TimeControl ®

Getting Started Guide

The fastest path to a TimeControl implementation

Last update: December 2024

Copyright

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

Table of Contents

Getting Started

So, you're a brand new TimeControl Administrator and you're about to get started implementing TimeControl for timesheet use in your organization.

That's great news.

You look at the Reference Guide, stop by the TimeControl.com website to look at the webcasts and within an hour you're completely overwhelmed. There seems to be hundreds of possible permutations. Should you link to a project management system? Should you create business rules? What user-defined fields should you create? How do you activate TimeControlMobile™?

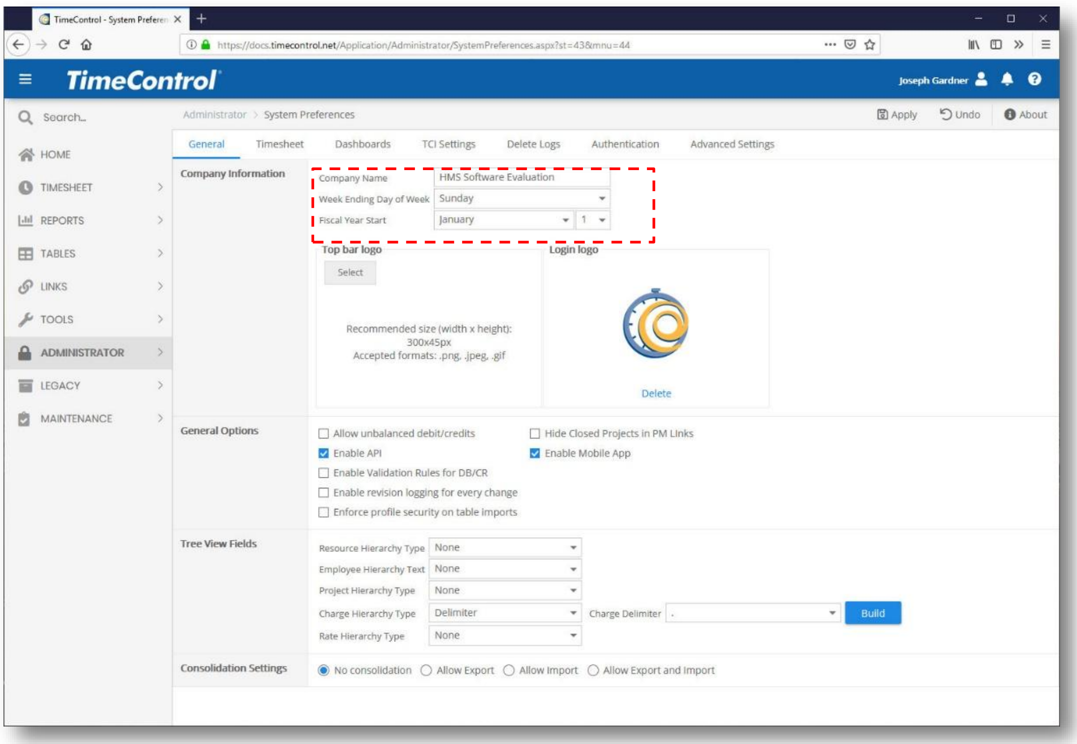
Don't worry. You've come to the right place. This guide will give you a start at getting your TimeControl up and running with the most basic and minimalist configuration and still leave you open to evolve your system and your organization's timesheet process as you become more familiar with TimeControl, and you see more ways it can be implemented.

TimeControl is a tremendously flexible system by design. The intent of the system is to provide a single timesheet interface for many different possible purposes. TimeControl can be used for time and attendance, project task tracking, government compliance for DCAA and R&D tax credits, time and billing and much, much more. But we don't need to get all that working on the first day. Over the next couple of pages, we'll walk through where to get started and what you <u>must</u> do to get TimeControl or TimeControlOnline™ working and into production.

System Preferences

Our first stop in getting TimeControl started is System Preferences. To get here, you'll need to login as the System Administrator using a browser such as Chrome, Edge, Safari or Firefox. TimeControl is multi-browser compliant. If you're using TimeControlOnline, HMS Software's hosted TimeControl timesheet service, then the URL to your TimeControlOnline environment and your login information were sent to you. If you've purchased and installed TimeControl on your premises, then the default login immediately after installation is username: "ADMIN" with password: "admin".

Once you're in TimeControl, click on the Administrator tab and then on System Preferences. You should be presented with the screen below. If you have issues you can contact HMS Technical Support by email at support@hms.ca or by phone at +1 514-695-8122 to get assistance.

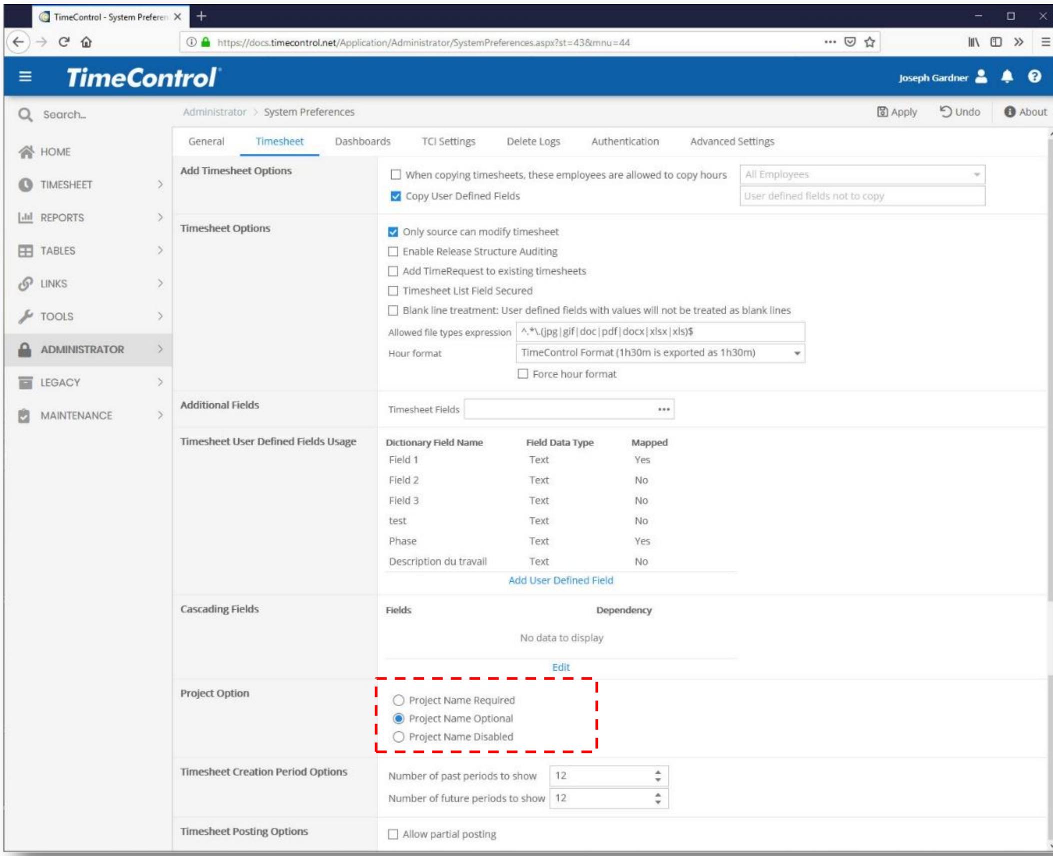


Once you're in the System Preferences function there are a couple of key things that have to be set.

On the General tab, enter your company or organization's name.

Next enter the organization's start of the Fiscal calendar.

When you're done, click on the Timesheet tab.



There are numerous choices here but the only one you should decide on right away is whether you'd like to impose the use of Projects for each line item. A timesheet line can have both a project and beneath that project, charge items. But, you can also have charge items which are not at all associated to a project (such as meetings or vacation). Organizations which use TimeControl for project/task tracking will often use a project for all lines by creating an internal project for non-project tasks. This will make the data clearer later when you're reporting on it.

If, however, you intend to use TimeControl primarily for Time and Attendance or other purposes, you may wish projects to be optional or not required on each timesheet line. Whichever you choose, it's best to make this decision before you start entering timesheet data.

There are lots of other options in System Preferences but the others can be adjusted at later dates.

