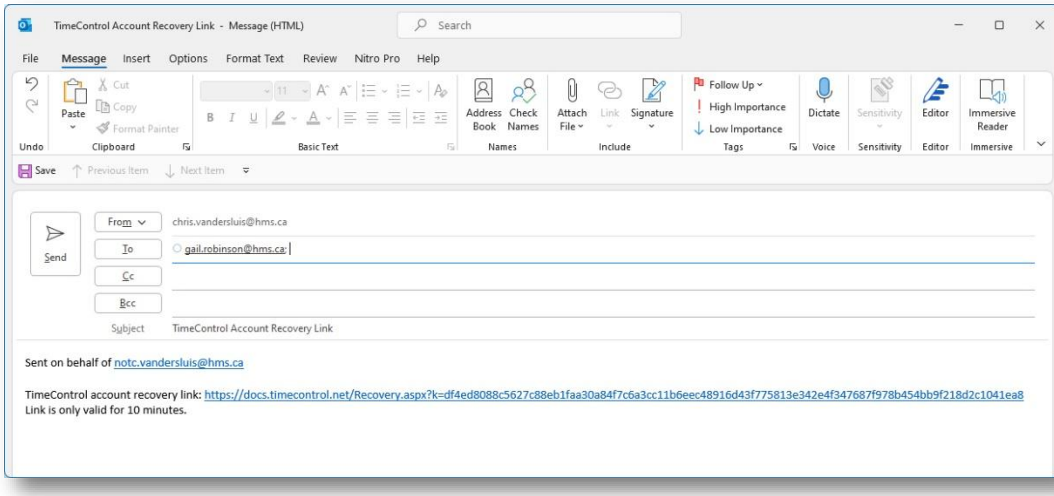


On the login screen click Recover your password at the bottom of the text area. You will be presented with a new screen for password recovery.



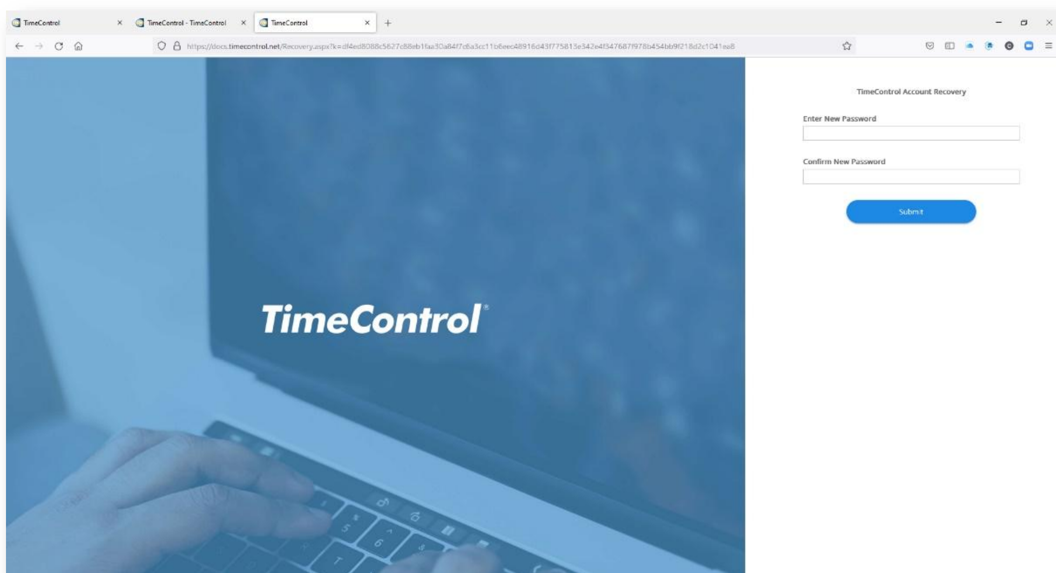
Enter your TimeControl User name.

If there is an email address associated with that User name, TimeControl will now email a link to reset the password. The email should look like this:



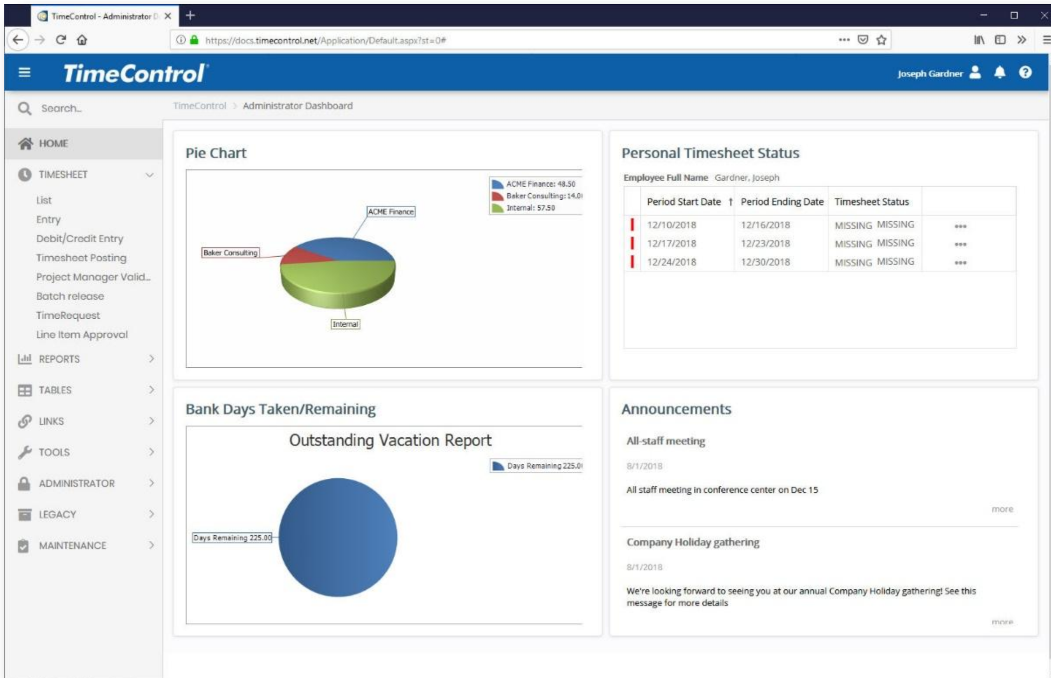
The actual view may be different based on your email provider and email application. The link will only be active for a short period.

Click on the link to reset the password on that site.



Enter and confirm the new password and you'll be able to enter TimeControl. If there is no email associated to this user, an Administrator can reset the password manually in the User Table.

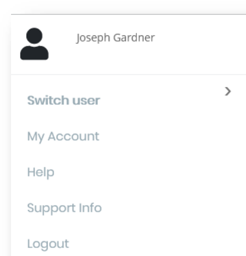
The following chapters describes the most commonly used features of TimeControl from a user's perspective. Screens are displayed using Firefox and may vary slightly with other browsers or other screen resolutions.



The menu in TimeControl is displayed as a series of selections grouped into categories on the left side of the screen. The categories and selections displayed are dependent on the User Profile assigned to the User. Within each category, selections show different functions. You can collapse or expand a category by clicking on the **>** arrow to the right of it. Clicking on the arrow updates the menu and displays that function in the area immediately below it. To hide or display the menu, click on the ☰ at the top left of the screen.

Logging Out of TimeControl

If you wish to log out of TimeControl select the Name and icon at the top right area of the screen. 



You can then select logout. If you have been listed as an alternate user by other TimeControl Users, you will see their login names presented in the same area and you can simply select a login name to switch your login to be that person.

You can also move to see settings for your account, see Support Information that may be required during a call to HMS Technical Support or go to the Help screen.

Exiting TimeControl

1. When you are ready to exit TimeControl, you may simply close the browser window. This closes the application.

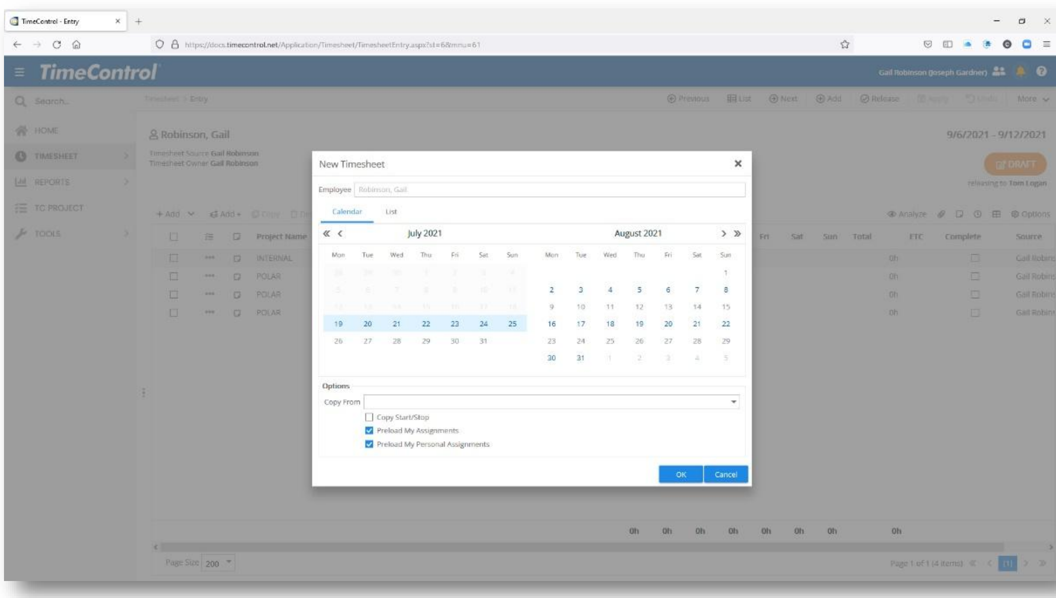
Timesheets

Creating a New Timesheet

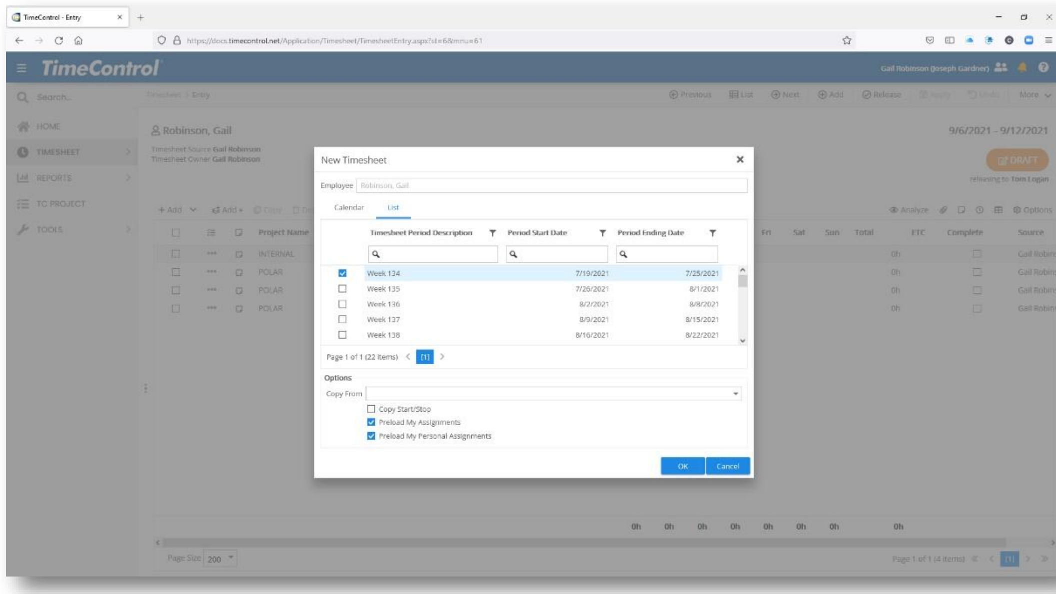
A new timesheet can be created at any time for the current period, a missed timesheet period, or for a future timesheet period.

➢ To create a new a timesheet:

1. Select the Timesheet tab then click the Add Timesheet icon in the Screen Actions area in the right of the MenuStrip. A dialog appears to start the timesheet. You will default to the Calendar View.



2. You can also create the timesheet from the List View showing all possible periods that are applicable to the employee selected. Depending on the configuration of your system, the timesheet length might be weekly, bi-weekly, bi-monthly, monthly or a custom period length. The list view is visible when you click the List tab.



3. If you are entering only your own data, the **Employee** field should already be populated along with the timesheet period for the next logical timesheet to be created. If your name is not selected, or if you are creating a timesheet for someone else for whom you have the authority to do so, click the down-arrow in the **Employee** field then select the name from the drop-down list.

4. To change the timesheet period select it by clicking on the date in the calendar or select a period on the left hand side of the dialog.

5. To copy the details from another timesheet (for example, the timesheet you filled in last week), click the arrow in the **Copy From** field then select the appropriate timesheet period from the drop-down list. Leave this field blank to start with an empty timesheet.

6. To load your pre-loaded assignments in a new timesheet click “Preload my assignments”.

7. To load the personal assignments you defined in your My Account area of TimeControl, click “Preload my Personal Assignments”

8. When copying a timesheet, you may elect to also copy the Start/Stop information. In this case, click “Copy Start/Stop”

9. Click **OK**. TimeControl creates a draft timesheet for the selected period.

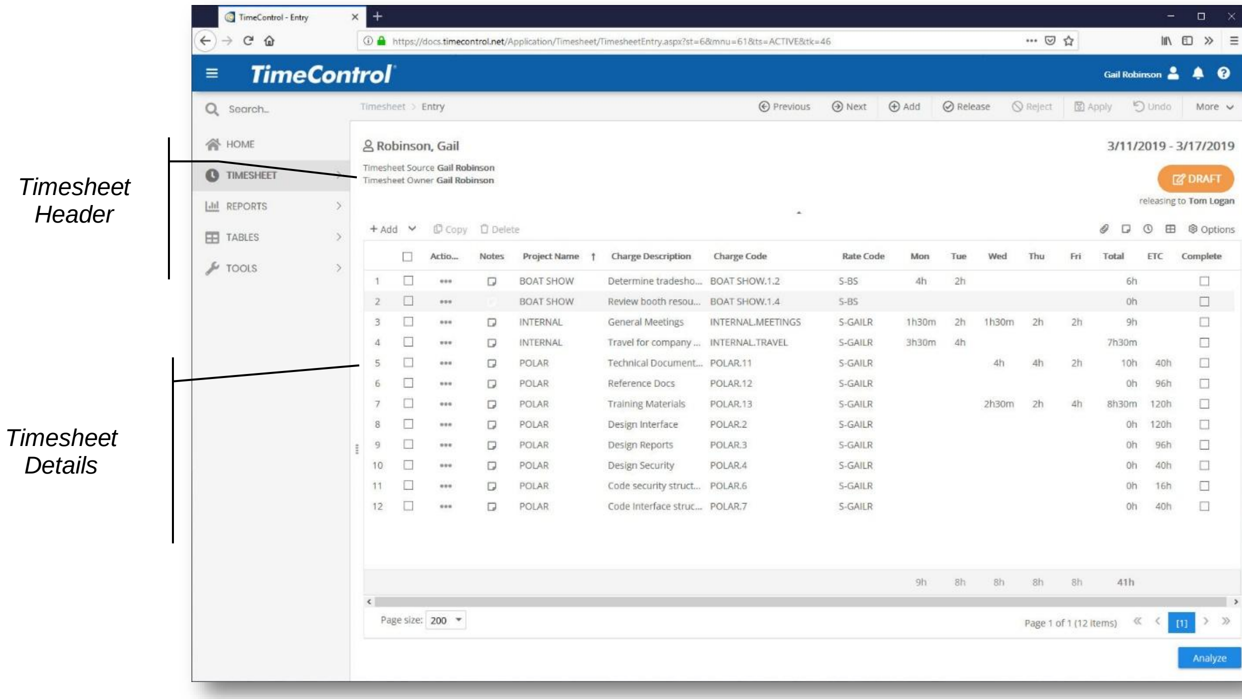
10. To see a list of missing timesheets which were expected from you but which you have not submitted, click on the Missing Timesheets tab and the list of dates will be presented. Click on the period you wish to complete.

11. If you wish to create a blank timesheet with neither your pre-loaded assignments nor your personal preferences from your MyAccount options, then leave all options associated to **Copy from** blank.

12. You can create multiple timesheets at once with this screen by holding down the Ctrl key and clicking multiple periods either in the Calendar View or the Period View.

About Timesheet Entry

The Timesheet Entry dialog box forms the core of TimeControl for individual users (vs. Administrators). To view the Timesheet Entry dialog box, create a new timesheet as described in the previous section or click on View to view an existing timesheet from the Timesheet List. The Timesheet Entry dialog box appears similar to the following:



The Timesheet Entry dialog box is divided into two main areas; the Timesheet Header and the Timesheet Details. The Header entries include the **Employee Name** of the person whose timesheet is displayed. Below this is the **Resource**, which represents the resource name that this employee is known by in that system.

In addition to the Employee information, the Timesheet Header contains the following timesheet information:

- **Period:** These are the Start and End dates of the currently displayed timesheet.
- **Timesheet Status:** This shows the timesheet's current status. There are three possible settings: DRAFT, RELEASED, REJECTED or POSTED.
  - **Draft** mode is when the timesheet is being created. A timesheet stays in Draft mode until it is released for approval.
  - **Released** simply indicates that the timesheet is no longer in the control of the person that created it, and that it is somewhere in the approval process.
  - **Rejected** means that your timesheet did not meet the approval of someone in release structure.
  - **Posted** mode is the final stage for timesheet data. It can no longer be rejected at that point.

- **Source:** This is the user code of the person that originally created this timesheet. This is often also the user code associated with the employee whose timesheet it is. If a timesheet is rejected, it will always be returned to this user.
- **Last Owner:** This is the person who last had control over this timesheet. If the timesheet is in draft mode for the first time, this field is blank.
- **Owner:** This is the user name of the person who currently controls this timesheet.
- **Releasing to:** This is the user name of the person who will be the next to receive this timesheet for approval. If this is the last person in the approval process, this field will read 'Posting', meaning that it will now be sent to the posting process.

In the Screen Actions area on the right hand side of the MenuStrip is a row of command buttons:

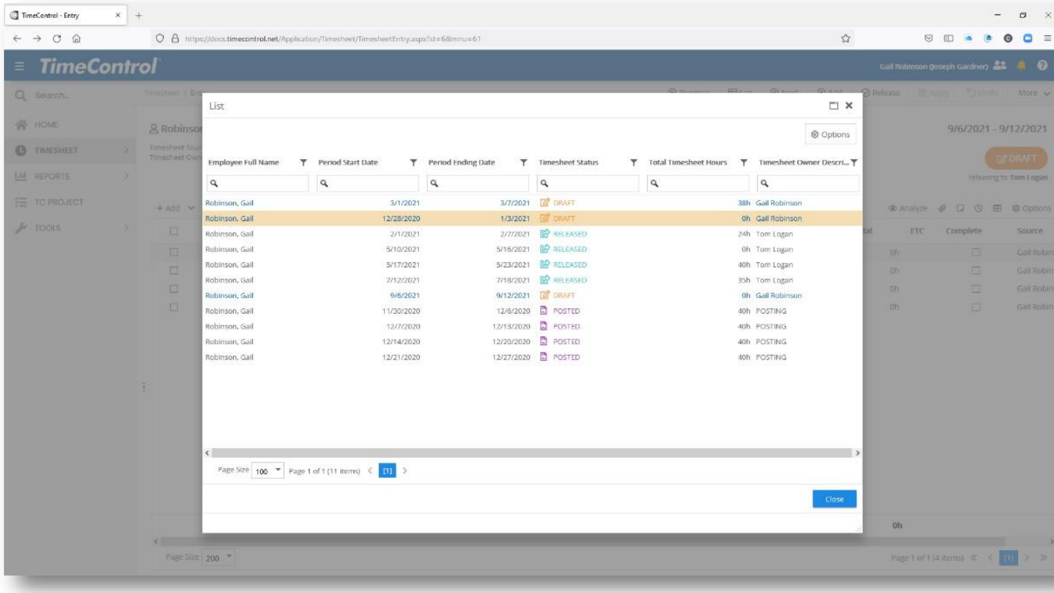
- **Previous:** Move to the previous timesheet record.
- **Next:** Move to the next timesheet record
- **List:** Show a list of all timesheets and allow the user to click on one to go to that timesheet in Entry mode.
- **Timesheet Add:** Once changes are made to the current record, the **Apply** button is activated. Selecting this command immediately commits the changes in the current record to the database.
- **Debit/Credt:** This button is for creating Timesheet adjustments and changes to posted timesheets and is typically displayed only to Administrators.
- **Delete:** Click **Delete** to remove the current timesheet from the database.
- **Release:** When you are finished entering timesheet data and your timesheet is ready for approval, click **Release**. Your timesheet is sent to the next person in your approval routing. You can **UnRelease** a timesheet and return it to your control should you need to make further changes.
- **UnRelease:** As you release a timesheet, the **Release** button changed to **UnRlease**. If you have just released a timesheet in error, you may click the **UnRelease** button to retrieve control of it. This button will become disabled as soon as the new owner touches the timesheet in question.
- **Reject:** If a timesheet that is released to you does not meet your approval, you can return it to the original source by clicking the **Reject** button. This is activated only for supervisors or administrators who have timesheets released to them.
- **Print:** Click the **Print** button to print the active timesheet.

Navigating to a particular timesheet

TimeControl allows you to switch from this timesheet to view another timesheet in several ways.

- Select **Previous** or **Next** to navigate to the previous or next timesheet in your timesheet list.

- Select Timesheet List from the left-hand menu and use the Timesheet List function to select another timesheet.
- Click on List from within the timesheet to be presented the Timesheet List without leaving the timesheet entry screen.



Clicking on a timesheet will bring you to the that timesheet in entry mode.

Entering Timesheet Data

Timesheet Details

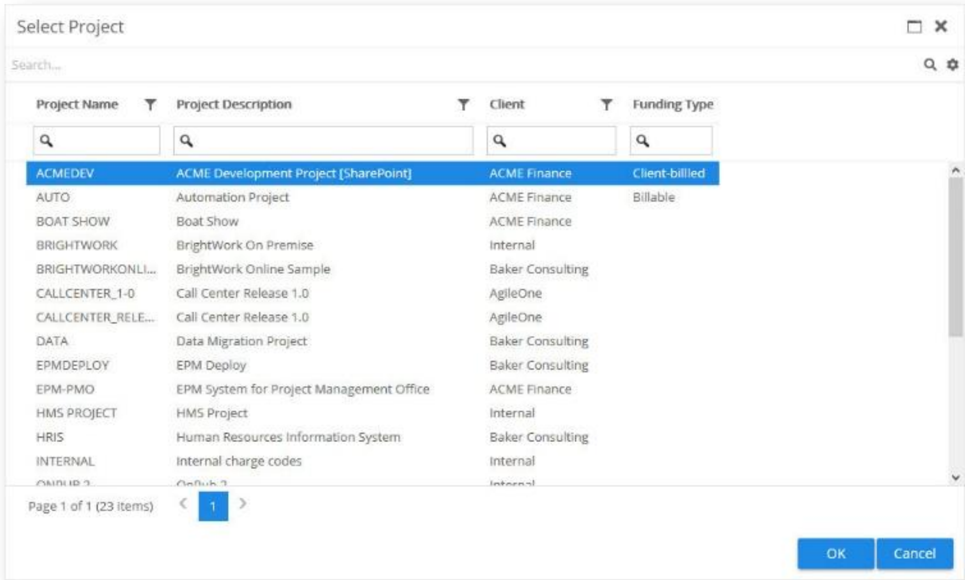
The main **Timesheet Details** area contains the main area for entering timesheet data.

The timesheet is made up of a grid or spreadsheet-type control with a number of columns. By default, a new timesheet contains a single, empty timesheet line. Some of your timesheet data, such as projects and charge codes, MAY be pre-populated by your Administrator.

➢ To enter data in a timesheet:

1. Select a Project

   - Click **Add** to add a line to the timesheet. Then Click the **Project Name** cell then click the ellipses to display a list of available projects.



- Double-click on the desired project or select it and click **OK**. The **Project Name** and **Project Description** cells are automatically updated in the timesheet.

2. Select a Charge:
   - Click the **Charge Code** cell then click the ellipses to display a list of associated Charge Codes.
   - Double-click on the desired Charge Code or select in and then click **OK**. The **Charge Name** and **Charge Description** cell is automatically updated in the timesheet.
3. Select a Rate:
   - Click the **Rate** cell then click the ellipses to display a list of available rates.
   - Double-click the desired rate or select it and click **OK**.
4. Enter hours worked:
   - Click a day cell in the line to select it then type the number of hours worked for the corresponding task. Time should always be entered in hours. Hours can be entered as integers (e.g. 8 = 8 hours), as fractions (e.g. 4.5 = 4 hours and 30 minutes), or as hours/minutes (e.g. 2h15m = 2 hours and 15 minutes).

     To enter 4 hours and 15 minutes, the following entries are acceptable:
     - 4.25
     - 4h15
     - 4h15m

     TimeControl will always display the above data as 4h15m.

     To undo any edits of the line, click the undo line icon  at the left of the line.

5. Click the Apply button in the Screen Actions menu at the top right to save any edits to the timesheet. You must save your timesheet before you can release it for approval.

Adding Timesheet Lines

It is likely that you will require more than one timesheet line per timesheet.

To add a line to enter additional projects, vacation time, meetings, etc:

- Click **Add** Insert**:** Click this button to add a timesheet line at the bottom of the grid.
- **Copy:** Click on the selection box for any line already in the system and click the Copy Button copy and append a selected timesheet line.

To remove a selected timesheet line, select the selection box at the left of the line then click the **Delete** button.

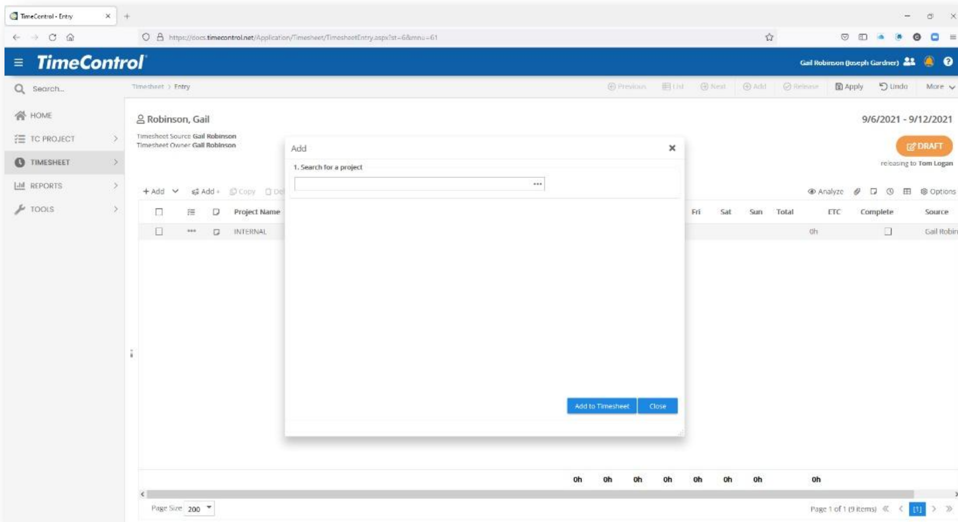
The Timesheet details section also contains the following columns:

- **ETC:** This is an acronym for Estimate to Complete. TimeControl has two “Estimate to Complete” types. The ETC on each timesheet line item refers to the remaining requirement by this resource to complete the highlighted task. This is always represented in person-hours; therefore, you should enter an integer in this column. The Estimate to Complete for the duration of the entire task is found on the Activity tab.
- **Complete:** You can also simply click the Complete button to mark this assignment as completed. The ETC will become 0 and if this assignment is linked to a project management tool, it will be marked completed in the project management system when ETC is transferred.
- **Source:** This is the user name of the person that originally entered this line item. If there have been post-processing adjustments, edits or debit/credits against this timesheet, the source field will determine exactly who did them.

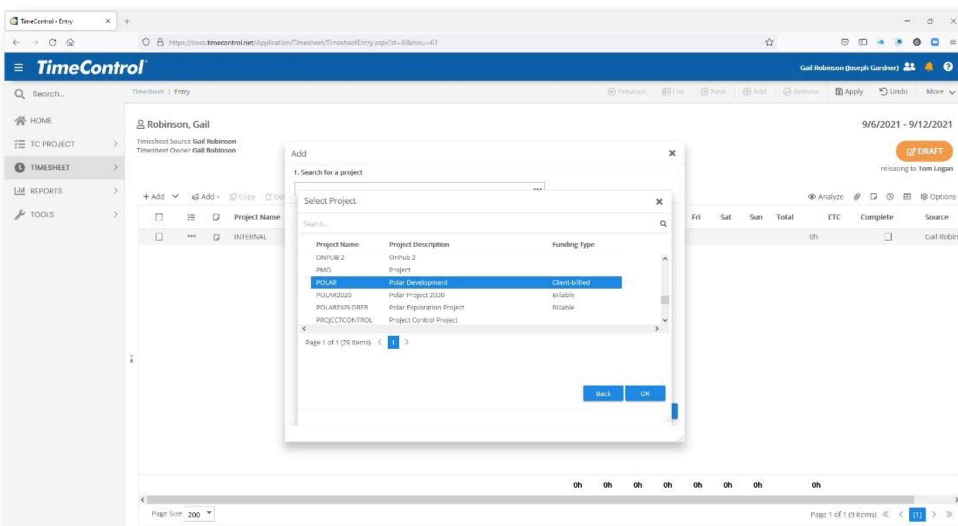
Adding multiple timesheet lines at once

It is possible that you will wish to add multiple lines from a project at one time. TimeControl supports this using the multi-add button Add +. This button activates a multi-part selection.

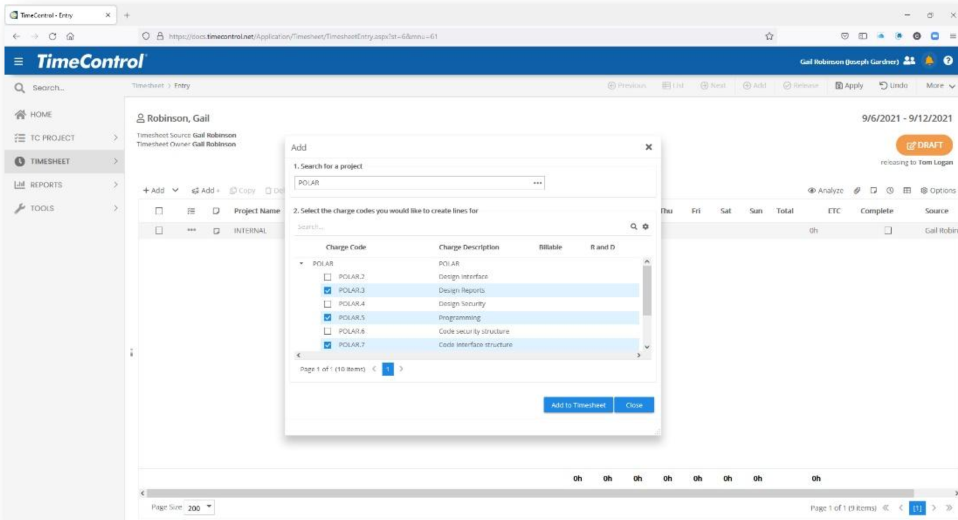
First, you will be asked to enter or search for a project.



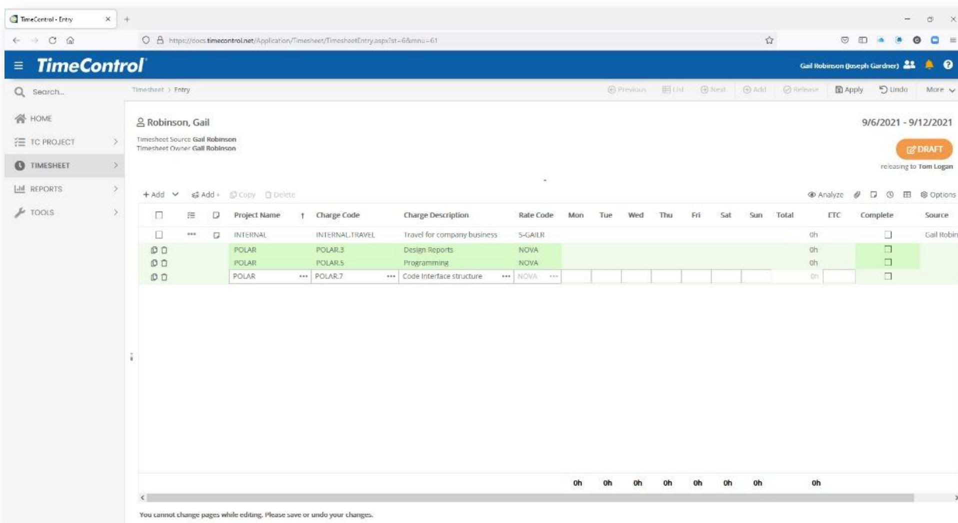
Choose a project and click Ok



Now you can select multiple charges from within that project. Click the gear icon and Expand All to expand all possible levels of any hierarchy in the charge codes.

