TimeControl® Creating your rate structure

For more information contact: HMS Software 189 Hymus, Suite 402 Pointe-Claire, Quebec H9R 1E9 Tel: 514-695-8122 Fax: 514-695-8121 Email: info@hms.ca Web: www.TimeControl.com

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Introduction

One of the most powerful aspect of TimeControl is the remarkably flexible method by which rates are applied to timesheet hours. As a multi-purpose timesheet, TimeControl's rates may have to serve numerous purposes. In other timesheet systems, the designers typically think of rates only for the purpose or system for which the timesheet is designed. It is not uncommon in some systems to find limitations on rates or on how many costs can be calculated or on how many rate codes an employee might have.

TimeControl's flexibility allows it to be used for multiple purposes at once. In a scenario where the timesheet data is being used to link to more than one system, what the rates will do in that timesheet becomes a more important aspect of the design.

As you'll see in the coming pages, the TimeControl Rates environment is configured with many options and touches several aspects of the TimeControl timesheet system.

In this tutorial we'll look at the functionality and options for each TimeControl area of configuration or functionality and then go deeper to talk about some of these functions in context of different use-case scenarios.

The Rates Table

Rates Table Display

The story about TimeControl rates starts with the Rates Table. This is a rather simple table where the only required fields are the Code, Description and Rate Type. Rates are displayed in a list on the left hand side and the details of the selected record are displayed on the right.

Rates can be entered manually one at a time or imported in volume using the Links module.

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There is no limit to the number of rate codes that can be entered and no limit to the number or rates an individual employee has access to. The only limits are those you create yourself using filtering.

The Rates detail view allows notes to be added for each rate record in a separate tab and, in the main tab, data is divided into four categories:

Rate Information

Rate Code:

Unlike other TimeControl tables, the Code does not need to be unique here. We can have many rates that have the code name "Standard". TimeControl adds several fields together to ensure a unique selectable value for the employee's timesheet. For Global Rates, TimeControl uses the Rate Code and Rate Type (Global) to be unique. For Resource-based rates, TimeControl combines the Rate Code, the Rate Type (Resource) and the Resource Code to be unique. For Employee-based rates, TimeControl uses the Rate Type (Employee) and the Employee Code to be unique.

If in the timesheet selection TimeControl finds more than one rate code for the employee with the same code (e.g. A Global and a Resource) then it will only show the rate code which is most specific to that employee. For multiple rate codes with the same Rate code It will give preference to an employee-based Rate Code then to a resource-based Rate Code then finally to a global-based Rate Code.

Associations

In the Associations area, TimeControl will activate the Employee Code/Description if the Rate Type is "Employee" or the Resource Code/Description if the Rate Type is "Resource".

Multiple Rate Values

By default, TimeControl supports 9 values for each Rate Code. New users to TimeControl will sometimes confuse the Rate Value with a Rate Code. For each Code, you can enter 9 definitions of what that time should be priced at. The Rate Value is defined in hours.

Rate Values	Rate 1	30.00	÷	Rate 2	60.00	*	Rate 3	75.00	÷
	Rate 4		*	Rate 5		*	Rate 6		*
	Rate 7		*	Rate 8		*	Rate 9		÷

Some organizations will assign one of these values to the internal cost and another value to the invoice price. Then, each time a timesheet is posted, it will multiply each value times the number of hours (or fraction) and store the result in a cost field associated to the rate value. The Posted Detail table which contains the timesheet data after it's posted will have a Rate Value 1 that matches a Cost Value 1 and a Rate Value 2 matched with a Cost Value 2.

This simple concept results in a powerful combination of how costs are managed in TimeControl. An organization can simultaneously price the same hour of work in multiple ways. There could be an internal cost of that hour that would match payroll, an external price for that hour that would appear on invoicing and perhaps even an average value project cost that could be used to compare costs in a project management system.

With so many values available, an organization can use other values for other purposes. A separate currency could appear in one value so that an hour of work could appear in a local currency value and have an associated base-currency value. In a single TimeControl report, both US dollars and Euros could appear. Using calculated fields in the TimeControl Report Designer, you could show the profit by comparing the Cost Values of the Internal Cost with the Cost Values of the Invoice Price.

User Defined Fields

Finally, as is the case in all TimeControl Tables, user defined fields can be used to further categorize the rate code. You'll see a specific example later in this paper on how to use user defined fields to make project-specific rates but rates can be categorized by almost anything and user defined fields are excellent for that.

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Rate Type: Global

The first type of rate that can be created is a Global rate. A Global rate will be available to all employees unless it is hidden by a Rate Filter in the Employee Table.

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LEGACY	>	Standard Rate for Gall Robinson Standard Rate for Jane Carpenter	Rate Values	Rate 1 30.00	\$	Rate 2	60.00	Rate	3 75.00	\$					
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		Standard Rate for Sally Thompson	User defined fields	Currency											- 1
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When we select a Global Rate Type, the options in Associations are greyed out and unselectable.

Rate Type: Resource

You can also define rates at the Resource Level. If a Rate Type of Resource is selected, the Association must be entered to select which Resource this Rate is linked to. If on the timesheet, TimeControl detects both a Global Rate Code and a Resource-specific Rate Code which are identical, it will select the Resource Rate Code as that is more specific to this employee.