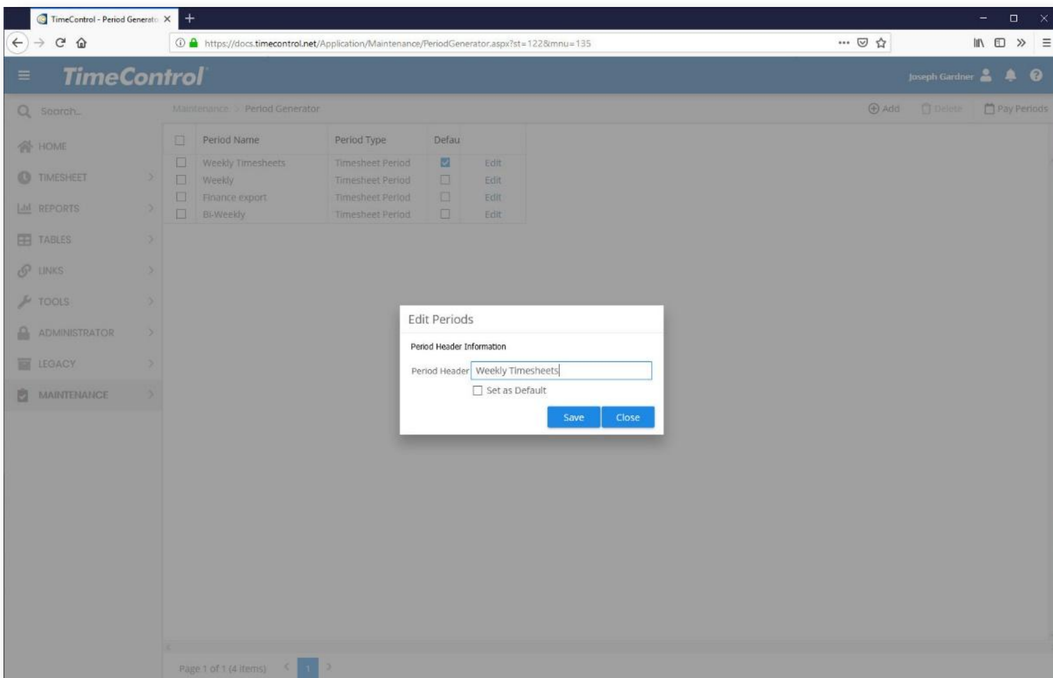
Timesheet Periods

TimeControl allows you to create your own timesheet periods. These are assigned at the employee level so you could, if you wished, have different timesheet periods for different groups of personnel. But for now, let's set up the simplest definition. We'll need to define at least one timesheet period list so people can start entering timesheets.

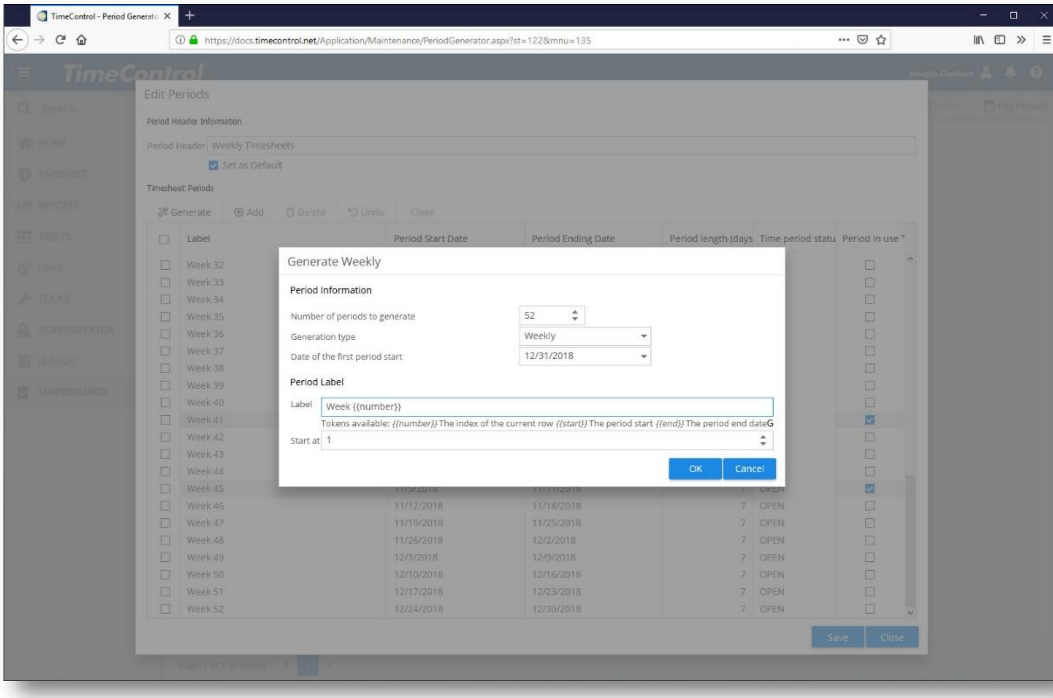
Go to the Maintenance Tab and select Period Generator.

Click on **Add** in the Action Menu.

Now enter the name you'd like to call this set of timesheet periods. For example "Weekly" or "Bi-weekly timesheets". If this is the only period set you're planning on, select **Default** to make sure this is automatically selected when adding employees later.



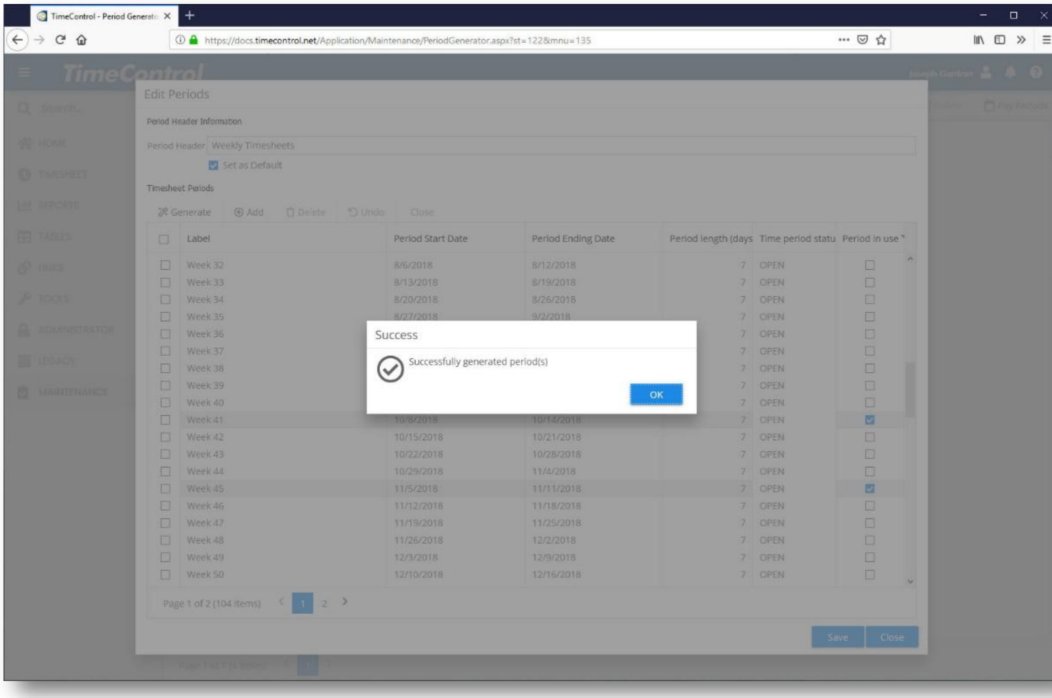
Now you'll have a blank list of periods. Click Generate to add periods automatically.



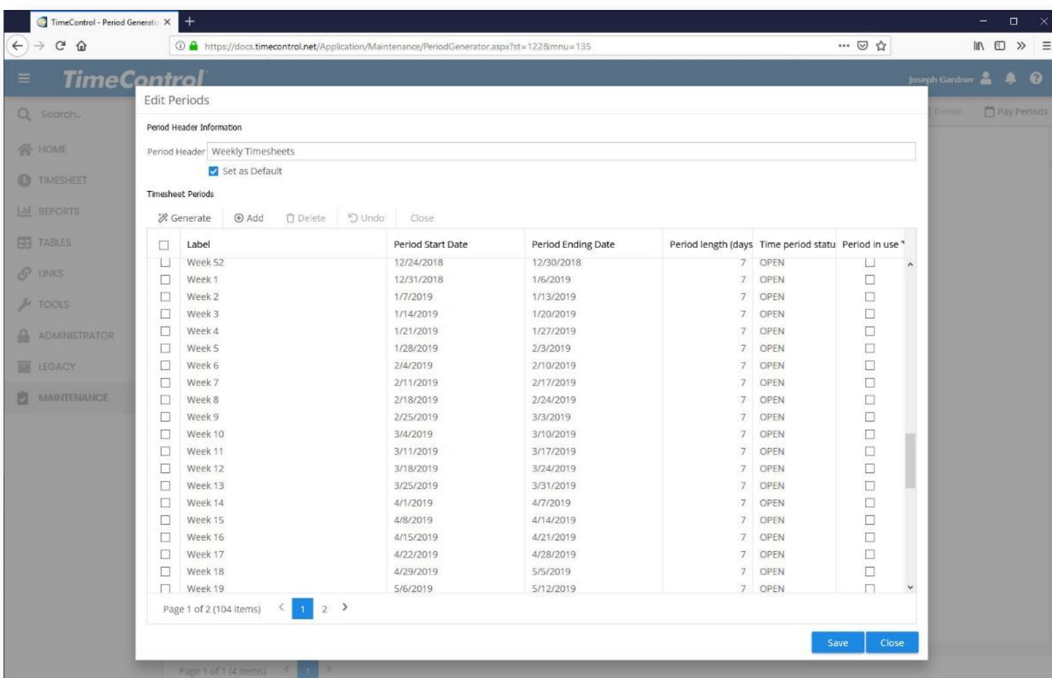
The Period Generator will want to know how many periods you should create, the date of the first period and the type of periods. Your choices are:

- Daily
- Weekly
- Bi-Weekly
- Bi-Monthly
- Monthly or;
- Custom

We'll select Weekly for our example as it's the most common.



