



TimeControl[®]

Getting Started Guide

The fastest path to a TimeControl
implementation

Last update: December 2024

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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 must 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.

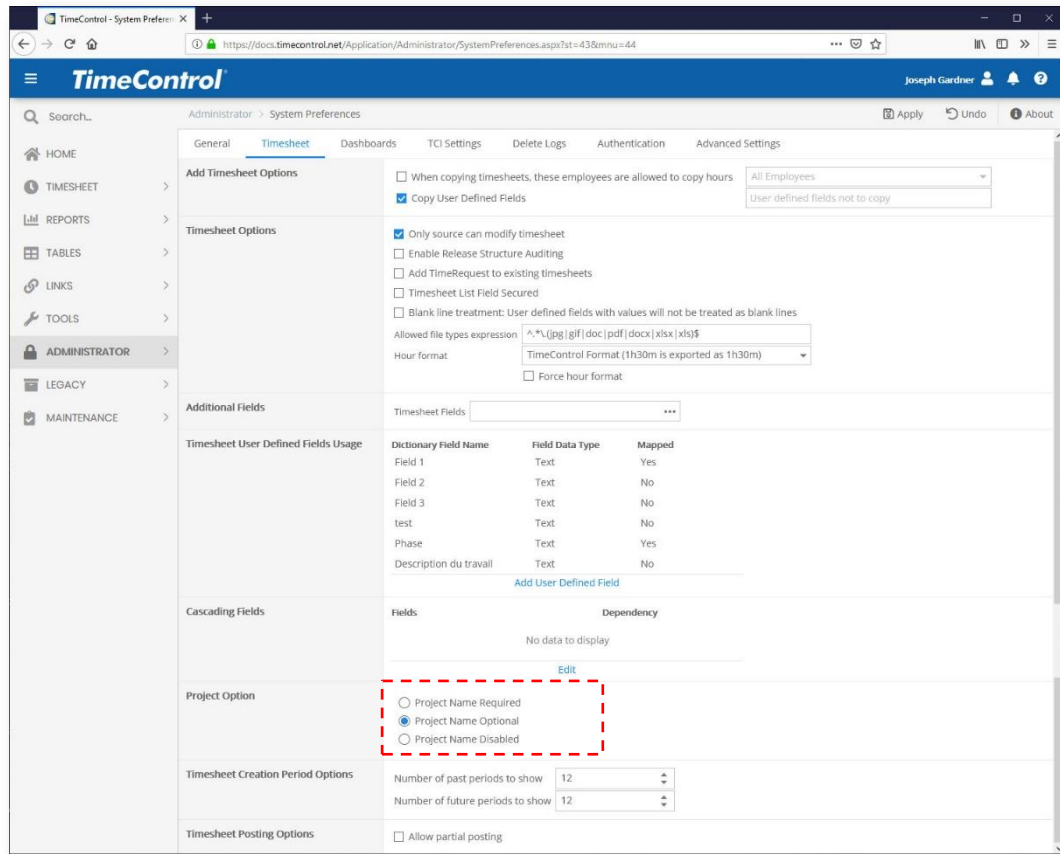
The screenshot shows the TimeControl System Preferences interface. The 'General' tab is selected, displaying various configuration options. A red dashed box highlights the 'Company Information' section, which includes fields for 'Company Name' (HMS Software Evaluation), 'Week Ending Day of Week' (Sunday), and 'Fiscal Year Start' (January 1). Below this, there are sections for 'Top bar logo' and 'Login logo'. The 'General Options' section contains several checkboxes, including 'Enable API' and 'Enable Mobile App'. The 'Tree View Fields' section features dropdown menus for hierarchy types and a 'Build' button. The 'Consolidation Settings' section at the bottom has radio buttons for different consolidation options.

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.