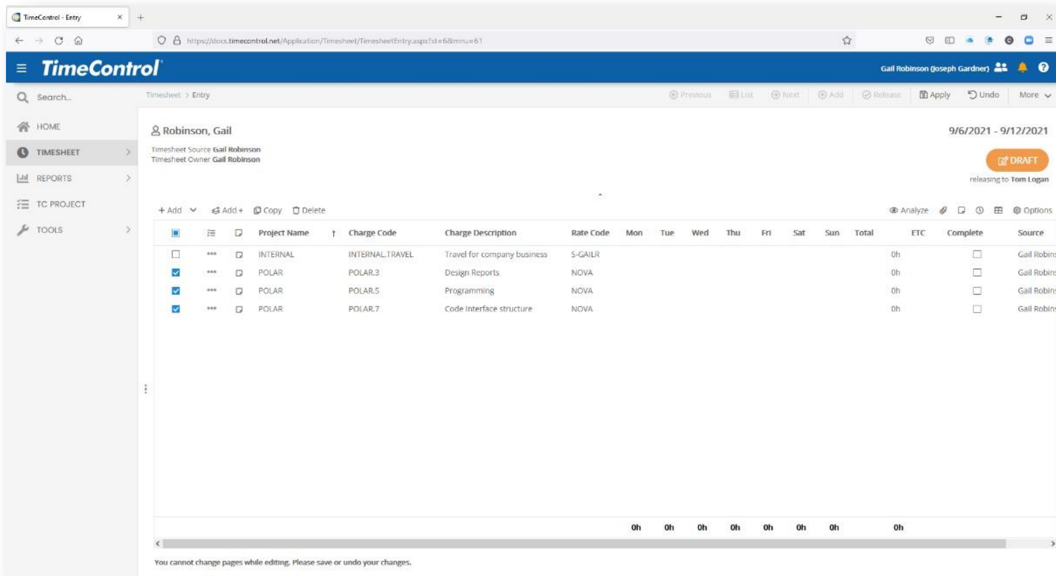


Click Add to Timesheet to have these items all appear on the timesheet.

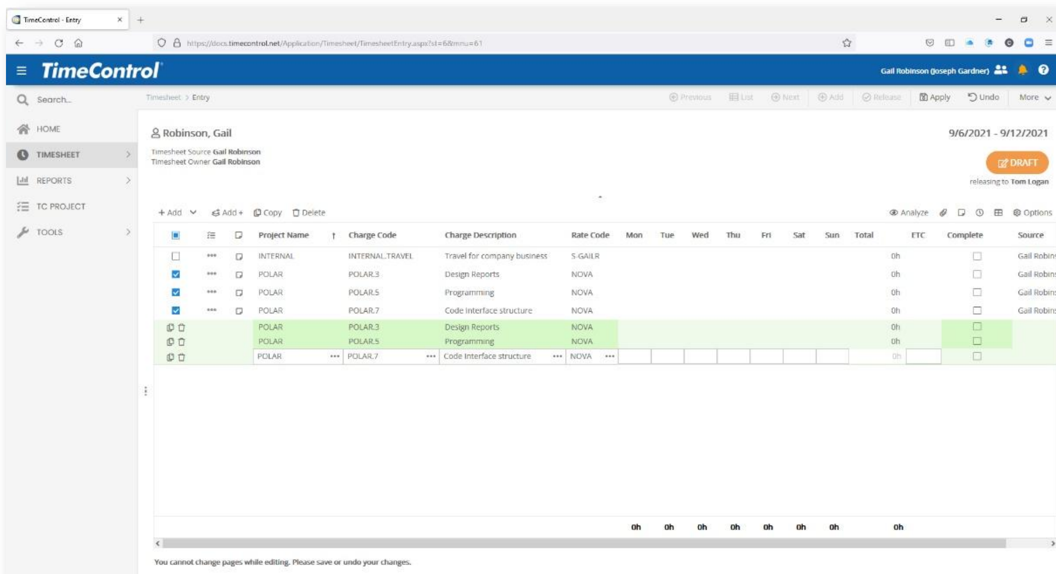


Copying timesheet lines

You may wish to copy one or more lines in your timesheet in order to add similar lines with some changes. For example, a timesheet line might be copied in order to have some hours during the day use one Rate Code and other hours using a different Rate Code. In order to copy lines, select the lines at the left of the screen.



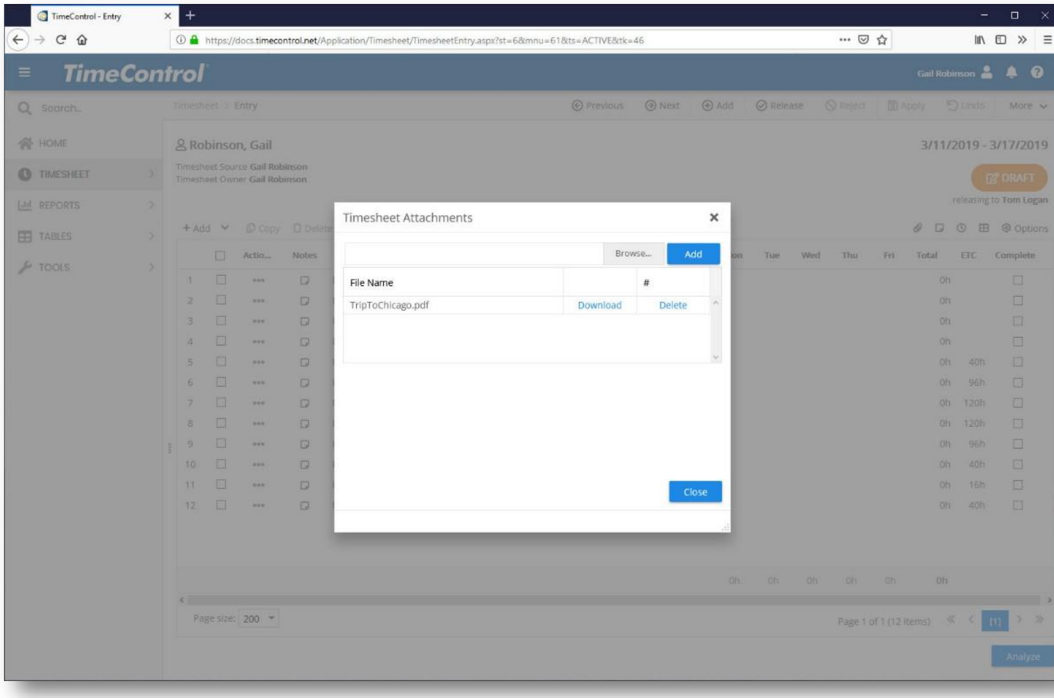
Then click Copy at the top of the timesheet grid.



TimeControl will add and highlight the new lines so you can change any relevant information before saving the timesheet. You must click Apply to save the copies lines.

Attachments

You can add scanned files or attachments to the timesheet as well as in each expense item. To add an attachment to the whole timesheet, Click on the paperclip attachment button.



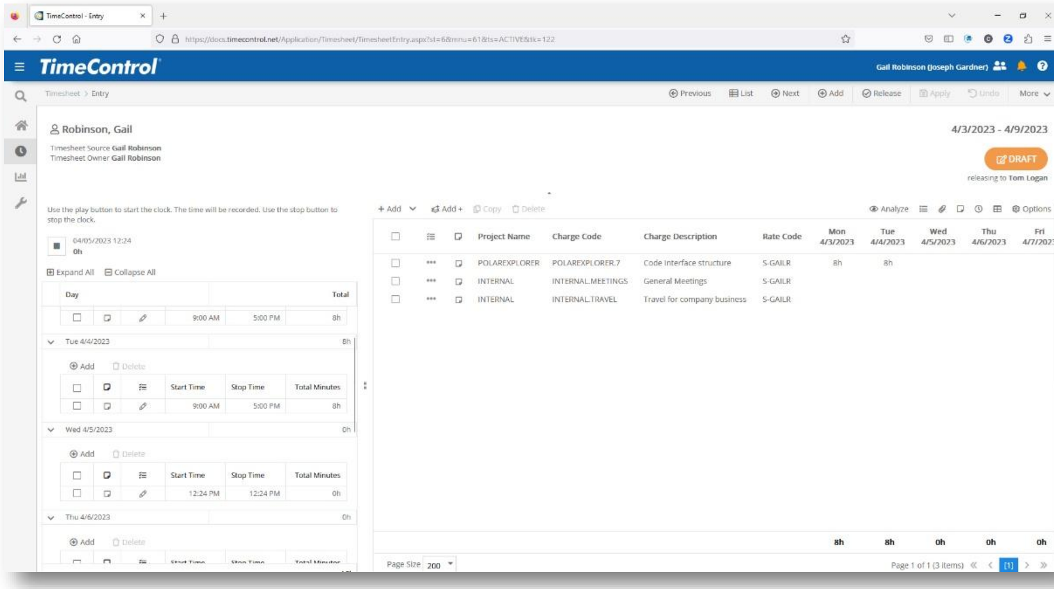
You can then browse and attach as many files as you wish to the Timesheet. If you wish to attach files specific to a particular expense item such as a scanned or photographed receipt, you can do that from the Expense Entry dialog.

Start / Stop

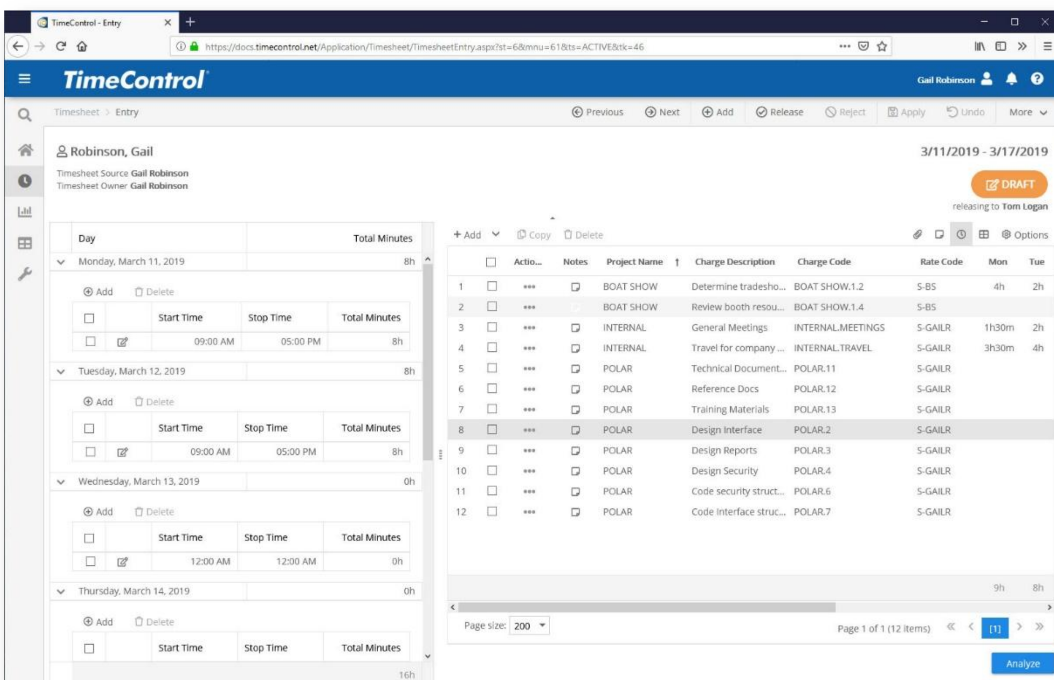
You may see a button with a clock icon on your timesheet. This option is only available if the Start/Stop option has been activated in the User Profiles area for your profile.

By Clicking on the Start / Stop icon, you will open a panel at the left of the timesheet and either see a single start and stop per day or the ability to add multiple intervals per day. For each day, you may enter a Start and Stop time to record the start and end of the working day. TimeControl will automatically calculate the elapsed duration from the Start to the Stop of the day.

The Start / Stop Clock is optionally displayed depending on the settings in the User Profiles. If you see the large triangle icon at the top of the Start / Stop values, this will start the clock from the system time of your device. The Start time will be inserted into today's date as a Start time so long as that date is in the timesheet in question. If, for example, you are filling in a timesheet for last week, the clock may run but it will not put a time anywhere. When you wish to stop the clock, click the square icon and the clock will stop. This will insert a stop time in today's date.



For Start / Stop times and the use of the Start / Stop clock, administrators may have established constraints such not allowing the user to enter or change their own times. Consult with your TimeControl Administrator about how they would like you to use this function.



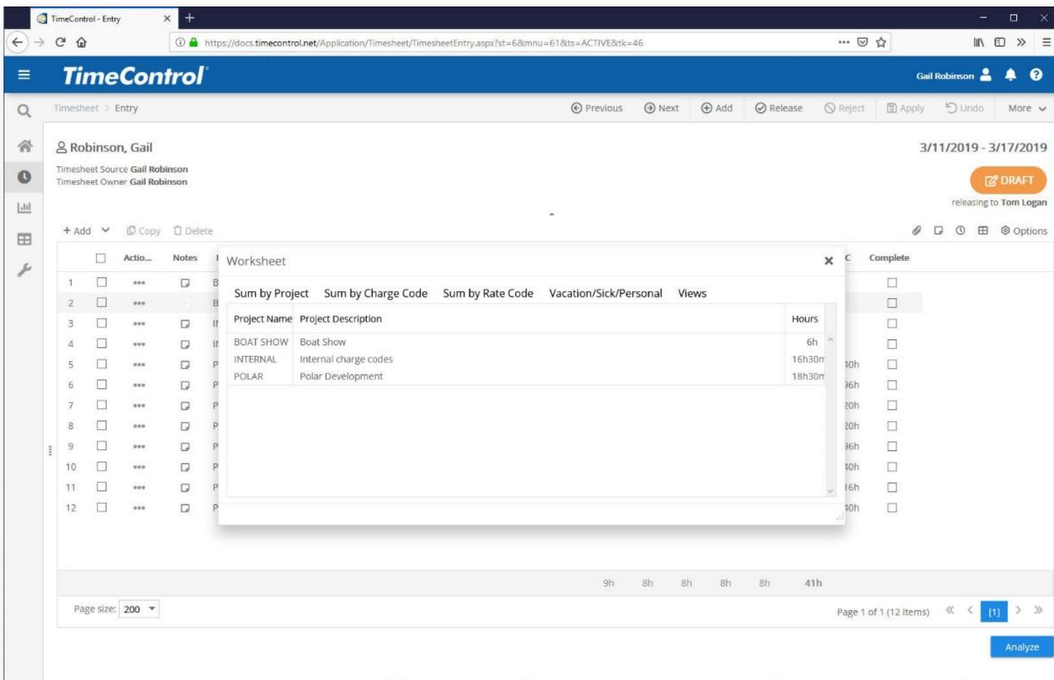
For organizations which wish to account for a complete day, a process will need to be implemented where users enter tasks for all possible time to account for a complete day including meals and breaks. Validation Rules and/or exception reports could then be created to ensure the full time has been accounted for.

The Worksheet button

The **Worksheet** button displays information about your timesheet in order to validate your entries. You can click to see the total number of hours worked in several formats:

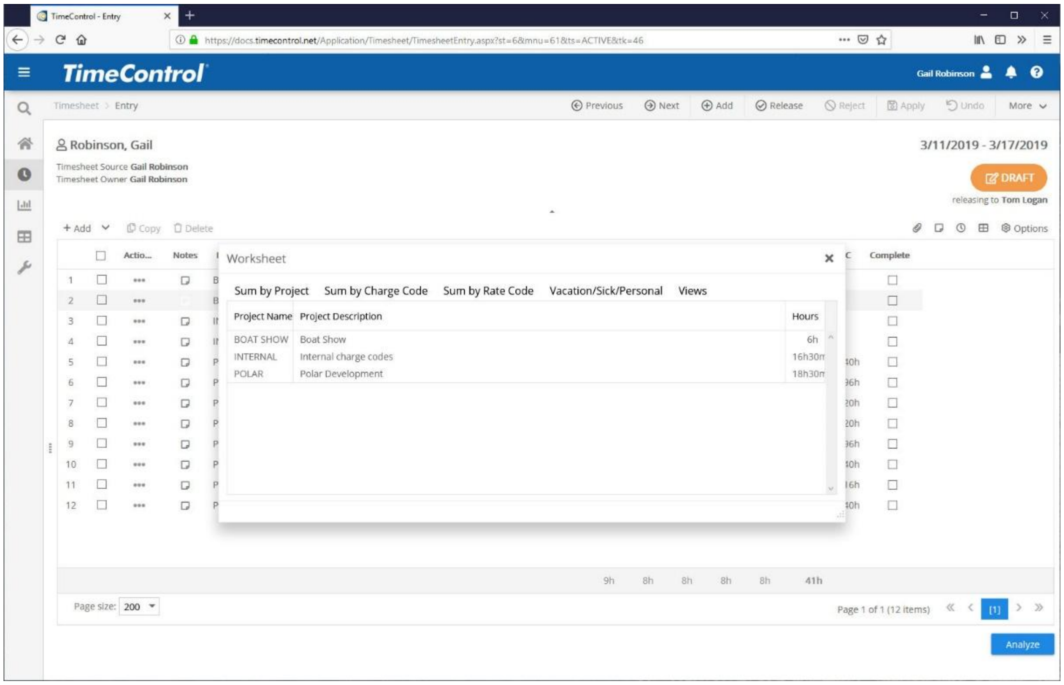
- Summed by Project
- Summed by Charge Code
- Summed by Rate Code
- Vacation/Sick/Personal time
- Custom Views

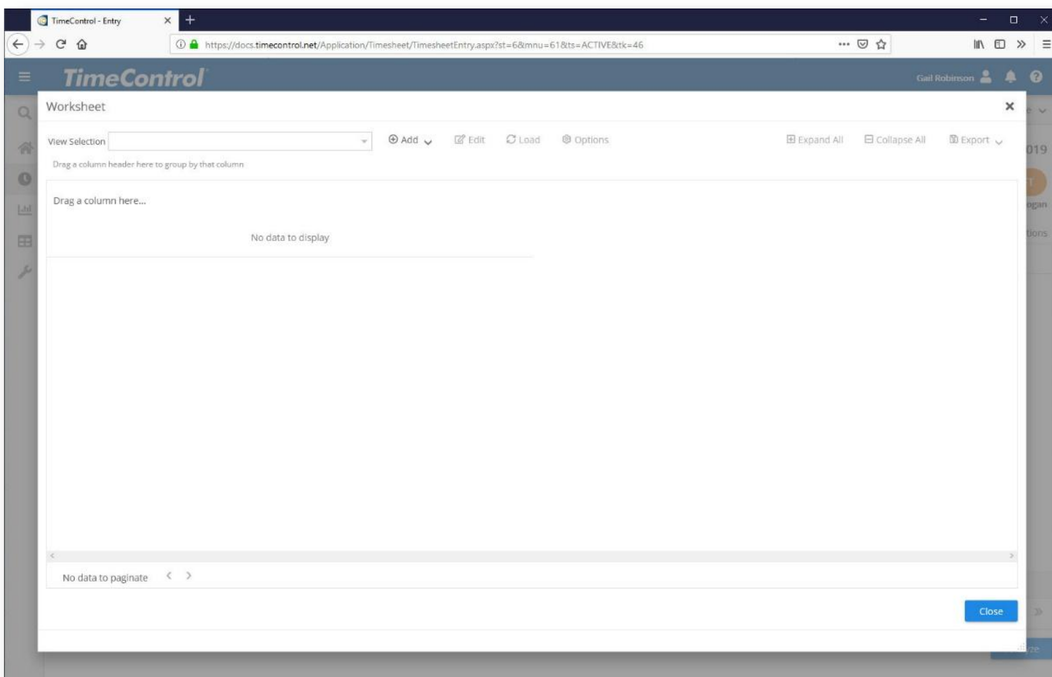
The purpose of this is to allow you to realize exactly how much time you have devoted to any given assignment, and to provide you with ideas concerning how to better manage your time on the job.



In addition, you can click to see summary information for yourself from any banks that have been defined such as Vacation, Sick Leave, or Personal time.

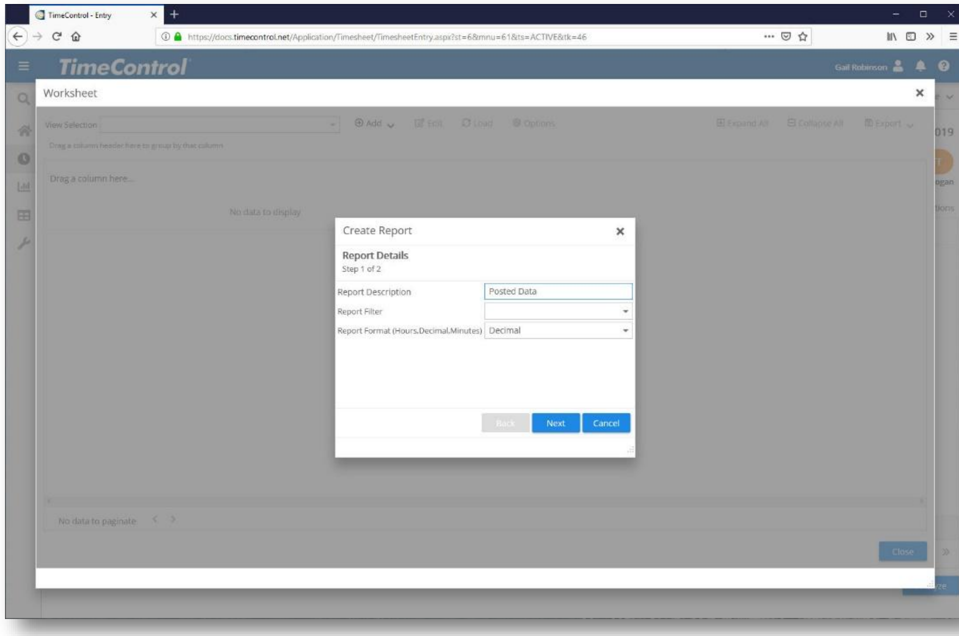
From within the Worksheet function, you can click on the Views button to create your own view of data.



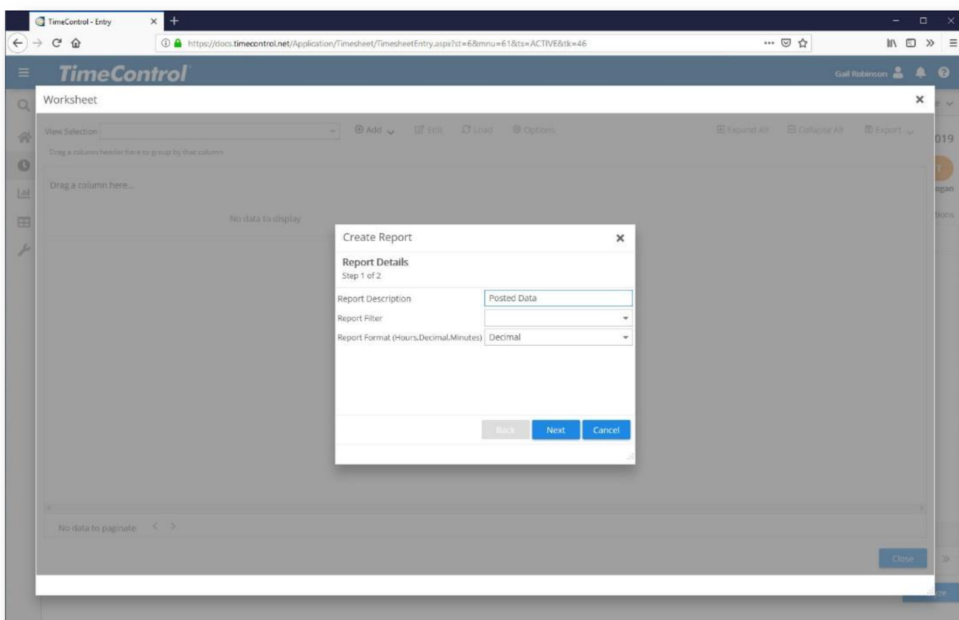


To add views for your personal use, click **Add**. A wizard will appear. Select whether this view will be for posted data (historic) or Unposted data (that data yet to be approved and posted into historic format).

The Worksheet Views Wizard will then ask you to enter information about the view you wish to create.

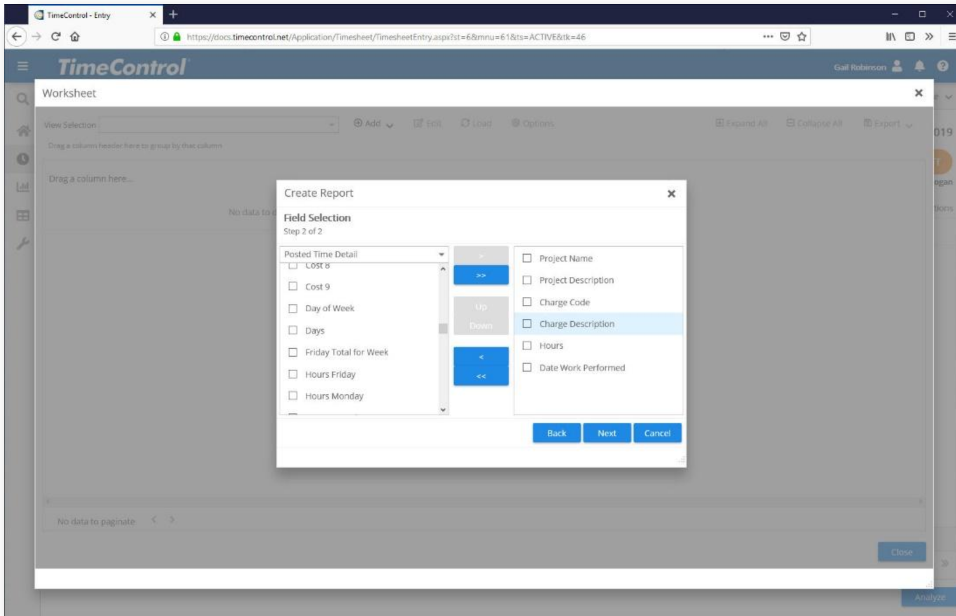


Enter a title, select a filter which may be appropriate to your view and the format for displaying hours. Then click **Next**.

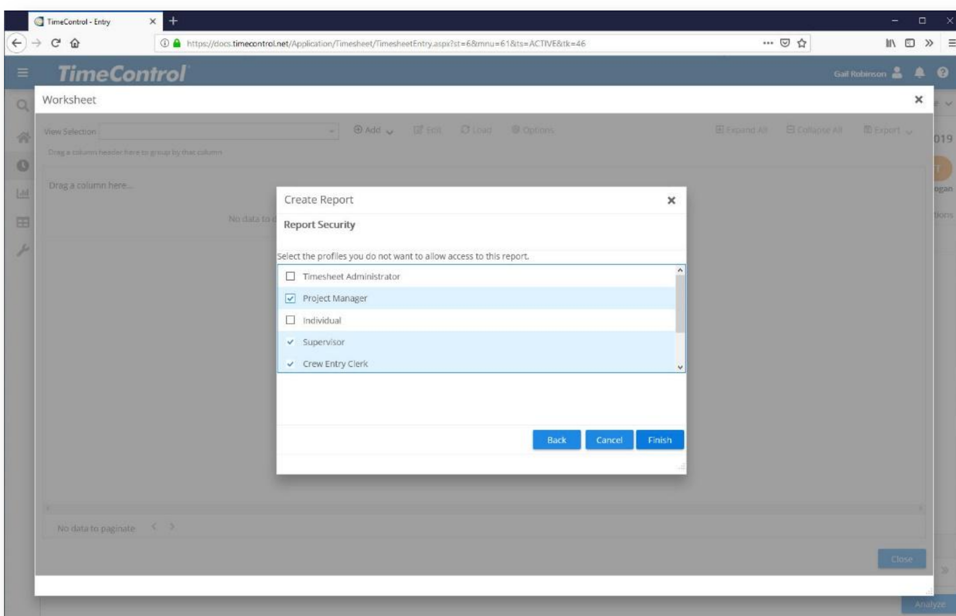


Now select tables from which to pull fields of data on the left, select the fields you wish and click the **>** button to move them to the right hand panel. The fields on the right will be in your view of the data.

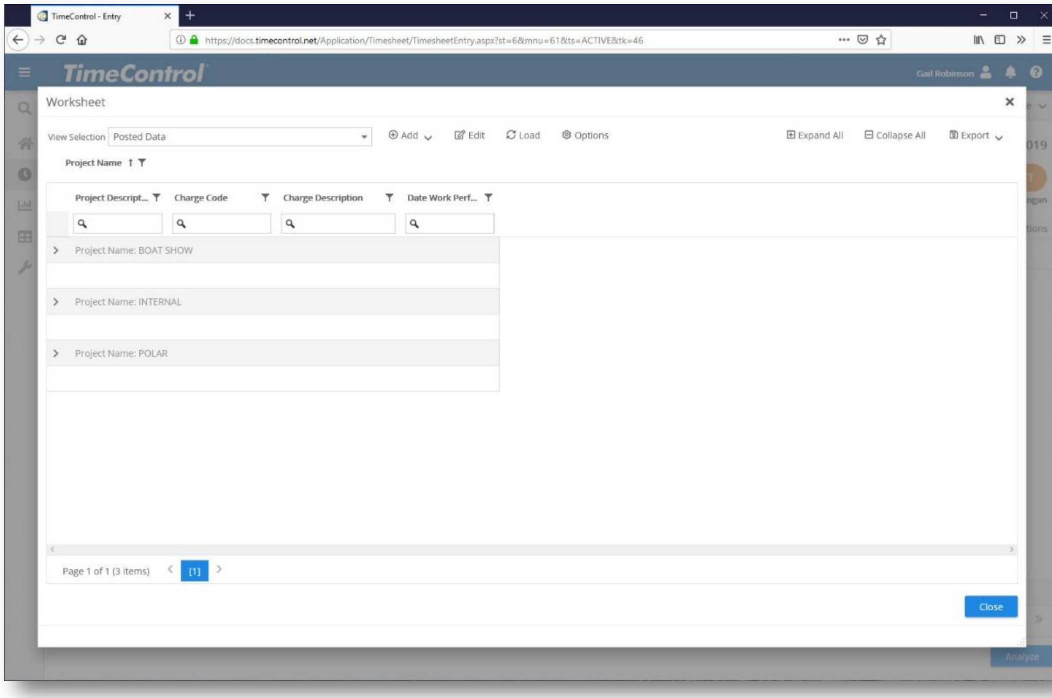
Once you have the fields you wish on the right hand side, you can change the order of the fields by clicking one or more of the fields and using the up / down button to move them.



Finally, determine if this view is just for you or if other TimeControl User Profiles should be allowed to see it as well. Any User Profile Roles where you click the checkbox will be prohibited from seeing this selection of fields.

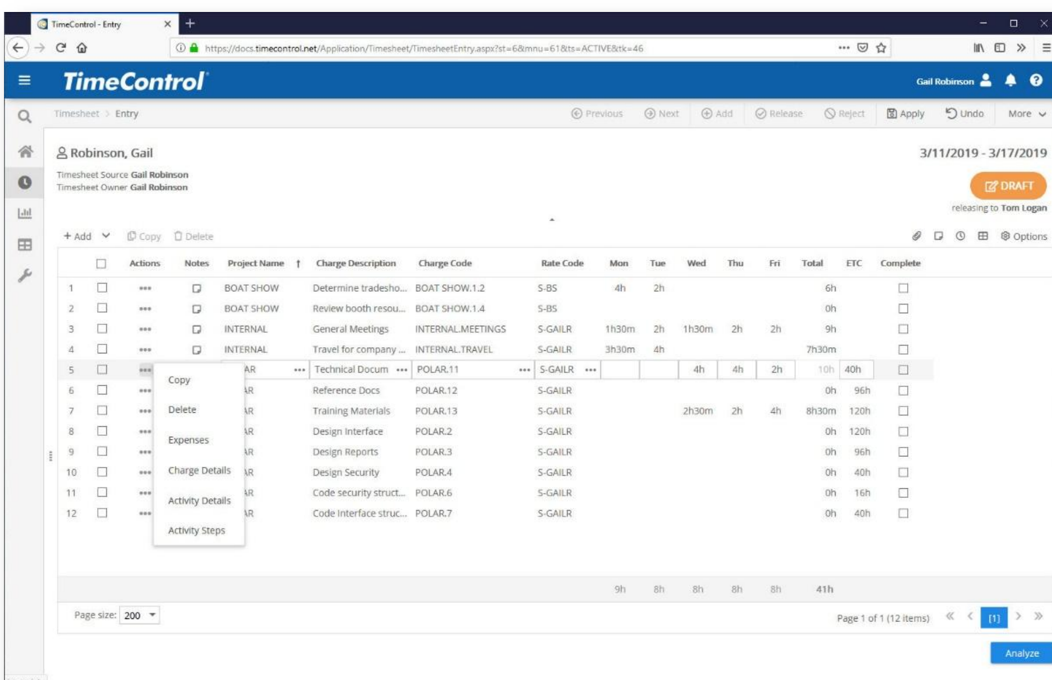


In all cases, anyone seeing this profile will see only the data they are permitted to see.



Additional Timesheet Line Actions

There is additional information available for each timesheet line. Access this information by clicking on the "…" Actions icon on the left of the timesheet line. You will be presented with a pop-up window containing further screens of details that can be viewed or edited for the current timesheet line.