Once you're done, click OK and your timesheet periods will appear in a list.



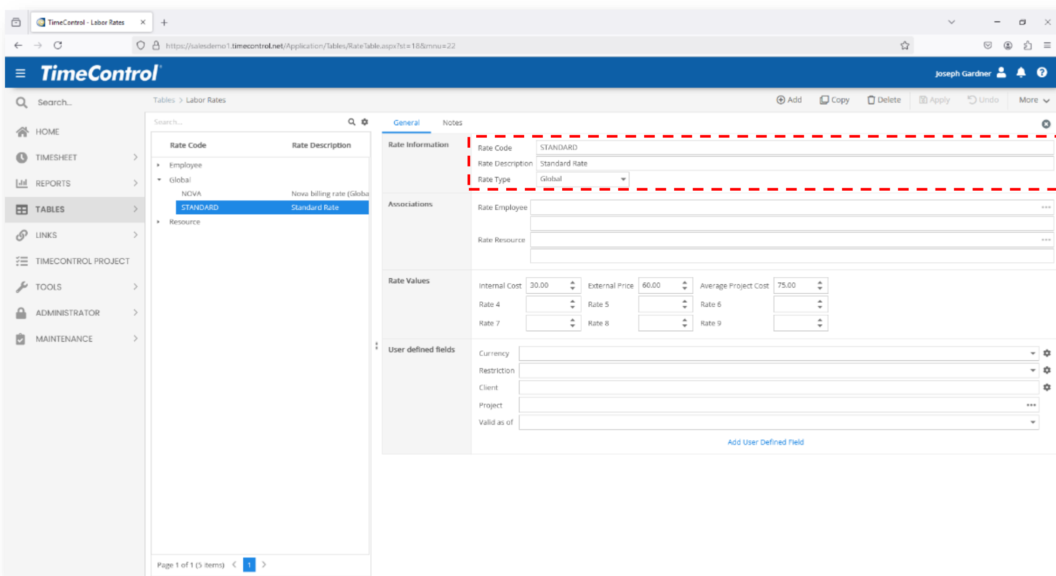
Essential Tables

There are a number of tables in TimeControl and numerous options in each one. The tables determine wide ranges of effects within TimeControl. Yet you don’t need to populate all of the tables or all of the aspects of each table in order to get TimeControl underway.

Here are the essential tables that you must complete and the essential elements in each of those tables that you must enter in each one in order to get your system underway.

Rate Table

TimeControl has extensive rate management capabilities, but we don’t need to use them all to get TimeControl started. However, at least one rate code will have to be created as a rate entry is an essential element of a timesheet line. We’ll start with a simple rate so we can add that as a default rate in the Employee Table later.



Here are the essential fields:

Rate Code: Enter a simple rate description such as “Standard” or “Normal” to set a basic rate.

Rate Description: Here you can describe the rate in more detail.

Rate Type: There are three choices as you can make rates that are specific to resource group or individual employees but to get the system started, select Global. This will make this rate available to everyone.

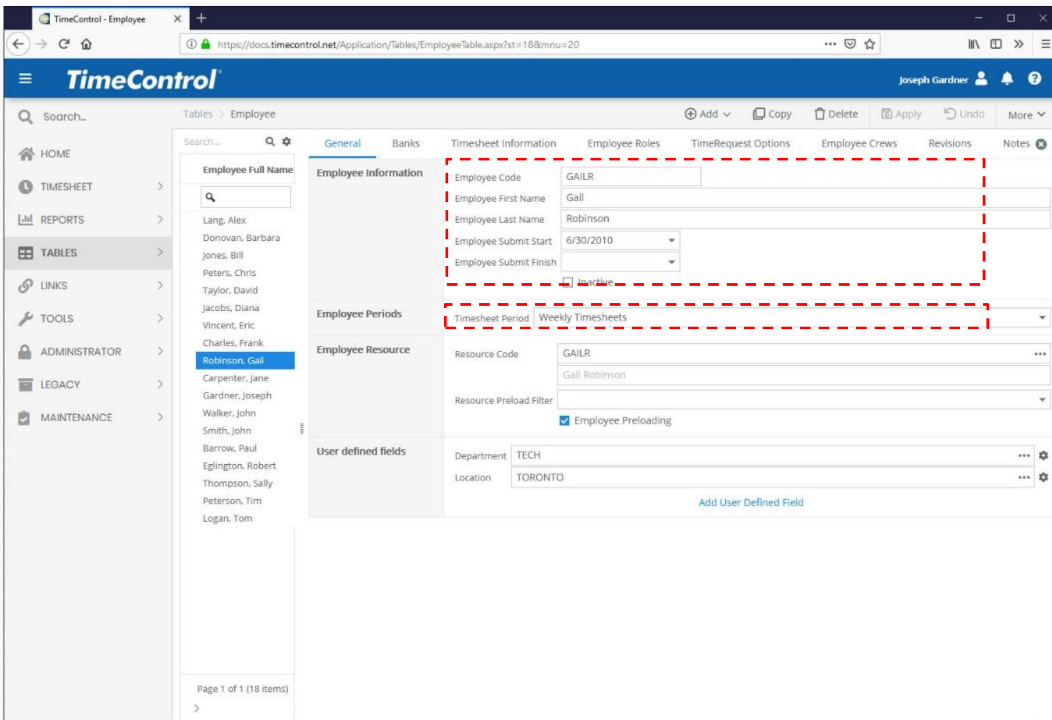
Rate Values: You’ll need some kind of value but just enter a value of 1.00 for Rate 1 and this will translate as 1 dollar (or other currency) per hour worked.

You may wish to make this more exact later, but this will get the system functional for now.

A minimal system could have one Global Rate Code with a value of 1.00 in Rate 1.

Employee Table

You should start your table entries with the Employee table. Click on the Tables tab then select Employee. The Employee table defines who timesheets are created for so this table is essential.



Here are the fields which must be populated in order to get you started:

Start on the General Tab with the following:

Employee Code: Enter a code which will be intuitive to the employee and the supervisors who will see it often.

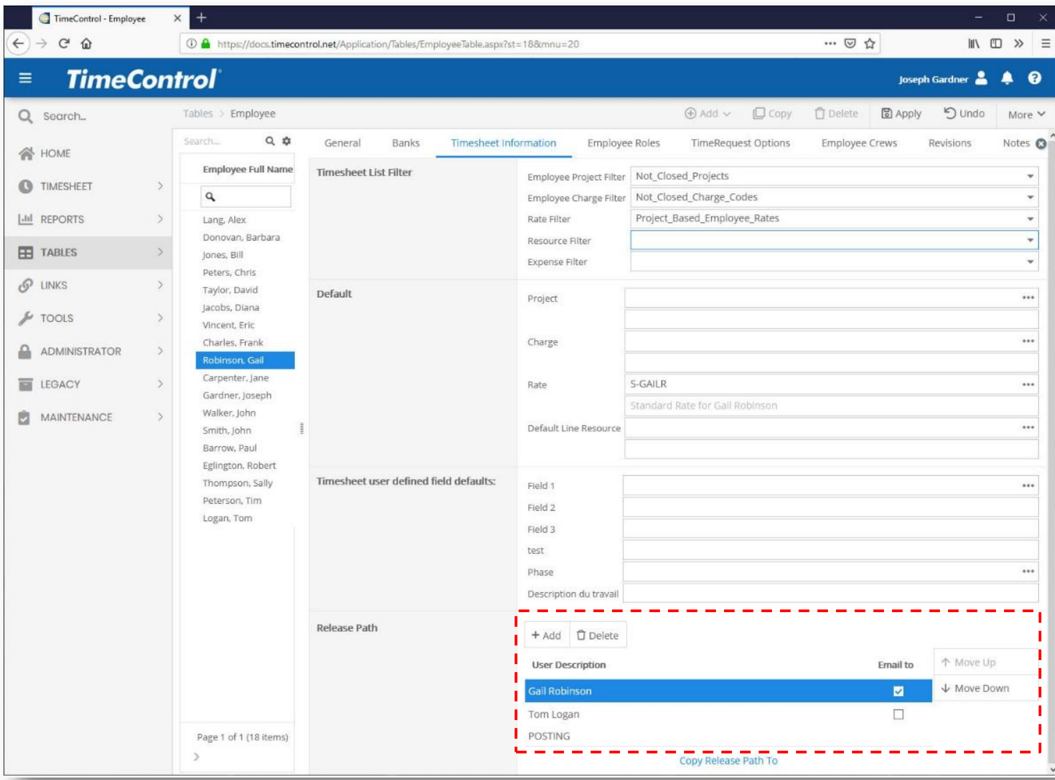
Employee First Name: Enter the employee's first name.

Employee Last Name: Enter the employee's family name.

Submit Start: This date will be used by the missing timesheet report and the missing timesheet notification function. When you no longer want an employee to be checked by the missing timesheet report or notification, you can enter an end-date here and TimeControl will exclude them.

Timesheet Period: The default period you created earlier should appear here automatically but double check as a period selection must be done here for employees to be able to enter timesheets.