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Rate Type: Employee

You can select an Employee Rate Code by choosing a Rate Type of Employee in which case you must complete the Employee selection in the Associations area. If on the timesheet TimeControl detects either a Global or Resource Rate code with the same Code name, it will show the Employee-based Rate code as that is more specific to this employee.

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			Standard Rate for John Walker Standard Rate for Robert Eglington Standard Rate for Sally Thompson Standard Rate Standard Rate for Tom Logan	•																		

There is no limit to the number of rate codes that can be Employee specific. For example, it is not uncommon to have regular and overtime rates for each employee and each project. Then TimeControl would only show this employee's rate selections to them on the timesheet. If a filter further constrained this to show project-specific rates, an individual would only see two choices (regular and overtime) for each project line but in the background, TimeControl might be managing a table with thousands of Rate Codes in order to show only those two in that situation.

Expense Rates associated in the timesheet

TimeControl can also associate rates to expense items. This will allow a predetermined value to populate the dialog in a timesheet expense item entry.

To do this we need to first set up a resource that will be referenced in an expense line item that is in a timesheet.

In this example we will add a resource for mileage. In the Resource Table we add the resource "MILEAGE" and declare it to be a "Non-Labor" type. TimeControl will display a list of Non-Labor resources when adding a resource entry.

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Once the resource is present, we can now go to the Rate Table.

We will create a new rate and again call it "MILEAGE". We select "Resource" as the Rate Type. When we click in the Resource field, we will see a list of possible resources. We'll select the "MILEAGE" resource we just created.

TimeControl - Labor Rates <) → C @ ... 🖂 🏠 (i) A https:// cs.timecontrol.net/Ar = TimeControl Joseph Gardner 💄 单 📀 > Labor Rates 🕀 Add 🛛 💭 Copy 🖞 Delete Q Search_ 9.0 General Notes 0 A HOME Rate Information Rate Description MILEAGE Rate Code ٩ Mileage for driving a personal car in the US Rate Descript Lill REPORTS Rate Type Resource Banked Overtime Standard Rate for Engineers TABLES Associations Standard Rate for Gail Robinson i... Rate Employee Holiday Rate netrage for personal car use Rate Resource MILEAGE Employee Mileage for driving a personal car ... Non-Compensated Overtime User Labor Rates Nova billing rate (Global)
 Rate 2
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In the Rate Values we'll add "\$0.51" for Internal Cost (Rate Value 1.

When we save this, it will now become available for expense entries as we'll see in the next screen.

Now we go to a timesheet, add a line and click on the "+" button to expand the timesheet line to show Expenses. Add an expense entry either in the grid or, as we see below, by hovering over "Append" in the Expense grid to get the Expense dialog.

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The user selects "MILEAGE" as their expense entry and then enters the quantity. When the quantity of 450 miles is entered, TimeControl automatically calculates this at \$0.51 per mile or \$229.50 as a Sub-Total. The user can then enter optional values for taxes and the grand total is calculated.

Rate Hierarchy

In System Preferences, in the Tree View Fields selection, there is an option for how to display rate codes. You can select one or several fields in order and TimeControl will build a hierarchy with those fields each becoming a different level. If we select the Rate Type for example, the Rate Table view will change. If we now go back to the Rates Table we can see that the rates are now displaying in a hierarchy based on Rate type.

Employon Hierarchy Type	None				
Project Hierarchy Type	None	*			
Charge Hierarchy Type	Delimiter	-	Charge Delimiter	. •	Build
Rate Hierarchy Type	Field Hierarchy	*	Edit Field Hiera	rchies	

The hierarchy defined will appear anywhere rates are selected. In the screen below we can now see the hierarchy in the Rate Table. This same type of tree structure will be found also in the timesheet selection, the default rate selections and elsewhere. If there is a filter that shows only some Rate Codes, the tree structure will appear only for those elements which have a Rate Code within them.

This is true also for anywhere else rates are displayed. Going to a user's timesheet and selecting the rate choices will show only their appropriate rate choices but will display them in the hierarchy defined in System Preferences.

Rate Filters in the Employee Table

One powerful aspect of Rate management in TimeControl is to filter what Rate Codes will appear for a particular situation. You can filter rates by any dynamic selection you wish and have only those rates appear. For example, you might want to filter rates to show only the current year's rates and on the first of the year start showing only next year's rates. That enables escalated rate management. Or, you might have a situation where based on the client, project and role, different rates should be visible and that the employee must select only from those.

This is activated in the Employee Table view. As we can see here, for this employee, we are selecting a filter that says only rates associated to their project are shown.

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-		Peters, Chris			Expense Filter				¥
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LEGACY	>	Vincent, Eric			Rate	S-GAILR			
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		Tadae David			User Description		Email to	↑ Move Up	
		Page 1 of 1 (31 items)	1		Gail Robinson			↓ Move Down	i.
		>			Tom Logan				

Making such a filter is fairly straightforward in the TimeControl filter menu.

This particular example is in the following screen.

Filter Name	Ŧ	SELECT RAT_KEY FROM RATE WHERE RAT_FLD4='%TSL_PRINM%
٩		
Advanced Examples	2	
From May 1 to May 31 2019		
No sick leave on weekends		
Posted Timesheet Filters		
Reporting		
TimeRequest Range		
Timesheet Filters		
2018_Rates		
Not_Closed_Charge_Codes		
Not_Closed_Projects		
Only Open Projects		

In this case we're using one of TimeControl's value macros for filters. The full expression is:

SELECT RAT_KEY FROM RATE WHERE RAT_FLD4="%TSL_PRJNM%"

This expression says: Show only the rates where the value found in Rate Table User Defined Field #4 is equal to the project name of that timesheet line number (TSL_PRJNM).