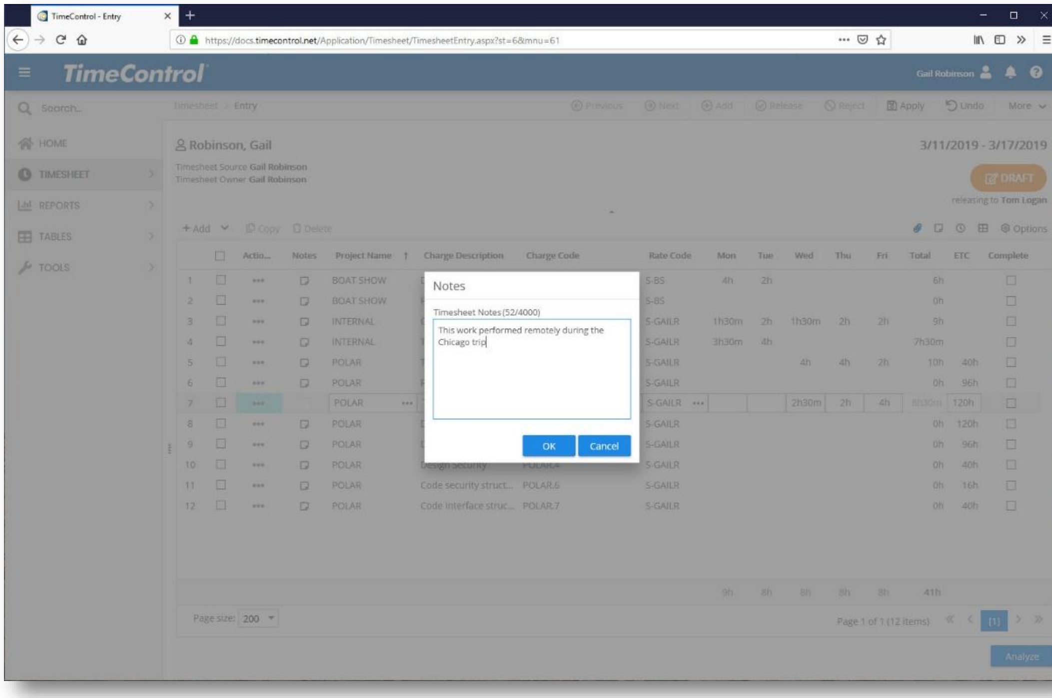


Line Item Notes

You can enter free-form notes for any selected timesheet line item.

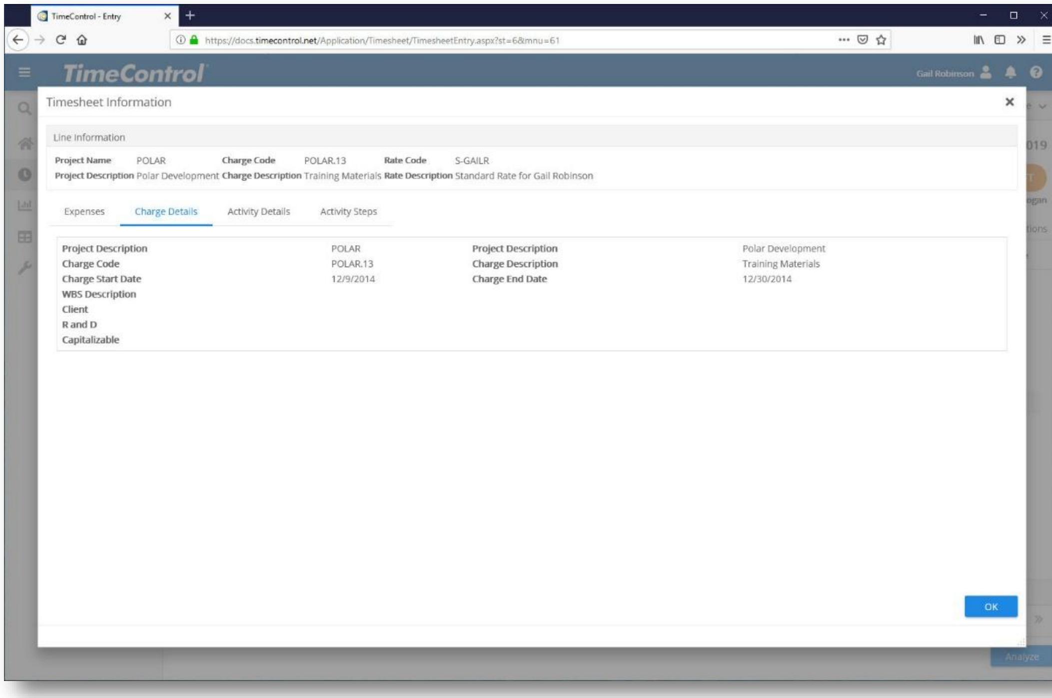
To enter a free-form note for any line item:

Click on the Notes icon to the right of the Actions icon if visible or click on Actions ("…") then select Notes.



The Charge Details Tab

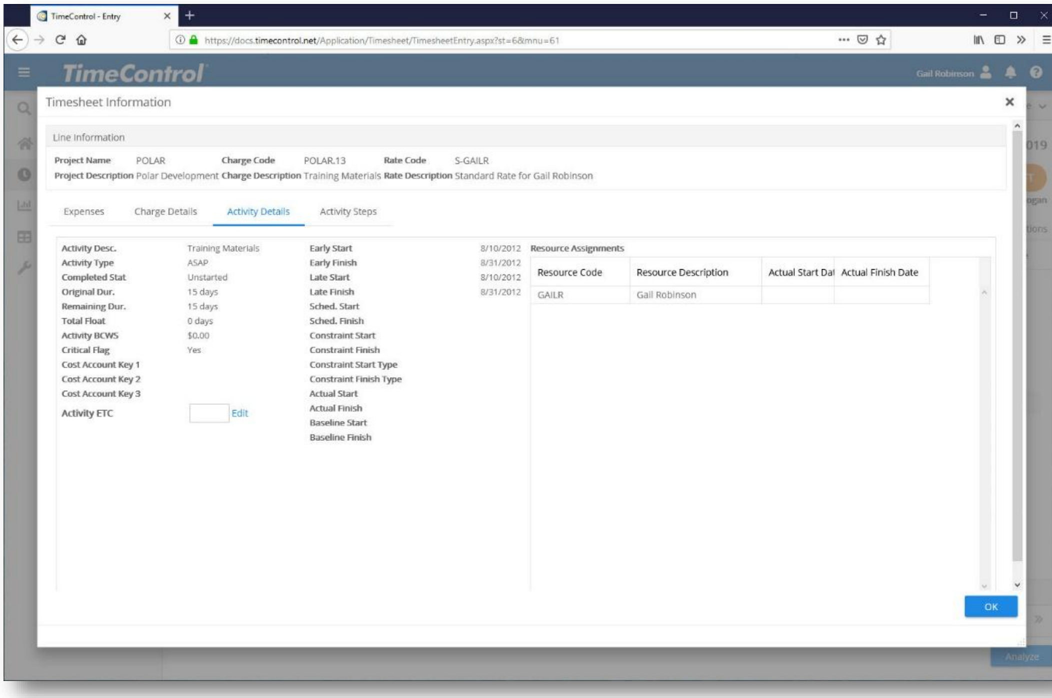
The **Charge Details** tab displays information from the Charge Table in read-only mode. Data in the Charge Table cannot be updated from the Charge Details tab.



Information includes the project description, charge code and description, the start and end dates, and whichever user-defined fields the Administrator has made available.

The Activity Details Tab

The Activity Details tab shows information from the Charge Table's Activity tab.

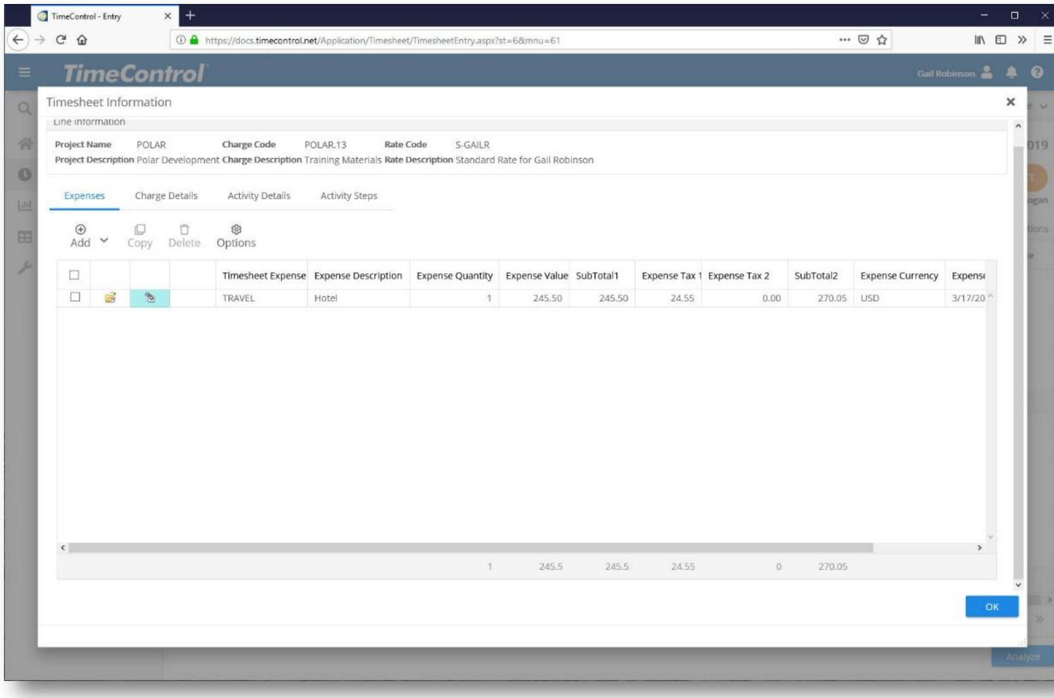


This information is imported when TimeControl is linked to a project management system. If TimeControl is not linked to a project management system, these fields may be blank.

The information varies according to the project management system that is linked with TimeControl. It usually contains at least some dates from the system and some indication of the duration of the task.

Expenses Tab

TimeControl allows you to enter expenses as part of the timesheet entry through the **Expenses** tab. This allows non time-related cost information to be attached to any timesheet line item.



Expense entries have several components. The entry values for an expense are:

- **Code:** This code is an entry from the Resources table. This is so that costs that are sent back to the project management system to determine which resource was budgeted. Only "Non Labor" type resources are visible or accepted in this field.
- **Description:** This is a free-form field that you can use to describe the expense item.
- **Qty:** This is the quantity of the item you are expensing, for example, a taxi ride from the airport would have a quantity of 1. TimeControl does not use this quantity to do calculations so you can enter any integer here.
- **Value:** This is the amount of the expense.
- **SubTotal1:** This amount is calculated as the **Qty** * **Value**
- **Tax 1:** Enter any amount here that you would like to track separately as a tax.
- **Tax 2:** Enter any amount here that you would like to track separately as a second tax.
- **SubTotal2:** This amount is calculated as **SubTotal1** + **Tax1** + **Tax2**
- **Currency:** Because you may have different offices entering expenses in different currencies, this field will allow you to enter a currency identifier. This is a free-form field, and TimeControl does not validate or convert using this field.
- **Date:** This is the date that the expense was incurred.
- **Source:** This entry is automatically populated by TimeControl for auditing purposes.
- **Expense Fields 1-3:** These are free-form user-defined text fields

TimeControl does not do any calculations aside from totaling the columns for each expense.

➢ To add an expense:

1. Click Insert or Append to add a blank line to the expenses for this task. You can also click the down arrow on Append and enter the expense information in a dialog view.
2. Fill in the grid with each value
3. Click **Apply** when you are finished adding your expenses.

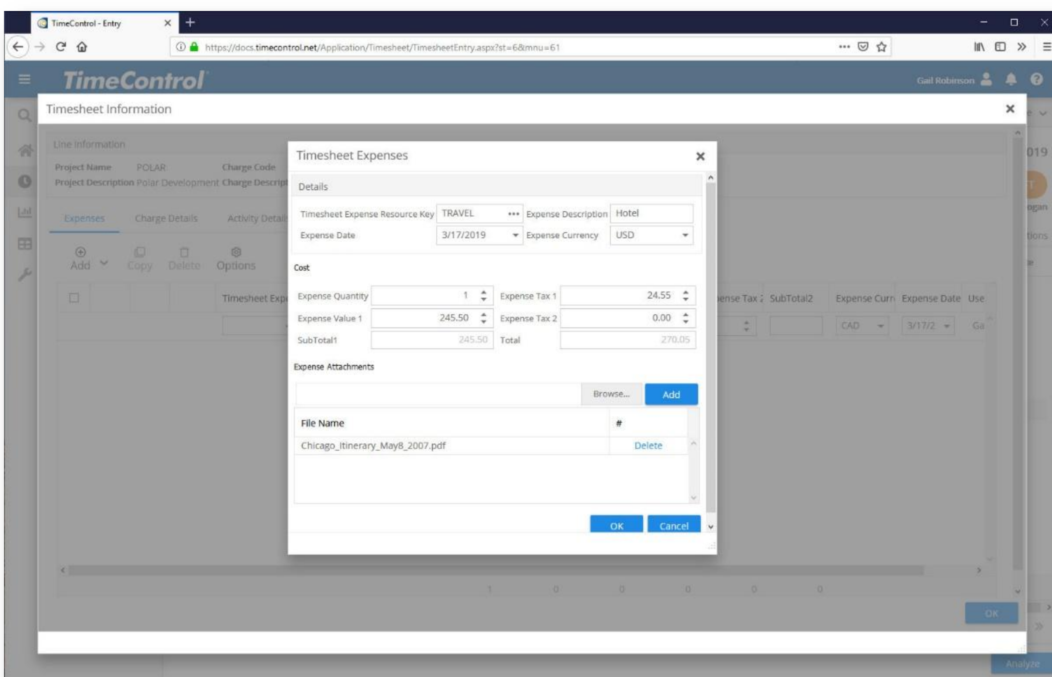
The Sub Total 1 and Sub Total 2 fields are calculated automatically in the following fashion. Sub Total 1 is Quantity * Value. Sub Total 2 is the sum of Sub Total 1, Tax 1 and Tax 2.

Customized fields in the Expense entry can be tied to drop down lists in the same manner as User Defined fields in all the other tables of TimeControl. These fields can be renamed using the Manage Languages option in the Administrator menu.

You can now select or deselect any fields you wish to view for your particular expense view. In this example, customized fields have their default name of Expense Field 1, 2, 3 but your view may include more or less fields and they may have already been renamed with other terminology specific to your configuration.

Expense Entry Dialog view

TimeControl also includes a dialog view to enter or view an Expense line item.

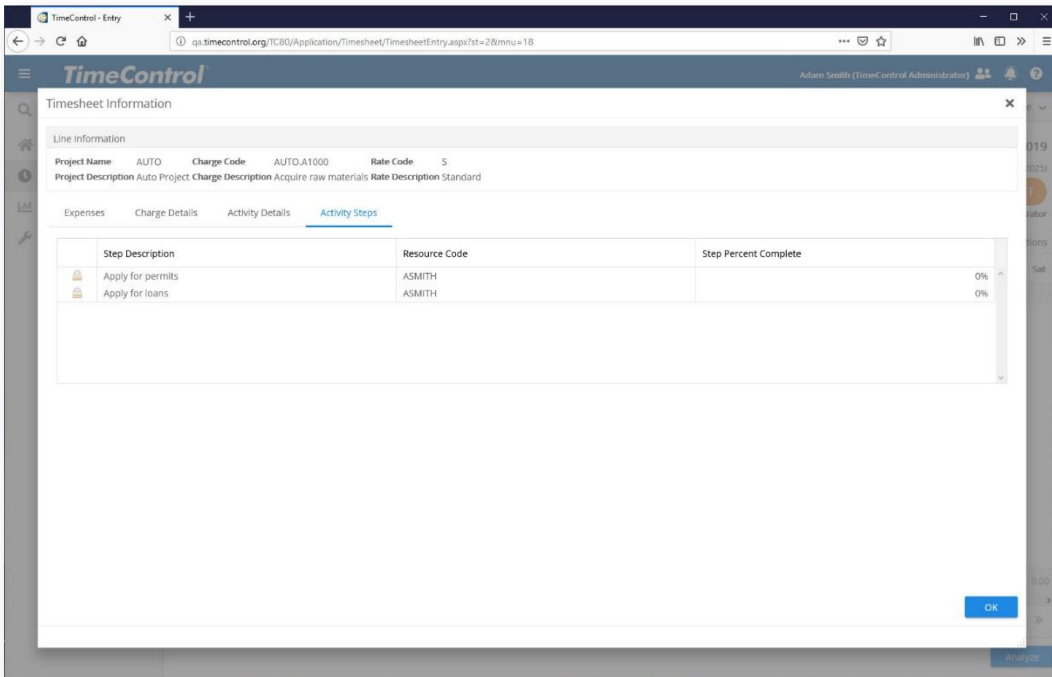


You can add an expense in the dialog view by clicking the down arrow next to Append and selecting Dialog. You can view an expense line in the dialog view by clicking the Dialog icon on the left side of the expense line.

To add external images or PDFs of receipts, browse for the file name and click the Add button. These files will be stored within TimeControl and attached to this line item.

Activity Steps tab

TimeControl supports the updates of Primavera's Activity Steps. These steps are progress milestones on a task which, when completed indicate the physical percent of progress on that task. TimeControl can optionally display or allow the update of these tasks directly inside TimeControl.

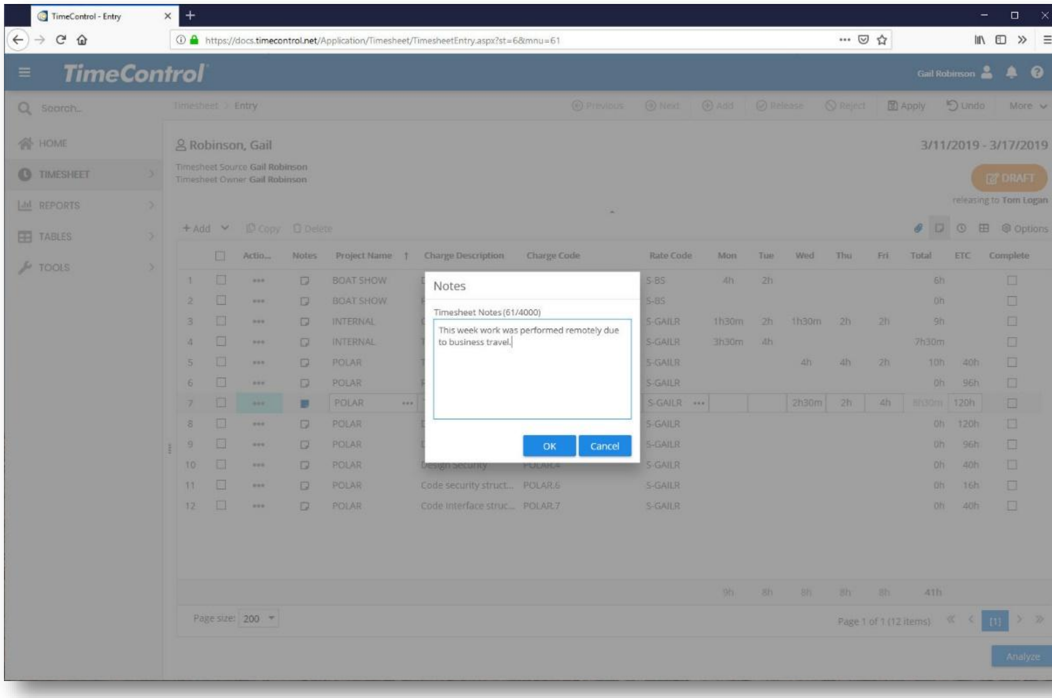


If you have been identified within Primavera as the "key resource" then TimeControl will allow you to update the percent complete on each step and this information can be sent back to TimeControl by the project manager. If you have access to this task but are not the key resource, then you will see a locked symbol on the left side of the step item.

Timesheet Notes

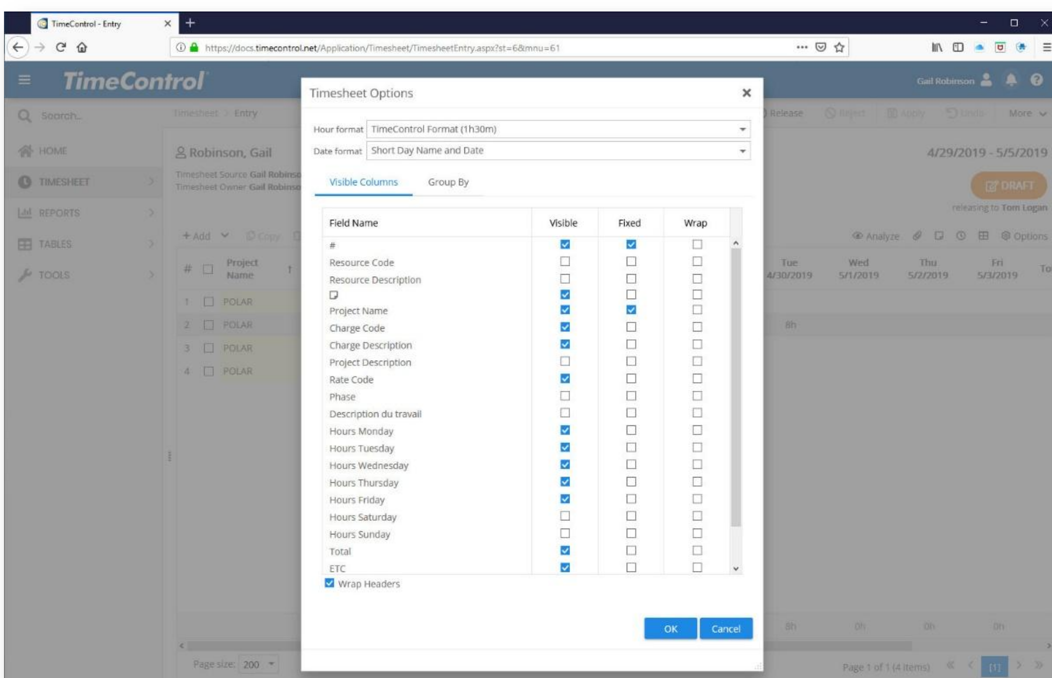
You can enter a timesheet note for any timesheet.

> To enter a free-form note for any timesheet, click the Timesheet Notes icon and enter your note in the large empty text area.

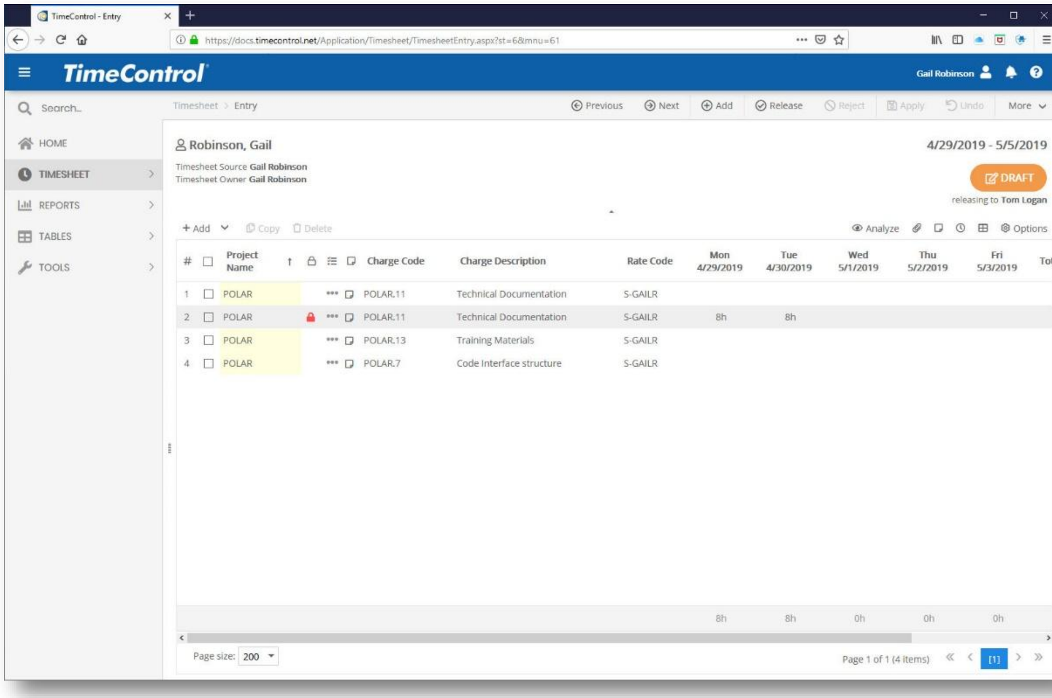


Freezing timesheet columns

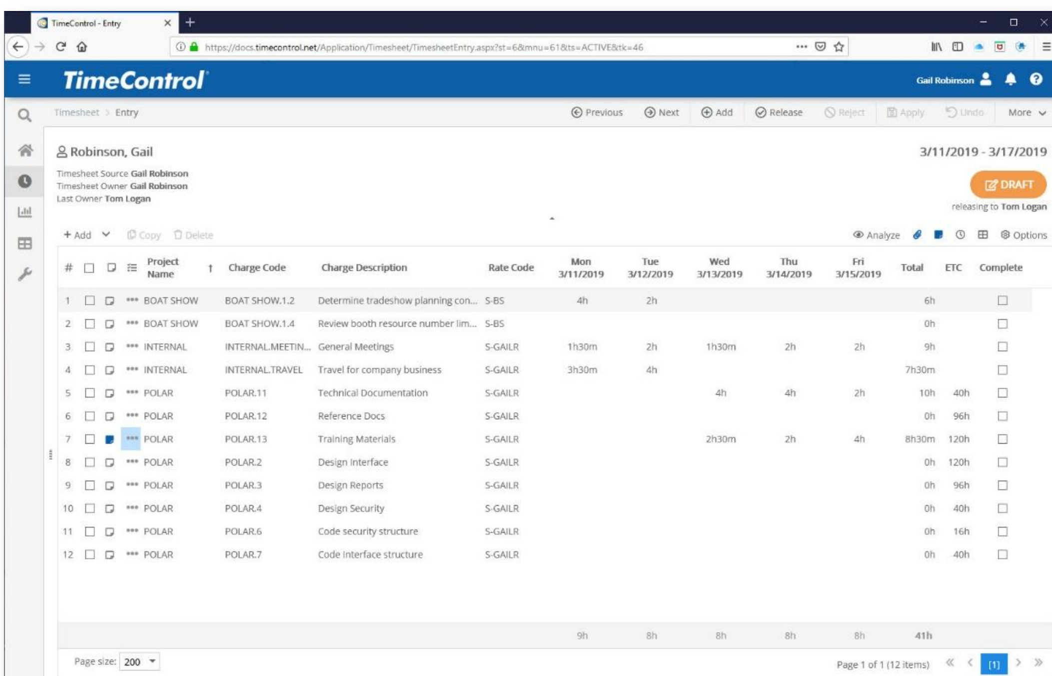
TimeControl allows you to select the number of columns on the left hand side to freeze in place, allowing columns on the right to scroll horizontally on and off the screen. In Timesheet Options, select the columns to freeze.

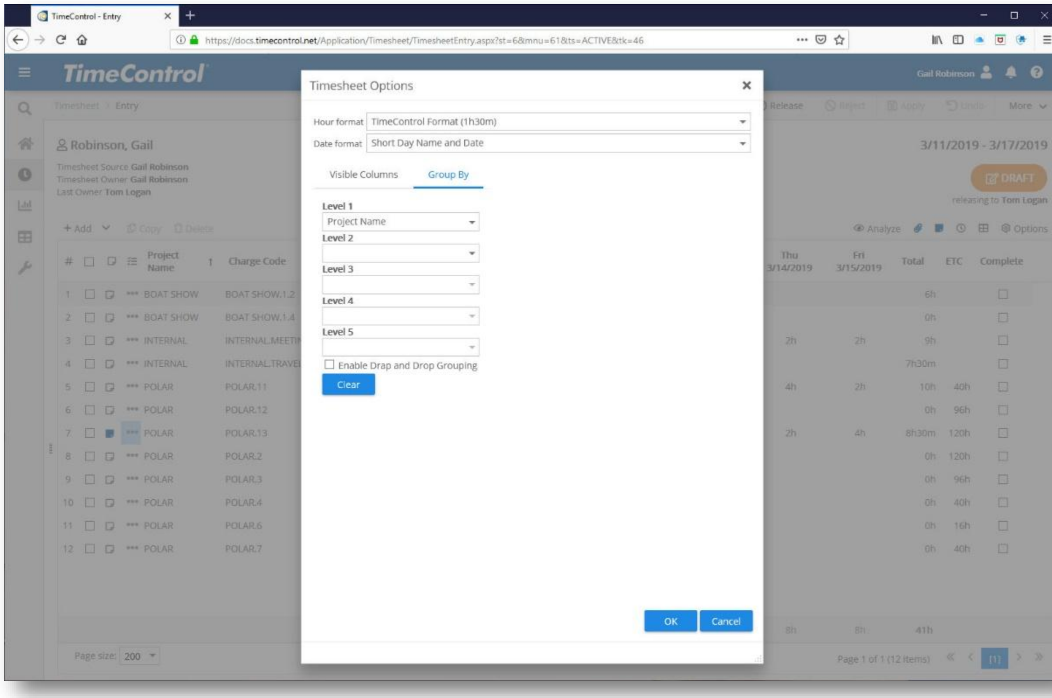


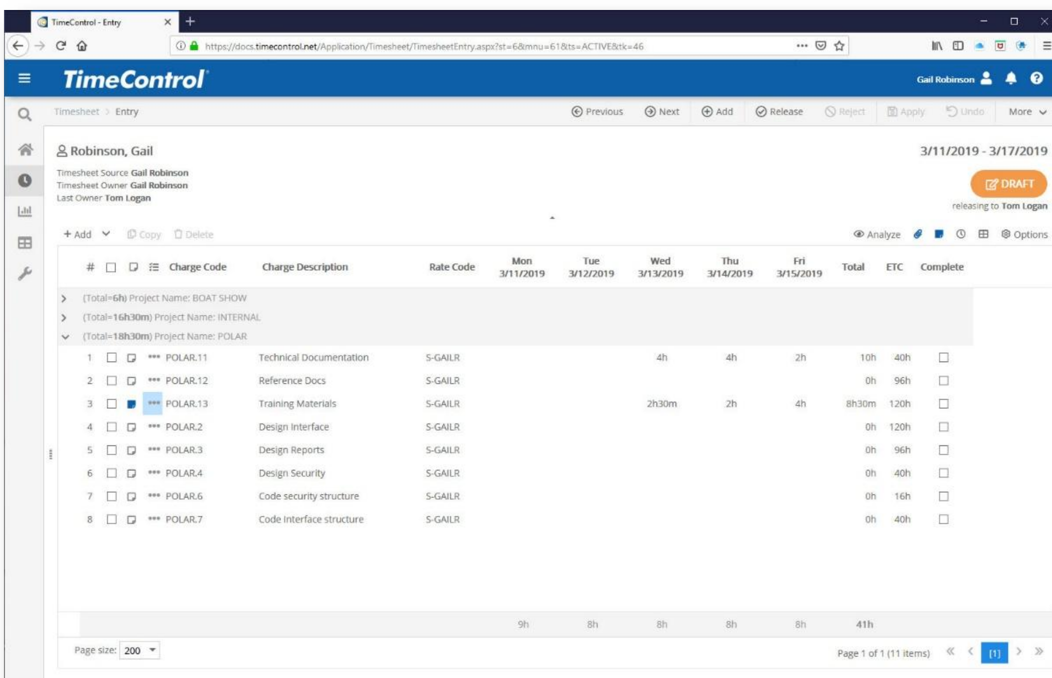
These columns will be colored in yellow and located on the left side of the timesheet grid.



Grouping Timesheet Lines




TimeControl
Timesheet Options
Hour format
TimeControl Format (1h30m)
Date format
Short Day Name and Date
Visible Columns
Group By
Level 1
Project Name
Level 2
Level 3
Level 4
Level 5
Enable Drag and Drop Grouping
Clear
OK
Cancel
Robinson, Gail
3/11/2019 - 3/17/2019

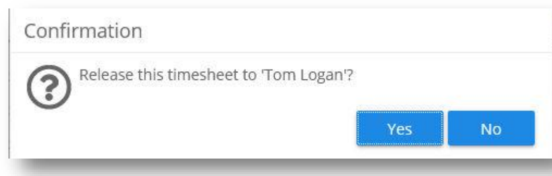

TimeControl
Gail Robinson
Timesheet > Entry
Previous
Next
Add
Release
Reject
Apply
Undo
More
Robinson, Gail
3/11/2019 - 3/17/2019
Timesheet Source Gail Robinson
Timesheet Owner Gail Robinson
Last Owner Tom Logan
DRAFT
releasing to Tom Logan
Analyze
Options
Charge Code
Charge Description
Rate Code
Total
ETC
Complete
(Total=6h) Project Name: BOAT SHOW
(Total=16h30m) Project Name: INTERNAL
(Total=18h30m) Project Name: POLAR
POLAR.11 Technical Documentation S-GAILR
POLAR.12 Reference Docs S-GAILR
POLAR.13 Training Materials S-GAILR
POLAR.2 Design Interface S-GAILR
POLAR.3 Design Reports S-GAILR
POLAR.4 Design Security S-GAILR
POLAR.6 Code security structure S-GAILR
POLAR.7 Code Interface structure S-GAILR
Page size: 200
Page 1 of 1 (11 items)

Releasing your Timesheet for Approval

➢ When your timesheet is complete and ready for approval:

1. Click the **Release** button at the top of the Timesheet Entry page. If the **Release** button is not highlighted, it probably means that you do not control the timesheet at the moment, or that you have not clicked the **Apply** button.