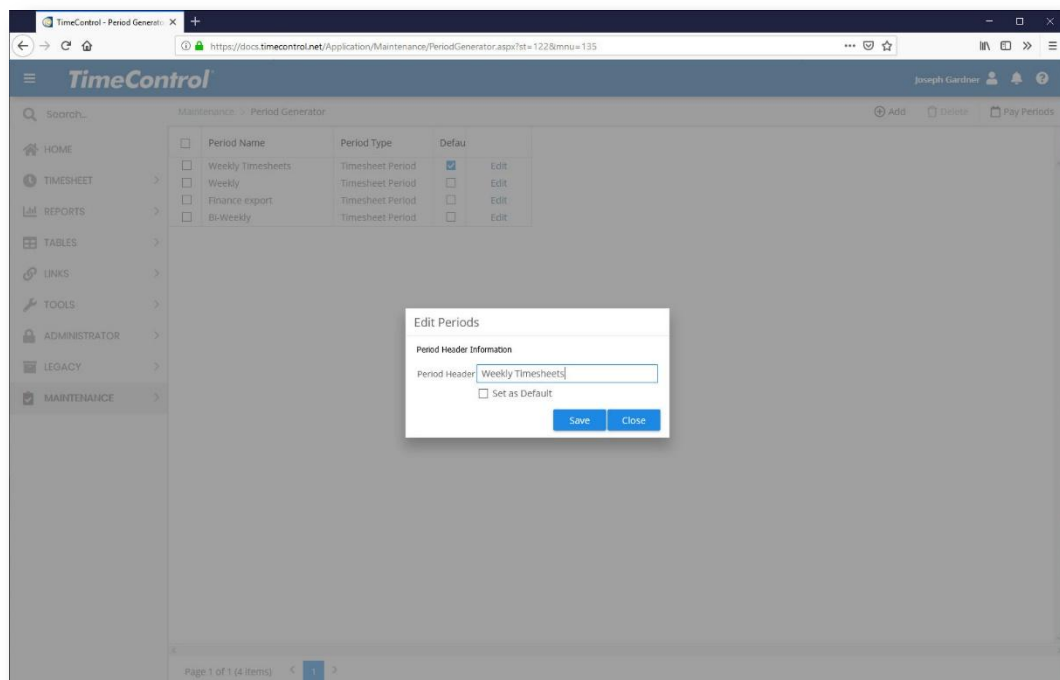
Timesheet Periods

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.

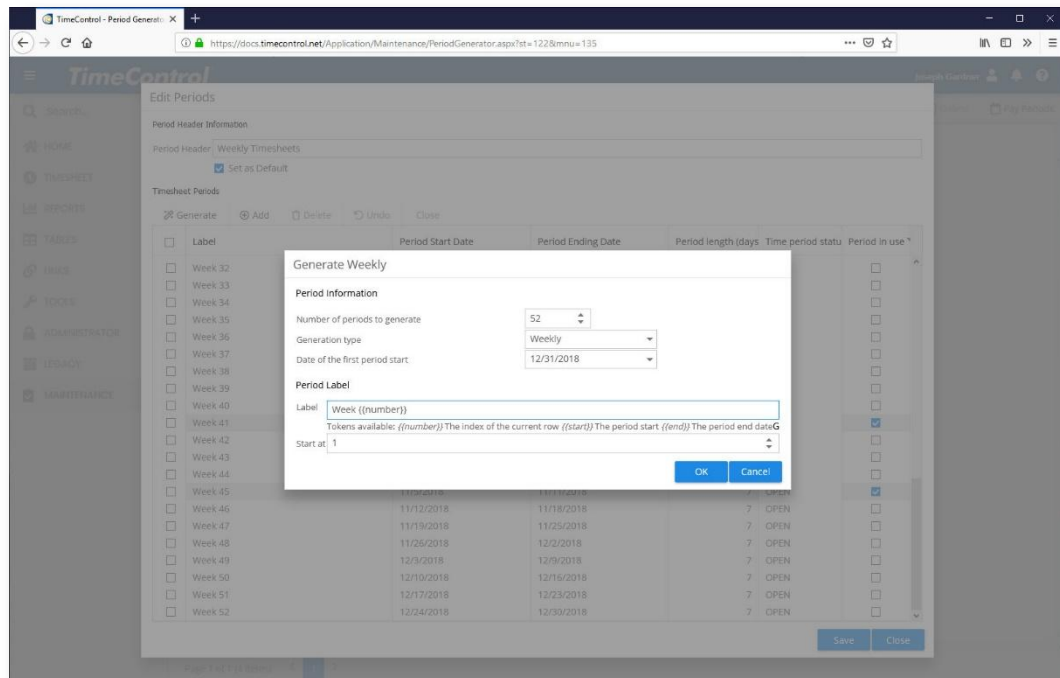
Go to the Maintenance Tab and select Period Generator.

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.



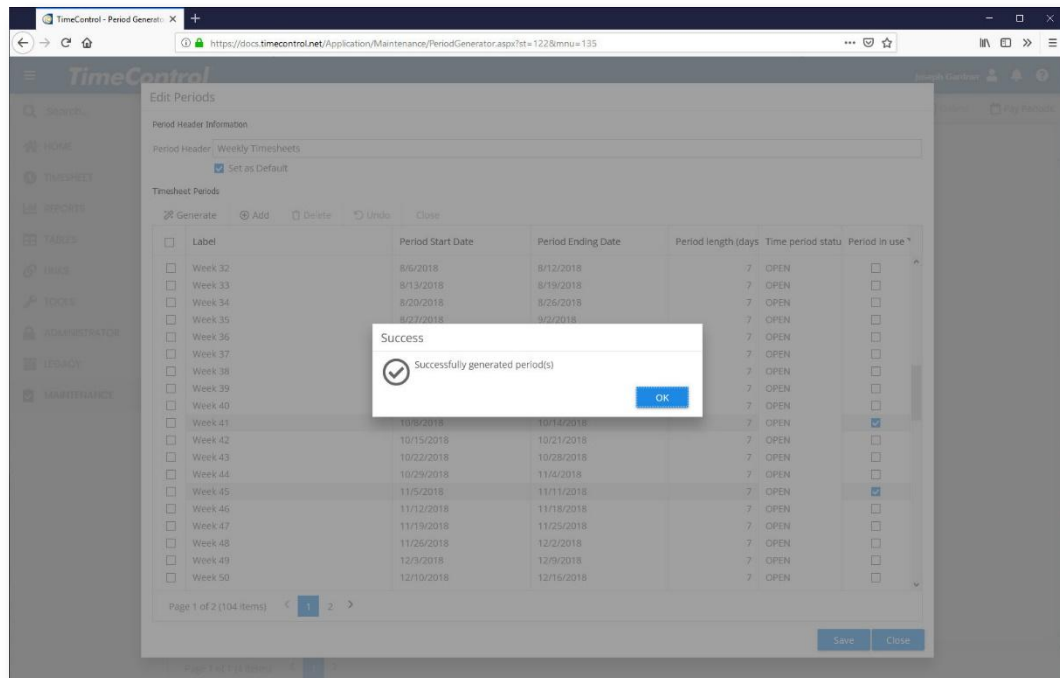
Now you'll have a blank list of periods. Click Generate to add periods automatically.