Rate Labels in Manage Languages

TimeControl is a multi-language system but it also allows you to change the menu names, field names, messages and other terms in any of the existing languages. We can use this to make our Rates more clear. This next screen shows the Manage Languages function where we can find an existing term like "Rate 3" and change it to "Average Project Cost"

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) Search		Maintenance	> Manage Langu	lages			🖂 Collapse All 🛛 🔍 Find		Languages) Add			室日
HOME		Tag Categor	ytŢ										
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g- Links	1	> Tag Categ	ory: PVO										
F TOOLS	>	> Tag Categ	ory: PWD										
		> Tag Categ	ory: QTRLY										
ADMINISTRATOR	1	✓ Tag Categ	ory: RAT										
LEGACY	>	0	RAT_0001		Rate Code Label	English	Rate Code						
		Ø	RAT_0002		Rate Description Label	English	Description						
MAINTENANCE	>	0	RAT_0003		Rate Type Label	English	Rate Type						
		0	RAT_0004		Rate Cost 1 Label	English	Internal Cost		-				
		0 5	RAT_0005		Rate Cost 2 Label	English	External Price						
		Ø	RAT_0006		Rate Resource Label	English	Assigned Resource						
		0	RAT_0007		Rate Employee Label	English	Assigned Employee						
		0	RAT_0008		Global Rate Type Label	English	Global						
		B	DAT 0000		Employee Pate Type Lahel	English	Employee						

Back in the Rate Table, you can see that we now have Internal Cost, External Price and Average Project Cost replacing the labels "Rate 1", "Rate 2" and "Rate 3".

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d Rate for Chris Peters		Rate Resource								
d Rate for David Taylor										
d Rate for Gall Robinson	Rate Values	Internal Cost	\$ 00.08	External Price	60.00 \$	Average Project Cost	50.00 \$			
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d Rate for John Walker		Rate 7).00 📮	Rate 8	0.00 Ç	Rate 9	0.00 🗘			
d Rate for Robert Eglington d Rate for Sally Thomoson	User defined fields	Currency								*
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d Rate for Tom Logan		Project								***
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Rate Defaults in MyAccount or Employee Table

Users can save time on their timesheets by selecting a rate code that they use most frequently. This can be done by the individual user on the Employee Tab of the MyAccount function. MyAccount is at the top right of the screen. The Employee is able to select any rate that is available to their view.

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Administrators can set up default selections for employees in the Employee Table. The Timesheet Information Tab allows for the Default Rate Code to be selected.

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) Search_		Tables > Employee				⊕ Add ∽ 🔲 Copy 📋 Delete	Apply	Undo More
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		Employee Full Name		Timesheet List Filter	Employee Project Filter	Not_Closed_Projects		
TIMESHEET	>	٩			Employee Charge Filter	Not_Closed_Charge_Codes		
REPORTS	>	Lang, Alex			Rate Filter	Project_Based_Employee_Rates		
TABLES	>	Donovan, Barbara Iones, Bill			Resource Filter			
10.000		Peters, Chris			Expense Filter			,
LINKS	1	Carpenter, Jane		Default	Project			
TOOLS	>	Donovan, Barbara						
ADMINISTRATOR	>	Jacobs, Diana			Charge			
IFRACY	>	Vincent, Eric			Rate	S-GAILR		
		Charles, Frank				Standard Rate for Gall Robinson		
MAINTENANCE	>	Gardner, Joseph	1		Default Line Resource			
		Carpenter, Jane						
		Gardner, Joseph		Timesheet user defined field defaults:	Field 1			
		Walker, John			Field 2			
		Lang, Alex			Field 3			
		Logan. Tom			test			
		Barrow, Paul Peters, Chris			Phase			
		Robinson, Gail			Description do travan			
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		Page 1 of 1 (31 items) <	1		Gail Robinson			↓ Move Down
		>			Tom Logan			

A Default Rate is a requirement for TimeControl Pre-Loading of timesheets and it can save a lot of time.

Rate Default in the Project Table

Some organizations will want to set a default rate for a project. If this is the case, a rate can be set up for each employee with the same name such as "NOVA" for all Nova projects. Each employee would have an Employee-based rate code of NOVA available. We'll also need to create a Global rate of NOVA in order to make it the project default. In the project table as we see below, we've done a selection of a rate as the default. Only Global rates can be selected here as we don't want the situation where a rate was selected but might not be available to a particular user.

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TABLES	>	Automation Project	Tojecentornatori	Project Status		Opened	*	Copy to Charge			
		BrightWork On Premise		Project Start D)ate	8/31/2012					
LINKS	>	BrightWork Online Sample		Project Budge	Hours	0.00	\$				
TOOLS	>	Call Center Release 1.0 Call Center Release 1.0		Calculated Pro	ect Budget Hours	8,400.00	\$				
ADMINISTRATOR	>	Data Migration Project		Project Budge	Cost	\$0.00	\$				
		EPM Deploy EPM System for Project Management Office		Calculated Pro	ect Budget Cost	\$1,000.00	\$				
LEGACY	>	HMS Project				Allow Cross 0	charges				
MAINTENANCE	>	Human Resources Information System	Associations	Project Owner	GAILR						
		OnPub 2			Gail Robinson						
		Polar Development		Rate	NOVA						10
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		TimeControl Demo Project TimeControl Deployment Project	User defined fields	Client	Baker Consultin	18					*
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		Training job from that bolian the PCar					Add User	Defined Field			
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With this rate now in the project table, whenever this project is selected in the timesheet or is part of a pre-load, this rate code will be the one that TimeControl inserts by default in the rate column. If there is an employee or resource-based code called Nova which is more specific to that employee, then that will be the particular "NOVA" that TimeControl uses during the Posting process.