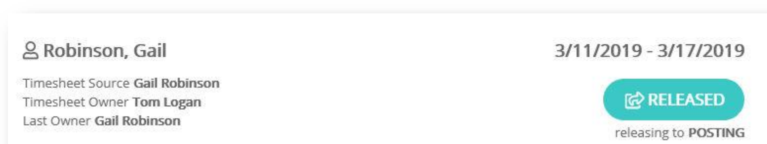
   A confirmation message appears.



2. Click **OK**. If you and your supervisor have an active email address entered in the system, you will be prompted to send an email message to your supervisor stating that the timesheet has been released. In most cases, this will not be required.

   If you know that your supervisor is waiting for this timesheet, you may want to send such a notice. Click **Yes** in the confirmation page to send a release notice. Enter an appropriate message then click **Send**. Remember, you must have a valid connection to your SMTP server when you send this email.

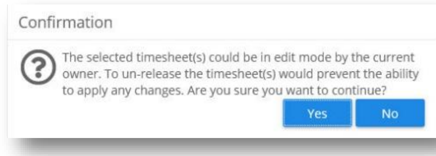
You can confirm the physical release of the timesheet by checking the timesheet status. In this example, Gail Robinson has just created and released her timesheet to her supervisor Tom Logan. The Status is **Released**. The current owner is Tom Logan who will send this timesheet to **Posting** if he approves it.



TimeControl uses this information in the Missing Timesheet report to identify where any timesheets are within the approval process. You can also check the status of a timesheet from the Timesheet List.

UnReleasing your Timesheet

If your timesheet has just been released in error, you can retrieve it by clicking on the **UnRelease** button.



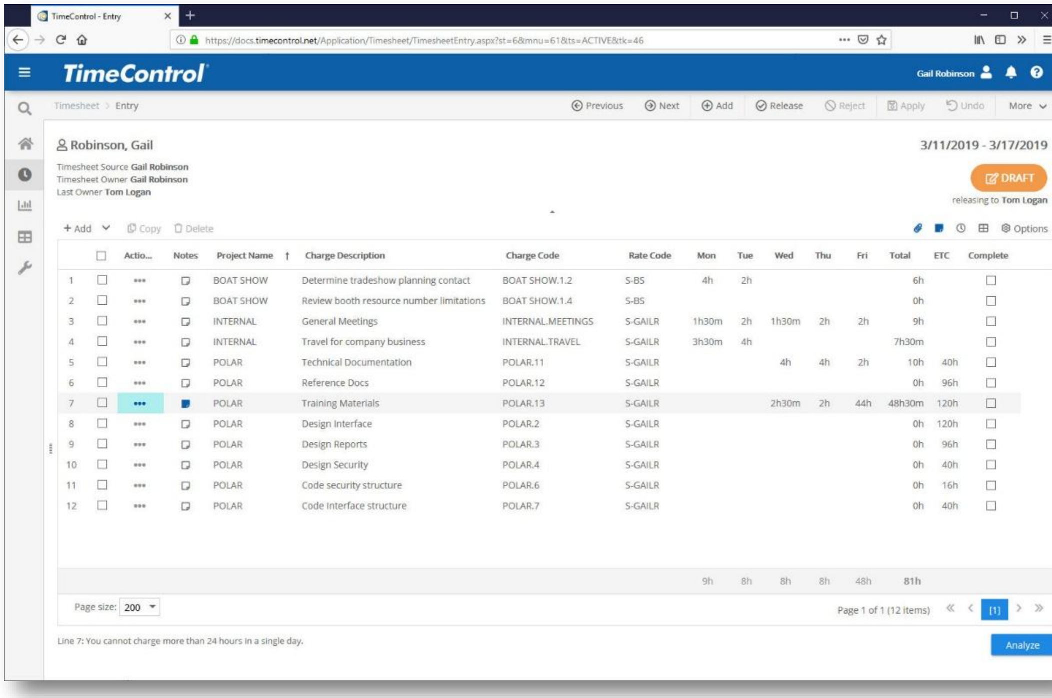
This button is only active when a timesheet has just been released and will instantly become inactive after a short period of time or if any other user (such as a supervisor) accesses the timesheet. If the **UnRelease** button is no longer available but you still need to regain access to your timesheet, you must ask an Administrator to return its control to you by using the **Change Ownership** function to change the timesheet's ownership back to you.

Post-Processing Adjustments and Debit/Credits

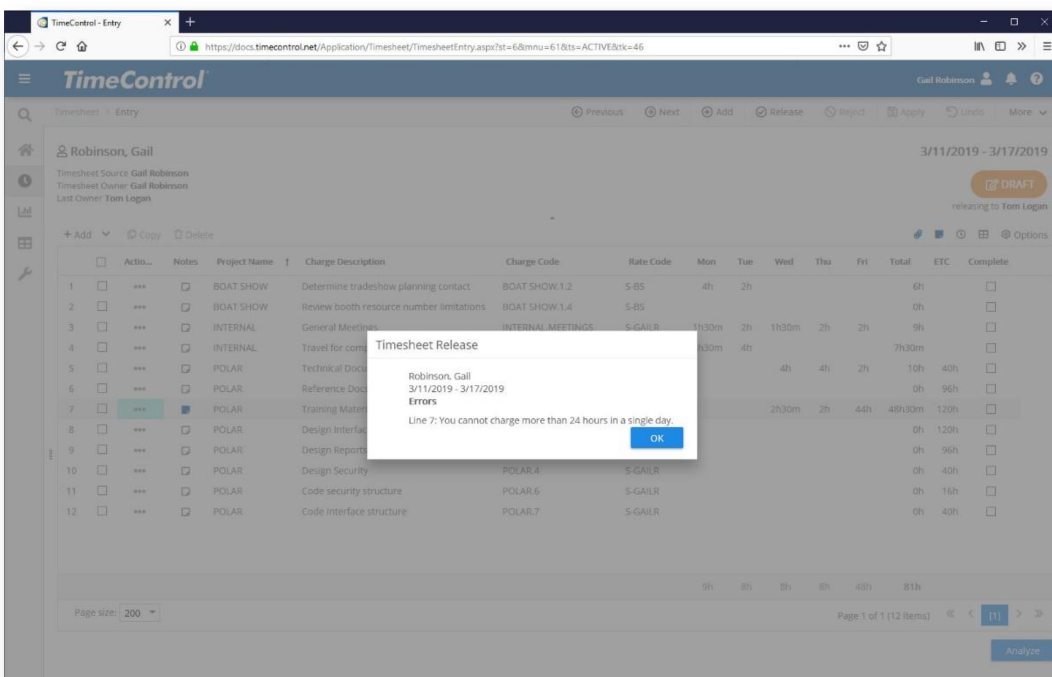
Timesheets can be edited and adjusted after the processing process through the Auditable Debit/Credit function. This function is described in more detail in the Reference Guide.

Validation Rules

When you release a timesheet, TimeControl applies all the validation rules that may be defined for it. Validation rules can be as specific as required, or as generic as the Administrator wishes. There are basically two types of validation rule: 'error' and 'warning'. An error rule is designed to prohibit certain types of data entry. Administrators use this kind of rule to eliminate typographical (and other) errors wherever possible. If the timesheet violates an error rule, an error message appears as soon as you click the **Release** button.



For example if user has accidentally entered 44 hours instead of 4 hours on a Friday and the Administrator has a validation rule that states that an employee can enter a maximum of 24 hours for a particular day then when the timesheet is released, an error message appears. This error must be corrected before the timesheet can be successfully released.

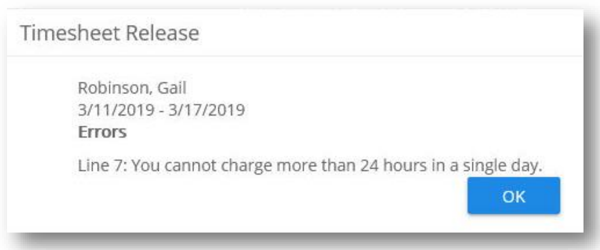


Administrators can also create a second type of validation rule—the warning rule. This type of rule is designed to capture errors in judgment in timesheet entry to ensure that the user has a second chance to consider what was entered. If a timesheet violates a warning rule, a message appears as soon as you click the **Release** button. Because this is a warning rule, you have the choice to release the timesheet as is, or to make changes to the timesheet before releasing it.

Since a TimeControl system may have hundreds of rules within it, you may occasionally run up against several rules. TimeControl displays all the violated rules in a single error message.

Checking Validation Rules before you release with Analyze

You can test your timesheet prior to releasing it to see if it has any issues with Validation Rules. To do this, click the **Analyze** button at the bottom right of the timesheet. TimeControl will check each Validation Rule just as it would if the timesheet were being released and will notify you of any issues that require correction before this timesheet will be accepted.



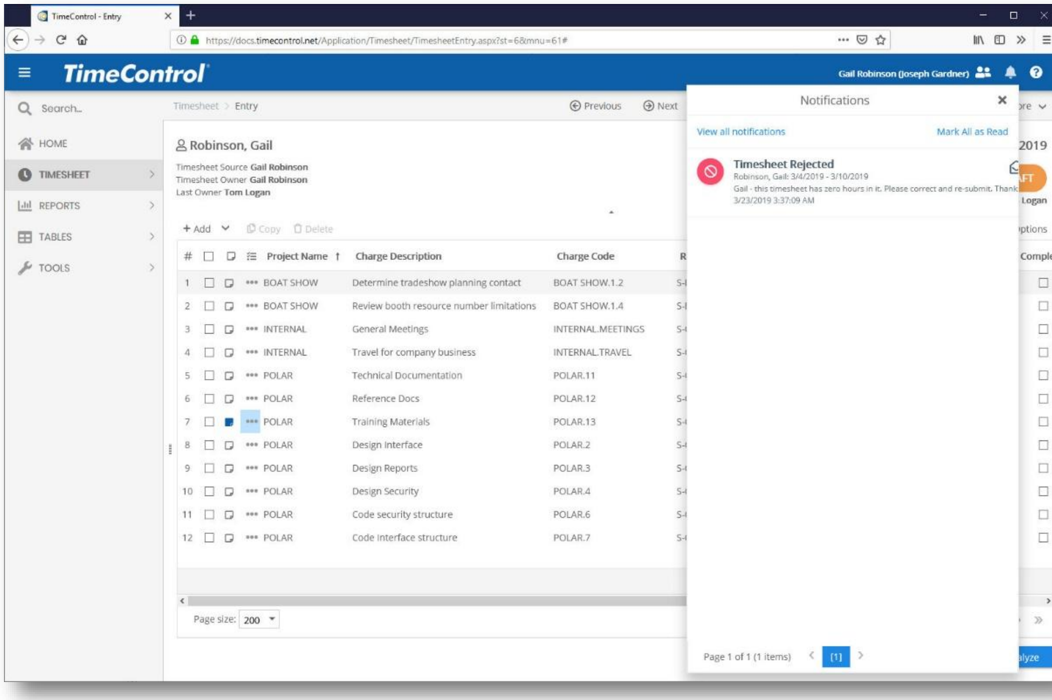
What if the Timesheet is Rejected?

Once the timesheet is successfully released, your supervisor can either approve or reject it. If your timesheet is rejected for some reason, your supervisor will notify you so that you can correct it. The supervisor can put a timesheet-level note into the timesheet or, more likely, send you an email indicating why the timesheet is not acceptable.

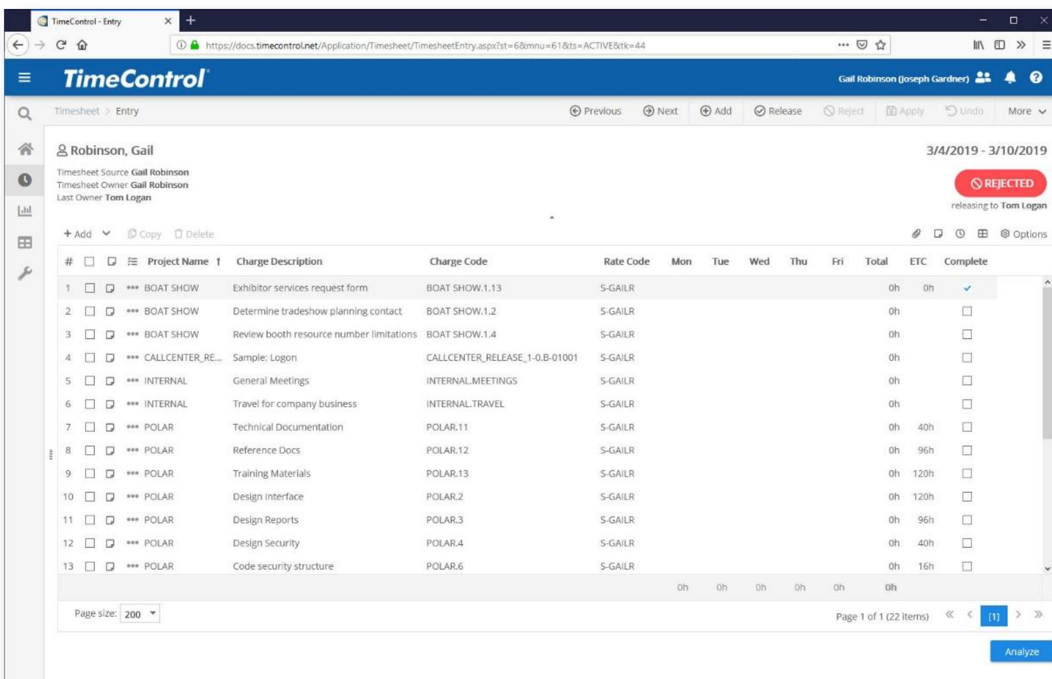
A timesheet can be rejected by anyone in your approval routing.

The next time you start TimeControl, the timesheet that you submitted will be back in your control and in Draft format. This means that you have the ability to make the required changes and release the timesheet again.

You will typically be informed via either email or notification that a timesheet has been returned to you. The Notification icon is shaped like a bell at the top right of the screen. If it is moving, then you have a notification waiting. Click the icon to see the noticed.



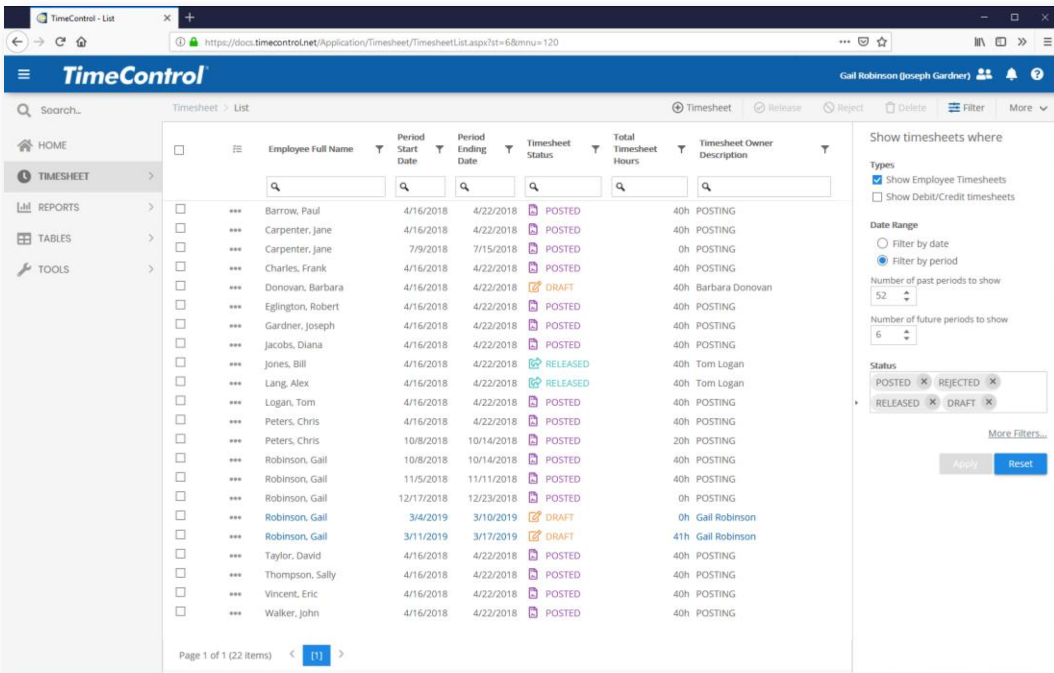
You can then return to the timesheet in question via the Timesheet List or Timesheet Entry to see the timesheet and correct it.



Your timesheet will be released through its standard approval routing. Since the next person on your approval list may not have been the person who rejected the timesheet, it is important to inform that person that your timesheet has been released again. To do this, TimeControl allows you to send that person an automatic email, provided you both have an active email address entered in the system. It is recommended to do so in this case. The email will be automatically addressed. Just fill in the text of the message that you wish and click **Send**.

The Timesheet List

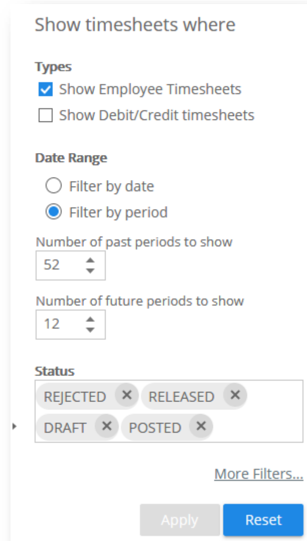
The Timesheet List provides an easy to view list of all timesheets within your control. Individuals will use this feature to see historic timesheets or adjustments to their timesheets. Supervisors and Administrators will use this as an easy way to see the summary data of multiple timesheets at the same time and to manage those timesheets.



You can see timesheets in the Timesheet List to which you have access. Timesheets which are currently owned by you have their text in blue. All other timesheets have their text in black. The Status column is color coded for quick sorting. You will see a different icon and color for each of the possible statuses: DRAFT, RELEASED, REJECTED, POSTED, ARCHIVED AND MISSING.

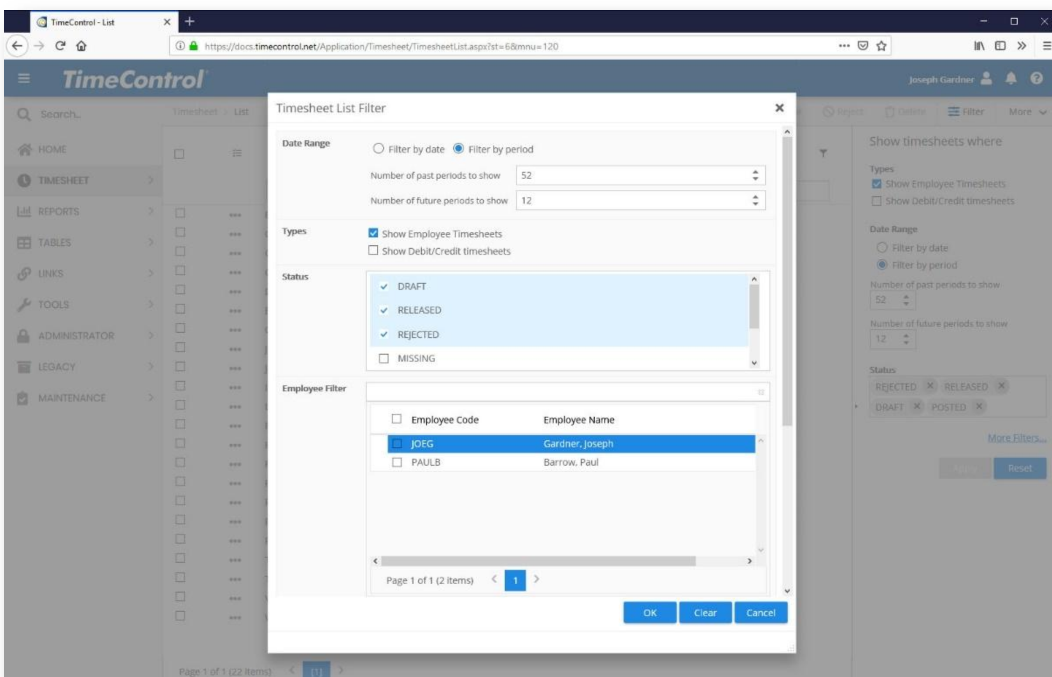
Filtering the Timesheet Lists

You can limit the number of timesheets in the Timesheet and Historical Timesheet Lists by applying a filter. Quick Filters are located on the right side of the screen or by pressing the Filter icon.



To apply a filter using Quick Filters, select options from the right on Timesheets and/or Adjustment Debit Credits, Date Ranges, Number of periods to show and the timesheet status.

Click on More Filters… to see a complete Filter Dialog.



Here you will also see options on which employees can be filtered.

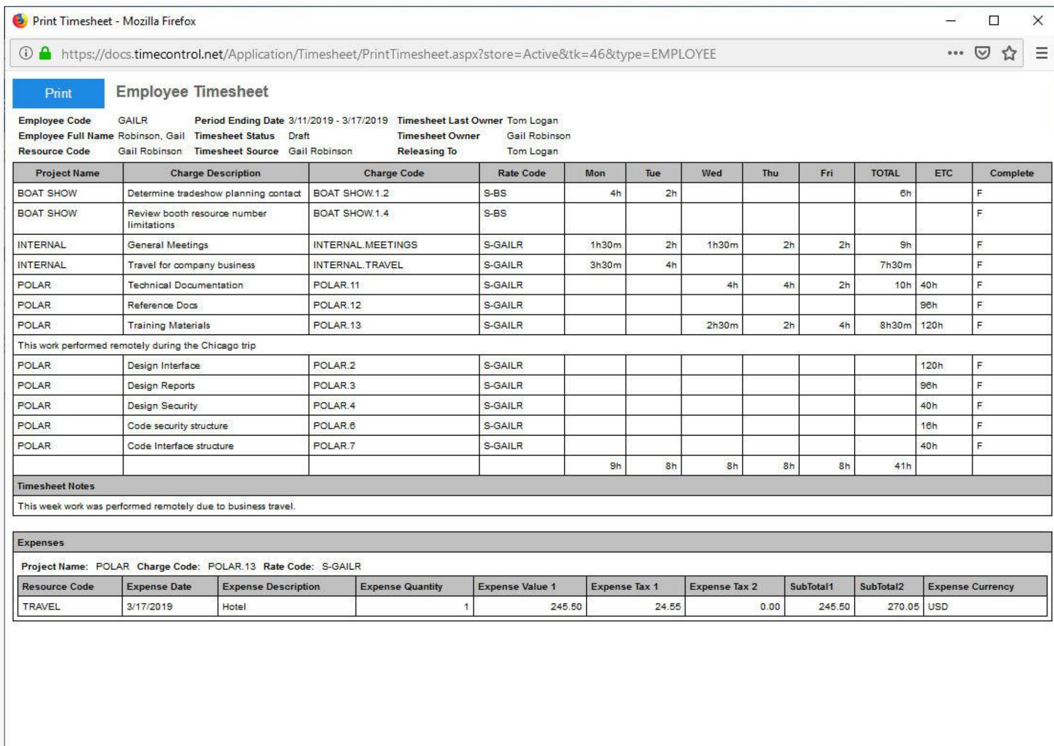
From the Timesheet List view you can also perform functions on multiple timesheets at once. If you have control of the timesheet and permission in your User Profile to do so, you can click on a number of timesheets then at the top of the screen, **Release**, **Reject** or **Delete** them all at once.

Printing your Timesheet

➢ To print an active Timesheet (Timesheet Entry, Historical Timesheet, Debit/Credit):

1. Click the **Print** button at the top of the timesheet. TimeControl recreates the selected timesheet in a browser window.
2. Make any desired changes to the formatting, layout or text then print the timesheet by selecting **File | Print**

1. Close the timesheet preview by clicking the **Close** button in the upper-right corner of the Formula One window.


Print Timesheet - Mozilla Firefox

https://docs.timecontrol.net/Application/Timesheet/PrintTimesheet.aspx?store=Active&tk=46&type=EMPLOYEE

Print

Employee Timesheet

Employee Code	GAILR	**Period Ending Date**	3/11/2019 - 3/17/2019	**Timesheet Last Owner**	Tom Logan
Employee Full Name	Robinson, Gail	**Timesheet Status**	Draft	**Timesheet Owner**	Gail Robinson
Resource Code	Gail Robinson	**Timesheet Source**	Gail Robinson	**Releasing To**	Tom Logan

Project Name	Charge Description	Charge Code	Rate Code	Mon	Tue	Wed	Thu	Fri	TOTAL	ETC	Complete
BOAT SHOW	Determine tradeshow planning contact	BOAT SHOW.1.2	S-BS	4h	2h				6h		F
BOAT SHOW	Review booth resource number limitations	BOAT SHOW.1.4	S-BS								F
INTERNAL	General Meetings	INTERNAL.MEETINGS	S-GAILR	1h30m	2h	1h30m	2h	2h	9h		F
INTERNAL	Travel for company business	INTERNAL.TRAVEL	S-GAILR	3h30m	4h				7h30m		F
POLAR	Technical Documentation	POLAR.11	S-GAILR			4h	4h	2h	10h	40h	F
POLAR	Reference Docs	POLAR.12	S-GAILR							96h	F
POLAR	Training Materials	POLAR.13	S-GAILR			2h30m	2h	4h	8h30m	120h	F
This work performed remotely during the Chicago trip											
POLAR	Design Interface	POLAR.2	S-GAILR							120h	F
POLAR	Design Reports	POLAR.3	S-GAILR							96h	F
POLAR	Design Security	POLAR.4	S-GAILR							40h	F
POLAR	Code security structure	POLAR.6	S-GAILR							16h	F
POLAR	Code Interface structure	POLAR.7	S-GAILR							40h	F
				9h	8h	8h	8h	8h	41h		
Timesheet Notes											
This week work was performed remotely due to business travel.											

Expenses

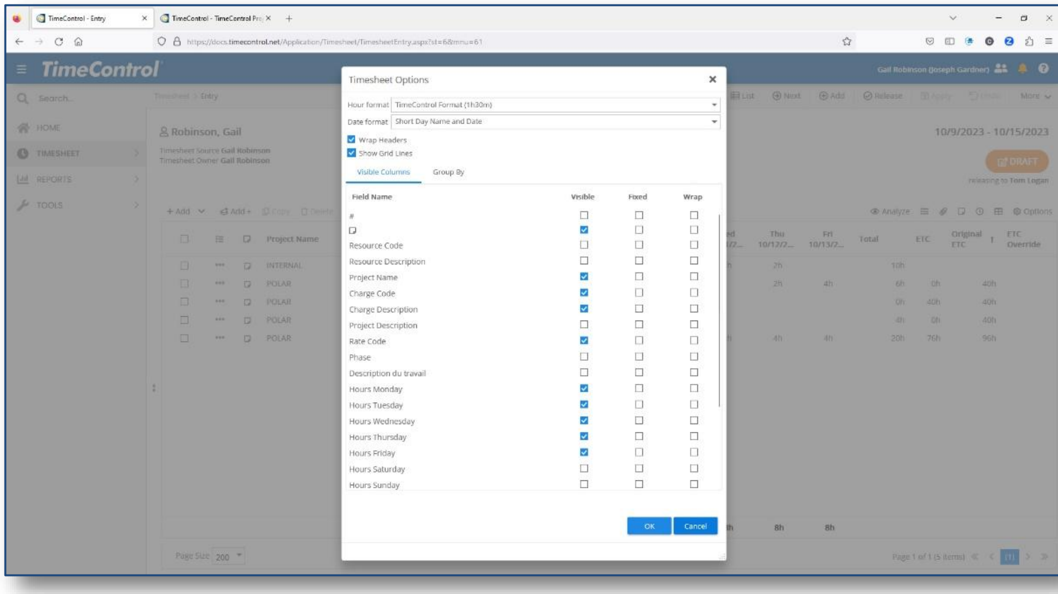
Project Name: POLAR **Charge Code:** POLAR.13 **Rate Code:** S-GAILR

Resource Code	Expense Date	Expense Description	Expense Quantity	Expense Value 1	Expense Tax 1	Expense Tax 2	SubTotal1	SubTotal2	Expense Currency
TRAVEL	3/17/2019	Hotel	1	245.50	24.55	0.00	245.50	270.05	USD

Options to Customize the Timesheet view

One of the most common user adjustments of the timesheet can be done right in the timesheet view. You can change the order of the columns by simply dragging and dropping the column headers into the order you wish. You can change the width of the columns by dragging the column handle between the columns and dragging it wider or narrower. If you are changing one of the daily columns, then all other daily columns will change to the new setting also.

For other options, click on **Options** to display the Timesheet Option view.

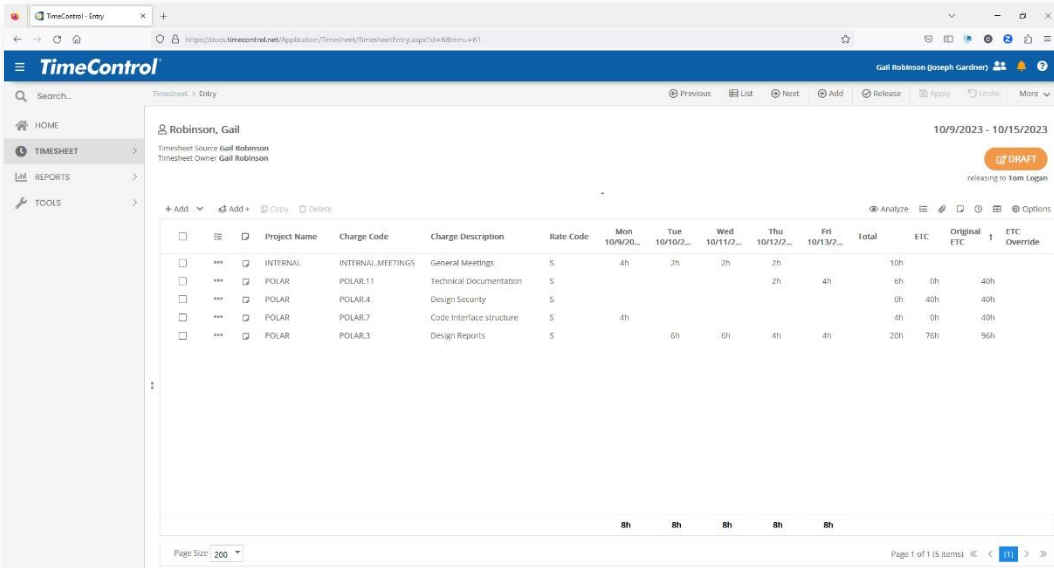


This module allows a user to define which fields will be displayed, change the display to include days of the week, dates or both and control how the display will be made of the hours and minutes in each timesheet cell. You can select the timesheet display for the hours and which fields will be displayed and will be locked on the left side when scrolling. Select the Wrap option for any field which you wish to word-wrap on the timesheet. If you wish to have only the headers wrap, then select Wrap Headers at the bottom of the page. These options will be saved individually for each user and remembered the next time TimeControl is started.

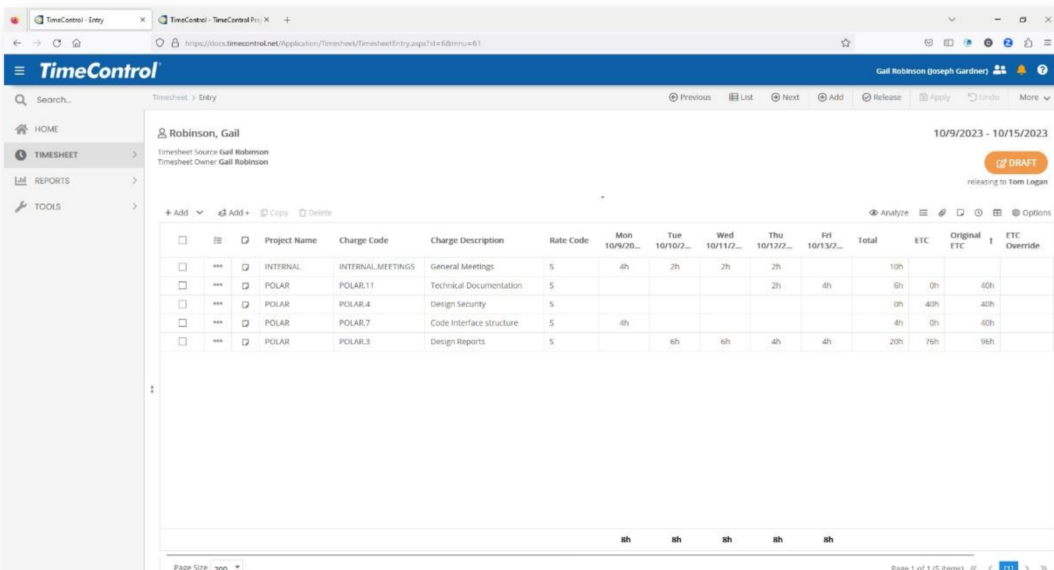
To change the order of any field in the timesheet, just drag the column header left or right where you want it and to resize the field, place your mouse on the line in between the column headers and drag the resizing control left or right. If you wish to return the timesheet view and all other personalized settings to their default values, go to MyAccount and click **Reset Defaults**.

Timesheet Grid Lines

One option on the timesheet affects the look and feel of the timesheet itself. Selecting Show Gridlines makes that change. With the option turned off, the timesheet shows its grid without lines.



Turning Show Gridlines on, highlights the grid outlines.



This is controlled in the timesheet options section for each user and can be turned on and off at any time without affecting the data.