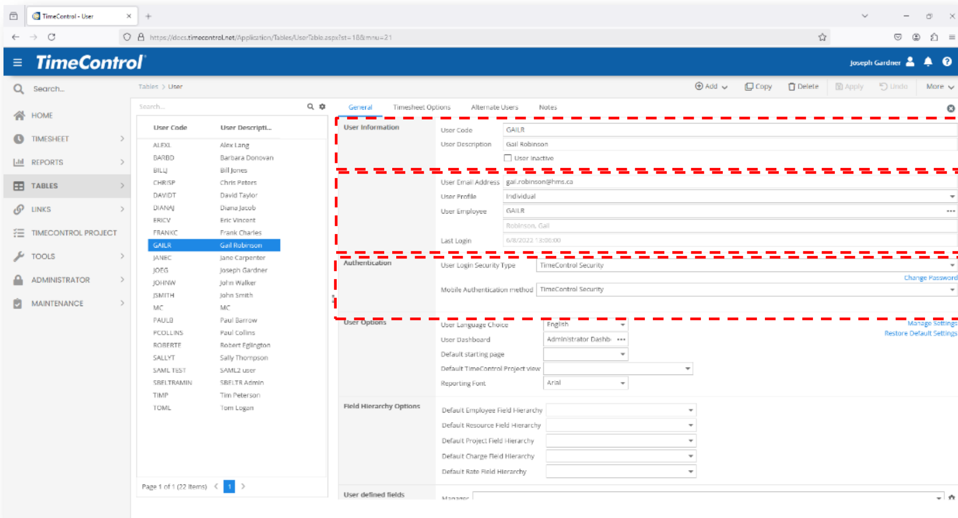
There are other fields in the Employee table which you might use for reporting by department or group or site or other criteria, but they are not required to get TimeControl started. Once you're done with the critical fields, you can move to the Timesheet Information tab.



In the Timesheet Information tab, you will have to enter the approval path for an employee's timesheet. This includes adding the employee him/herself as TimeControl can allow timesheets to be entered by someone else. In most cases however, you should first enter the employee and then Append the supervisor who will approve that timesheet. TimeControl has extensive approval mechanisms, but a single approver is the most common. The last line "Posting" is automatic. That's the state in which all timesheets end up once they've been approved.

User Table

Now you can move to the User table which determines who can get access to TimeControl. This is where a user's login is defined.



User Code: Enter a user code that the user will enter to login. This will go in the Username field on the Login page.

User Description: Enter the name of the user here.

User Profile: Each user must be associated with a User Profile. There are four user profiles by default: Individual, Project Manager, Supervisor and Administrator. You can add to this list of profiles or edit the existing profiles at any time in the future in the Administrator/User Profiles module. In the meantime, select the most appropriate of the four default choices for the user.

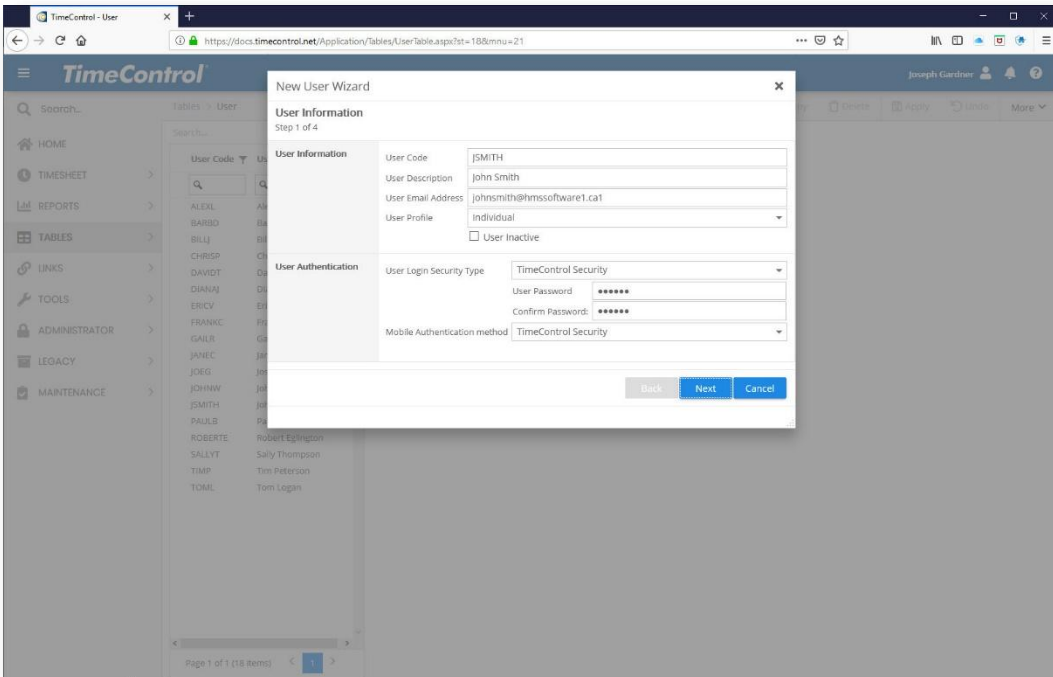
User Employee: You can associate this user with an Employee record that you've already created in the Employee table. Select an employee by clicking on the button to the right of the field.

Security Type / Password: TimeControl has several authentication methods but the internal one is called TimeControl security. You can explore elements like Active Directory authentication later but for now, leave the default authentication type as TimeControl Security and create a password for this user.

Add New User Wizard

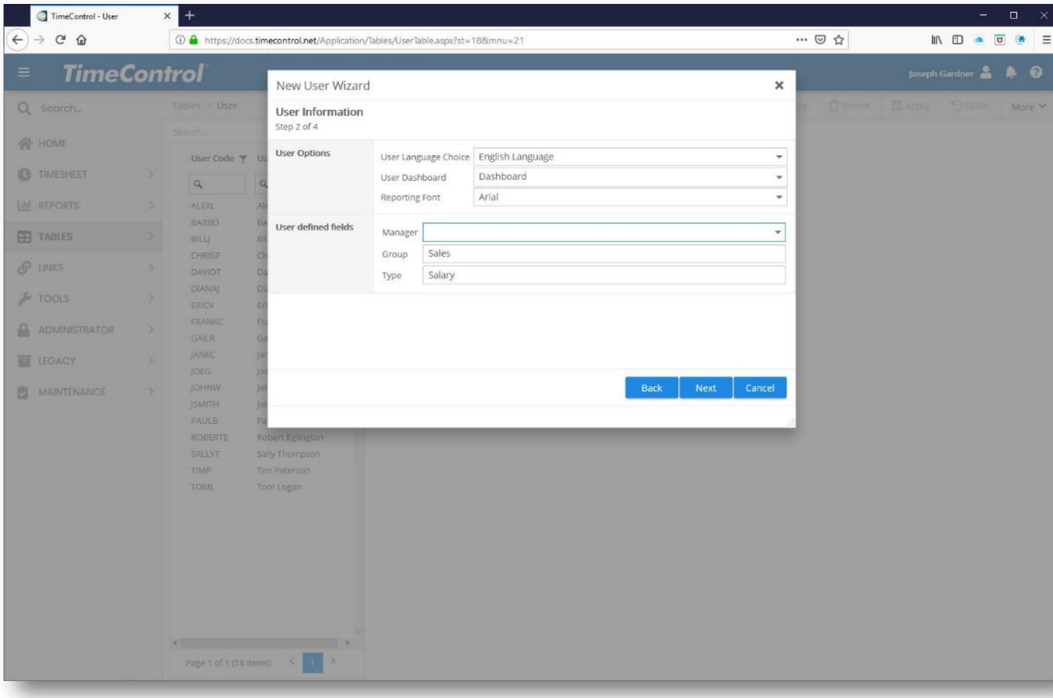
There is an alternate to entering a New User and New Employee as you've done above. You can enter both the Employee and User table simultaneously using the New User Wizard. This wizard will guide you through entering the minimal information required for a new user then will populate the User, Employee and Resource tables appropriately so that users can immediately start using TimeControl. To start the New User Wizard, hover your mouse over the Add button in the MenuStrip and then select *New User Wizard*.

The Wizard will now appear starting with User- oriented data.