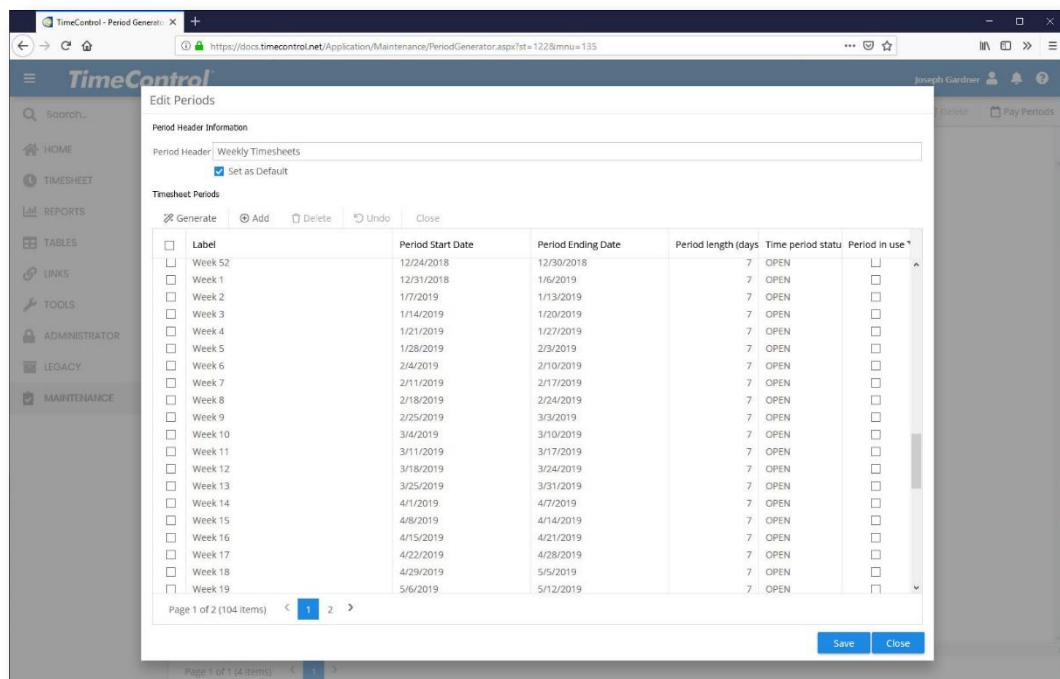
The Period Generator will want to know how many periods you should create, the date of the first period and the type of periods. Your choices are:

- 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.

The screenshot shows the TimeControl web application interface for managing labor rates. The left sidebar contains navigation links: HOME, TIMESHEET, REPORTS, TABLES (selected), LINKS, TIMECONTROL PROJECT, TOOLS, ADMINISTRATOR, and MAINTENANCE. The main content area is titled 'Labor Rates' and includes a search bar. A table lists existing rates, with 'STANDARD' selected. The details for the 'STANDARD' rate are shown in a form with the following sections:

- Rate Information:** Rate Code (STANDARD), Rate Description (Standard Rate), Rate Type (Global).
- Associations:** Rate Employee, Rate Resource.
- Rate Values:** Internal Cost (30.00), External Price (60.00), Average Project Cost (75.00), Rate 4, Rate 5, Rate 6, Rate 7, Rate 8, Rate 9.
- User defined fields:** Currency, Restriction, Client, Project, Valid as of.

A red dashed box highlights the Rate Code, Rate Description, and Rate Type fields in the Rate Information section.

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.

The screenshot shows the 'TimeControl - Employee' form. The 'General' tab is active. The 'Employee Information' section contains the following fields: Employee Code (GAILR), Employee First Name (Gail), Employee Last Name (Robinson), Employee Submit Start (6/30/2010), and Employee Submit Finish. The 'Employee Periods' section shows 'Timesheet Period' set to 'Weekly Timesheets'. The 'Employee Resource' section shows 'Resource Code' (GAILR) and 'Resource Preload Filter' (Employee Preloading). The 'User defined fields' section shows 'Department' (TECH) and 'Location' (TORONTO). A red dashed box highlights the Employee Code, Employee First Name, Employee Last Name, Employee Submit Start, and Employee Submit Finish fields. Another red dashed box highlights the Timesheet Period field.

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.