TimeControl Reports

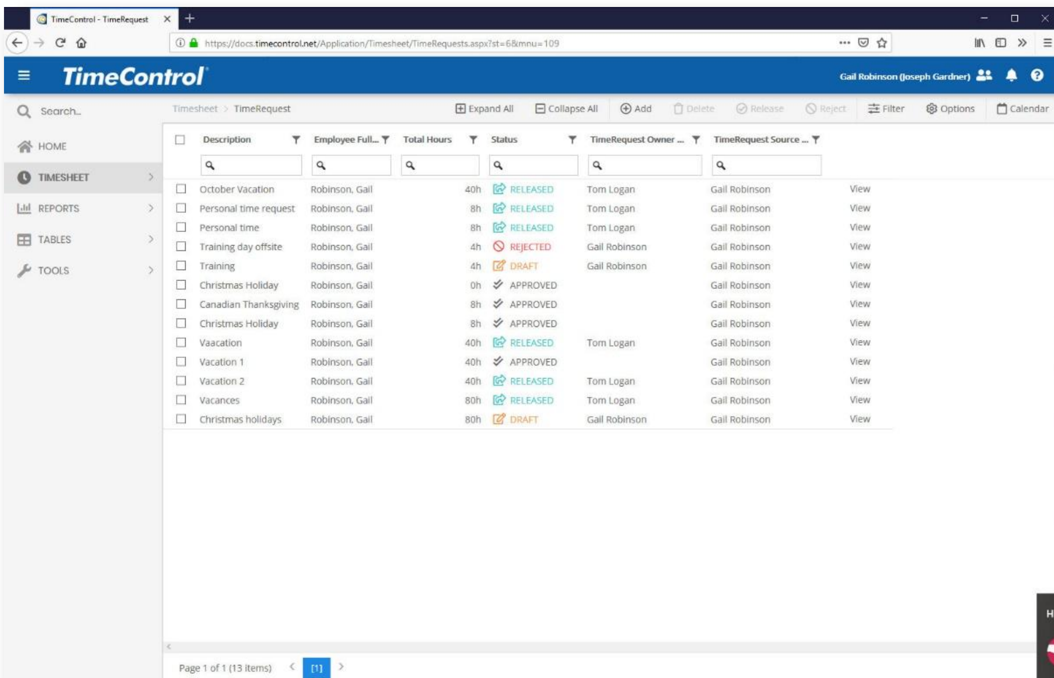
TimeControl includes a wide range of reports for tables, posted and unposted timesheet data. Your TimeControl Administrator will determine what reports, if any, will be visible to you. See the TimeControl Reference Guide for more information.

TimeRequest™

TimeControl includes the ability to make requests for certain types of time which will appear in your timesheet in the future. The most common use for this function is to request time off such as vacation or personal time. However, the TimeRequest module is not restricted to time off. It might also be used for requests for travel or request for training or requests for almost anything that might belong in a timesheet in the future.

TimeRequest List

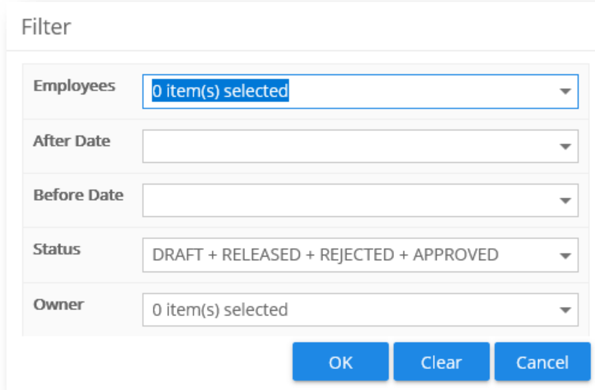
To access TimeRequest click the clock icon called TimeRequest in the navigation area on the left of the MenuStrip. You'll first see the TimeRequest List.



If you are a supervisor, you might see a number of requests here that are awaiting your approval. To see a request, click on View.

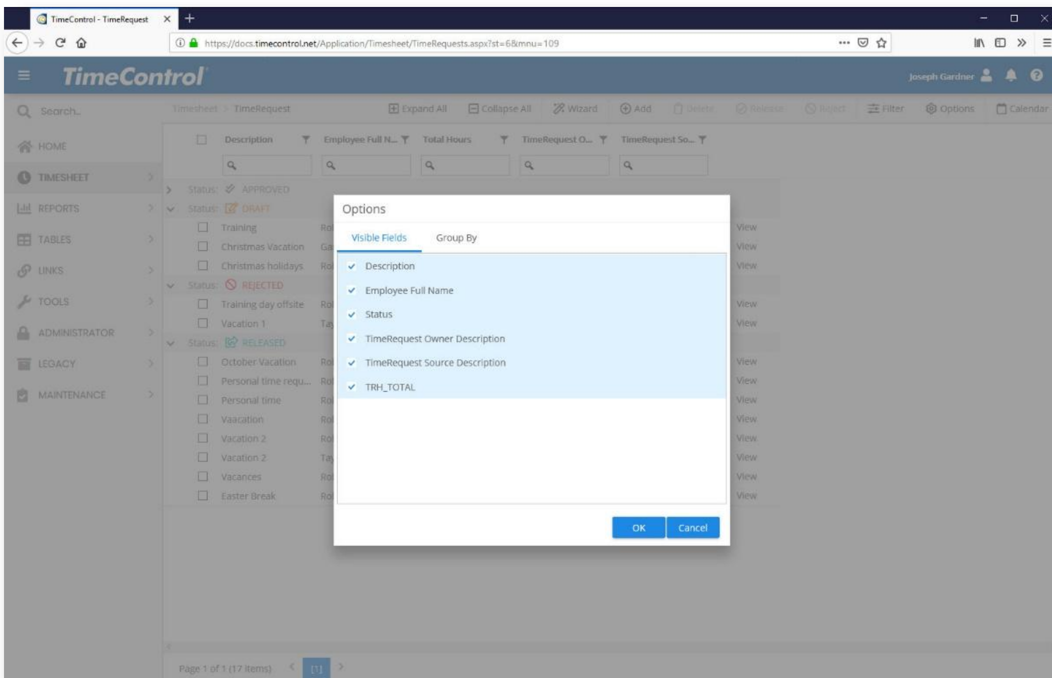
To filter which TimeRequests are visible in the list, click the Filter icon.

You can now determine which TimeRequests to view. You must have the rights to any data that you view.

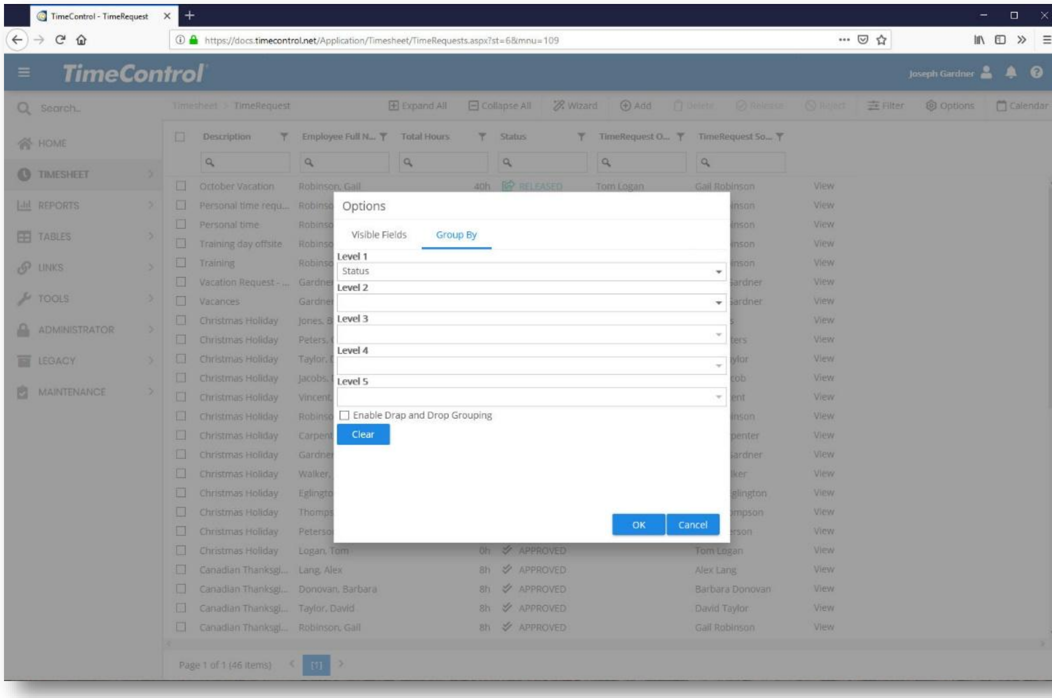


You can customize this view by clicking on Options.

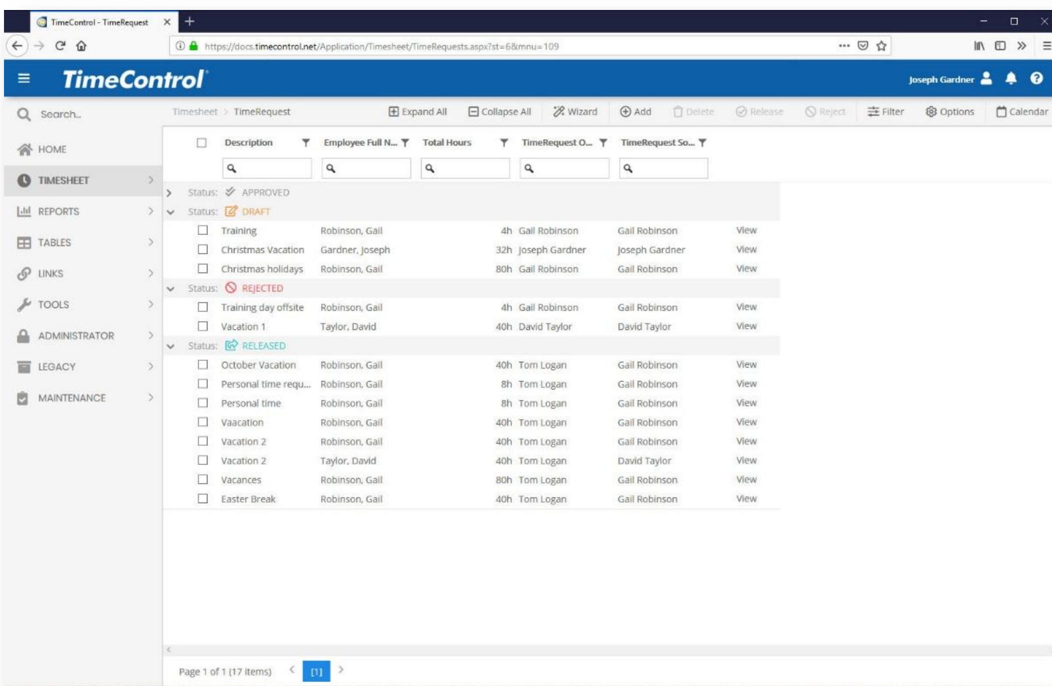
Select the fields you wish to view in the Visible Field



You can also group the view with multiple levels of grouping.



Click OK to see the list now organized by the selected field(s). Expand and Collapse buttons will now appear in the Actions Menu to expand or collapse all groupings.

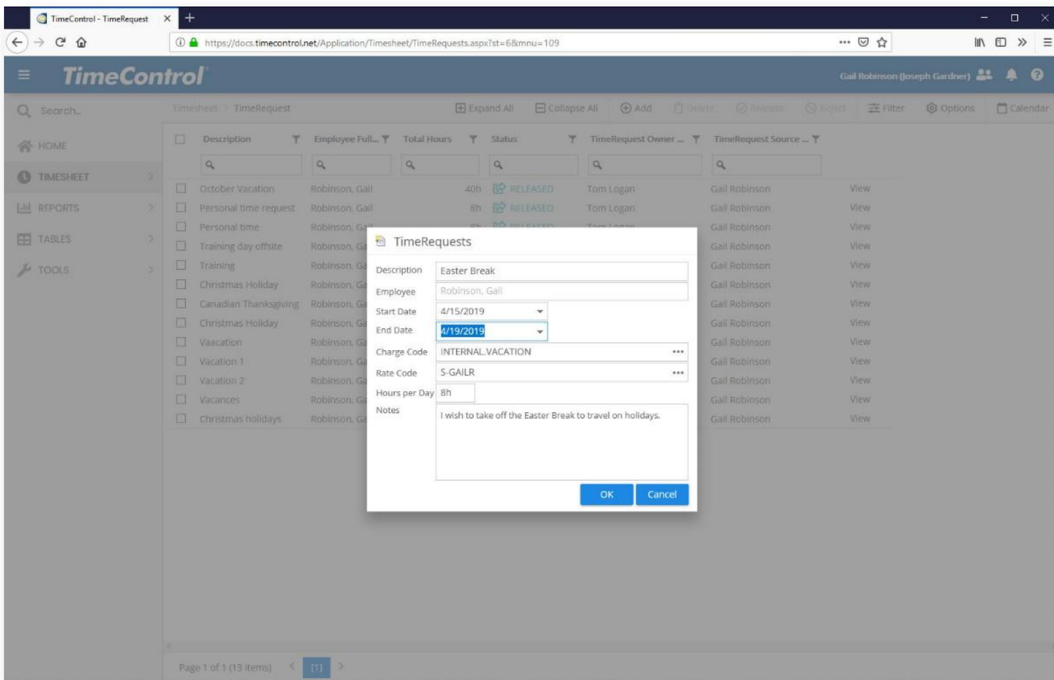


If you prefer a more dynamic grouping interface, you can “Enable Drag and Drop Grouping. This will display a grouping band just above the grid and you can drag the header fields of any column to that band to group. Dragging a field header to the right of a field already in the band will result in the new field becoming a sub-group.

Drag and Drop supports reorganizing the grouping of this screen by simply dragging fields to the left and right within the grouping band.

To return to the original format, click on Options/Group By and select **Clear**.

Add a TimeRequest



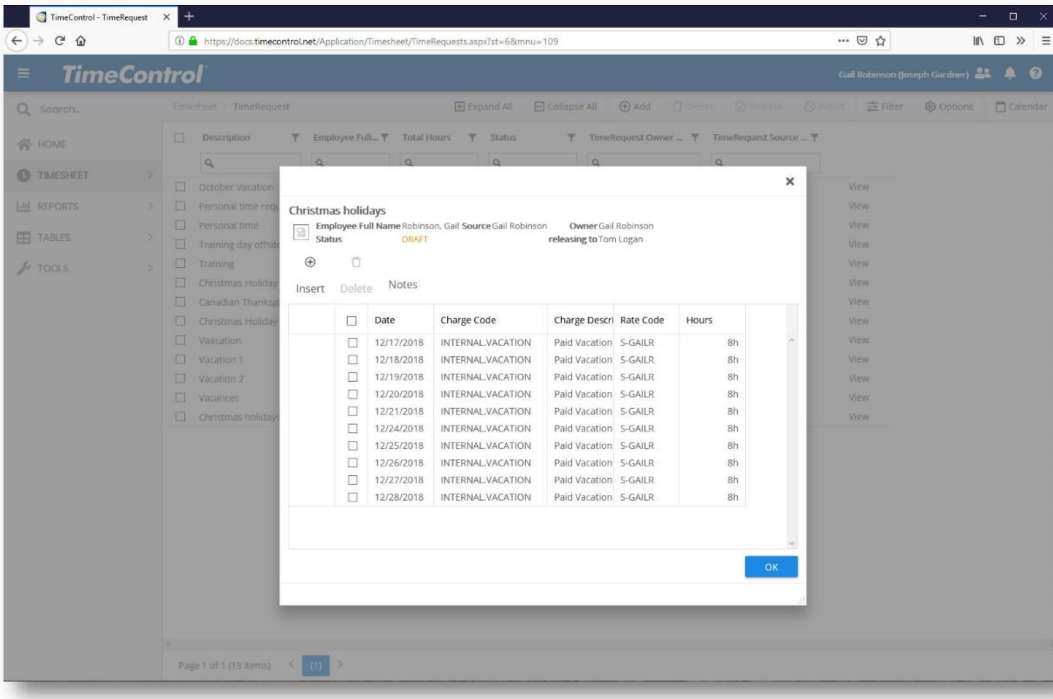
If you wish to add your own request and send it for approval, click the **Add** button in Screen Actions.

Now enter a description for the request, your employee name (or another person if you're entering a request for someone else), the rate code that's appropriate to this particular request and the number of hours per day you'd like to have in the request each day. Click on Ok to complete the request.

To see the details of a request, click View from the TimeRequest List.

A line will have been created for each date in the Time Request. Weekend days are omitted. Your Administrator will define the days to omit by default in the User Profiles. You can still add them as an exception however, by clicking **Insert** and adding a line. You can use this same technique to add a non-standard line such as a half day off.

TimeRequest Approvals



TimeRequests are approved in a sequence defined by your administrator. By default, the approvals are in the same sequence as your timesheet however, TimeRequests can be routed along a different path for certain types of requests. For example, in some organizations, your vacation request might not be approved in the same manner as a Personal Time Off request. Your Administrator should inform you if the TimeRequest release path for your TimeRequests are different from the default. You can also send emails during a release or reject of a TimeRequest. To release your TimeRequest for approval, select it in the list at the bottom of the screen and then click **Release** just like you do for a timesheet. The approver will click **Release** or **Reject** to approve or return the TimeRequest to you.

Just like Timesheets, TimeRequest can have automated Validation Rules defined. You might see a warning message or error message if your TimeRequest violates one of these rules. For example, in some organizations, a vacation request cannot be requested on weekends for salaried employees. If this rule has been defined and you attempt to create a TimeRequest for vacation on a weekend, TimeControl will display an error or warning message. In this case, either correct the TimeRequest or speak to your administrator.

Unlike timesheets, TimeRequests do not have a Posting process. When the last person in the approval sequence has *Released* the TimeRequest, it is marked “Approved”.

Users and Supervisors can optionally send emails as part of the TimeRequest Approval process so long as the relevant email address is in the Employee Table record.

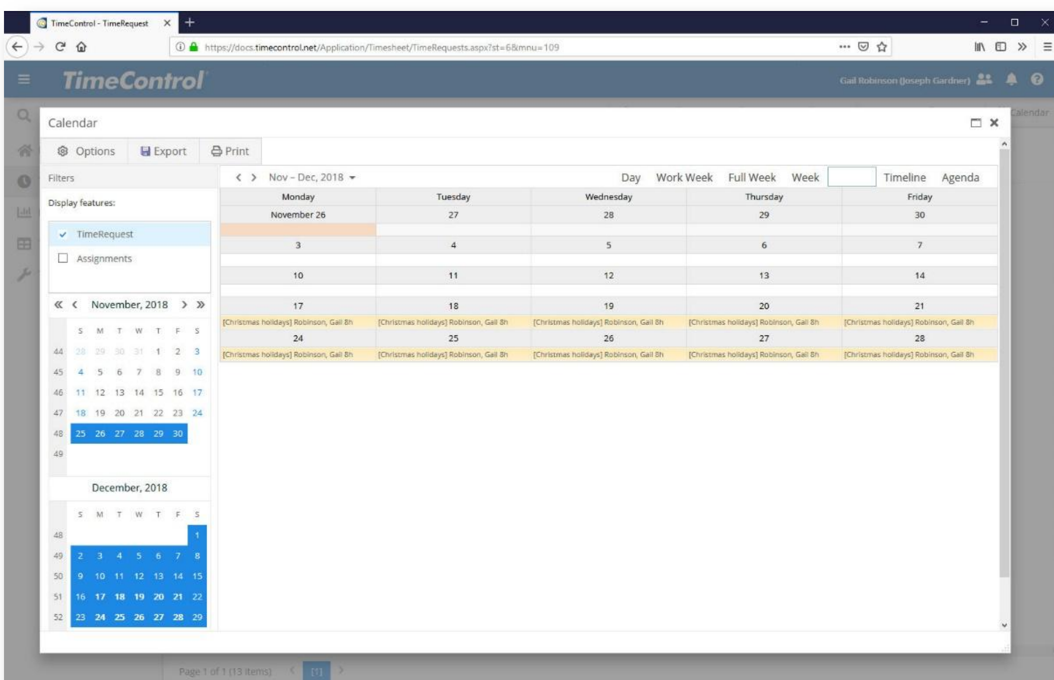
Getting your TimeRequest into your Calendar

Once a TimeRequest has been approved, you can add it to your calendar by clicking on “View” then on Add to my Calendar in the header area.

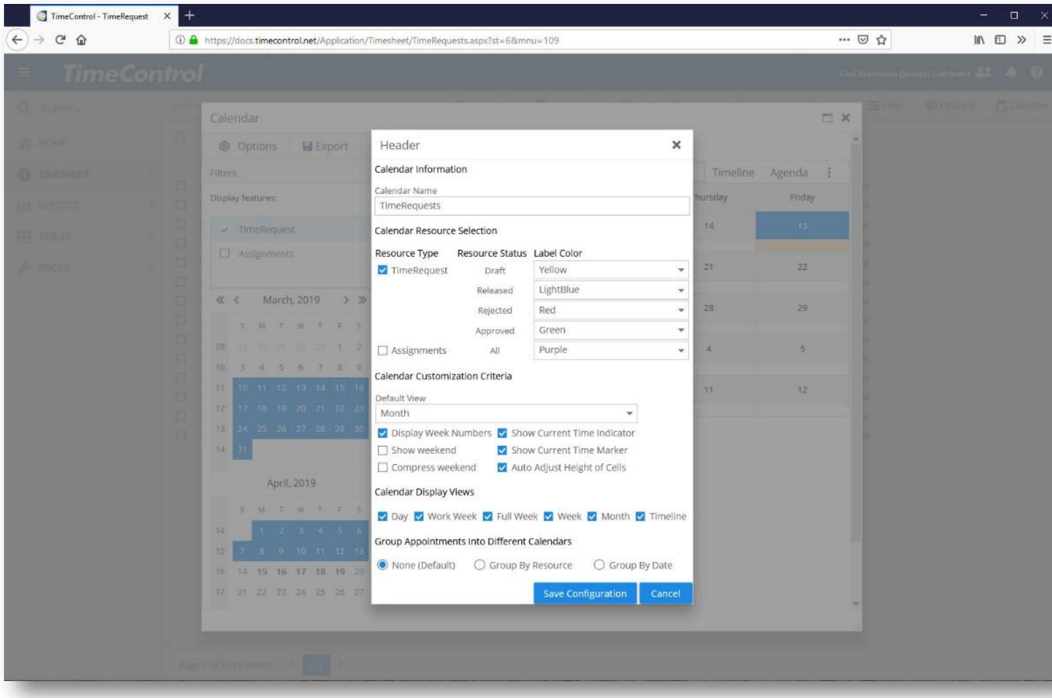
The resulting file should work with most major calendar programs and will create an event with the relevant start and stop dates and information.

Calendar View

When reviewing and approving TimeRequests, it may be helpful to display the Calendar View. Click on the Calendar icon in the Screen Actions area at the top right and a calendar will display.



TimeRequests are automatically selected by default. You can display Draft, Released, Approved and Rejected TimeRequests. Clicking on Options will allow you to configure the display.



You can determine the colors you wish to use for each TimeRequest category as well as how the text is defined on the screen. Selecting **Auto Adjust Height of Cells** will make each row change in height based on the amount of text there is to display.

You can select Daily, Work Week, Full Week, Monthly or Timeline views. Once you have made your selections, you can copy your views into your own library of customized selections.

Executing TimeRequests

Once a TimeRequest is approved it will remain in the system waiting for the timesheet period for which it applies. When the timesheet is created in which an approved TimeRequest is pending, it will be added to the timesheet just like a pre-loaded charge would be. The end user can then accept and release or edit or delete the line as they require.

Other functions

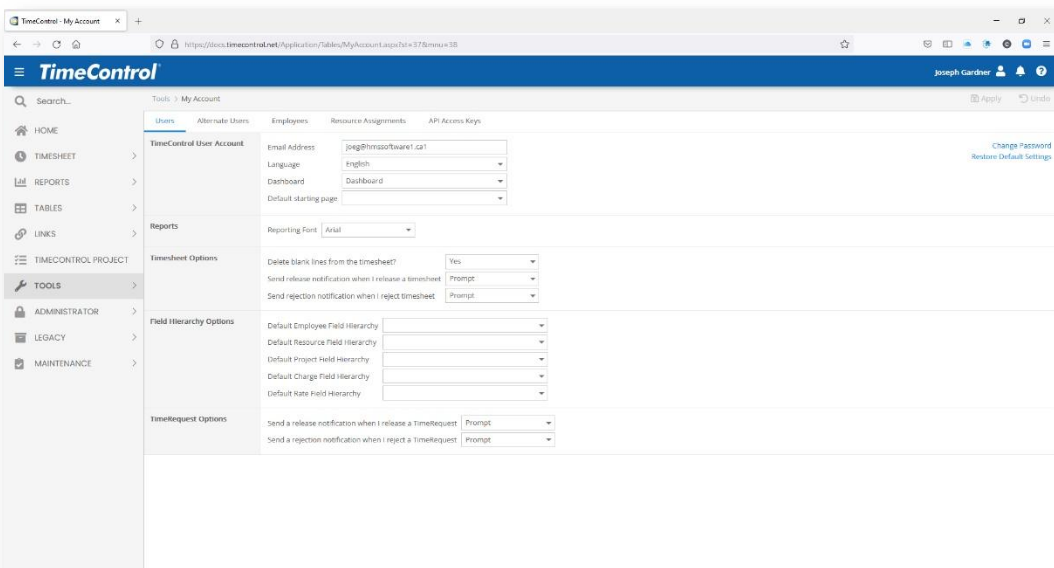
MyAccount / Options

The MyAccount module allows you to define how TimeControl appears to you. Your TimeControl Administrator may have pre-configured some of these options, but you can change the settings to suit your individual needs.

To view the TimeControl Options, select MyAccount at the top right of the screen or click My Account in the Tools Tab. There are a number of options in the MyAccount page organized by Tab.

Users Tab

- **Email**: Enter the email at which you wish to receive notices from TimeControl



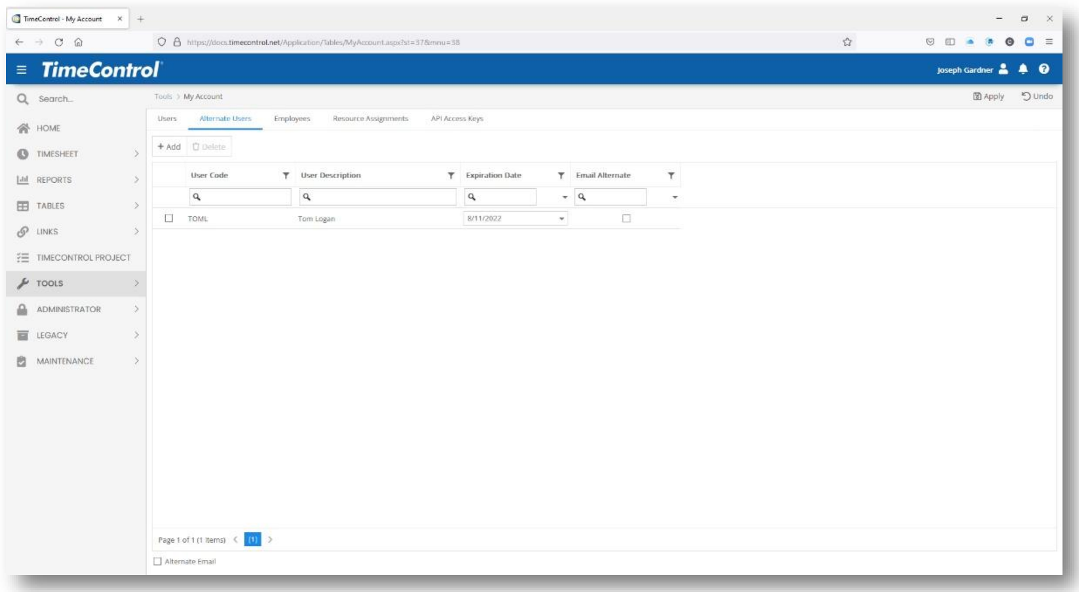
- **Language:** Choose from a list of available languages.
- **Template:** Choose a system or personal template that will determine the display of the My TimeControl Home Page when you log in.
- **Restore Default Settings:** In the event the columns or selections on the timesheet entry screen have been adjusted so that the screen has become difficult to view, clicking on Restore Default Settings will reset the column widths and column selections to their original default settings.
- **Reporting Font**: To change the font used in reports, select it here from the available options.
- **Page Defaults**: TimeControl allows you to select defaults for where in the system TimeControl will start upon login and which function will appear by

default for each of the Tabs. You will see here a selection for each tab to which you have access. Leaving the selection blank will default to the dashboard page. The "Home" tab dictates where TimeControl will start upon login.

- **Timesheet Options**: You can elect to be prompted for these timesheet options here. The Delete Blank Line Option and Send Email on release option are prompted by default when a timesheet is released. The Send Email on reject option is prompted by default when a timesheet is rejected. At the time of being prompted, you can elect to not be prompted again. To turn the prompts back on, change the option to "Prompt" for the selections you wish.
- **Change Password:** To change your TimeControl password click Change Password on the right of the screen. The Change Password dialog will appear

1. Click **Change Password**. This displays the Change Password dialog box.
2. Enter your current password and then a new password. A password can be a maximum of 256 characters.
3. Confirm your new password by entering it a second time in the **Confirm Password** field. Once you've entered your new password, click **OK**.

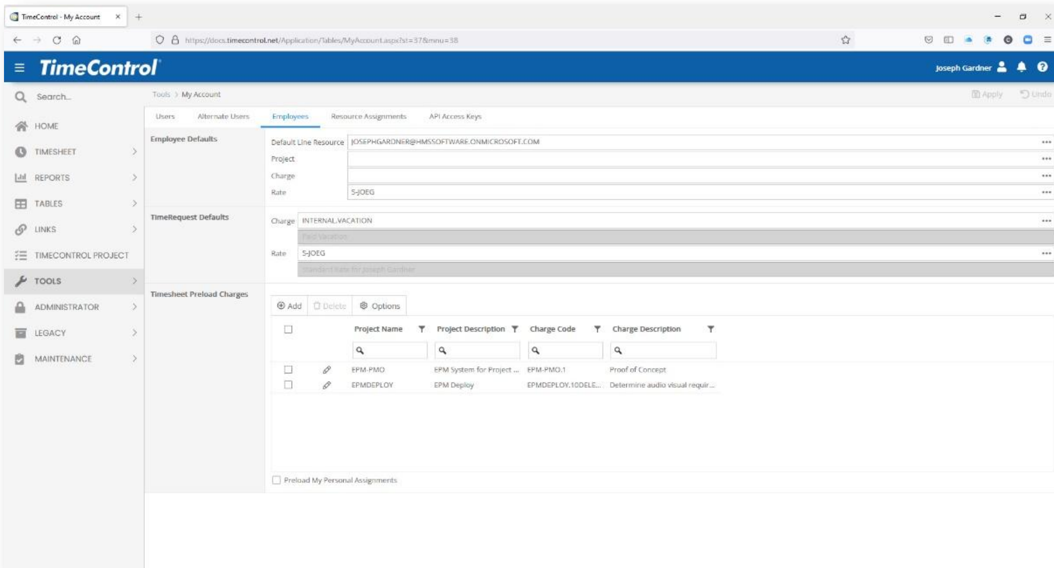
Alternate Users Tab



You can delegate multiple other TimeControl users who will be able to log in as you to perform your responsibilities within the system if you plan to be absent for an extended period. While an alternate user is within TimeControl as your delegate, they will have all the privileges and access that you enjoy but TimeControl will also be tracking what changes they do for auditing purposes in the background. If you wish to set alternates for yourself, click Add and select the user name and an expiry date beyond which you do not wish them to have this privilege.

Employee Tab

Next is the Employee Tab with defaults for use on the timesheet



- **Employee Defaults:** TimeControl uses any of the default entries to automatically populate new timesheet line items that are added in the Timesheet. If you wish to use Preloading, you must set a default Rate Code here. Enter here defaults you wish to see when you enter your timesheet. You select a default entry for Project, Charge and Rate.

Click **Apply** to save your selections.

Timesheet Preloaded Charges

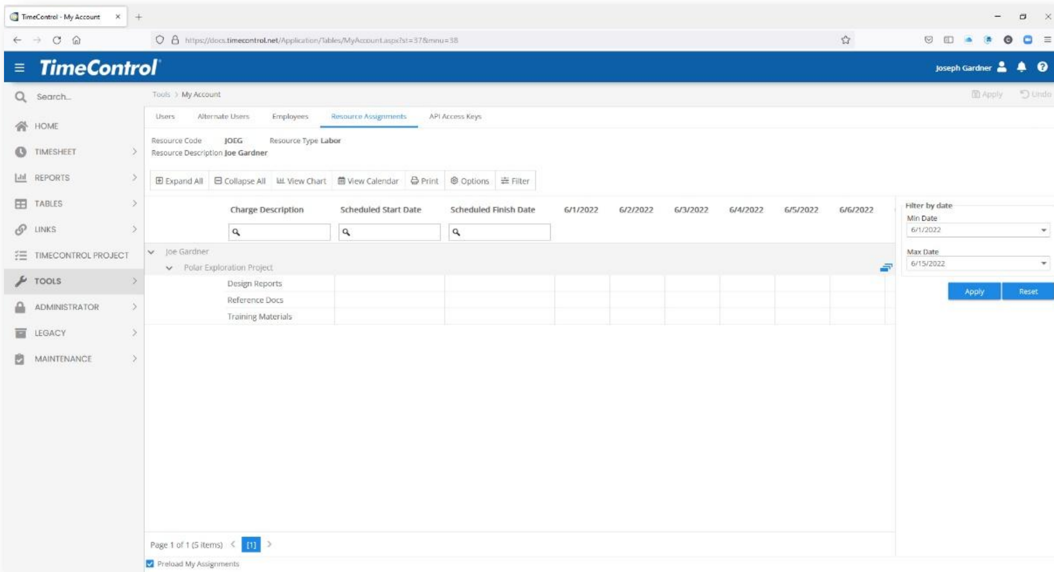
TimeControl allows users to select charges that can appear on a new timesheet. There are two functions that perform this function. The Resource Preload function is managed by an Administrator and can be set manually by an Administrator or automatically display assignment charges that were transferred from an external project management system. Whether or not the Resource Preload function is activated, employees can define and activate their own Personal Preloaded charges in the MyAccount area on the Employee tab.