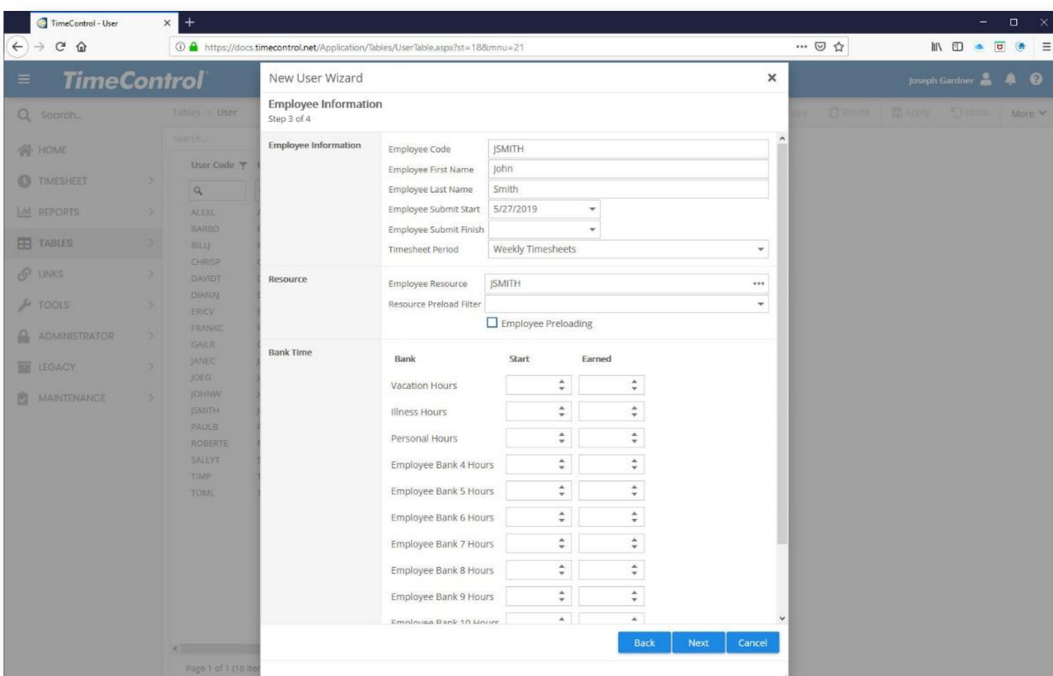
Enter the **User Code** and **User Description**; select a **User Profile** and optionally enter information about the user's email. Select the Authentication type and enter a starting password.

Click **Next** to move to the next page.



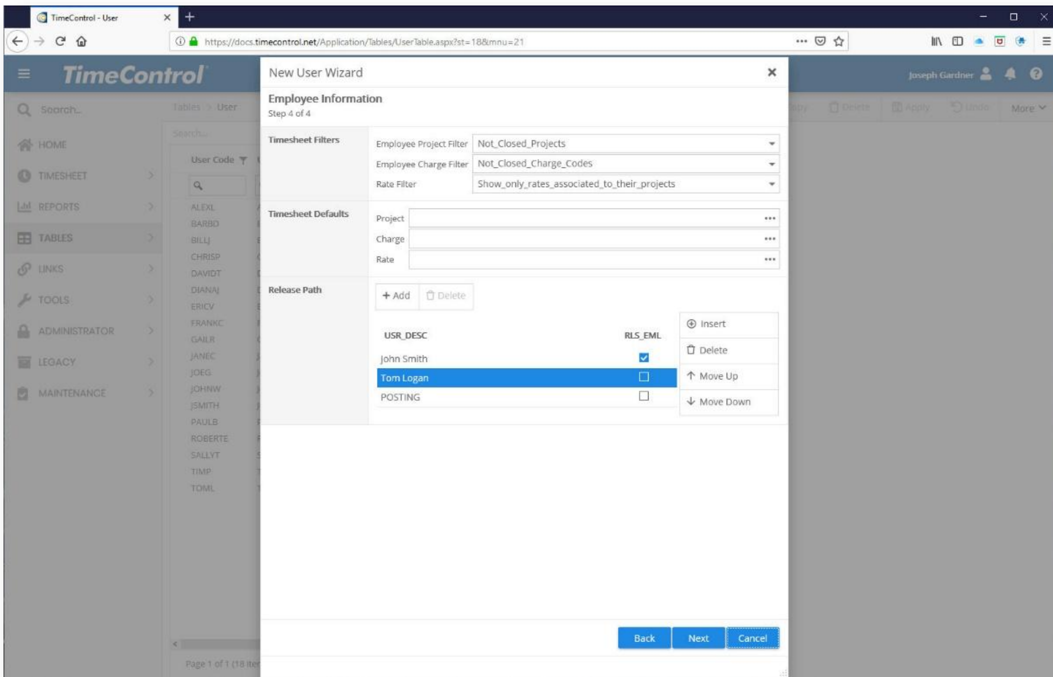
Now enter the Language you'd like this User to start TimeControl in, their Dashboard Template, any change in the font for reporting and any User-Defined field entries for the User table

Click **Next** to move to the next step.



Now enter the Employee table information for this new user including his/her Code, First and Last name, the date you'd like TimeControl to begin searching for missing timesheets for this employee and a date in the future that TimeControl should no longer search for missing timesheets. Enter the Resource Table entry for this user and information for any banked time such as vacation, sick leave or other types of leave or banks you've defined in your TimeControl setup.

Complete this screen with any entries for the User-Defined fields in the Employee table for this employee and click Next to continue.

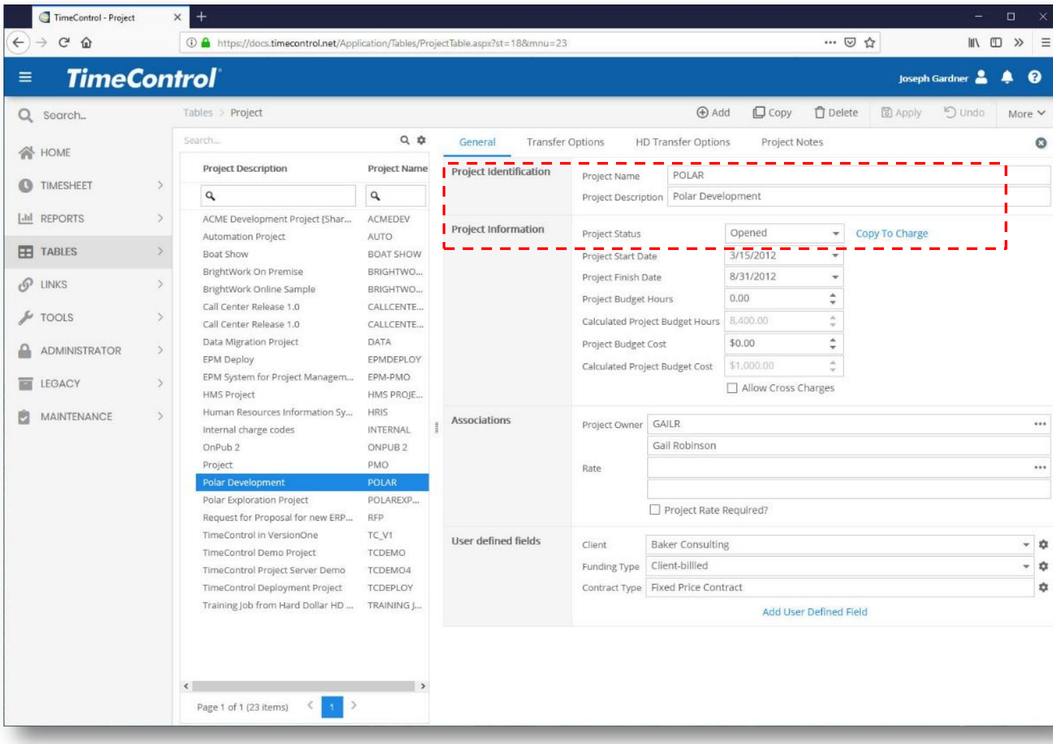


Now enter information about this employee's timesheet including any filters that apply to what projects and charges this employee may select from, any timesheet default entries (Note: A Rate default is required in order to use the pre-loaded timesheet function) and then select the release path for this employee at the bottom before clicking Next.

The New User Wizard will now make the necessary entries in the User, Employee and Resource tables. The **User Password** will be, by default, blank, but is required for any TimeControlOnline instances. Once all entries have been successfully entered, the Wizard will confirm the new user and optionally allow additional entries.

Project Table

Unless you decided not to use projects at all in the System Preferences you'll need to create at least one project in the Project Table.



All you need to get started though, are the entries to three simple fields:

Project Name: Enter here a short identifier for the project.

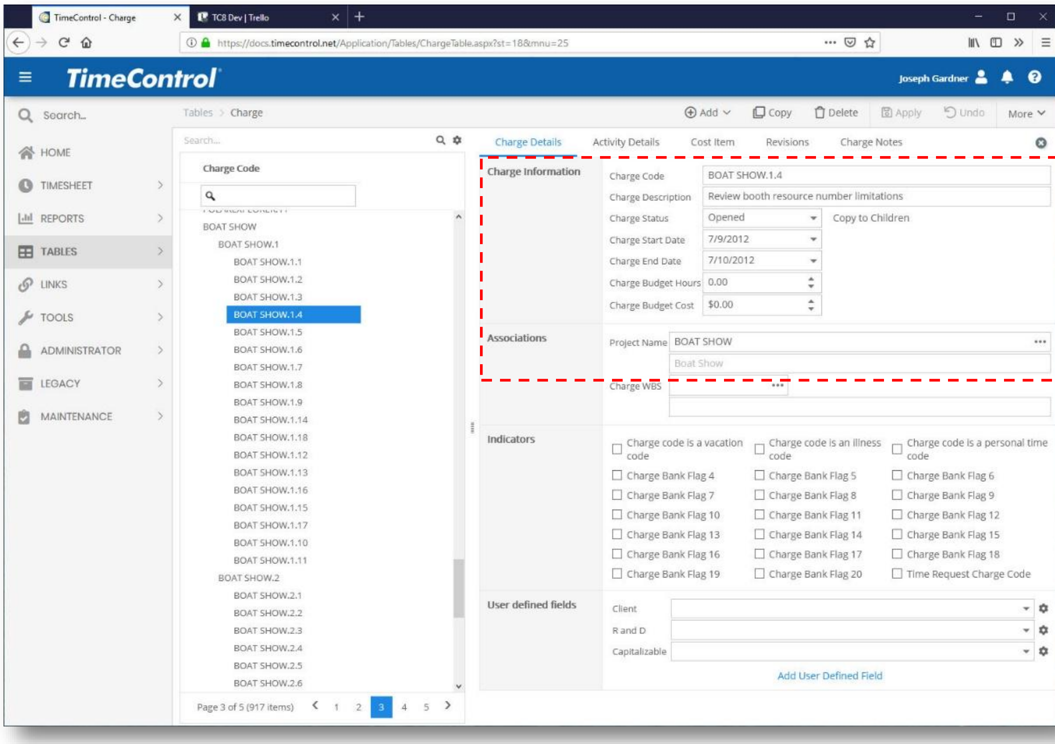
Project Description: Enter a longer description for the project.