Employee Full Name	Timesheet List Filter	Employee Project Filter	Employee Charge Filter	Rate Filter	Resource Filter	Expense Filter
Lang, Alex		Not_Closed_Projects	Not_Closed_Charge_Codes	Project_Based_Employee_Rates		
Donovan, Barbara						
Jones, Bill						
Peters, Chris						
Taylor, David						
Jacobs, Diana						
Vincent, Eric						
Charles, Frank						
Robinson, Gail						
Carpenter, Jane						
Gardner, Joseph						
Walker, John						
Smith, John						
Barrow, Paul						
Eglington, Robert						
Thompson, Sally						
Peterson, Tim						
Logan, Tom						

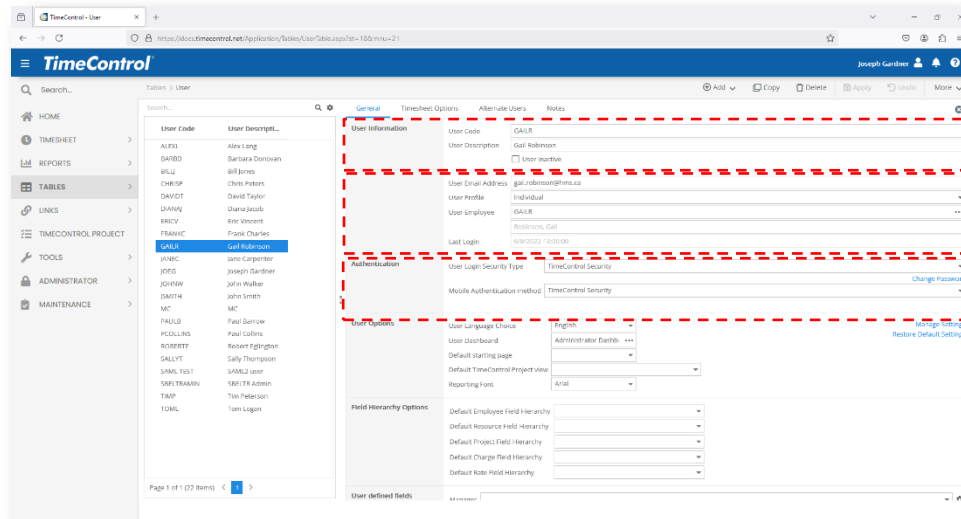
Field 1	Field 2	Field 3	test	Phase	Description du travail

Release Path
+ Add - Delete
User Description
Gail Robinson <input checked="" type="checkbox"/>
Tom Logan <input type="checkbox"/>
POSTING

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.

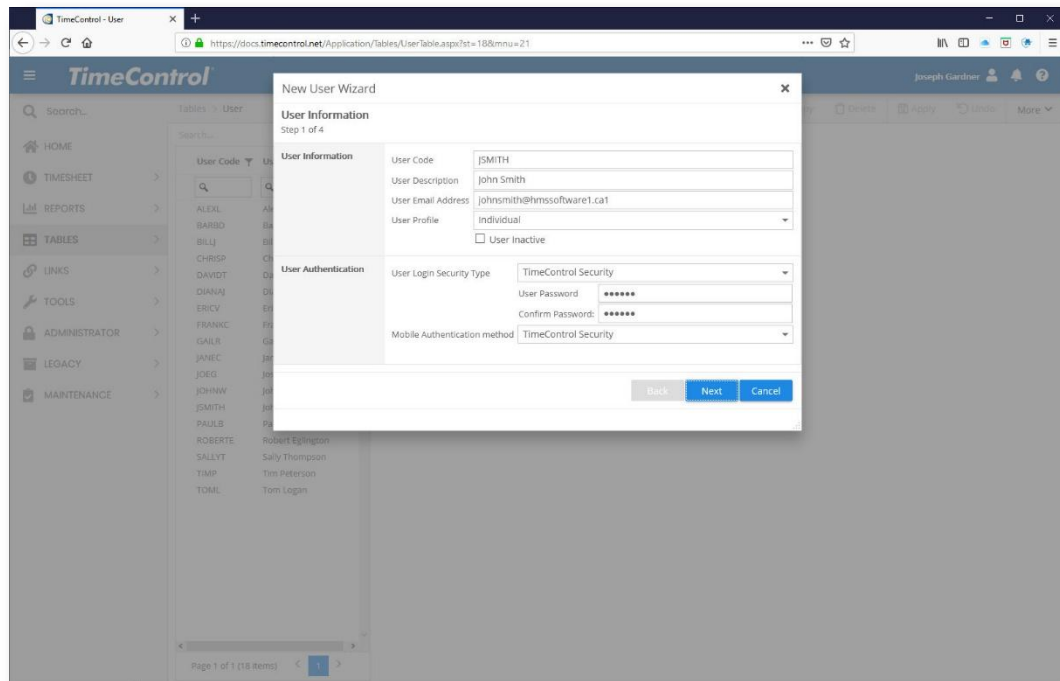
User Employee: You can associate this user with an Employee record that you've already created in the Employee table. Select an employee by clicking on the button to the right of the field.

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.



The screenshot shows the 'New User Wizard' dialog box, Step 1 of 4, overlaid on the TimeControl application interface. The dialog is titled 'New User Wizard' and contains two main sections: 'User Information' and 'User Authentication'.

User Information (Step 1 of 4):

- User Code: JSMITH
- User Description: John Smith
- User Email Address: johnsmith@hmssoftware1.ca1
- User Profile: Individual (dropdown menu)
- ☐ User Inactive

User Authentication:

- User Login Security Type: TimeControl Security (dropdown menu)
- User Password: *****
- Confirm Password: *****
- Mobile Authentication method: TimeControl Security (dropdown menu)

At the bottom right of the dialog are three buttons: 'Back', 'Next', and 'Cancel'.

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.

New User Wizard
User Information
Step 2 of 4

User Options

User Language Choice: English Language
User Dashboard: Dashboard
Reporting Font: Arial

User defined fields

Manager:
Group: Sales
Type: Salary

Back Next Cancel

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.