The "Project Rate Required" option will force the selected Project Rate to be the one associated to that project so there is no mistake by the end user.

Project Management Links

When sending data back to a project management system one of the options is to send back the costs. The Rate Value selected will be a key decision here.



In the Project Table or in the Links Wizard, two options are presented that reference the Rate Values. First, decide at the bottom of the page if you are going to transfer the actual costs at all. If not, there's no need to select the rate value. If you intend for the project management system to take the hours as uncosted data and do its own calculations with the rates it has stored, then don't transfer the actual costs in order to avoid double counting or ending up with unsynchronized costs which don't match.

If the intent is to have TimeControl's costs match the project costs in the project management system, then select one of the 9 Rate Values to transfer. TimeControl will take the Posted Cost for that associated value and send that information to the project system.

Some organizations will want to send the internal cost. Some will want to send a billing value and others will want to use an average project cost value. This last concept is fairly common among those who have had to wrestle with managing restricted rate functionality in the project system and trying not to do too much accounting in the project system.

One thing to avoid here is to transfer the data to the project system and then use the project system to transfer it again for invoicing, payables, payroll tax reporting or any other auditable purpose. Given you already have the auditable data in TimeControl, it's unlikely that that the project system will give any additional added value to the costing data. You can make a link instead directly from TimeControl to the financial system that needs it.

How are costs calculated?

TimeControl posts the costs that are associated to each Rate Value during the Posting Process. For each of the 9 Rate Values, TimeControl will create a corresponding Cost on the Posted Detail record. Since this is done at the moment of Posting, if rates have changed during the week, the rate that is present at the moment of Posting will be the one used for the calculation.

In this next screen we can see the Drill-Down Analyzer showing data for a project with the hours, 2 Rate Values and the associated Costs:

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MAINTENANCE	1	Polar Development	POLAR.10	Documentation		6.00	\$1.00	\$6.00	\$2.00	\$12.
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		Polar Development	POLAR.11	Technical Documental	tion	4.00	\$30.00	\$120.00	\$60.00	\$240.
		Polar Development	POLAR.11	Technical Documenta	tion	8.00	\$30.00	\$240.00	\$60.00	\$480.
		Polar Development	POLAR.11	Technical Documenta	tion	8.00	\$30.00	\$240.00	\$60.00	\$480.
		Polar Development	POLAR.12	Reference Docs		4.00	\$30.00	\$120.00	\$60.00	\$240.
		Polar Development	POLAR.12	Reference Docs		4.00	\$30.00	\$120.00	\$60.00	\$240.
		Polar Development	POLAR.12	Reference Docs		2.00	\$30.00	\$60.00	\$60.00	\$120.
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Looking in a bit more detail, you can see that on the first line, there is an entry for 4 hours of time and based on the rate code selected for that timesheet, there was a Rate Value 1 or Internal Cost of 30.00. The Posted cost is 4 x 30.00 or 120.00.

On the same line, the Rate Value 2 or external price rate is 4 hours with a Value of \$60. The Posted Cost 2 for that entry is 4 x \$60 or \$240.

So, for this entry we can see values that might have represented the Internal Cost and the External Billing value for the same timesheet entry. The end user doesn't ever see this of course. They simply chose the appropriate rate code based on the codes available to them. The values of these entries were never displayed to the end user.

Rate Security in User Profiles

Rates are considered very sensitive in most organization. If the rates include personnel salary or wage data there may be privacy issues that are mandated by law to ensure that the rate data is not displayed.

The main areas of User Profiles that can secure Rates data are in the User Profiles security screens.

In the menu area, you can turn off access to the entire Rate Table, thus hiding it from view. Most users will not require access to the table anyway and it is a basic tenet of security design to not give access when no access is needed.

This screen shows the User Profiles menu page. You can remove access to just the Labor Rates menu selection or turn off the entire Tables Tab (as is done in this example) so users with the Individual User Profile will not see any table selections in their menu.

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ADMINISTRATOR	>			Reports						
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		<	>	Interface Definition						
		Page 1 of 1 (7 items) (1	>	Tools						

The User Profiles Field security screen allows you to define any field in any table as visible (blank = no constraint), Read-Only, Value Hidden or Invisible.

- A blank entry would mean the field label is visible and the field value is editable.
- An entry of read-only would mean the field label is visible and the field value is visible but not editable.
- An entry of value-hidden would mean the field label is visisble but the field value is not visible and not editable.
- An entry of invisible would mean that the field label is invisible and the field

value is not visible and not editable.

This next screen shows the Internal Cost Value as Read-Only, the External Price as Invisible and the Average Project Value as Value Hidden.

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		Project		
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		Rate Description		
	c >	Rate Row Source		
	Page 1 of 1 (7 items) (1)	Rate table location code		

When these selections are made, they are honored across the entire TimeControl system. For example, if you have made Rate Value 1 as invisible, then the Rate won't be visible in the Table view but it also won't be visible in reports, in exports or anywhere else. Remember, you may need to also secure the Posted Cost fields in the Posted Detail table.