Project Status: Enter the project's status of Unopened, Opened or Closed. You can leave projects Open by default.

TimeControl includes many project-oriented features including the ability to link to project management tools like Microsoft Project or Oracle Primavera but you can explore those in the future.

Charge Table

Charges are an essential element of TimeControl. Each timesheet line must contain a charge item which is pulled from this table. The Charge table can be rich with data but to get things started, you can enter just the essential elements.



Everything critical is on the General Tab. Here are the essential elements:

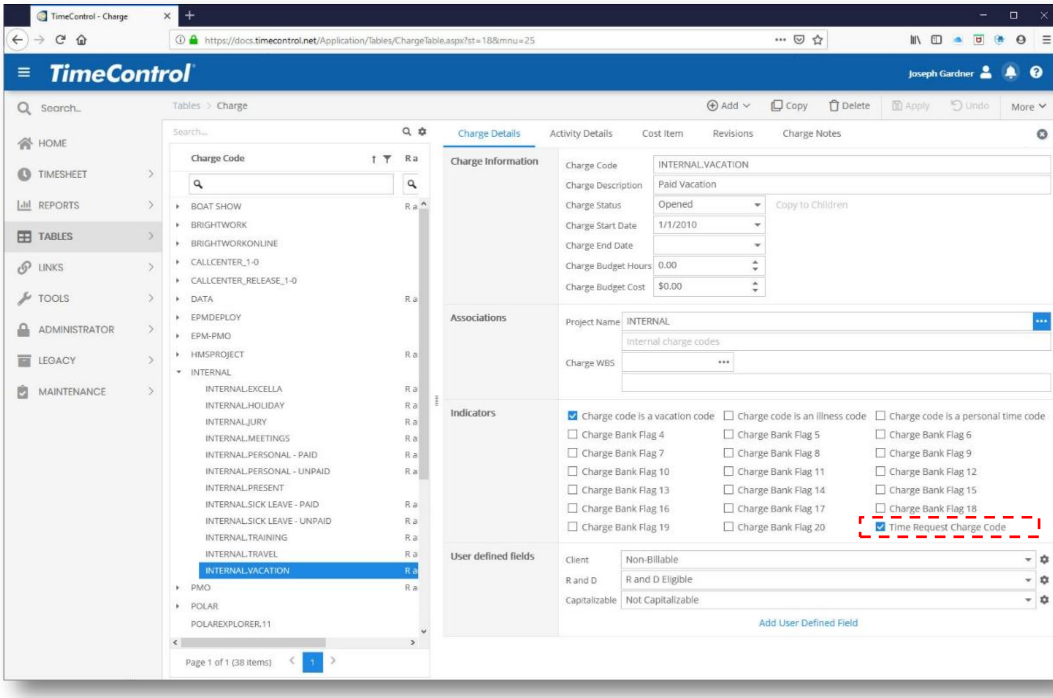
Charge Code: Enter a short code to identify the charge. If you use a period "." within the charge it will be made hierarchical just like the example above. It's a common practice in TimeControl to enter the project name as the beginning of a charge code so that all charges are grouped by their project name. So, if we wanted to use project names (because we'd decided that in System Preferences) and have an internal charge called "Meetings", we'd first create a charge with a code of "INTERNAL" then a second charge with a code of "INTERNAL.MEETINGS". This will put MEETINGS underneath INTERNAL in the hierarchy. This is a great way to organize many charges at once and there's no practical limit to the number of levels you can create.

Charge Description: You'll need a description for each charge code

Start Status: Just like projects, enter Opened, Closed or Unopened to set the status. Opened is a good default.

Charge Project: If this code is associated to a project, then select the project here by clicking on the ellipses button to the right of the field.

To use TimeRequest for Vacation Approvals you will need to identify at least one type of charge that is available to TimeRequest. You can do that by adding a Vacation Charge and then flagging that charge as something that you want TimeRequest to be able to see.

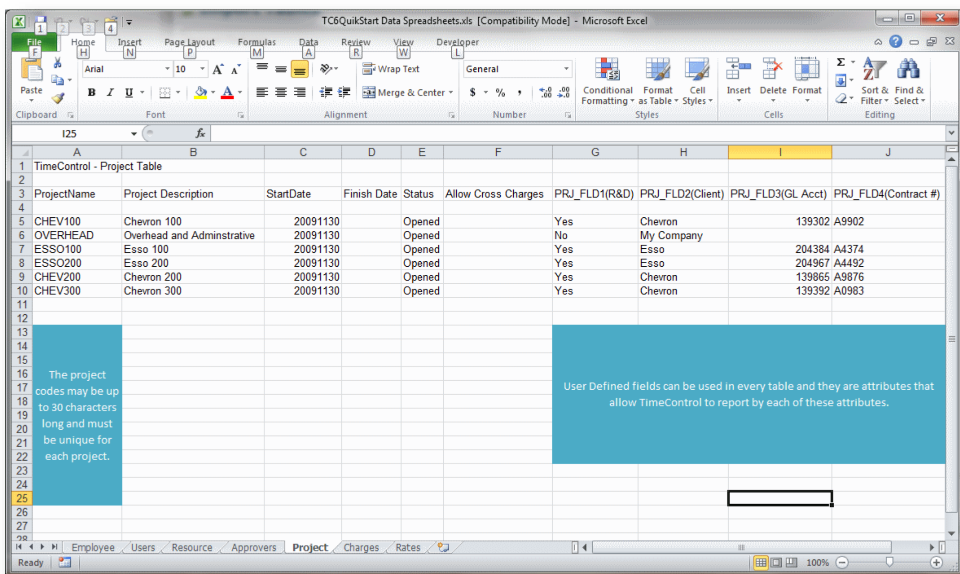


Importing table data

If none of this sounded attractive because you have just too much data to think about typing in manually, then fear not. TimeControl's extensive linking functionality allows you to bulk load or bulk-update the system using files created in Excel.

In fact, we've created a template for you that you can download to prepare your data.

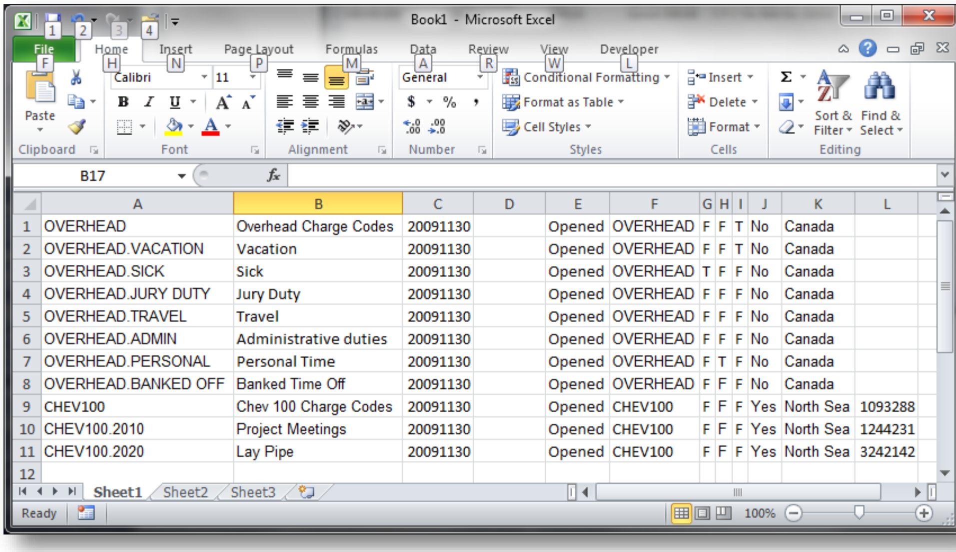
The file is located at: www.timecontrol.com/docs/tc8_data_template.xlsx.



This file has several tabs for the essential tables and we've put some simple data into the file so you can see what yours should look like. Keep an eye on formats of dates, currency and where we've used all CAPS and not. There are some basic instructions within the timesheet on how to format your data.

When you're ready to import this data into TimeControl you'll need to make sure that spreadsheet contains *only* the data. The comments and even the file headers must be removed.