New User Wizard
Employee Information
Step 3 of 4

Employee Information

Employee Code: JSMITH
Employee First Name: John
Employee Last Name: Smith
Employee Submit Start: 5/27/2019
Employee Submit Finish:
Timesheet Period: Weekly Timesheets

Resource

Employee Resource: JSMITH
Resource Preload Filter:
☐ Employee Preloading

Bank Time

Bank	Start	Earned
Vacation Hours		
Sickness Hours		
Personal Hours		
Employee Bank 4 Hours		
Employee Bank 5 Hours		
Employee Bank 6 Hours		
Employee Bank 7 Hours		
Employee Bank 8 Hours		
Employee Bank 9 Hours		
Employee Bank 10 Hours		

Back Next Cancel

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.

The screenshot shows the 'New User Wizard' in the TimeControl application, specifically 'Step 4 of 4: Employee Information'. The interface includes a sidebar with navigation links like HOME, TIMESHEET, REPORTS, TABLES, LINKS, TOOLS, ADMINISTRATOR, LEGACY, and MAINTENANCE. The main content area is divided into sections: 'Timesheet Filters' with dropdowns for Employee Project Filter (Not_Closed_Projects), Employee Charge Filter (Not_Closed_Charge_Codes), and Rate Filter (Show_only_rates_associated_to_their_projects); 'Timesheet Defaults' with input fields for Project, Charge, and Rate; and a 'Release Path' section containing a table of users. The table has columns for 'USR_DESC' and 'RLS_EML'. 'Tom Logan' is selected in the table. To the right of the table are buttons for 'Insert', 'Delete', 'Move Up', and 'Move Down'. At the bottom right are 'Back', 'Next', and 'Cancel' buttons.

USR_DESC	RLS_EML
John Smith	<input checked="" type="checkbox"/>
Tom Logan	<input type="checkbox"/>
POSTING	<input type="checkbox"/>

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.

The screenshot displays the TimeControl web application interface. On the left is a navigation menu with options like HOME, TIMESHEET, REPORTS, TABLES, LINKS, TOOLS, ADMINISTRATOR, LEGACY, and MAINTENANCE. The main area is titled 'Tables > Project'. It features a search bar and a list of projects. The 'Polar Development' project is selected and highlighted in blue. To the right of the list is a detailed form for the selected project, titled 'Project Identification'. This form includes fields for Project Name (POLAR), Project Description (Polar Development), Project Status (Opened), Project Start Date (3/15/2012), Project Finish Date (8/31/2012), Project Budget Hours (0.00), Calculated Project Budget Hours (8,400.00), Project Budget Cost (\$0.00), and Calculated Project Budget Cost (\$1,000.00). There are also sections for Associations (Project Owner: GAILR, Rate: Gail Robinson) and User defined fields (Client: Baker Consulting, Funding Type: Client-billed, Contract Type: Fixed Price Contract). A red dashed box highlights the 'Project Identification' section.

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.

The screenshot displays the TimeControl web application interface for managing charges. On the left, a sidebar menu lists various navigation options. The main content area is titled 'Charge Table' and features a search bar and a list of charge codes. The 'BOAT SHOW.1.4' charge code is selected and highlighted. To the right of the list, a detailed form for the selected charge is shown. This form is organized into several sections: 'Charge Information' (containing fields for Charge Code, Description, Status, Dates, Budget Hours, and Budget Cost), 'Associations' (for Project Name and Charge WBS), 'Indicators' (a grid of checkboxes for various flags and codes), and 'User defined fields' (for Client, R and D, and Capitalizable). The 'Charge Information' section is highlighted with a red dashed border.

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.

The screenshot shows the TimeControl web application interface. On the left is a navigation menu with options like HOME, TIMESHEET, REPORTS, TABLES, LINKS, TOOLS, ADMINISTRATOR, LEGACY, and MAINTENANCE. The 'TABLES' section is expanded, showing a list of charge codes. 'INTERNAL-VACATION' is selected and highlighted in blue. The main area displays the 'Charge Details' form for this selected charge code. The form includes sections for Charge Information, Associations, Indicators, and User defined fields. In the 'Indicators' section, the checkbox for 'Charge code is a vacation code' is checked. In the 'User defined fields' section, the 'Client' field is set to 'Non-Billable', 'R and D' is set to 'R and D Eligible', and 'Capitalizable' is set to 'Not Capitalizable'. The 'Time Request Charge Code' checkbox is also checked and highlighted with a red dashed box.

TimeControl - Charge

https://docs.timecontrol.net/Applications/Tables/ChargeTable.aspx?st=18&mnw=25

TimeControl

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Search...