End users can add or remove any charges in this area of the MyAccount options and then select “Preload my timesheets” at the bottom of this section to activate the preload function.

Note: Preloads will only work properly when there is a default rate code selected. Select a Default Rate code in the MyAccount option area.

Resource Assignments Tab

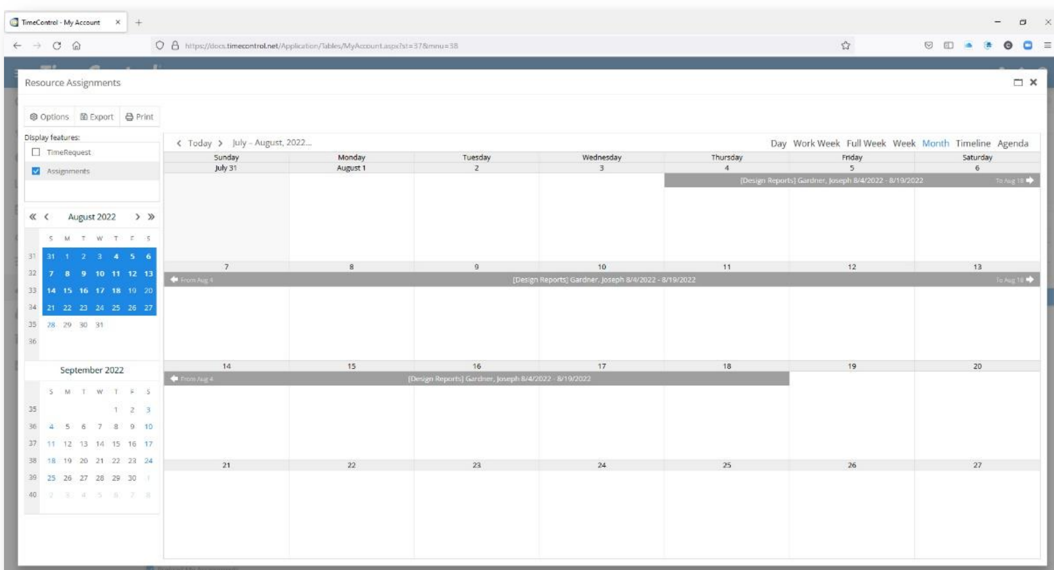
TimeControl includes a view for users to see tasks that have been assigned to them. This is in the Resource Assignments tab in the MyAccount module.



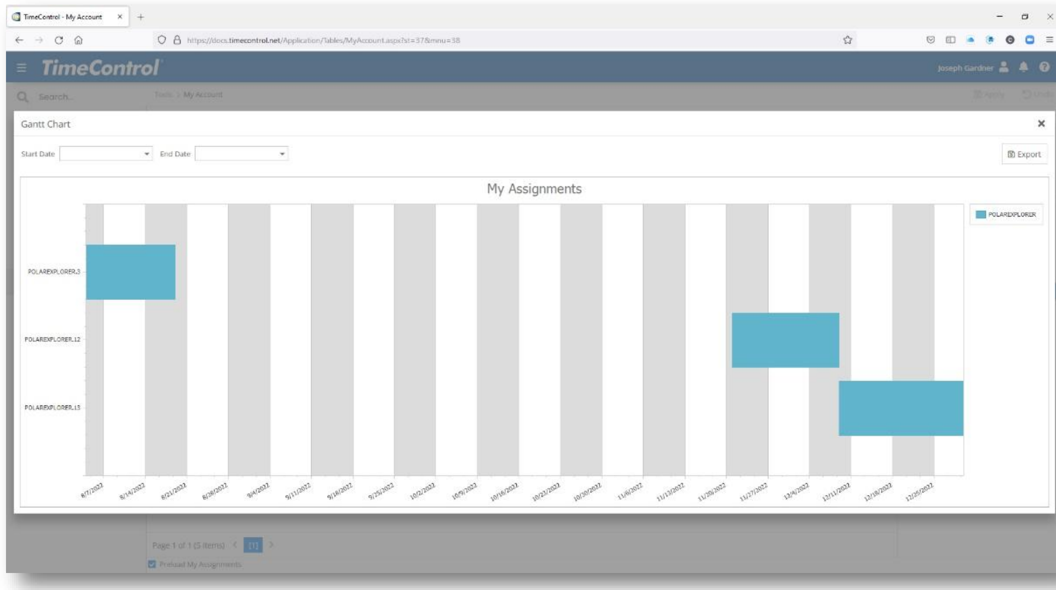
The view allows the user to see all assignments which are allocated against their resource code. The user can expand or collapse the view and sort the view by clicking on the column header. More complete information about tasks which are associated to a project management system are available by clicking the information button on the right of the screen.

You can see your assignments either as a calendar or in a GANTT chart.

Click on the Calendar icon to see your TimeRequests, your Assignments or both in a calendar view. Clicking Options will allow you to create new views showing assignments and TimeRequests in different colors and changing what text appears.

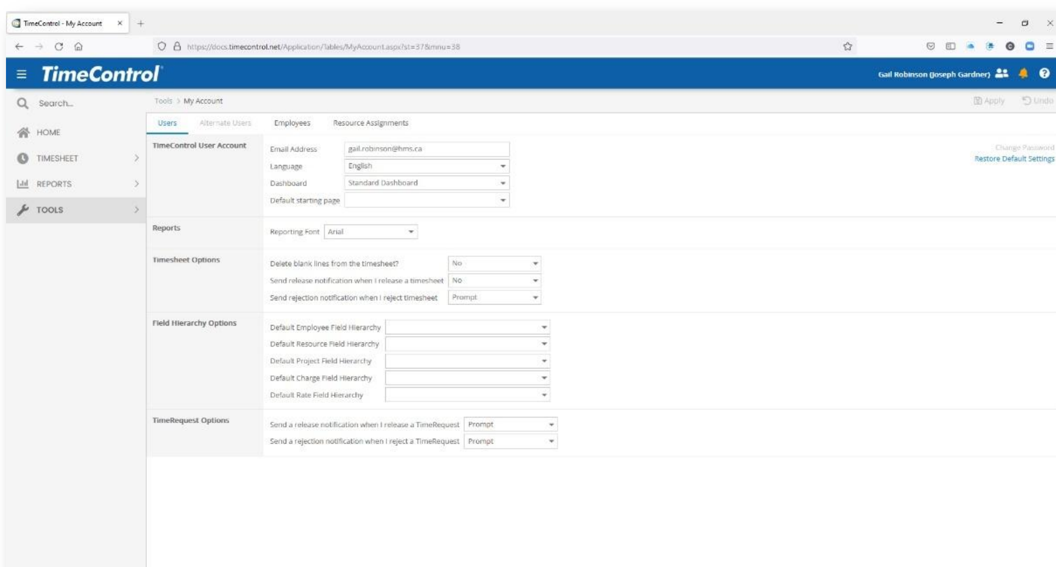


Click on the GANTT view to see a bar chart representation of your assignments.



API Key Tab

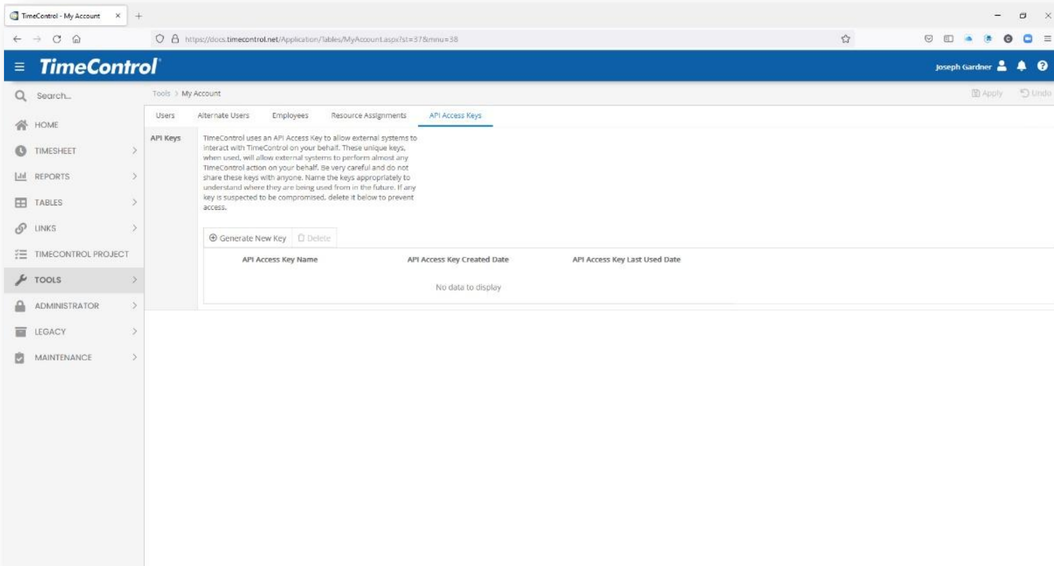
When using the TimeControl API, some applications will require a unique key associated to one user.. This tab will only appear if in the User Profile of this user, API is selected. Typically API access is granted only to one or small number of users as it can allow automated access to any part of TimeControl to which the User Profile of this user is permitted.



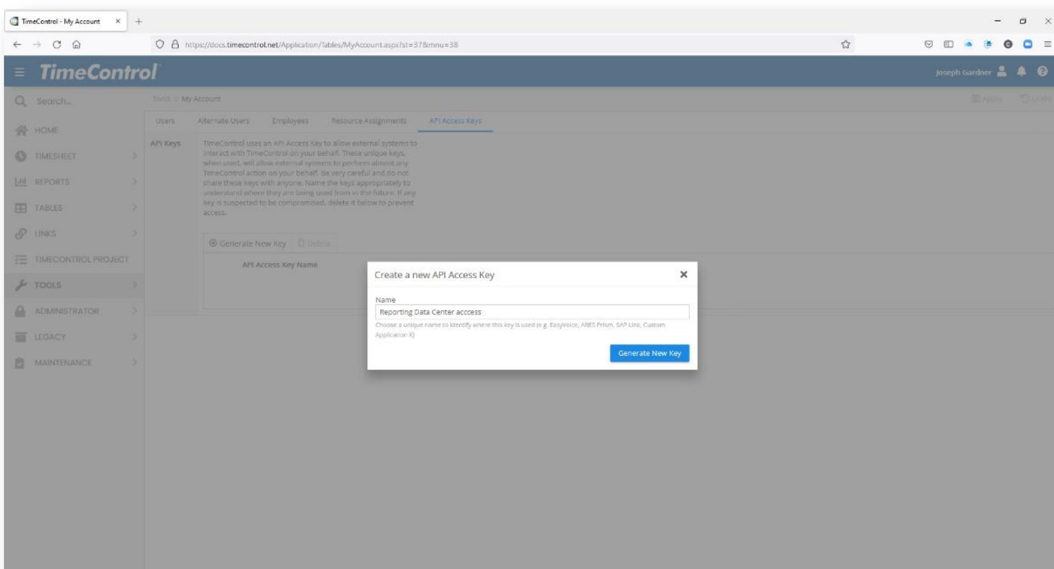
For any user whose User Profile record does not have API Access turned on, this tab will not be visible and isn't required.

Creating an API Key

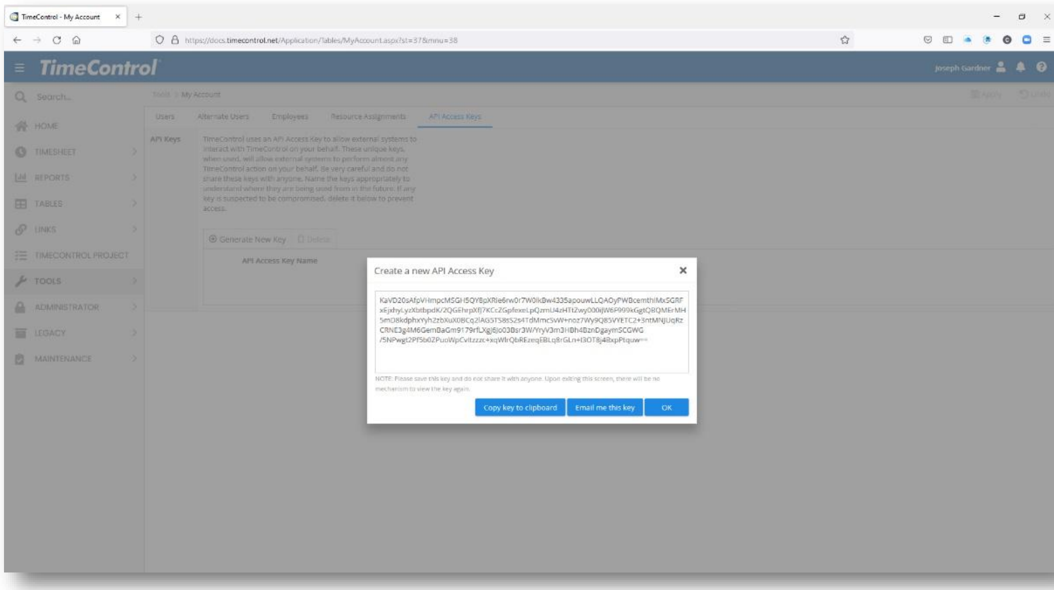
If API Access has been selected, this tab will appear along with a list of all unique API keys that have been generated for this user.



To add a key, click the Add button.

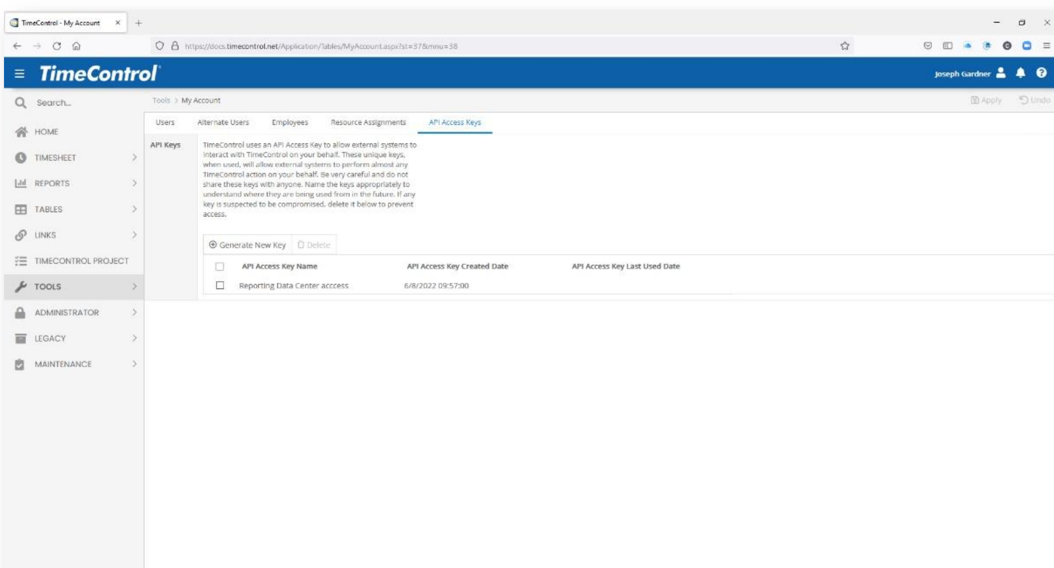


Now enter a name for this key that will allow you to identify what application or purpose it is being used for.



The key will be a long string of numbers and letters. This is the only time you will see this key. Copy the key and keep it in a safe place or email it to yourself. This long string of letters and numbers is what the external application will require.

Click Ok when you have safely stored the key.



In the API Tab you will now see a list of the keys that have been generated. The details of this key is no longer visible. The only function possible by selecting this record is to delete it.

Logging Out of TimeControl

If you are a supervisor or administrator and want to log in with another username, select **Logout** at the top right area of the screen

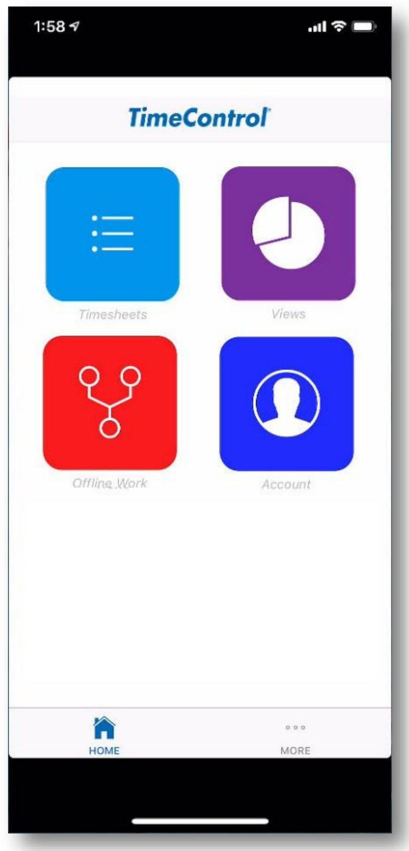
When you close TimeControl by selecting log out or by moving away from the TimeControl environment by selecting another URL, TimeControl will briefly display a message that lets you know that it is disconnecting from the TimeControl Server and releasing any cached data. This is a normal message.

Exiting TimeControl

When you are ready to exit TimeControl, simply close the browser window. This closes the application.

The TimeControl Mobile App

TimeControl has a free Mobile App for use by any TimeControl user with an active license. The App supports both IOS and Android devices and can be downloaded from the Apple App Store or Google Play. Search for TimeControl Mobile. Your TimeControl Mobile App can only work with your TimeControl system if your Administrator has activated support for the Mobile App and has made it available to your profile. Check with your TimeControl Administrator to ensure you are able to use the TimeControl App.



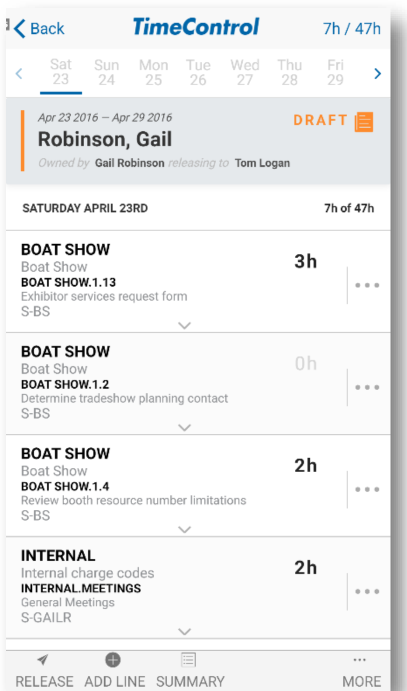
The TimeControl Mobile App requires 3 pre-requisites:

1. The TimeControl Mobile App API must be installed. This is done automatically for TimeControl Online but requires an option to be selected during a TimeControl upgrade for TimeControl on premises
2. The TimeControl Mobile App must be selected in System Preferences to turn on the option for this instance of TimeControl.
3. The TimeControl Mobile App must be selected for the User Profile of the user trying to access TimeControl Mobile. If you are having difficulty logging into your instance of TimeControl, please contact your Administrator.

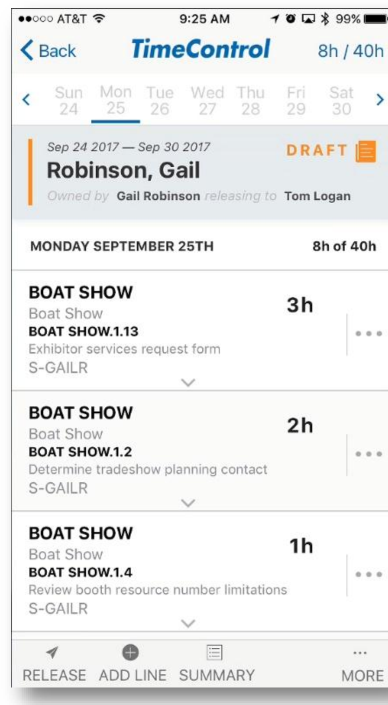
Multi-device support

The TimeControl App works in iOS (Apple) or Android environments. The presentation is highly responsive and will adjust to portrait or landscape modes where possible and for different sized displays such as tablets. The display of certain features may differ depending on the screen resolution available to the TimeControl App at the time.

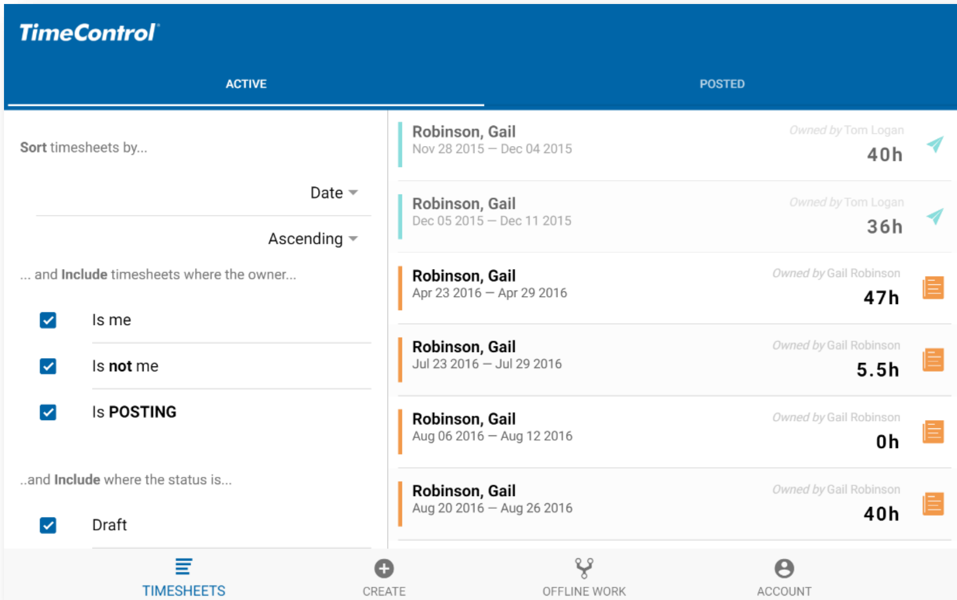
Display on Android phone



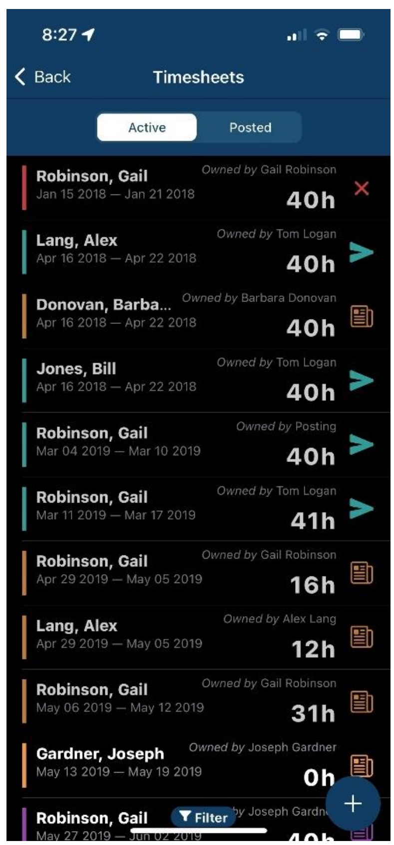
Display on iPhone



Timesheet list on iPad in Landscape mode



TimeControl in Dark Mode

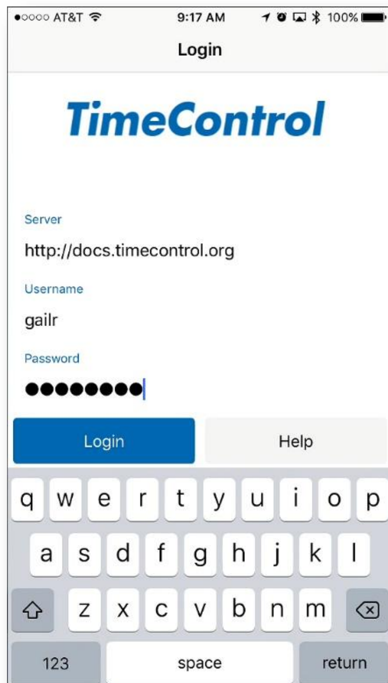


Connection and Login

Once downloaded, start the App. It will look slightly different on an Apple vs. Android device as the App conforms to the style of the device.

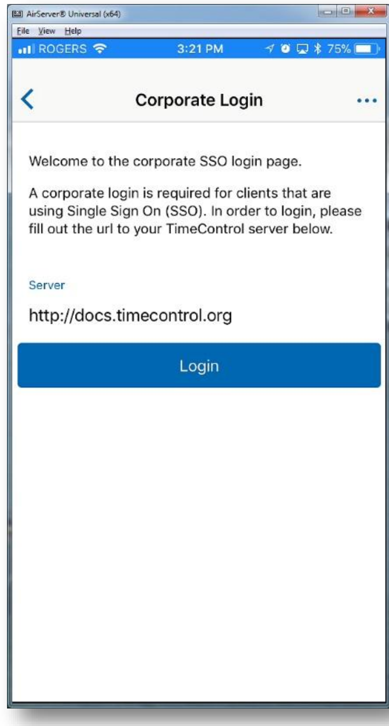
To log in you will need the URL of your TimeControl Server, your TimeControl Username and Password.

Your URL will likely begin with https as most organizations will wish to use SSL secure communications with mobile devices.

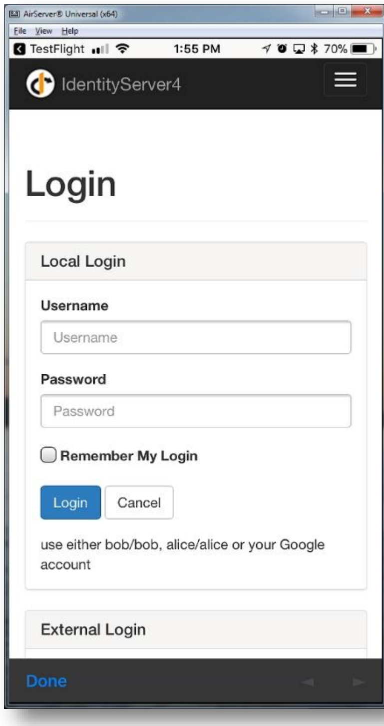


Corporate Login

TimeControl can also support a corporate single-sign-on environment using OpenID. TimeControl, uses the Explicit flow for this which means you will need to log in to the TimeControl Mobile App each time you use it but you will log in Instead of logging in using the standard method, click on Corporate Login at the top right of the screen.



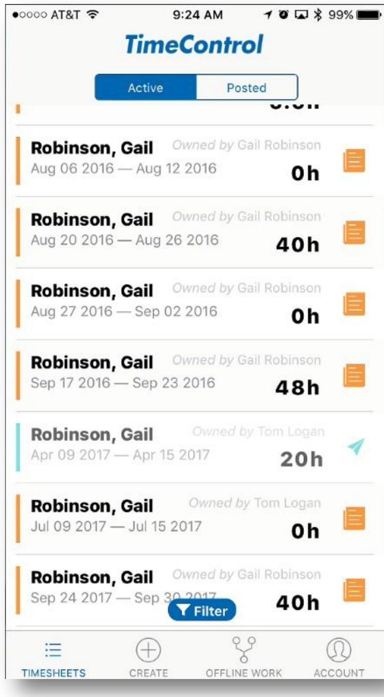
Now enter the server that your organization has identified to use for corporate logins such as this one. The next screen will vary based on the Open ID setup your own organization has created. Here are a couple of examples:



Now enter your corporate login information and you will gain access to TimeControl.

Timesheet List

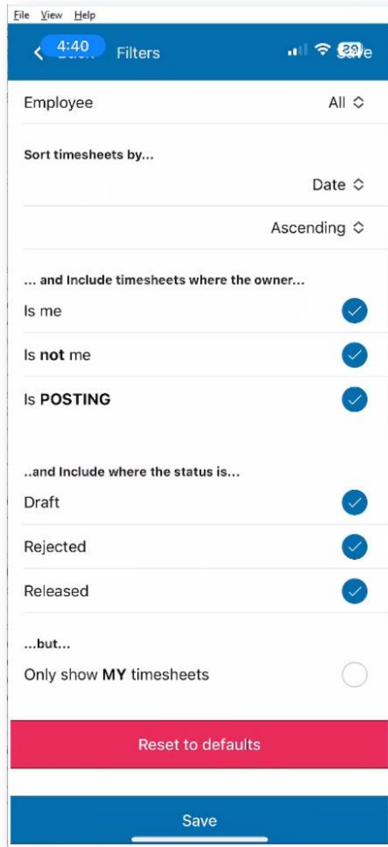
Once you have logged in you will be presented with the timesheet list. The list will show all timesheets to which you have access.



The timesheet view defaults to unposted timesheets. To see posted timesheets to which you have access, click the Posted tab.

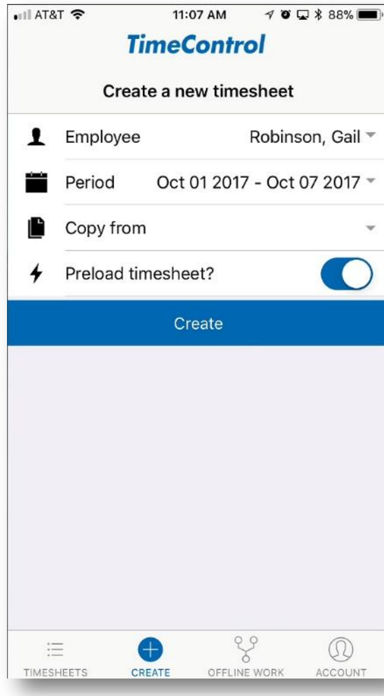
Filters

You can filter the timesheets that are visible to you by clicking the Filter button. TimeControl will allow you to select from a number of criteria. TimeControl only shows timesheets to which the Administrator has given you access through security. The filter command works within those parameters.



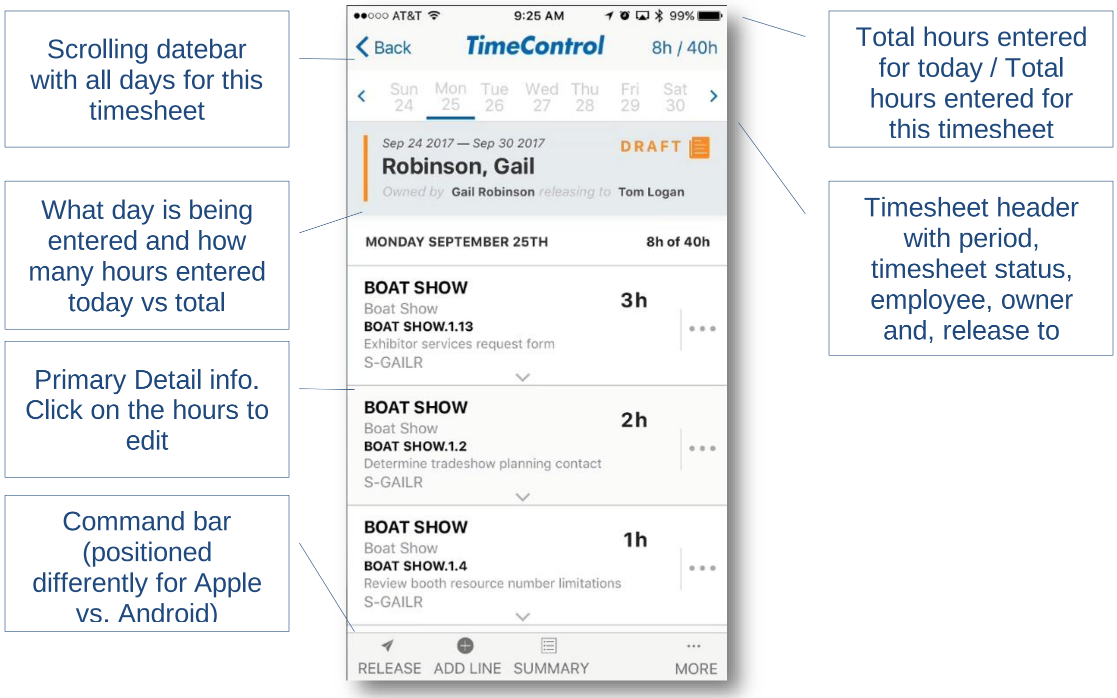
Creating a new timesheet

To create a new timesheet, click the Create button. TimeControl will present you with the option of which Employee to create a timesheet for (providing you can create a timesheet for someone other than yourself), possible timesheet periods, a list of existing timesheets from which you can copy and the option to load preloaded charges or to create a blank timesheet.


AT&T
11:07 AM
88%
TimeControl
Create a new timesheet
Employee
Robinson, Gail
Period
Oct 01 2017 - Oct 07 2017
Copy from
Preload timesheet?
Create
TIMESHEETS
CREATE
OFFLINE WORK
ACCOUNT

Timesheet Entry

Once the timesheet has been created, you can see the detailed view of each line. At the top of the page, the days for the period of the timesheet are displayed. You can click on the relevant day/date and the left and right arrows to scroll if necessary. Above the date scroll bar is the total number of hours displayed.