Your final file might look like this:



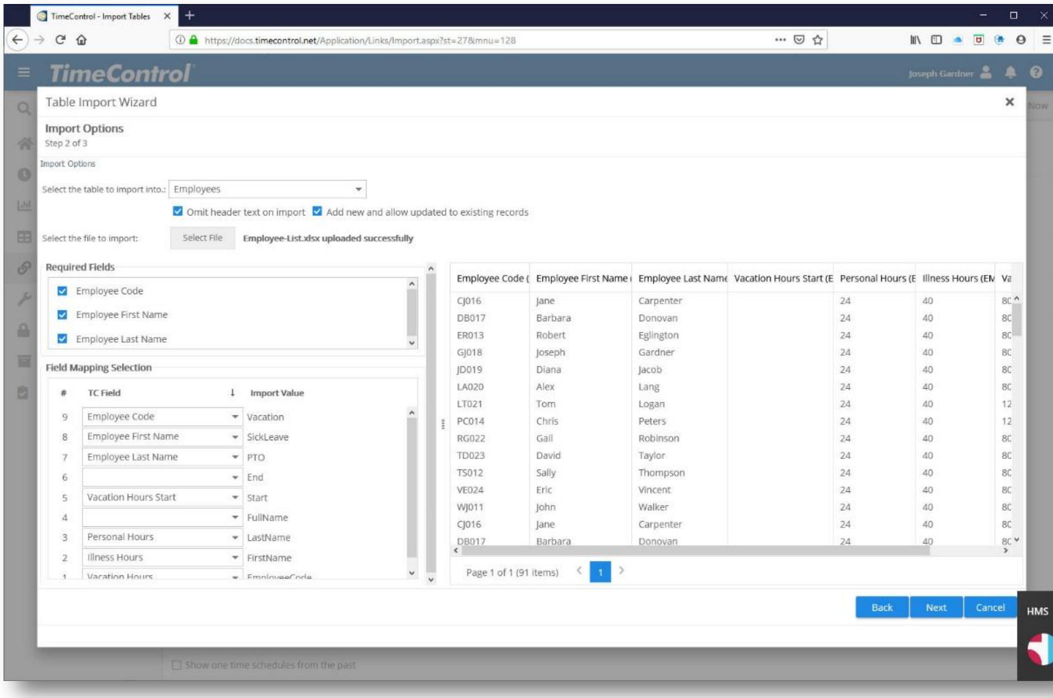
	A	B	C	D	E	F	G	H	I	J	K	L
1	OVERHEAD	Overhead Charge Codes	20091130		Opened	OVERHEAD	F	F	T	No	Canada	
2	OVERHEAD.VACATION	Vacation	20091130		Opened	OVERHEAD	F	F	T	No	Canada	
3	OVERHEAD.SICK	Sick	20091130		Opened	OVERHEAD	T	F	F	No	Canada	
4	OVERHEAD.JURY DUTY	Jury Duty	20091130		Opened	OVERHEAD	F	F	F	No	Canada	
5	OVERHEAD.TRAVEL	Travel	20091130		Opened	OVERHEAD	F	F	F	No	Canada	
6	OVERHEAD.ADMIN	Administrative duties	20091130		Opened	OVERHEAD	F	F	F	No	Canada	
7	OVERHEAD.PERSONAL	Personal Time	20091130		Opened	OVERHEAD	F	T	F	No	Canada	
8	OVERHEAD.BANKED OFF	Banked Time Off	20091130		Opened	OVERHEAD	F	F	F	No	Canada	
9	CHEV100	Chev 100 Charge Codes	20091130		Opened	CHEV100	F	F	F	Yes	North Sea	1093288
10	CHEV100.2010	Project Meetings	20091130		Opened	CHEV100	F	F	F	Yes	North Sea	1244231
11	CHEV100.2020	Lay Pipe	20091130		Opened	CHEV100	F	F	F	Yes	North Sea	3242142
12												

Keep your larger file handy as you'll need to know what the fields represent and what columns have which data in them in order to get the definition right during the import.

Once you've got your file ready, go to the Links tab and click on Table Imports. Select the table that matches the Excel file you've prepared:

Then enter the number of the column from your spreadsheet file that contains the relevant data. Only the required fields are an absolute must.

You'll need to select your Excel file (don't forget to make sure you don't have it open when you click "Finish") and then it's a good idea to save your import definition so you can reuse it again later by clicking "Save and Import".



You can repeat the same process for each of your Excel files. This technique is also a great one to update existing records as you'll be able to choose to import new records or import new records <u>and</u> update existing records. So, if you've got more detail to your table information in the future (for example department information per employee is now in your spreadsheet) then you can use this same definition to update your Employee table extremely quickly.

The Timesheet Process

Once your basic data is in TimeControl, you can give your users access to the system by giving them the URL, their username and password and they can start entering timesheet data. You are now ready to begin the regular cycle of your timesheet process.

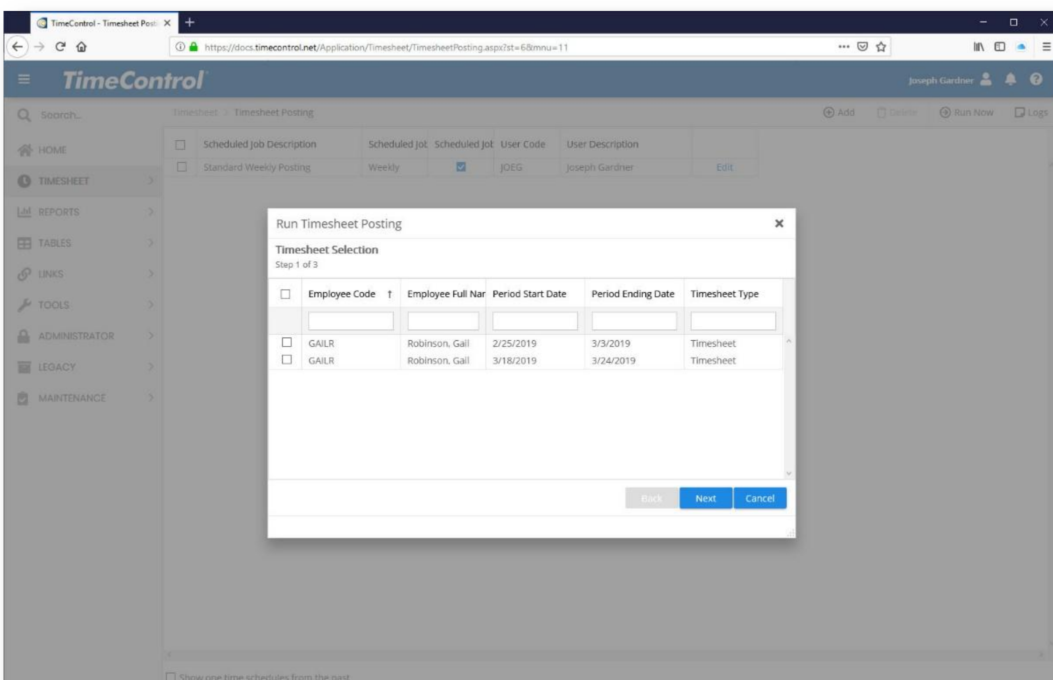
The essential elements of the process are as follows:

1. Users enter timesheets and release them for approval;
2. Determine if all timesheets have been collected, approved and released to "Posting";
3. Run the posting process;
4. Do any reporting that is required.

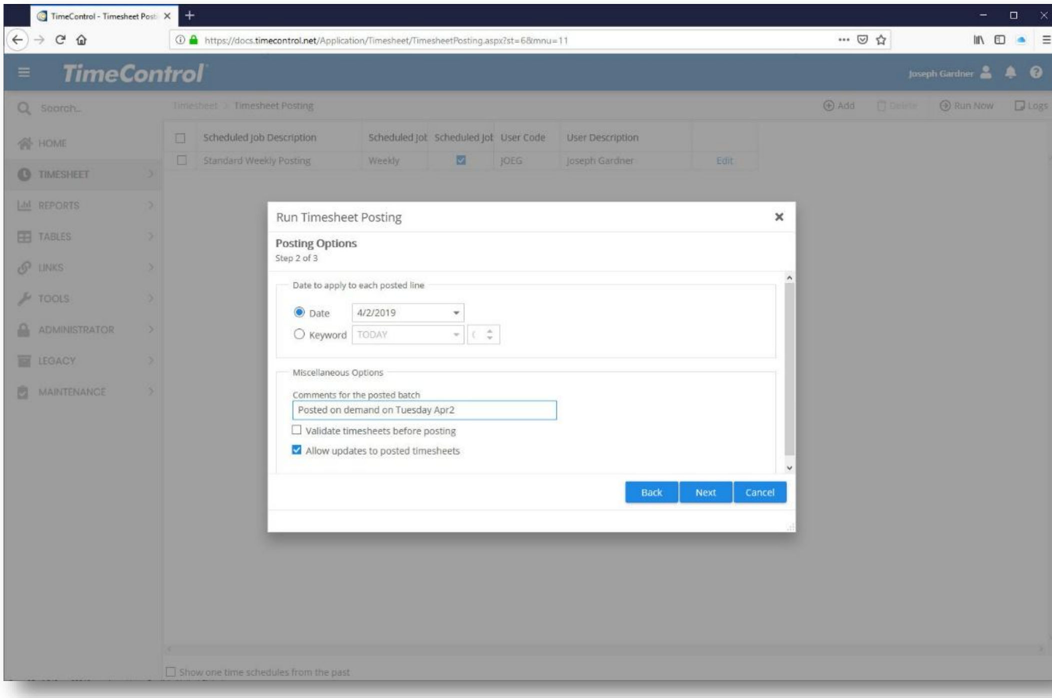
The Posting Process

The Posting Process takes timesheets that have completed the approval process and closes them. Posted timesheet data then becomes available for reporting, exporting to external systems or other analysis. The Posting Process, while simple, is an essential aspect of TimeControl.