A final place to think about security of the Rates Table is in User Profiles/Table Security.

There are several options for each table including the Rates Table that can be established in this area and are specific to that User Profile so that different rights can be associated to different groups of people.

Even if a role has access to the Rates Table, you can define whether a user with that role can:

- Add (Insert) a new record
- Edit (Update) an existing record
- Delete a record
- Add a new User Defined filed (Structure) to the table
- Change the Links for the User Defined Fields (Linked Fields)
- Add Values to the pop-up list for a User Defined Field (Edit Links)

The last value on the right hand side of the security screen says "Filter". This can be used to apply a filter from the Filter Table when accessing this table. This feature would allow an organization to have some Rate Administrators who could see one department and other Rate Administrators that would see any other department.

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Using Validation Rules to check rate selections

You can use TimeControl's extensive Validation Rules system to check for anything else that may be Rate related. You can use the Employee-level filter to only show certain rates for certain conditions but the Validation Rules would check and deliver either a warning or an error based on the rates selected.

For example, we could check timesheets for only project personnel to see if the Rate Code selected on a timesheet line was associated with the proper project such as was shown above in the "Project Specific Rates" example.

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ADMINISTRAT	DR >				Message Text You	u must :	select a rate code on this line that is associated to this proj	ect
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MAINTENANCE	>				 Entire Crew 		Crew Employee	
			1					

In this case the Detail section shows how we are applying this rule only to Project Personnel by selecting the Filter called "Project Personnel". Then in the next line we are validating for "Rate is Associated to the Project by selecting the filter for that.

Here's the example filter that would be used in such a validation rule.

Sei		Q	¢	Filter Details	Filter SQL
	Filter Name	r .		SELECT RAT_KEY FR	ROM RATE WHERE RAT_FLD4="HTSL_PRINMH6
	٩				
	Advanced Examples		~		
	From May 1 to May 31 2019				
	No sick leave on weekends				
	Posted Timesheet Filters				
	Reporting				
	TimeRequest Range				
	Timesheet Filters				
	2018_Rates				
	Not_Closed_Charge_Codes				
	Not_Closed_Projects				
	Only Open Projects				
	Project_Based_Employee_Rates				

In this case we're using one of TimeControl's value macros for filters. The full expression is:

SELECT RAT_KEY FROM RATE WHERE RAT_FLD4="%TSL_PRJNM%"

This expression says: Show only the rates where the value found in Rate Table User Defined Field #4 is equal to the project name of that timesheet line number (TSL_PRJNM).

Extended Rates in TimeControl Industrial

TimeControl Industrial includes all the remarkable Rates functionality we've seen above but goes one step further when entering Crew Timesheets. The Crew Timesheet Module of TimeControl is designed to enter a high volume of timesheet data in the field as part of Field Data Collection for Labor, Equipment and Materials. There may be hundreds of possible rate combinations and these have to be properly selected on the Crew Timesheet. TimeControl Industrial includes a function call "Extended Rates" which makes the proper rate selection based on the information in finds in each line. For example, if there is a premium for a particular project when working on the night shift and the shift number is on the timesheet line, TimeControl can automatically see both the project column entry and the shift column entry and then make the appropriate rate selection for that employee. Numerous columns can be matched in order to do this.

The Extended Rate table is very simple. It has a number of columns that are matched in the timesheet and then the Rate Values (1 through 9) for that Rate selection.

Previous Next Apply Undo			
ALL	▼		C Load
insert Copy Delete Se	lect All Deselect All		
Timesheet Project Name	Rate 1 Rate 2	Rate 3 Rate 4 Rate 5	Effective Date
ENGPROJ	27.57 38.4	3 2.25	01/01/2007
COMCONSTR	32.57 47.7	5 2.17	01/01/2007
HOMECONSTR	22.45 34.4	5 1.67	01/01/2007

The definition for this is made in the System Preferences area of TimeControl Industrial where the fields in the Extended Rate Table are matched to those in the Crew Timesheet.

Extended Rate Field	Timesheet Details Field	Visible
Field 1	Timesheet Project Name	 ✓
Rate 1	+*	 Image: A start of the start of
Rate 2		 Image: A state of the state of
Rate 3		 Image: A start of the start of
Rate 4		~
Rate 5	**	~
Rate 6		
Rate 7		
Rate 8		
Rate 9		
Effective Date		 Image: A start of the start of
EXR_FDATE		

Use-Case Scenarios

Since 1994 when TimeControl first appeared in the market, HMS has been asked to solve timesheet challenges that involved rates functionality. Here are several of the most common business situations and how you can overcome these challenges using the functionality we've described above.

Time and Billing rates

If you are using TimeControl for time and billing, you'll need to use rates to track the billing price in order to make invoices from the TimeControl data. You may also need to track internal costs as the profit for each hour worked would be the difference between the billable price and the cost. So it's typical to use at least two Rate Values.

Billing rates are likely to have the complexity of being specific to a client or to a client and contract. In this case, use one of the user-defined fields to identify the client and/or the client's contract so those rates can be associated to the correct category.

In some billing scenarios, the invoicing is done based on the role rather than the employee. This can be easily accomplished by using either resource rates or by making a rate code for each role/person. While this might result in a large volume of rates, you can use the Rate Filters in the Employee Table to reduce the number of rates to those specific to the employee and the line they are working on.