Tables > Charge

Charge Code

Charge Code

Charge Information

Charge Code: INTERNAL-VACATION

Charge Description: Paid Vacation

Charge Status: Opened

Charge Start Date: 1/1/2010

Charge End Date:

Charge Budget Hours: 0.00

Charge Budget Cost: \$0.00

Associations

Project Name: INTERNAL

Internal charge codes:

Charge WBS:

Indicators

☒ Charge code is a vacation code

☐ Charge code is an illness code

☐ Charge code is a personal time code

☐ Charge Bank Flag 4

☐ Charge Bank Flag 5

☐ Charge Bank Flag 6

☐ Charge Bank Flag 7

☐ Charge Bank Flag 8

☐ Charge Bank Flag 9

☐ Charge Bank Flag 10

☐ Charge Bank Flag 11

☐ Charge Bank Flag 12

☐ Charge Bank Flag 13

☐ Charge Bank Flag 14

☐ Charge Bank Flag 15

☐ Charge Bank Flag 16

☐ Charge Bank Flag 17

☐ Charge Bank Flag 18

☒ Time Request Charge Code

User defined fields

Client: Non-Billable

R and D: R and D Eligible

Capitalizable: Not Capitalizable

Add User Defined Field

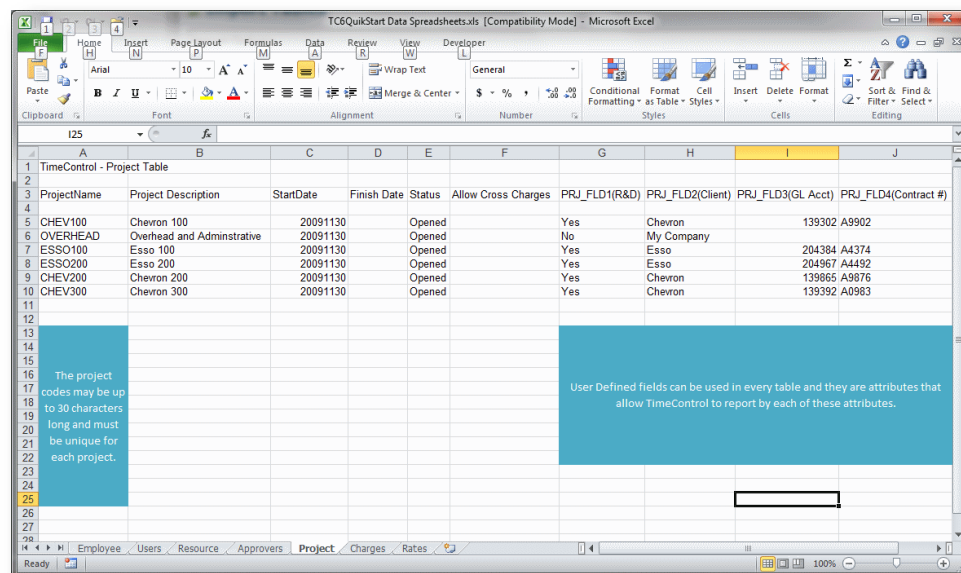
Page 1 of 1 (38 items)

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.

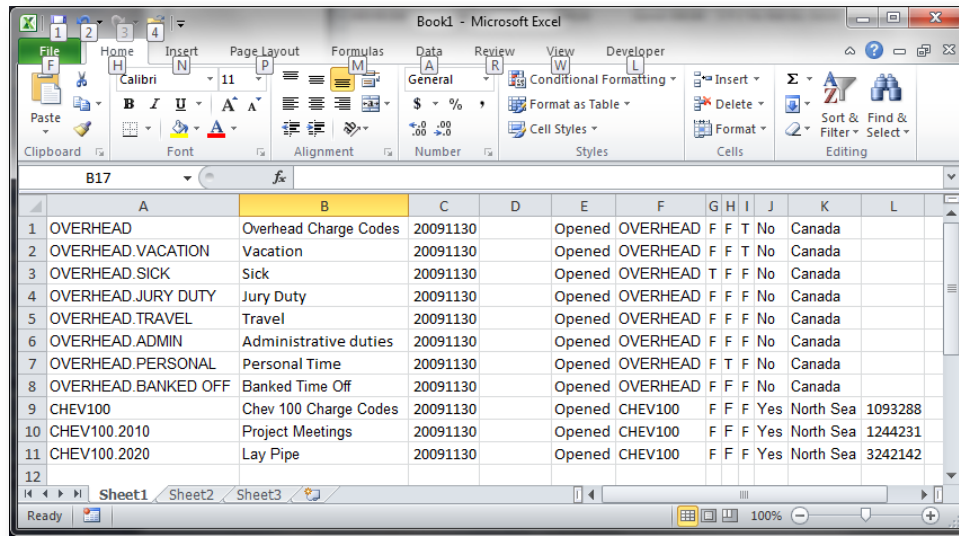
The file is located at: www.timecontrol.com/docs/tc8_data_template.xlsx.



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

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".

TimeControl - Import Tables

https://docs.timecontrol.net/Application/Links/Import.aspx?st=27&menu=128

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Table Import Wizard

Step 2 of 3

Import Options

Select the table to import into: Employees

☒ Omit header text on import ☒ Add new and allow updated to existing records

Select the file to import: Employee-List.xlsx uploaded successfully

Required Fields

☒ Employee Code
☒ Employee First Name
☒ Employee Last Name

Field Mapping Selection

#	TC Field	Import Value
9	Employee Code	Vacation
8	Employee First Name	SickLeave
7	Employee Last Name	PTO
6		End
5	Vacation Hours Start	Start
4		FullName
3	Personal Hours	LastName
2	Illness Hours	FirstName
1	Vacation Hours	EmployeeCode