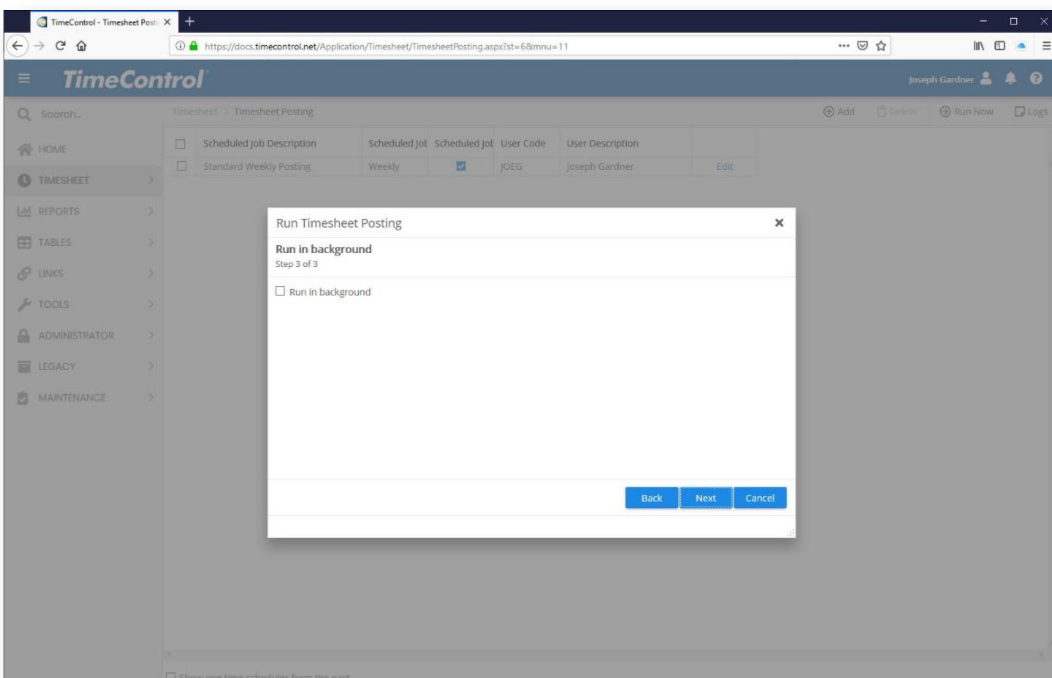
To start the Posting Process, go to the Timesheet tab and select Timesheet Posting.



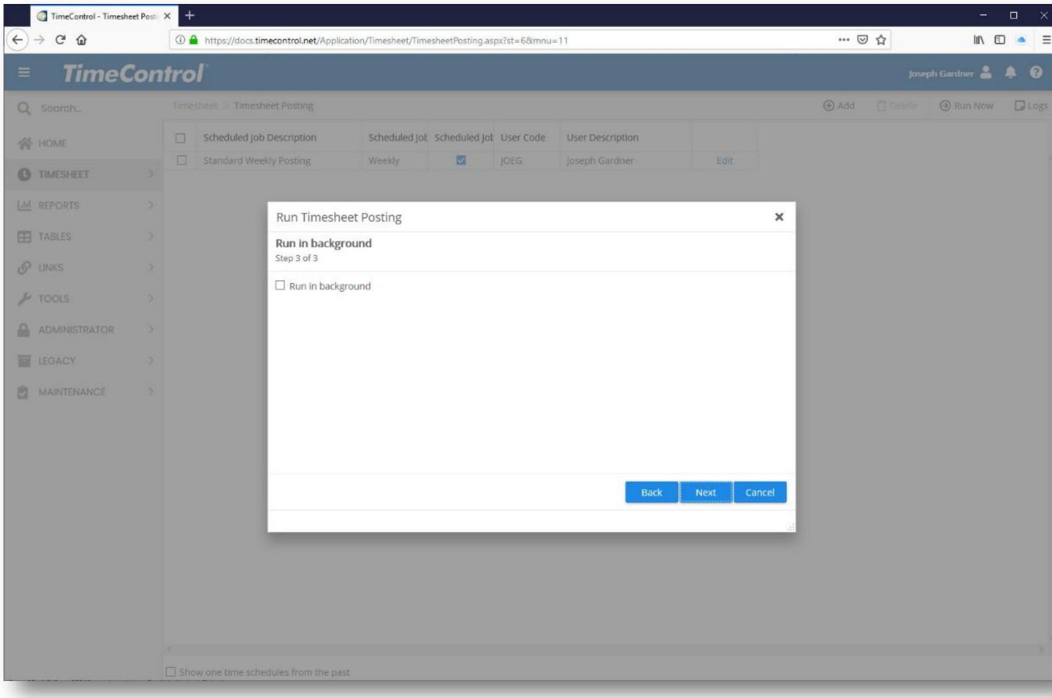
Posting can be scheduled to be done automatically but for now, let's just do one on demand by selecting Run Now and clicking "Next".



The Partial Posting is not for most clients so let's skip it for now. Click Next to Continue.



You can now choose a variety of options of what you wish to post. Leave the default settings to select All Timesheets that are ready for Posting and today's date and click Next.



You can enter a comment here or just click “Finish” to complete the Posting process. Take a peek at the log to ensure that the timesheets were posted without error (they almost always are) and you’re done.

You can elect to run the posting in the background and immediately free-up your screen but that is for occasions when you have a lot of timesheets to post. To get started, leave this option blank and click Next to start the process.

TimeControl will now run the posting process and relocate timesheets from the unposted tables and into the posted or closed tables.

When it’s done, TimeControl will display a log. Take a quick look for any issues or problems you may need to address then click Finish.

Your first cycle of timesheets is complete!

The timesheet data that has been posted can now be used to update Project Management systems, Payroll systems for reporting and other purposes.

Where to go from here

Timesheet Best Practices

You've got your TimeControl system up and running and now's a good time to start a list of best practices for your organization's employees to start following. This will be different for each organization and should evolve over time.

Communicating your timesheet process to the staff and how employees can best use TimeControl and what difference their timesheet can make to the organization is a good place to start.

Deploying a timesheet is often an organizational culture change. If this is so, go for compliance as your first goal and focus less on the quality or richness of the data. Get everyone used to doing a timesheet and make it simple to do.

Once your organization gets used to doing a timesheet every week and weekly timesheet compliance gets closer to 100%, you can start working on the quality of data. Look for common timesheet errors and find ways to trap them or to communicate with people to avoid them in the future.

When the quality of data gets better, you can look at making the data richer by adding more user-defined fields, greater distinctions in types of charges and start reporting in more detail.

User-Defined Fields

TimeControl's flexibility means it can continually adapt as your organization finds new requirements for it and that often means looking at the meta data in each table record. User-Defined Fields is a very powerful place to characterize data for different purposes. But, before adding dozens of fields you'll need to support, think about their purpose first. A good business analyst will start from outputs (like reports or exports) and move backwards to the inputs (the user-defined data) to see what definitions might need to be added. If a report is required for R&D Tax Credit preparation perhaps, then you might need a User-Defined Field on the charge table to identify eligible charges from ineligible charges.

Linking to external systems

TimeControl is also able to link to many different systems including project management systems, payroll systems or services, human resources systems and finance or ERP systems. TimeControl can also link to multiple systems at once. Before making these links however, make sure that it makes sense to do so and that the data that TimeControl can provide is appropriate for the uses required by those other systems.

Other resources

Reference Guide

The Documentation Tab of TimeControl includes both a User Guide and a Reference Guide. The Reference Guide covers Administrator functionality in much more detail. The Reference Guide is an essential tool for Administrators.

The TimeControl blog

HMS maintains a blog at blog.timecontrol.com in which the technical and consulting staff post tips, tricks and techniques on how to get the best out of your system. You may also see use-case scenarios you haven't considered.

TimeControl.com

Our main website has several sections that contain information of interest to Administrators:

- **Online Lessons**: This area contains mini-videos of simple TimeControl functions such as adding a timesheet or adding a record in the employee table.

  www.timecontrol.com/resources
- **Support**: This area contains downloads such as filters, validation rules and reports that may be of interest as well as frequently asked questions.
- **Resources**: This area has white papers, factsheets, slides and other resources that may be of interest
- **Solution Portals**: This area has use-case scenarios of how to use TimeControl in different ways.

Technical Support

When you need Technical Support because TimeControl simply doesn't seem to be working the way it should, then you can reach us by email at support@hms.ca or by phone at +1 514-695-8122 and we'll do our best to help you.