You can find out more about Time and Billing Rates on the TimeControl Website in the Time and Billing Solution area at: www.timecontrol.com/solutions/timebilling/.

Project Specific Rates

Some organizations have asked to have multiple rates associated to each project and then display only those rates on a timesheet line when that project is selected. We call this project specific rates.

To do this, start with creating a user defined field on the Rates Table. You'll need rights to Change the "Structure" in User Profiles Security.

C C Inter//docs/fmecontrol.org/Application/Tables/#	ati 🍳 = 🗟 C 🚺 TimeC	ontrol	×	_	_	-	Joseph Gardi	er Dashboard My Ac	count Lopout Help
Hatte Timesheet Reports Tables Laiks Tools A Boonne Likko Kates Mageet A Boonne Reports Reports B Wes Frequent Labor Rates	Administrator Docum	entation Maintena	nce -	Expand All Co	Rapse All Add	Copy	Delete	Undo Ree	
	German Note	6							
Page 1 of 112 kerns Rec Code Rec Department Rec Code Rec Department Rec Off Rec Off Re	Rate Information Associations	Rate Code Rate Description Rate Type	BNK-OT Banked Overtime Employee	u.					
	Rate Values	Ad User Defined Faild Charge Description Protect Feld Type Feld Size Text CK Cancel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAncel CK CAnc							
S-JOEG Standard Rate for Joseph Gardner S-JOHNW Standard Rate for John Walker		Rate 7 0.00	Rate 8 0.00	Rate 9	0.00				
S-ROBERT Standard Rate for Robert Eglington S-SALUT Standard Rate for Saliry Thompson S-TONIL Standard Rate for Ton Logan Global III Resource	User defined fields	Type Rate Owner Category							

Once the field is created, go to Manage External Links / Manage External Tables and associate the new User Defined Field to the Project Name and Description files in the Project Table.

		Field Links	Field Links TimeControl Column Name	Field Links Column Required ?	Field Links Table Name	Field Links External Column Name	Field Links External Column	Popup Dialog	
]	1	CHR_FLD1	Work Code		Linked Fields	Code	Description		View Links
	1	CHR_FLD2	R 88. D		Linked Fields	Code	Description		View Links
	1	CHR_FLD3	Capitalizable		Linked Fields	Code	Description		View Links
	1	EMP_FLD1	Department		Linked Fields	Code	Description		View Links
	1	EMP_FLD2	Location		Linked Fields	Code	Description		View Links
	1	EMP_FLD3	Туре		Linked Fields	Code	Description		View Links
	1	PRJ_FLD1	Client		Linked Fields	Code	Description		View Links
177		001.0.00	fundas films		Colored Fields	e	A	-	Manufiela.
	1	RAT_FLD4	Project		Projects	Project Name	Project Description		View Links
	Ł	KPH_FLD1	Report Field 1	L.	Linked Helds	Code	Description		VISW LINKS
	2	TSL_FLD1	Field 1		Projects	Funding Type	Funding Type		View Links
	1	TSL_FLD5	Phase		Projects	Client	Client		View Links

Now in the Rates Table we should be able to get a drop-down or pop-up list of Projects to which each rate code can be associated.



All that's left to do is create a filter that will only show the appropriate rate that is associated to the project in the timesheet line. We've described that example in the Rate Filters in the Employee Table earlier in this document.

Rates when linked to Project Management

When linking to a project management system, there are a couple of things to think about. First, do you want to send only the hours and keep the actual and billable costs in TimeControl or do you want to send the fully costed information to the project system?

If you have decided to send the fully costed information to the project system, the next decision is what value do you want to cost at? Will you manage your project costs at an internal cost value, external pricing value or, and this is quite popular, an average project cost value.

Once you've decided which Rate Value will be used for linking to project management, it's best to lock that in place so that there is no confusion by transferring with a different Rate Value in the middle of the project.

Rates when linking to an ERP

When linking to a Finance System or ERP, the first question to be asked is what will be done with the information. It is common, for example, to use TimeControl for Time and Attendance data for the Payroll system. If this is the case, then it is likely that the payroll cost won't be required. All payroll systems typically do their own calculations. What may be critical however, is that the rate codes might require some user defined fields to be established to deliver certain codes to payroll. It might be critically important for example to have a code that identifies each Rate Code as a regular or overtime code or a Payable or Non-payable code for payroll.

If the data will be used for Invoicing then the same logic applies. Will we need the pricing values from TimeControl or just the hours.

When we are linking to multiple systems such as <u>both</u> Payroll and Invoicing then using the User Defined Fields in the Rate Table and the Rate Values in each Rate Code will allow you to distinguish which information is transferred to which system.

The beauty of the TimeControl system is the manner in which multiple systems can be serviced simultaneously.

Managing hourly rates when salary cost must be calculated

You can do both hourly billing and salaried cost in TimeControl. The simplest way to do this is to have a "regular time" rate in which the annual salaried cost is divided by the number of working hours per year. For example, a 40 hour workweek will give us 2080 hours per year of workable time. Divide this into a \$65,000 per year salary and we know we need to account for <u>exactly</u> \$31.50 per hour. We can then make a validation rule to insist that every timesheet have exactly 40 hours using the "regular time" rate. Any other time such as overtime for example, would have to use a different rate. In the overtime rate, the internal cost would be zero and the billable cost would be the billable price value.