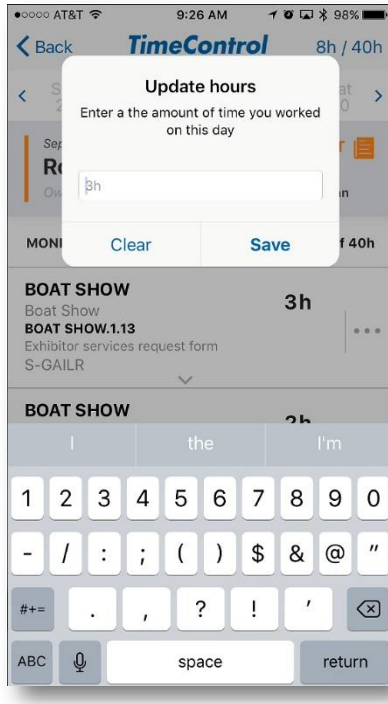


The format is “hours displayed for today / total hours created for this timesheet.

Immediately below the scrolling date bar is the detail line. The primary fields are displayed. Below them is a down arrow to optionally display the secondary fields.

Editing hours

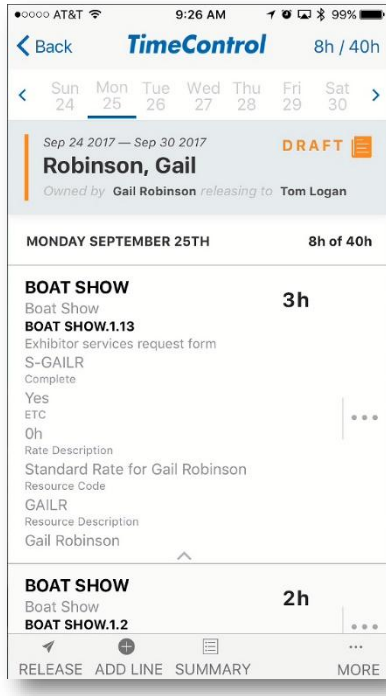
To edit hours, simply tap where the hour is displayed.



TimeControl will pop up an edit field to clear, or change the hours for that day. You can do this in the timesheet screen or the summary screen.

Timesheet Secondary fields

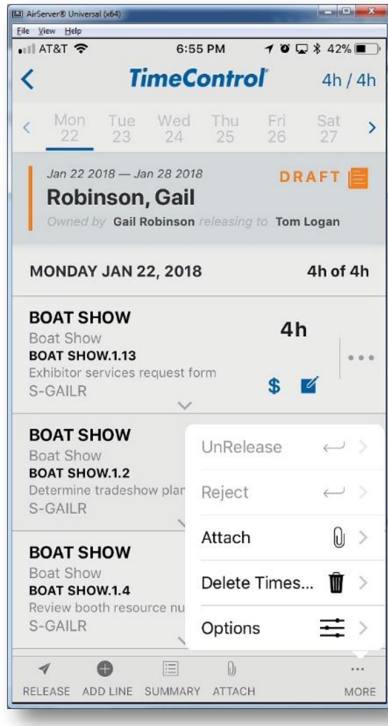
Clicking the down arrow below each primary detail line displays the fields identified as secondary fields.



The fields can be hidden again by clicking the up-arrow. The timesheet options allows the primary and secondary fields to be defined.

Timesheet More Edit Options

Click the More… Ellipses at the bottom-right of the screen.

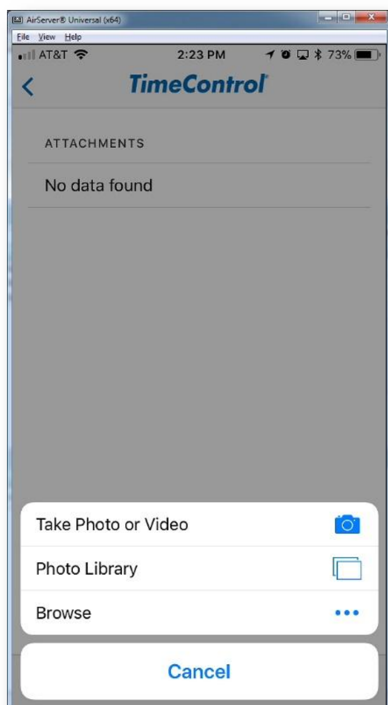


Click on **Options** to see the Timesheet Options which are discussed later in this section.

Click on **Delete** to remove the entire timesheet.

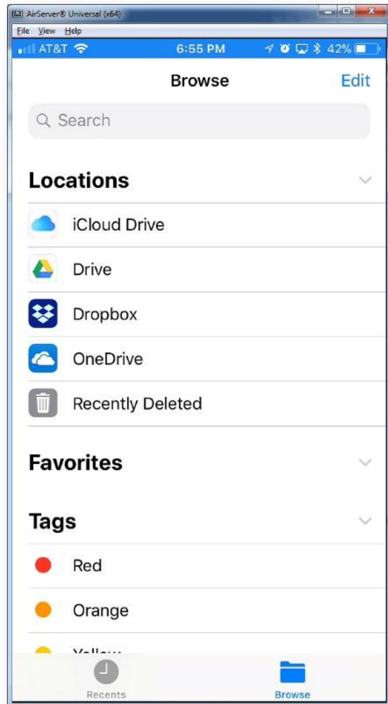
Click on **Attach** to attach files or photos to the entire timesheet. You can also make attachments to expense line items which is discussed later in this section.

Click Add Attachment to add an attachment to the timesheet.



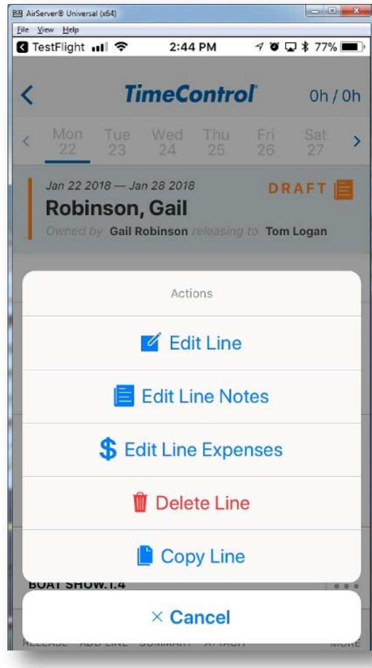
The next screens will vary depending on your device and operating system. You can access your camera to take a picture or video, access your device's photo library to attach a photo or video from your library.

If you select Browse, you will be able to access files in your device and any systems such as iCloud, Google Drive or Dropbox to which your device is linked.



Timesheet Editing

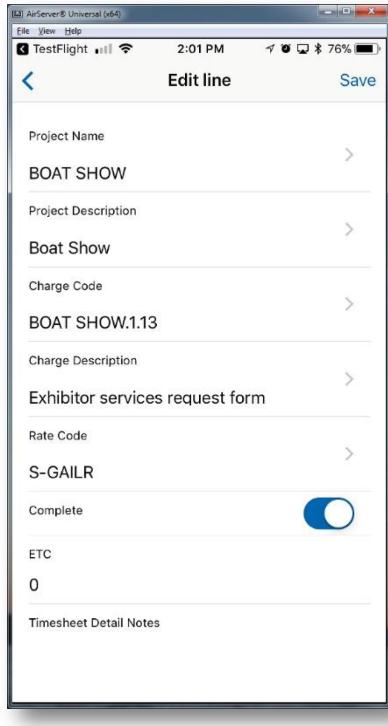
The ellipses to the right of each line displays additional commands.



Options include:

Edit Line

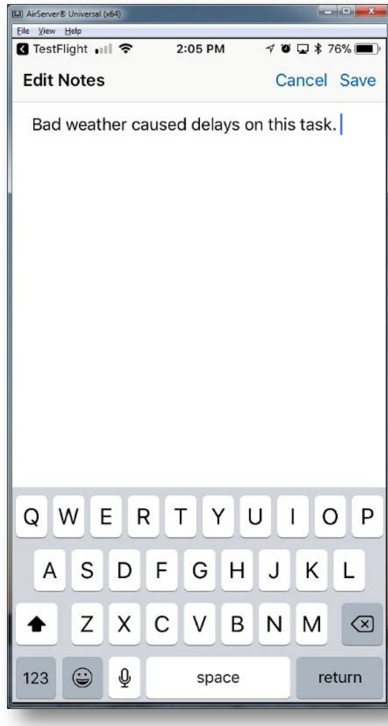
Selecting Edit Line allows you to see more detail at the line level. This allows you to edit hours for any day in the period but also allows you to see primary and secondary fields and make entries for user-defined fields, for task progress or any other data elements in the line.



Click Save once your selections are complete to save any changes you have made.

Edit Line Notes

To enter notes for just this line, click Edit Line Notes. You will be presented with a panel for writing your notes that are significant to this line item. The notes are for the entire line. They are not specific to any one day in the period.

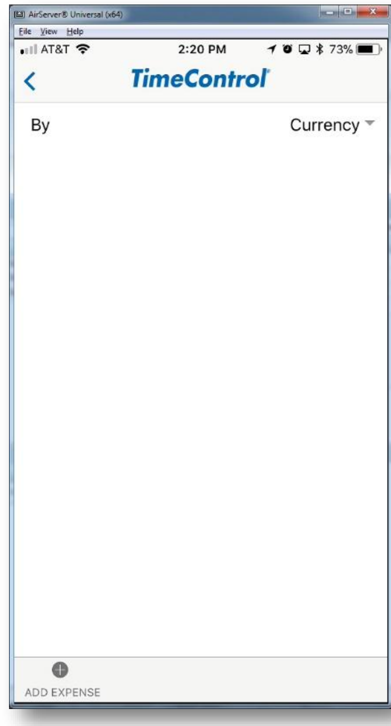


Once you have entered your notes, click Save to record them.

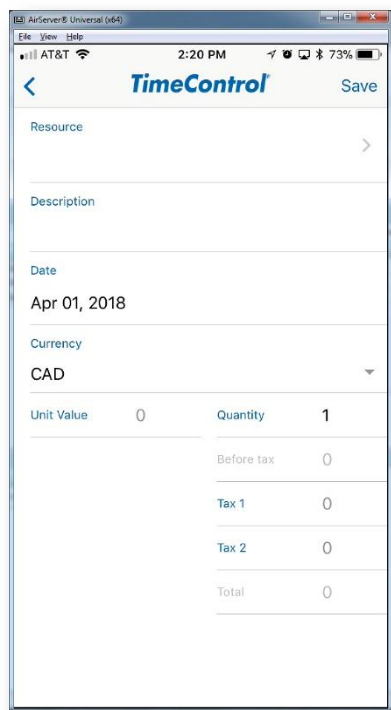
Edit Line Expenses

The TimeControl Mobile App lets you add expenses data to any line item in your timesheet. Expenses are approved at the same time as your timesheet. Each line can support an unlimited number of expenses and each expense item can include an unlimited number of attachments.

When you select Edit Line Expenses, from the Line Item Options, you are entering the expenses attached to this charge item.

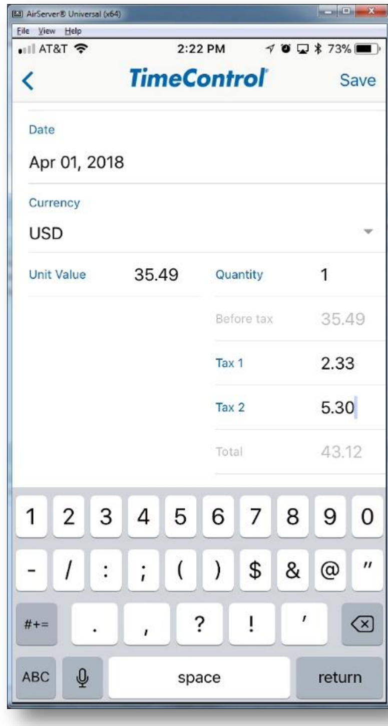


Click on Add Expenses to an Expense line to this Line Item.



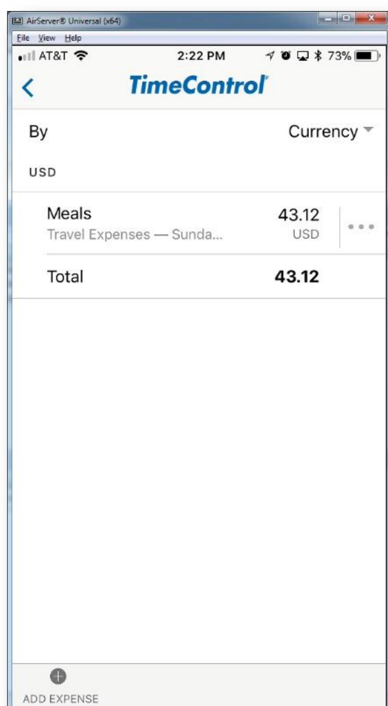
Now select a Resource. This will display only non-labor resources.

Enter a description of your expense. Then move lower to the amount of this expense item.



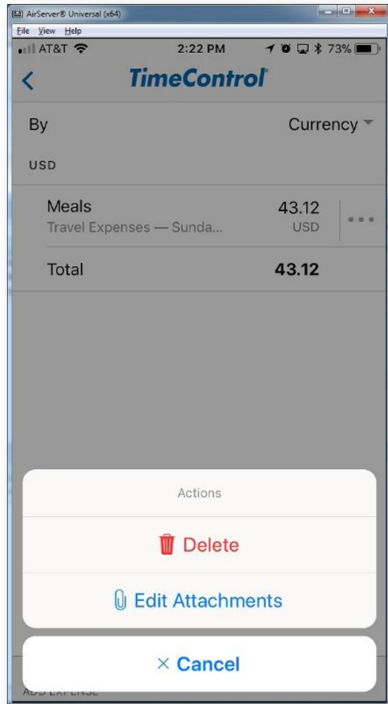
Select a Currency for this item. The list of Currencies is set by your Administrator in the TimeControl system configuration.

Enter the Amount, the Quantity and any extra taxes or charges. TimeControl will calculate the total. Click Save to save the line item.



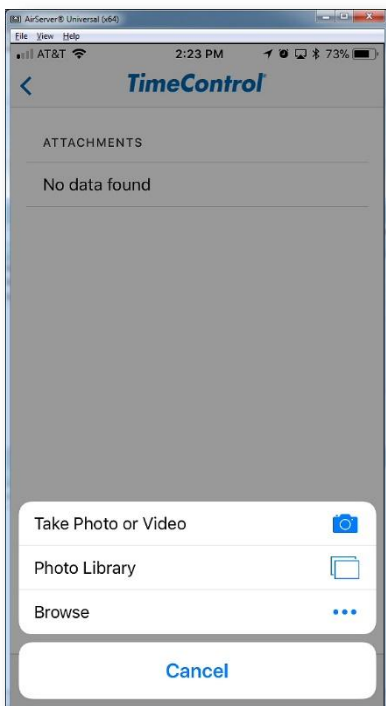
Now that the Line Item Expense has been saved, you can optionally add attachments to it. The TimeControl Mobile App will access your camera, stored files area and Photo libraries. The exact screens may vary depending on your device and mobile operating system.

Click on the Ellipses to the right of the Expense Item and select Edit Attachments.



Click on Add Attachments. Depending on your device, you will see different options for making an attachment.

Take a photo directly, access your photo library or browse your file area which can include iCloud, DropBox, GoogleDrive or other file systems to which your device is connected.



Select Photo to take a picture immediately.

Take a picture of a receipt or other collateral you may need to attach to the Expense.

Delete Line

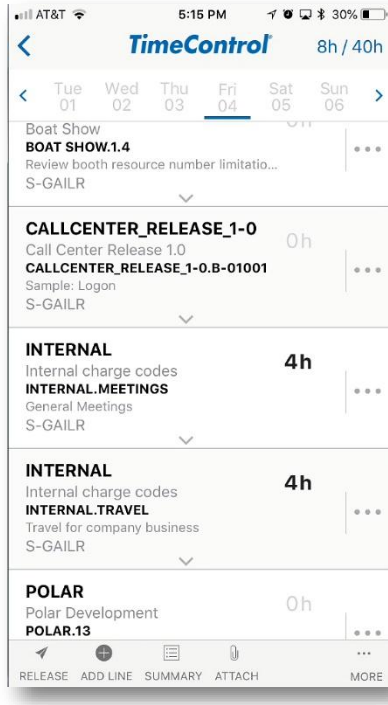
Remember, if you delete a line, it deletes the line not only from this day but also from any other days in this timesheet.

Copy Line

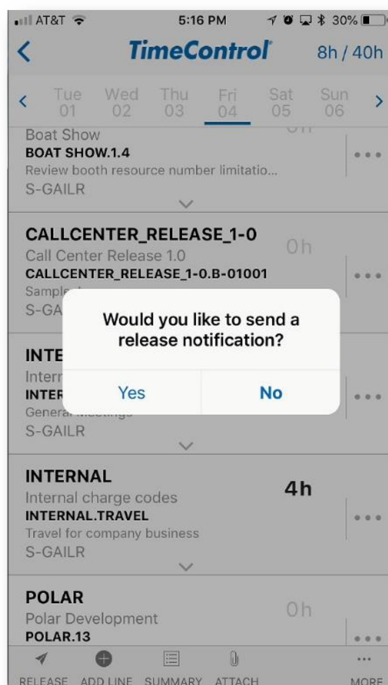
Copy line will make an identical copy of this line without the hours from any day in the period. You can then edit the hours or other information in the copied line.

Release Timesheet for Approval

When you have completed all entries for the timesheet, it can be released for approval from the TimeControl Mobile App or from the TimeControl web interface. To release through TimeControl Mobile App, select Release at the bottom of the Timesheet entry.

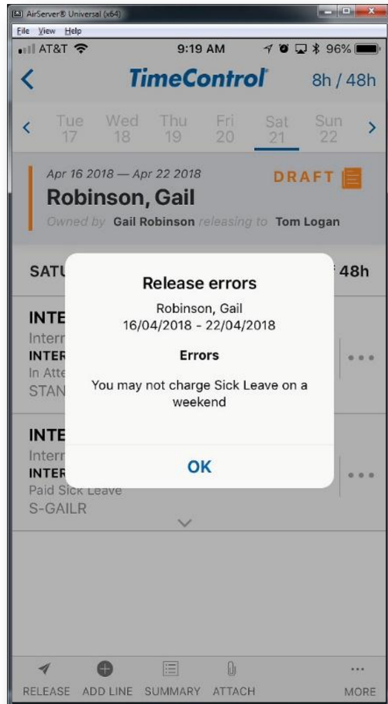


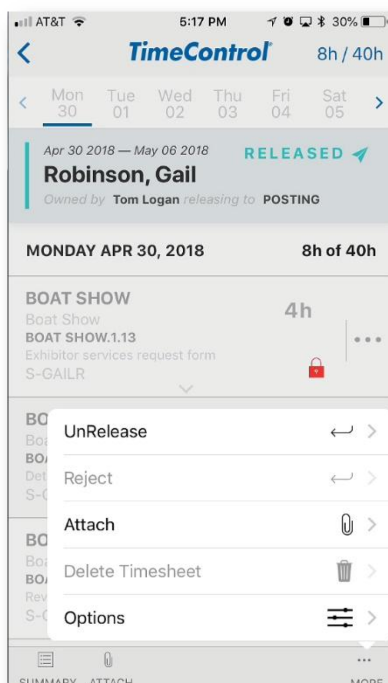
TimeControl will next ask if you wish to send an email notification to the person who will receive control over this timesheet for approval.



A release notification may be particularly useful if this timesheet is being submitted at an unusual time in the cycle or if it is being resubmitted after being rejected.

Now TimeControl will determine if there are any automated Validation Rules that apply to your timesheet. If there are any errors or warning about the timesheet, they will be displayed immediately. If the timesheet has an error, it will remain in your control until the error is corrected.



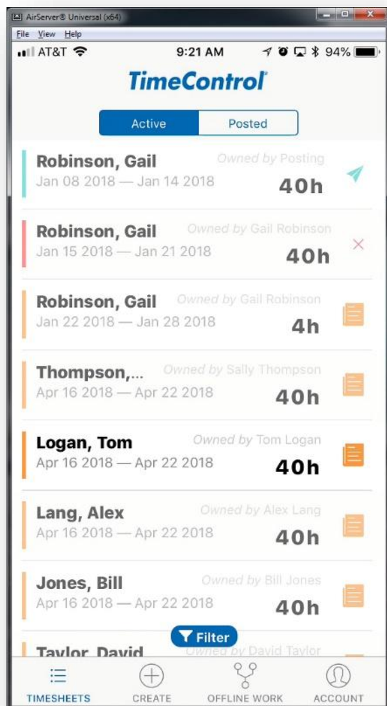


If there are no errors, TimeControl will now show you who the timesheet is now owned by. For a moment, you can UnRelease the timesheet and return it to your control. But, the moment that the receiving user sees the timesheet in their interface, this option will no longer be available.

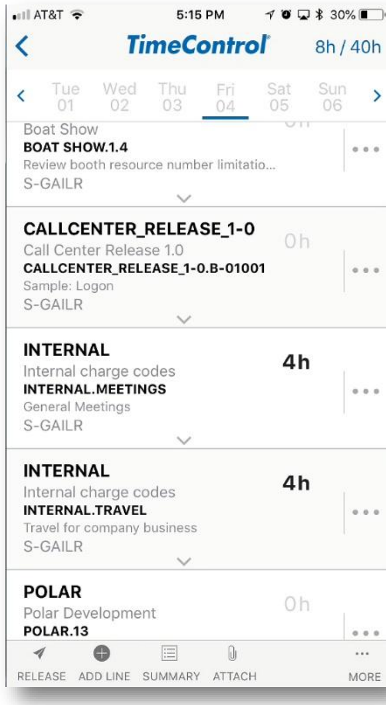
The timesheet has now been released for approval.

Approving Timesheets

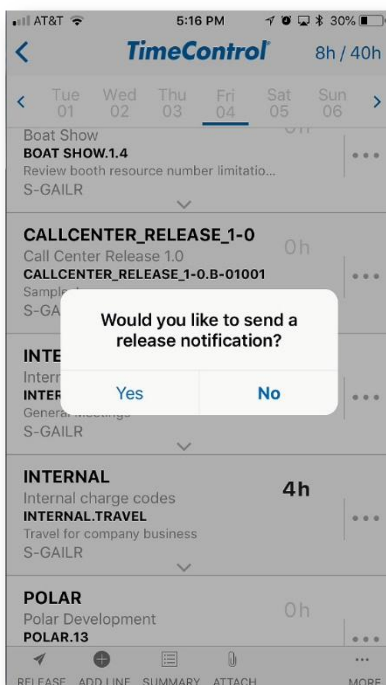
A supervisor might be responsible for the approval of multiple timesheets. In this case, the typical TimeControl Mobile App screen to use will be the Timesheet List.



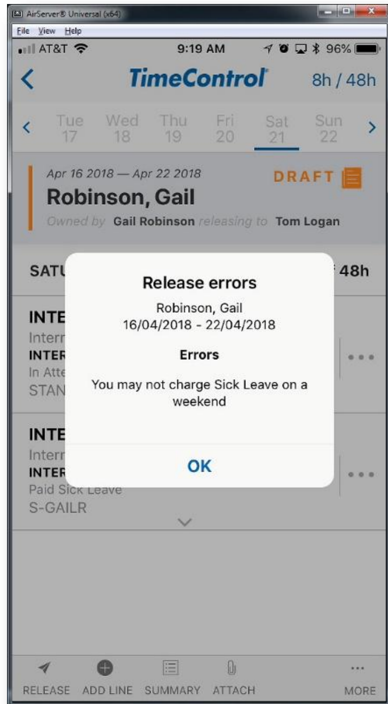
The Timesheet List displays all timesheets that you have or had access to. Timesheets which have already been released are in blue. Timesheets which have already been rejected are in red. Timesheets currently owned by you and are currently under your control will be in bold. To release a timesheet. Select that timesheet and click Release.



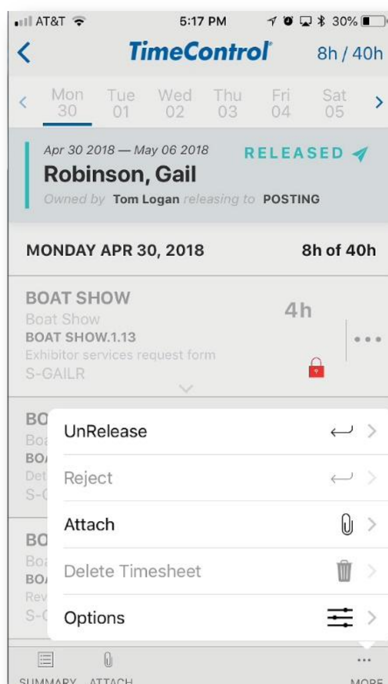
TimeControl will then ask if you need to send an email notification to the next person to receive the timesheet for approval. If you are the last person who will need to approve the timesheet or if the person receiving it does not have an email associated to their account, this prompt will not be displayed.



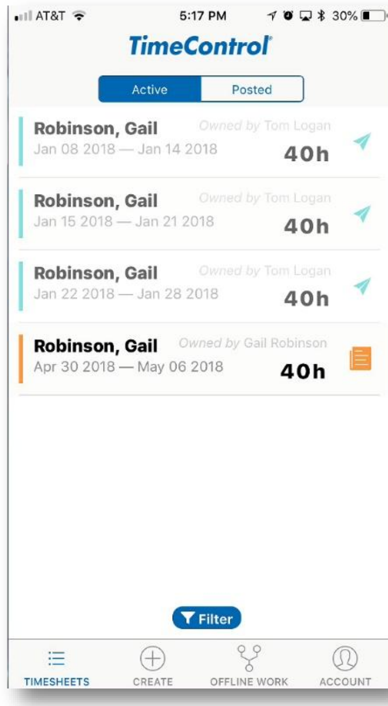
Now TimeControl will check all business Validation Rules associated with this timesheet and will display any errors or warnings.



If there are no warnings or errors, the timesheet will move to the next level of approvals. If this is the last manual approval, then its owner will become Posting.

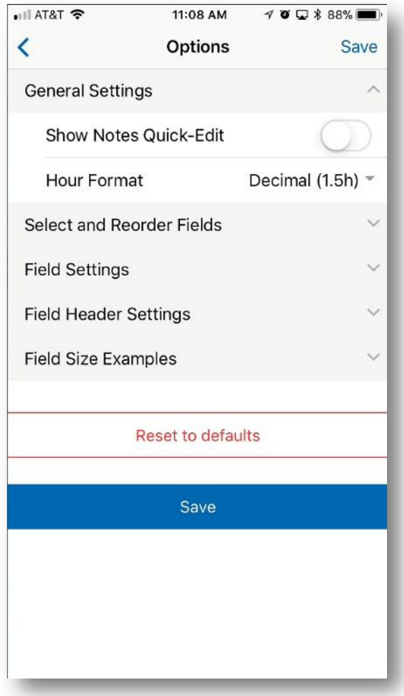


Returning to the Timesheet List will show the newly released timesheet no longer in bold. It will change to blue.



Timesheet Options

Timesheet options has numerous options to change the display of the timesheet.



Notes Quick-Edit will display an icon on the timesheet to allow notes to be edited just by clicking that icon.

Hour Format changes how hours and minutes are displayed on the timesheet.

Select and Reorder fields determines which fields are displayed on the timesheet screen and in which order.

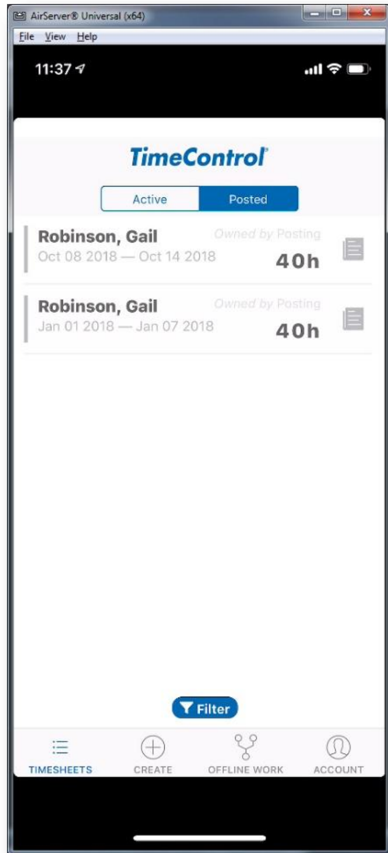
Field settings determines which fields are set in the primary view vs. the secondary view.

Field Header settings changes the font sizes of fields

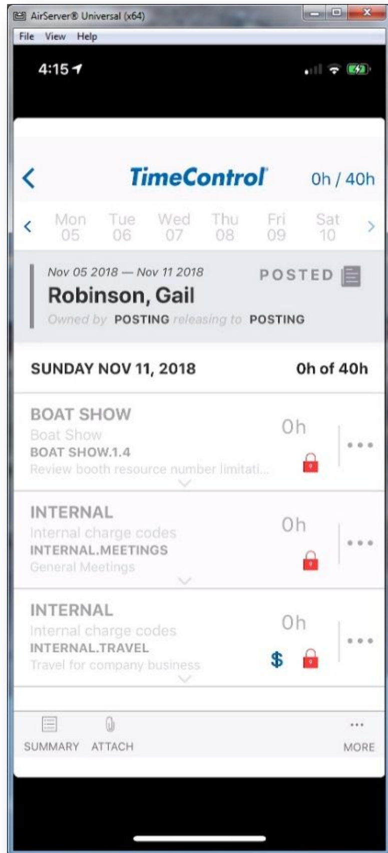
Field size examples gives you an indication of how large each font size is.

Viewing Posted Timesheets

You can view past timesheets in the Timecontrol Mobile App which are already posted. To view a list of posted timesheets to which you have access, click Posted at the top of the Timesheet List.

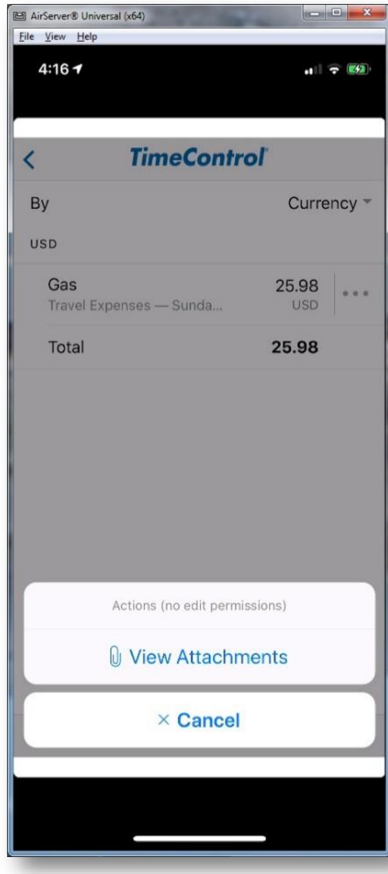


Select the timesheet you wish to view.

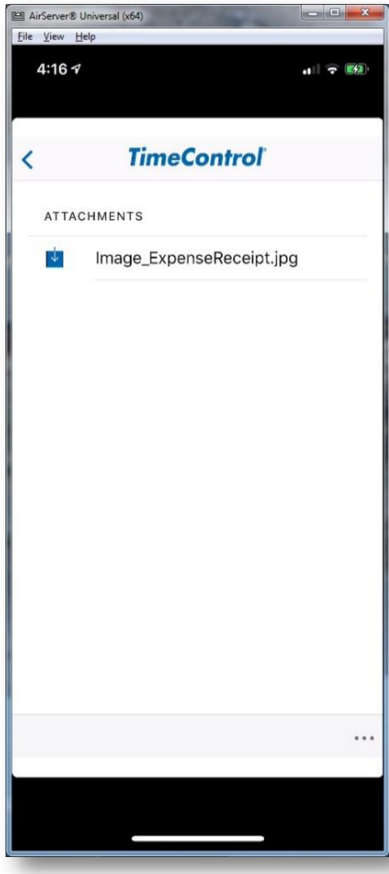


If you have Debit/Credit Adjustment rights, you can adjust a posted timesheet. Consult the TimeControl Reference Guide for more information on this process.

If a posted timesheet has expenses attached to it, a “$” sign will appear. Click on the “$” to see more details.



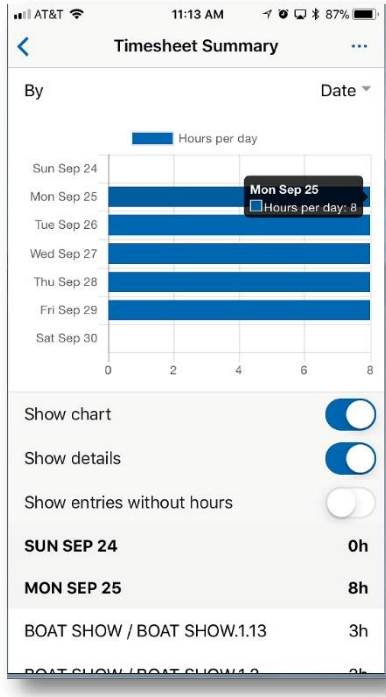
If the expense items contain any attachments, you can click View Attachments to see any files or photos that were attached to this Expense item.



Any photos or files will appear if they can be rendered in the mobile device.