Employee Code	Employee First Name	Employee Last Name	Vacation Hours Start (E	Personal Hours (E	Illness Hours (EM	Va
CJ016	Jane	Carpenter	24	40	8C	8C
DB017	Barbara	Donovan	24	40	8C	8C
ER013	Robert	Eglington	24	40	8C	8C
GJ018	Joseph	Gardner	24	40	8C	8C
JD019	Diana	Jacob	24	40	8C	8C
LA020	Alex	Lang	24	40	8C	8C
LT021	Tom	Logan	24	40	12	12
PC014	Chris	Peters	24	40	12	12
RG022	Gail	Robinson	24	40	8C	8C
TD023	David	Taylor	24	40	8C	8C
TS012	Sally	Thompson	24	40	8C	8C
VE024	Eric	Vincent	24	40	8C	8C
WJ011	John	Walker	24	40	8C	8C
CJ016	Jane	Carpenter	24	40	8C	8C
DB017	Barbara	Donovan	24	40	8C	8C

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HMS

☐ Show one time schedules from the past

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 and 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.

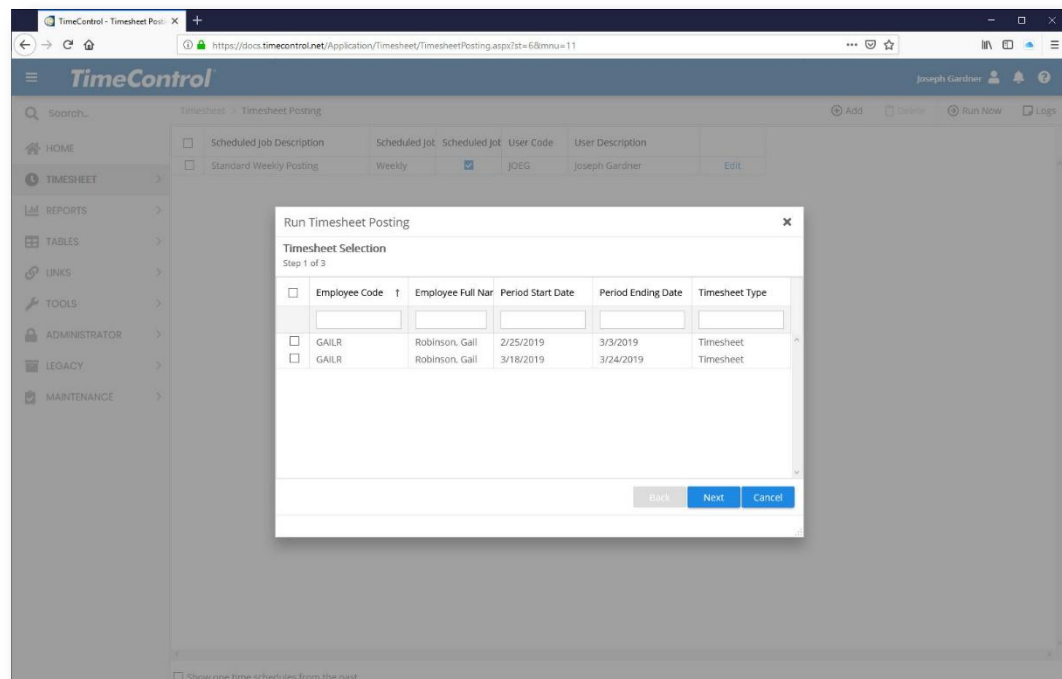
The essential elements of the process are as follows:

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.

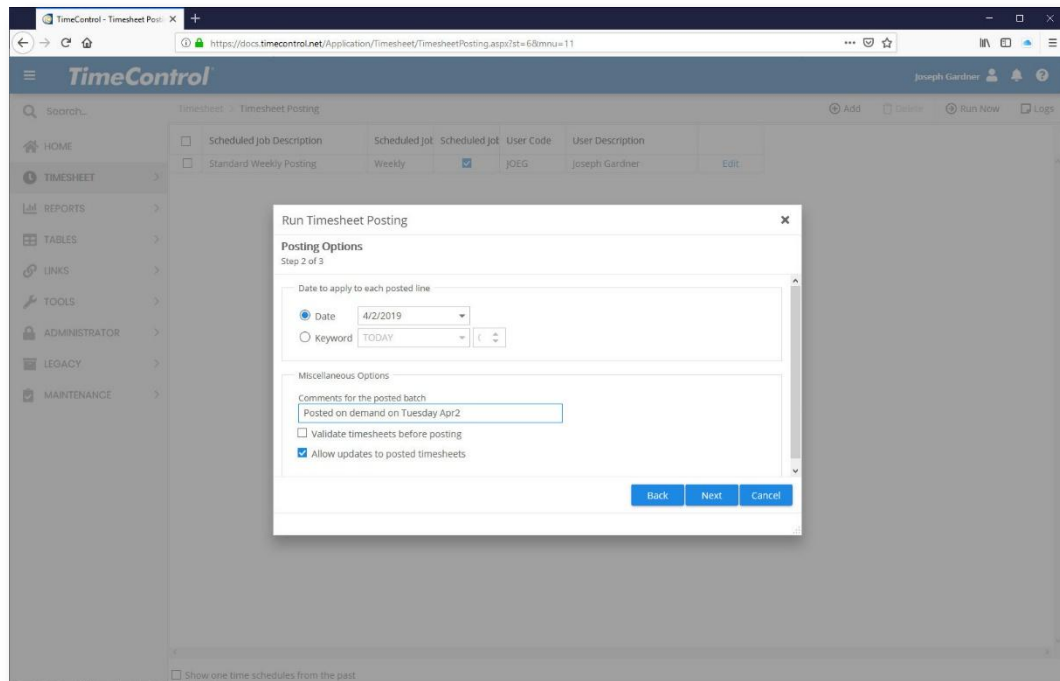
The Posting Process

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.