Escalated Rates

Some organizations have a rate situation where rates will change automatically on a given date. If, for example, an organization will have rates after January 1st reflect the next year's billing values, TimeControl can use Rate Filters and a user-defined field to support this.

TimeControl - Labor Ra	ates >	< +												-		
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TimeCo	ontr	oľ											Joseph	Gardner 💄	4 8	
L Search		Tables > Labor Rates								۲	Add 🔲 Copy	🖞 Delete	C Apply	9 Unde	More `	
HOME		Search Q	\$	General Notes											(
TIMESHEET	5	Rate Description		Rate Information	Rate Code	GAIL	R14									
TIMESTICET		٩			Rate Descript	on Stand	lard R	te for Gail Rob	oinson in 20	19						
REPORTS	>	Banked Overtime	^		Rate Type	Empl	oyee	*								
TABLES	>	Standard Rate for Gail Robinson i		Associations	Rate Employe	Joyee GAILR										
UNKS		Holiday Rate				Robins										
chine.		Kilometrage for personal car use i Mileage for driving a personal car	trage for personal car use I e for driving a personal car	Ra	1	Rate Resourc										
TOOLS	>	Non-Compensated Overtime														
ADMINISTRATOR	>	Nova billing rate (Global) Nova Billing rate (Employee)		Rate Values	Internal Cost	30.00	\$	External Price	60.00	\$	Average Project Cost	50.00	:			
LEGACY	>	Overtime rate for Boat Show		1	Rate 4	0.00 🗘 Rate 5 0.00 🗘 Rate 6 0.00	0.00	:								
		Paid Overtime Standard Rate for Alex Lang			Rate 7	Rate 7	0.00	÷	Rate 8	0.00	÷	Rate 9	0.00			
MAINTENANCE		Standard Rate for Barbara Donov	. 1	User defined fields	Currency	Billable									-	
		Standard rate for Boat Show Standard Bate for Chris Beters			Restriction	JOEG							*			
		Standard Rate for David Taylor		Clien Proje	Client	Client Private										
		Standard Rate for Diana Jacob			Project AUTO											
		Standard Rate for Gail Robinson Standard Rate for Jane Carpenter		Valid as o		1/1/2019					*					
	Standard Rate for Joseph Gardner									Add	User Defined Field					
		Standard Rate for John Walker Standard Rate for Robert Eglington Standard Rate for Sally Thompson Standard Rate for Tom Logan Page 1 of 1 (25 items) < 1														

To accomplish this, first create a field in the Rates Table to hold a date. This will be the "Valid as of" date to use in escalation. You'll need to go to new rates and add the value in each rate for the New Year.

Now you'll need to create a Rates filter which refers to that field and says to show only those rates with a value higher than that field.

Finally, you'll need to reference this filter in the Employee Table in the Rates Filter area of the Timesheet tab.

This example will ensure that as of the first of January 2019 only those rates which are 2019 rates will appear and will be selectable on the timesheet. The definition could be set up months in advance and would not be visible to end users until the New Year occurred.

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HOME		Search	Q \$	General Banks Timesheet In	formation Employ	ee Roles TimeRequest Options Employee C	rews Revi	sions < 🗲 🗲	¢
		Employee Full Name		Timesheet List Filter	Employee Project Filter	Not_Closed_Projects			•
I IMESHEEI		٩			Employee Charge Filter	r Not_Closed_Charge_Codes			-
E REPORTS	>	Lang, Alex			Rate Filter	2019_Rates			· •
TABLES	>	Jones, Bill			Resource Filter				*
		Peters, Chris			Expense Filter				*
P LINKS	1	Carpenter, Jane		Default	Project				•••
TOOLS	>	Donovan, Barbara							
ADMINISTRATOR	>	Jacobs, Diana	Q. Q. General Banks Timesheet Info	Charge					
		Vincent, Eric				E CAUD			333
LEGACT		Charles, Frank		Rate	Standard Rate for Gall Robinson				
MAINTENANCE	>	Robinson, Gail Gardner, Ioseph			Default Line Resource				
		Carpenter, Jane							
		Jacob, Diana		Timesheet user defined field defaults:					
		Walker, John		Three and active new seconds	Field 1				
		Smith, John			Field 3				
		Logan. Tom			test				
		Barrow, Paul			Phase				
		Peters, Chris			Description du travail				
		Eglington, Robert		Release Path	+ add Dipolate				
		Thompson, Sally			T AGG U Delete			A. 110-01	
		<			User Description		Email to	The Move Up	
		Page 1 of 1 (31 items)			Gall Robinson			↓ Move Dowr	1
		/			Tom Logan				

There is one additional challenge which might occur when the New Year (as is the case for 2019) or the escalation date falls in the middle of the week. If this must be accommodated, then use partial posting (which is described in the TimeControl Reference Guide) to post the first part of the week with the earlier rates and then do the regular posting which will catch the remainder of the lines at the end of the week.

Multi-currency Rate Issues

While TimeControl does not automatically convert multiple currencies, the enormous capacity of the Rates system does allow for several ways to manage multiple currencies and report on them at the same time.

You could, for example, use one of the 9 Rate Values for each rate code to have a foreign currency value. Then at posting time, this value could be used to translate to a base currency in a TimeControl Post-Posting procedure in which a list of currency exchange values is polled either internally or on a service on the Internet.