Summary View

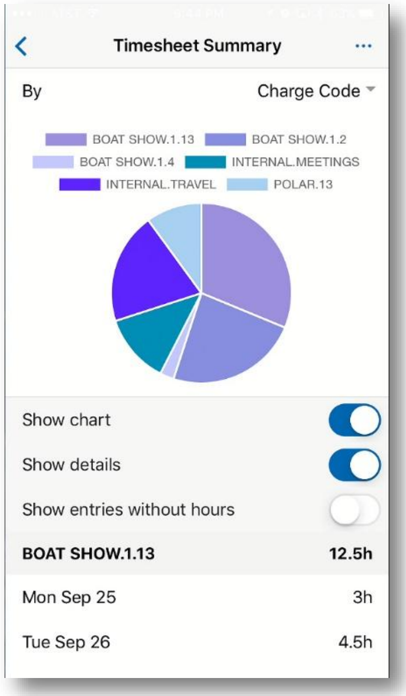
The Summary view shows the timesheet data in numerous formats. Some of these formats are interactive where data can be changed by tapping on the relevant data. Some are more view-only in nature.



When Summary is selected, the default view is to show the timesheet in day form. There are options to display or hide the daily bar chart and then to show the totals for each day selected for each charge. In this view, the hours are editable by clicking on the relevant hour display.

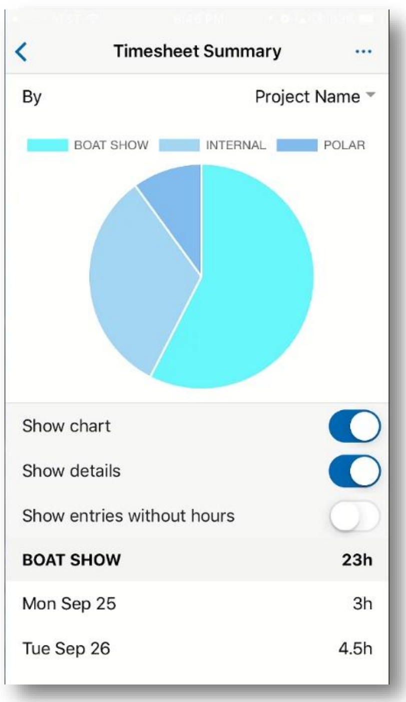
There are numerous other Summary displays for different perspectives and views of the data.

Summary by Charge

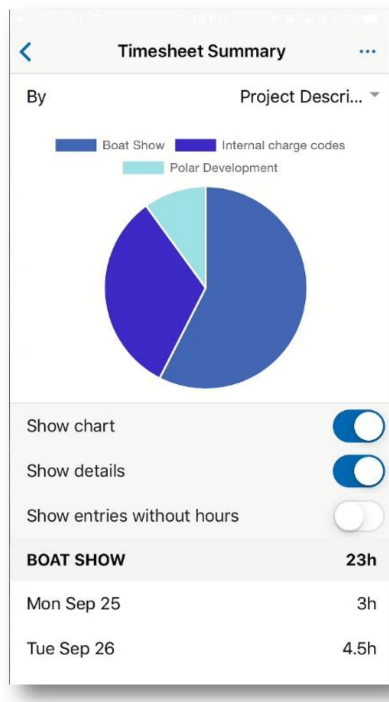


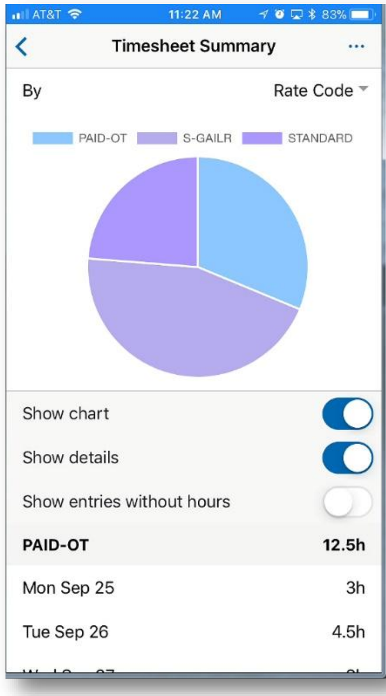
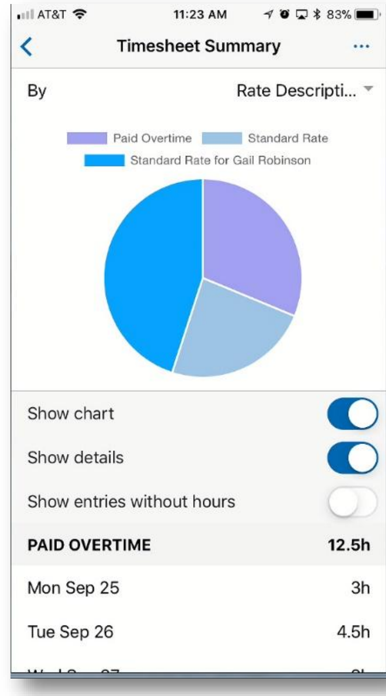
Summary by Charge Description

Summary by Project Name



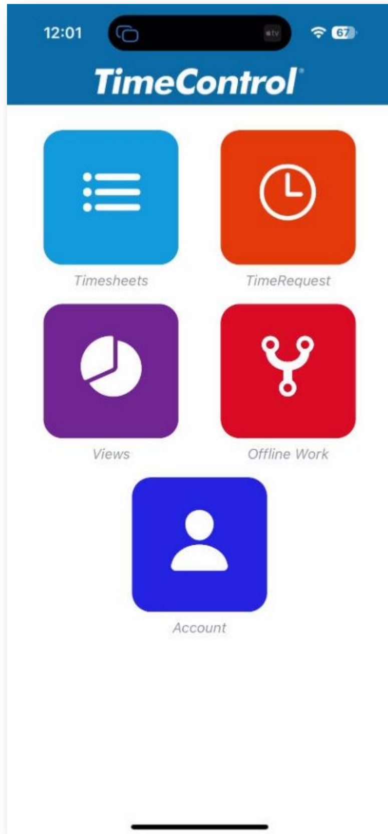
Summary by Project Description



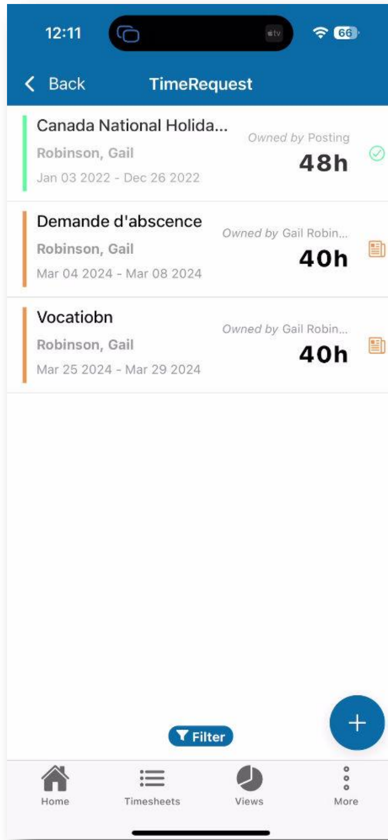
Summary by Rate	Summary by Rate Description
	

TimeControl Mobile TimeRequest™

The TimeControl Mobile App supports the entry, editing, release and approvals of TimeRequests. The rules and processes for TimeRequest are described in more detail elsewhere in this guide. We will focus here on how that functionality works inside the Mobile App.



The TimeRequest list screen appears when you select TimeRequest. From here youc an select an existing TimeRequest to edit or if you are a supervisor to approve or reject.



To create a new TimeRequest, click the + key at the bottom of the screen.

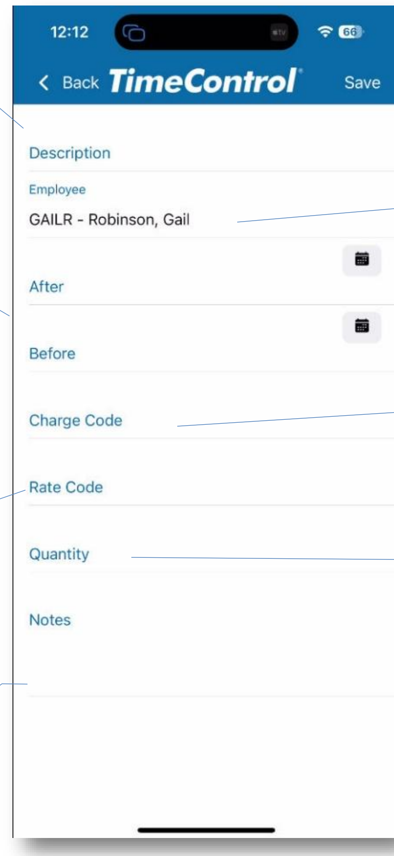
The TimeRequest detail screen has several details that must be entered.

Description
Enter a description of the request

After
Enter the start date of the TimeRequest then the end date

Rate Code
Enter the appropriate Rate Code for this TimeRequest.

Notes
You can enter free form notes here.

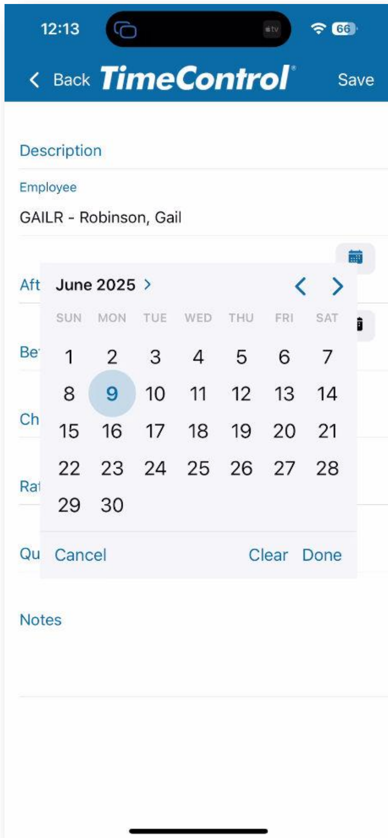


Employee
Select the employee for whom this TimeRequest is being made. This may be yourself.

Charge Code
Select the appropriate charge code for this TimeRequest. For example: “paid vacation”

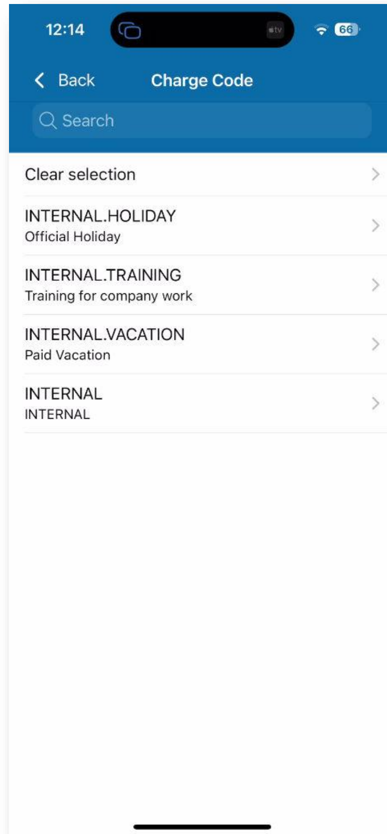
Quantity
Enter the number of hours per day for this TimeRequest.

Over the next few pages, we’ll see a TimeRequest record being entered.

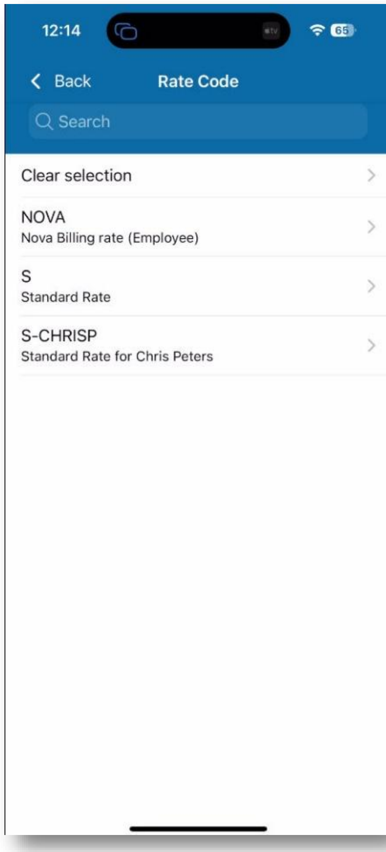


Enter the description then tap on the Employee line if needed to select or change the employee. This may not be needed. If you are entering the record for yourself, you employee selection will already be displayed.

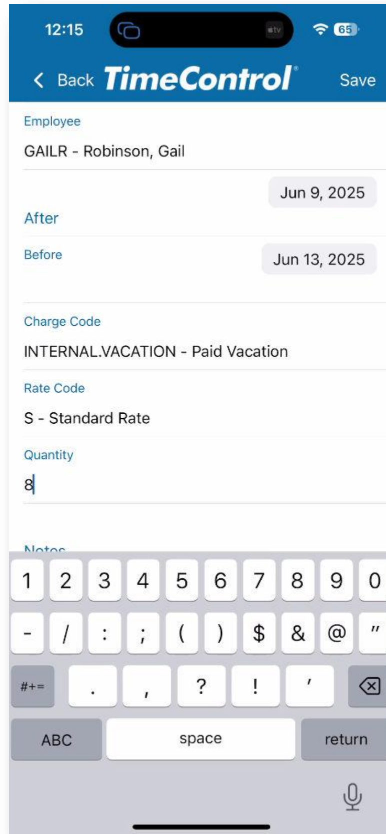
Now select the Later than date icon to enter the start date of the TimeRequest. Do the same on the next line to select the end date.



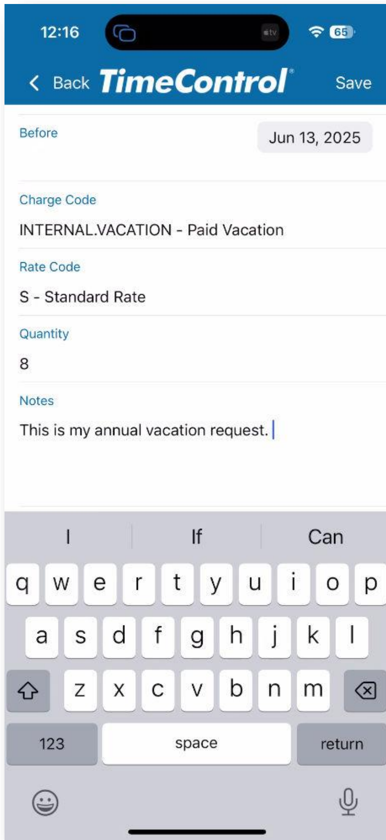
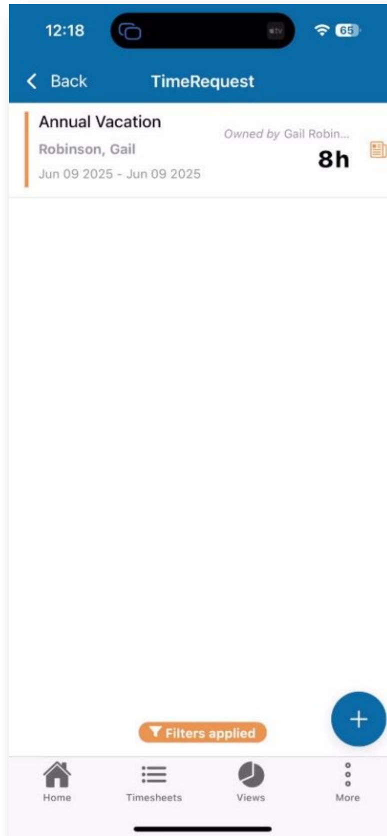
Tap the Charge Code line to see a list of possible Charge Code selections that are appropriate to your organization and your situation. Select the most appropriate Charge Code for your TimeRequest from the existing list.



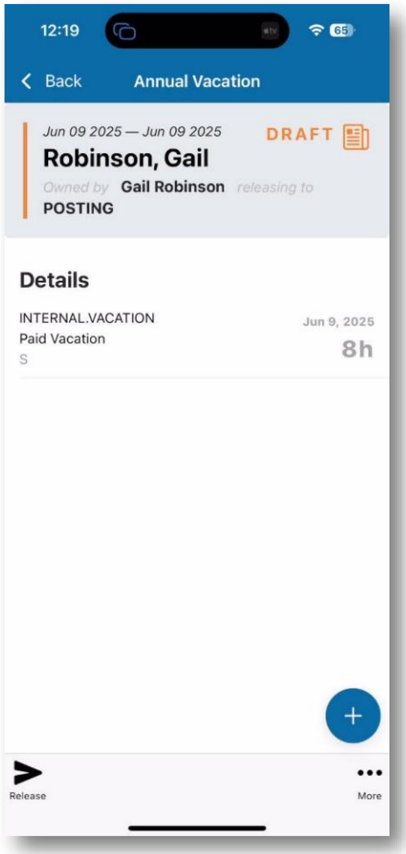
Tap the Rate Code to select from the possible Rate Codes configured for your organization for TimeRequests. Select the Rate Code that is appropriate for your situation.



Tap on the Quantity line to enter the number of hours per day you would like to submit in this TimeRequest. The keyboard should appear for you to enter this number.

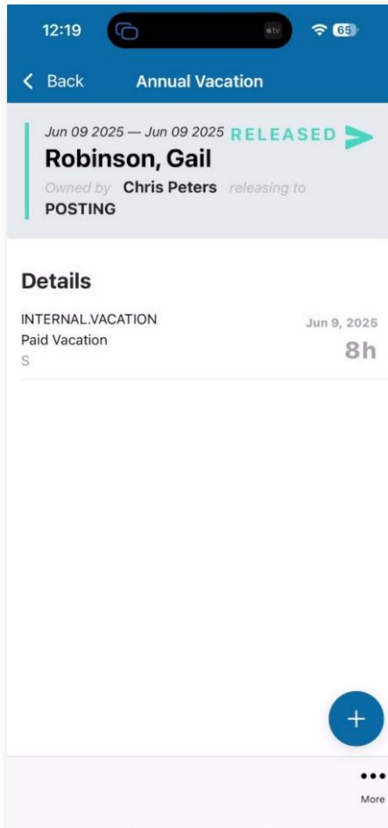
<table>
<tr>
<td>
</td>
<td>
</td>
</tr>
<tr>
<td>In the last line you can enter free form notes that you may wish to save with this TimeRequest either as a reminder for yourself or for the supervisor to see when they consider approving this TimeRequest.</td>
<td>When you click Save at the top of the screen, you will be returned to the TimeRequest List and should see the TimeRequest you’ve just created.

Your TimeRequest is now saved but has not yet been submitted.</td>
</tr>
</table>

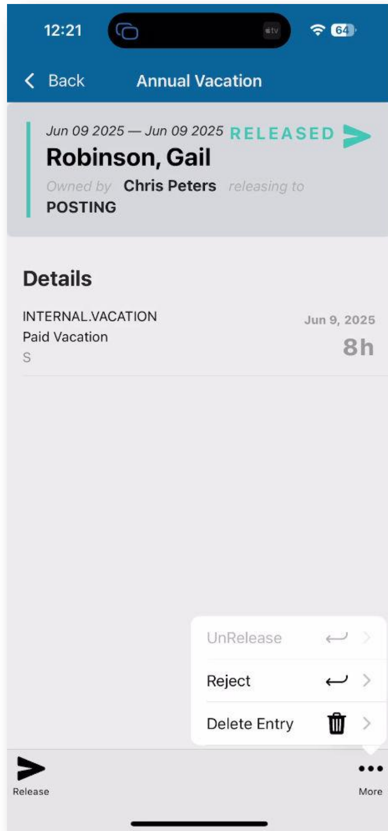
 Click on the completed TimeRequest from the TimeRequest List to submit it for approval. Review the TimeRequest if needed for accuracy. You will see at the top of the screen that its status is still DRAFT. If you are ready to submit, click the Release Arrow at the bottom left of the screen and the TimeRequest will be submitted.	

TimeControl Mobile TimeRequest Approvals

Now that the TimeRequest has been submitted, it can be reviewed by the supervisor either through the Web browser or in the TimeControl Mobile App. The supervisor can see any TimeRequests currently under their control.



By clicking on the TimeRequest, they can then see the details and take action on the request.

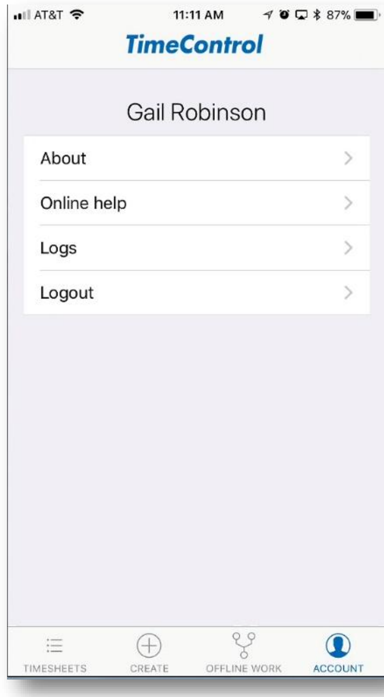


The supervisor can release the TimeRequest by clicking the Release Arrow at the bottom left. If they wish to date different action, they can click the ellipsis and either reject the TimeRequest back to its source or, if they have rights to do so, delete the entire TimeRequest.

Account / Logout

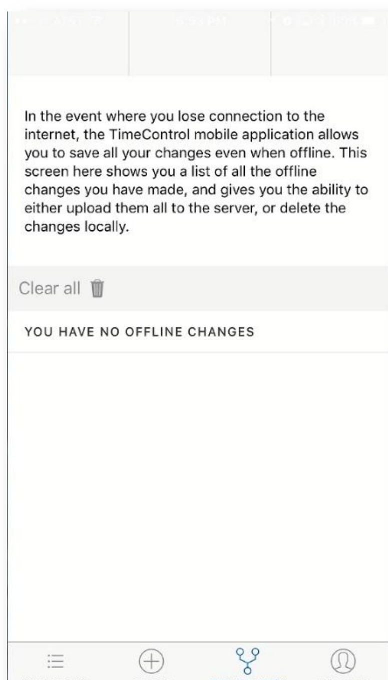
The Account screen has several options. From this screen, you can display online help, show information about the version number of the App and the TimeControl Server to which it is connected and any error logs for errors TimeControl Mobile has encountered.

You can logout of the App from this screen in which case you will need your TimeControl Server URL, your Username and Password to log back in.



Offline

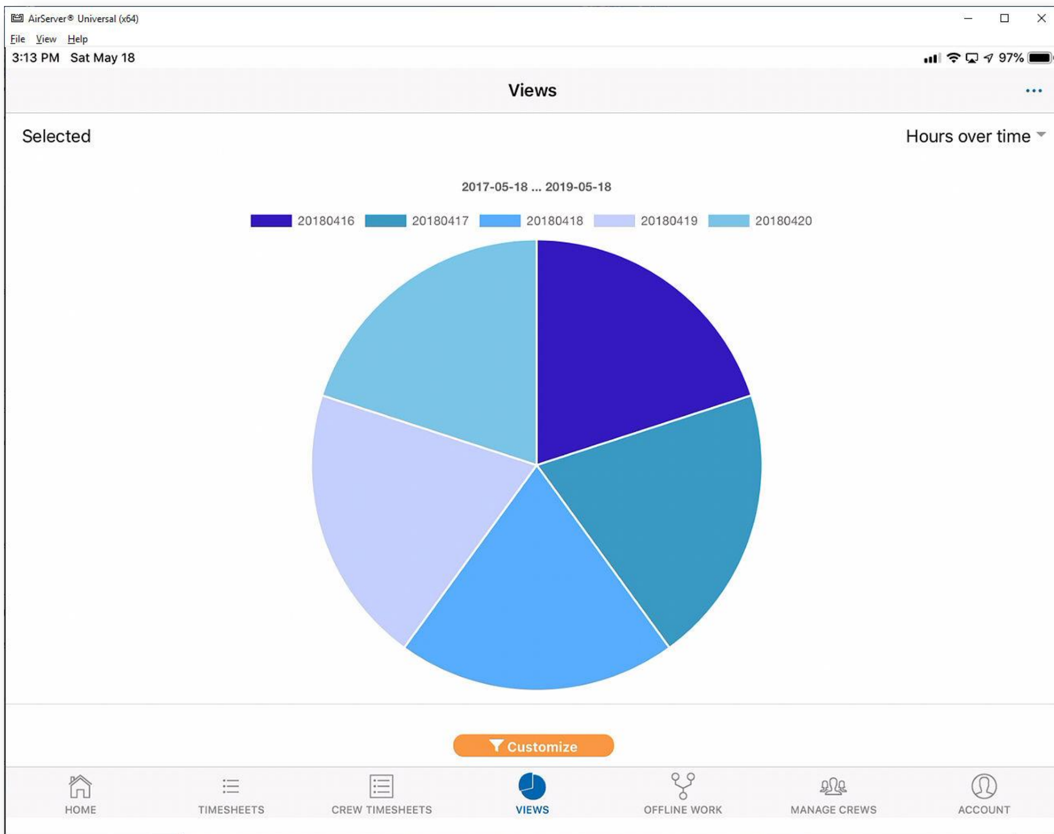
TimeControl has the ability to store data internally in case of momentary loss of Internet connection.



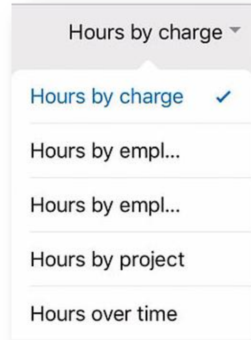
Once you are reconnected to the Internet, the App should synchronize automatically with the TimeControl server. This screen will let you know if you have any cached information awaiting synchronization.

Views

TimeControl Mobile includes a Views Generator in which any user can have different perspectives of data to which they have access.

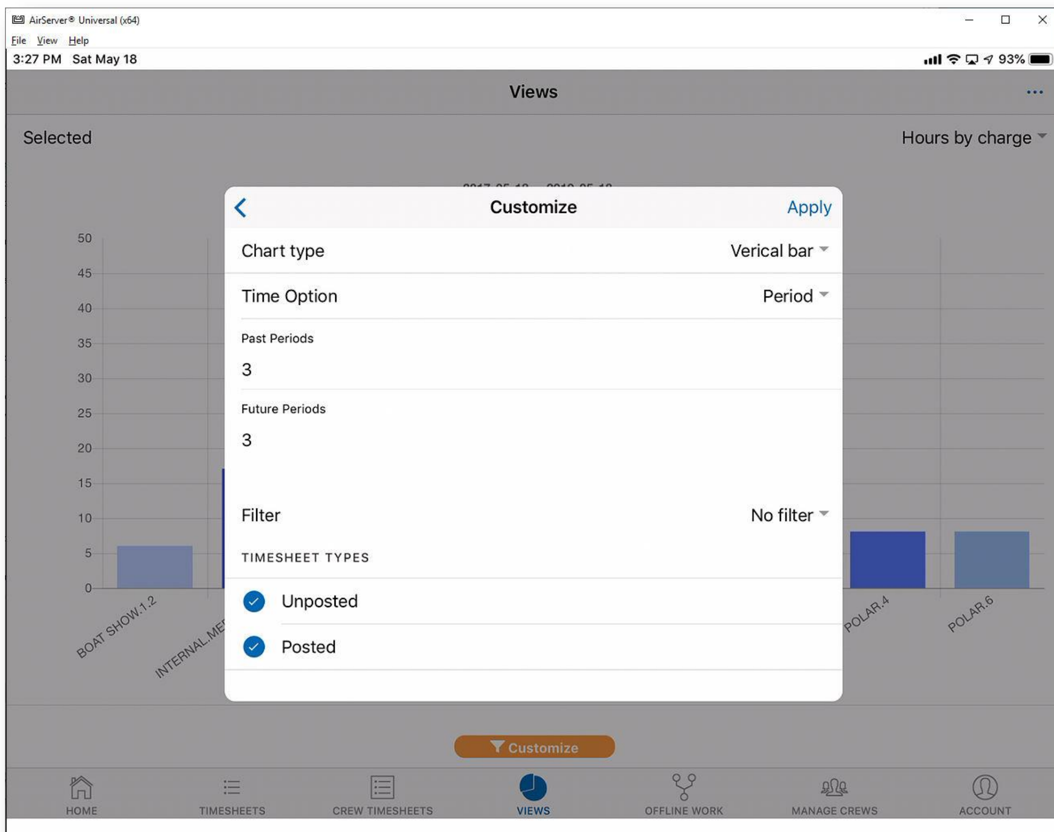


Clicking on the top right of the screen allows you to choose from numerous views including:

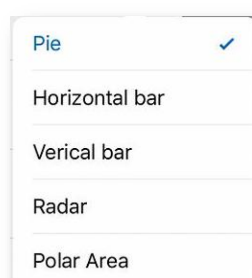


- Hours by Charge
- Hours by Employee
- Hours by Project and;
- Hours over time

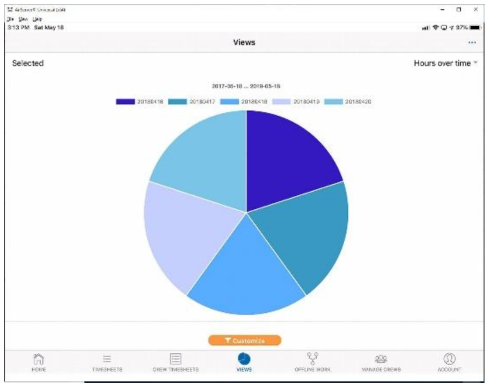
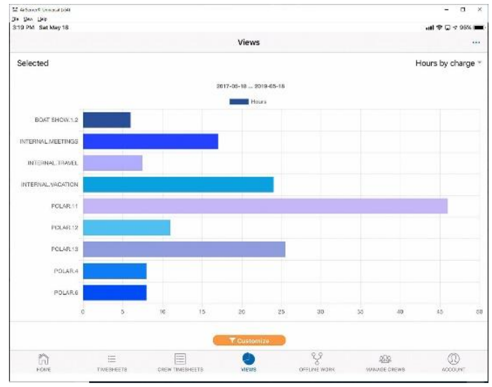
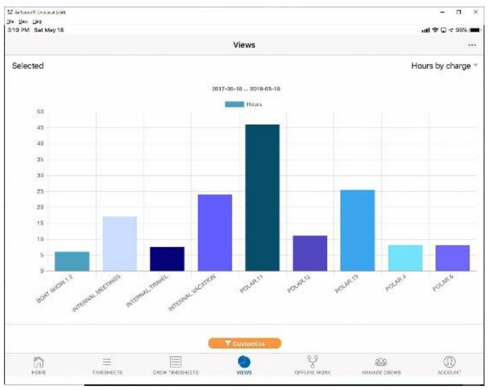
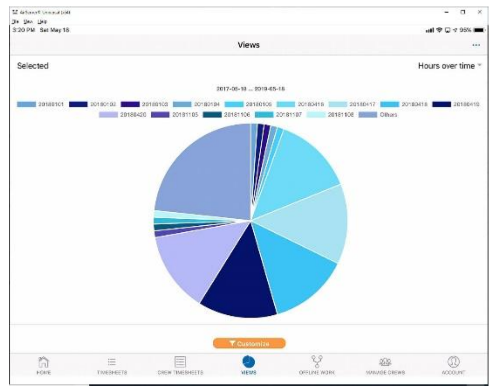
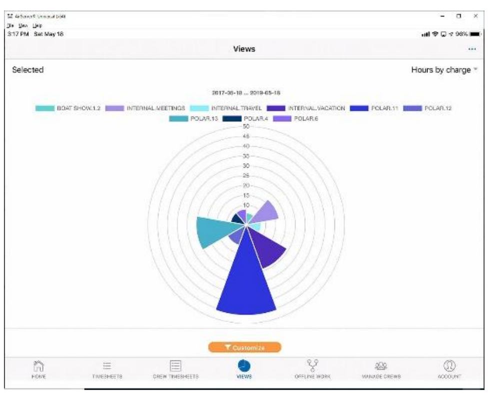
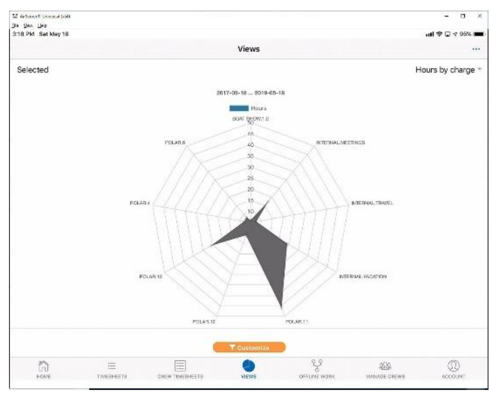
For each view, you can customize the view by clicking Customize at the bottom of the screen.



There are numerous chart types including Pie Charge, Horizontal Bar, Vertical Bar, Radar and Polar Area.



Below are some examples of how these options might be displayed.

Pie Chart 	Horizontal Bars 
Vertical Bars 	Pie Chart 
Radar Chart 	Polar Area Chart 

Help Topics

TimeControl includes an extensive online help facility for users. Select **Help** from the TimeControl menu bar to view the introduction topic, the Help table of contents and a search function to quickly find the information you need.

In addition, you will find tips for Administrators on the TimeControl Blog at blog.timecontrol.org.

Getting Technical Support for TimeControl

Technical support for TimeControl is available through numerous media. Our technical support hot line is available from 9:00am to 5:00pm EST from our Montreal offices. Email for technical support is answered immediately during those hours. Our website also contains technical information of interest to our users and is, of course, available 24 hours per day. You may also find our technical Frequently Asked Questions of interest. To contact HMS Software's Technical Support, use the following contact information:

HMS Software Montreal (Head Office)
189 Hymus boulevard, Suite 402,
Pointe-Claire, Quebec
H9R 1E9, Canada
Tel: +1 514-695-8122
Fax: +1 514-695-8121
Email: support@hms.ca
Web: www.timecontrol.com/support