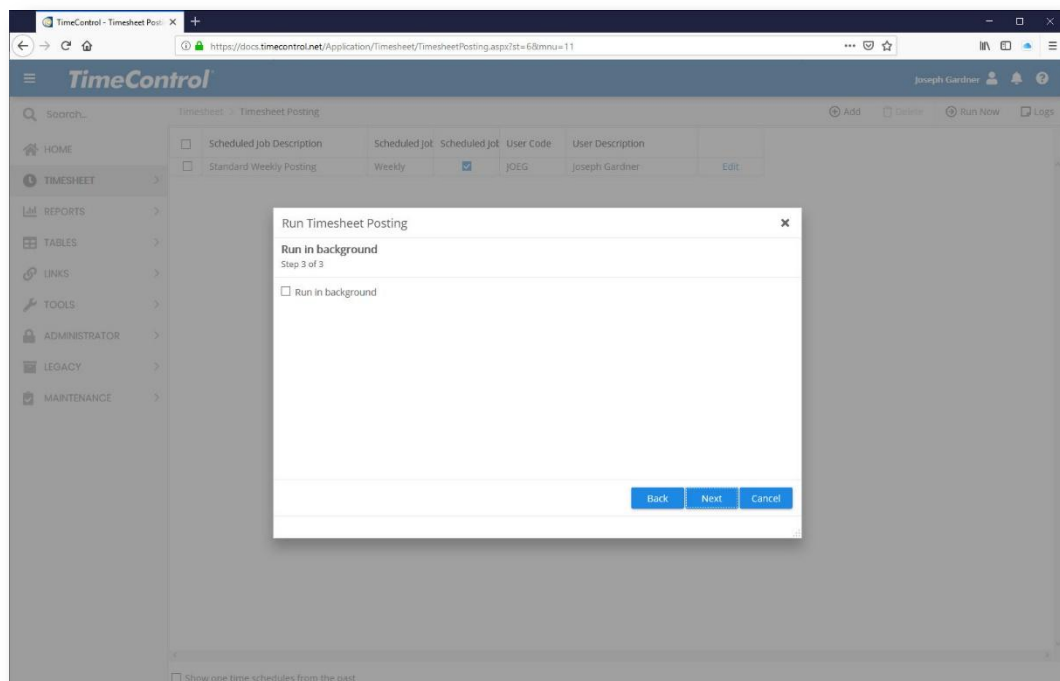
To start the Posting Process, go to the Timesheet tab and select Timesheet Posting.



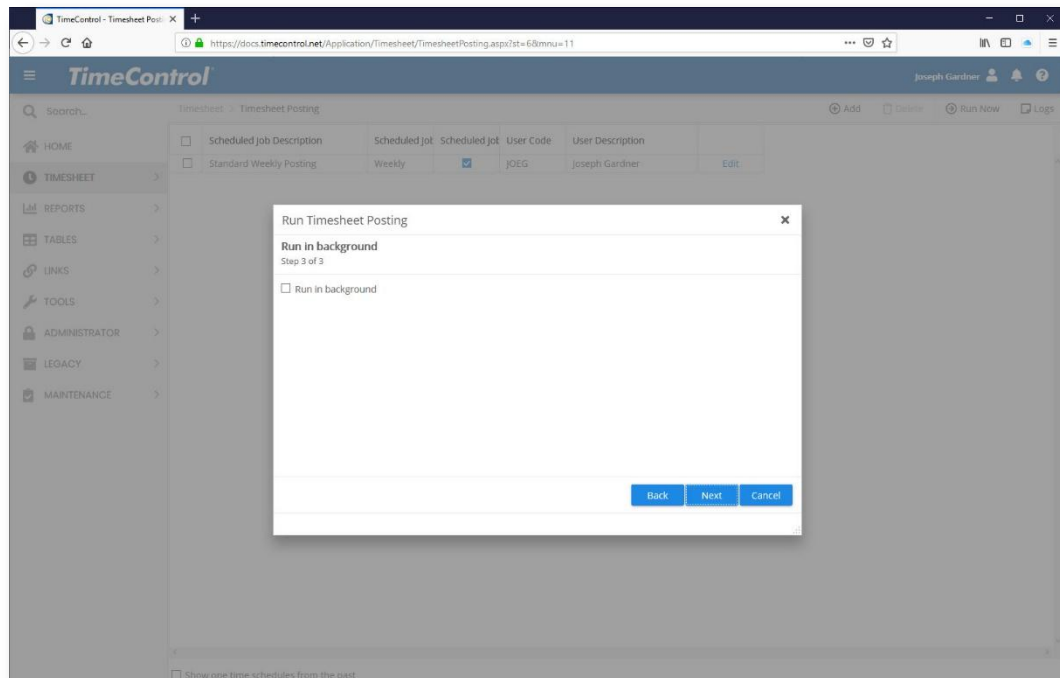
Posting can be scheduled to be done automatically but for now, let's just do one on demand by selecting Run Now and clicking “Next”.



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.