There is more information on this subject on the TimeControl blog at: <u>https://blog.timecontrol.com/managing-multiple-currencies-in-timecontrol</u>

Questions and Answers about rates

- Question: How many rates can an employee have?
- Answer: There is no limit to the number of rates that can be selected by an employee.
- Question: How many rates can be put on a single timesheet?
- Answer: One per line

Question: What if I want to track burdens on a rate?

- Answer: You can use one or more of the 9 Rate Values or one or more of an unlimited number of user defined fields to record the burdens. If the Rate Values are used, the values will be multiplied by the number of hours in an associated cost field during Posting. You can then report on these costs in the Reporting system.
- Question: If a Debit/Credit is used to adjust a timesheet later and the rate has changed, will the new rate be used or the old one?
- Answer: If the rate has been changed, then the Debit/Credit will be calculated at the new rate. In order to do an adjustment which would reflect both the old and new rate, a new rate could be created and the Debit done with the old rate code and the Credit done with the new rate code.
- Question: How could we do escalated rates?
- Answer: Create rates for the escalation date and use Rate Filters to show the old rate code up until the escalation date and the new rate codes after the escalation date.
- Question: Our rates will be changing on the first of the year which is mid-week. How do I have rates change in the middle of a timesheet period?
- Answer: Use Partial Posting to post the first part of the week at the old rate values, then change the rates to the new values and post the rest of the week normally at week's end.
- Question: Can we just take the rates from an external system?

- Answer: Sure. The Links module allows you to import rates that have been exported from another system to an Excel or CSV file.
- **Question**: Can we transfer the rate codes from TimeControl to Microsoft Project, Primavera or some other system?
- Answer: This is a question for the publishers of the systems you are thinking about but for any transfer to work, the destination system must be able to accommodate the data. TimeControl's rates can have 9 values. If the destination system does not have such capabilities, the data will have nowhere to be accommodated. TimeControl can have an unlimited number or rates per employee. If the destination system does not support this, the transfer had nowhere to put that data.
- **Question**: Are rates required on every timesheet line?
- Answer: Yes. A rate code must be selected on each timesheet line
- Question: We don't use rates and I don't want users to have to see them or select them. Is there any way to turn rates off?
- Answer: You can hide rates rather easily. If each user has a default rate value (such as "S" for standard), then hiding the field in User Profiles Field Security will have that column disappear from the timesheet and, even though it will be populated with the default value, no user ever needs to look at the rate codes again.
- Question: At what level of time resolution is the Rate Code calculated into a Cost Value?
- Answer: At the minute. All TimeControl times are stored internally as minutes. During the Posting process, the cost values are defined as the number of minutes times the (Rate Value/60).

Use Case Scenarios

www.timecontrol.com/use-cases

We have created numerous solution portals with resources for different situations. In many of these situations we discuss some aspect of rates and costing. There are use case scenarios for project management, HR, Billing, linking with different products, specific approvals to be compliant with the DCAA and more.

TimeControl Free Hosted Trial

Freetrial.timecontrol.com

You can try TimeControl yourself to see or try any of the features that have been described here. Go to <u>freetrial.timecontrol.com</u> to register for the free trial.

TimeControl Reference Guide

The TimeControl Reference Guide includes more extensive descriptions of all the rate management mechanisms discussed in this paper. You can access the guide as part of the TimeControl Free Hosted Trial system in the Documentation tab or on your copy of TimeControl.

TimeControl Blog

blog.timecontrol.com

The TimeControl blog contains numerous discussions of approvals done in different circumstances and tips and techniques on how approvals functionality can be used. It's a good place to keep up on tips from the TimeControl technical and deployment staff.

TimeControl Feature List

Easy to use Interface

- Full web-based browser interface with multiple browsers supported
- TimeControl can be implemented within a SharePoint interface or a Microsoft Project Web Access interface
- Scaleable user profiles facilitates use for data entry users yet provides full functionality for administrators
- Multilingual with multiple languages included
- Unlimited charge codes displayed in simple, hierarchical dropdown lists
- · Unlimited free-form notes for each line item and each timesheet
- E-mail-enabled. E-mail messages sent for system notices such as rejected timesheets or missing timesheets
- Scheduleable E-mail notification for missing or unapproved timesheets.
- Predefined timesheets based on resource assignments from the project management system or by user input

Robust Architecture

- Open database architecture; support for Oracle, Microsoft SQL Server, Sybase and MySQL databases
- N-tier architecture makes system scaleable for 10 to 100,000 users
- Unlimited rate codes per employee
- Field-level security. Make any field visible, value read-only, or invisible
- · Complete redefinition of every field label
- Complete auditability of timesheet data
- User-defined fields on every table
- Add pop-up data validation for each user-defined field
- Allows charges to be linked to a specific project or projectindependent
- Multiple overhead charge types
- Filter charge codes, projects and rates visible to any employee

Web Interface

 MyTimeControl[™] home page dashboard gives extensive and customizable dashboard information to employees

Mobile App

• The free TimeControl Mobile App is available on Gooble Play for Android devices or the Apple store for iOS devices

Approval Process

- HMS's unique Matrix Approval Process for Labor Actuals™
- Unlimited automatic Validation Rules are user defineable, flexible and can be applied globally or to any group or even an individual
- Unlimited manual validation levels in which each employee can have a unique approval routing
- Project Managers or Account Managers can preview and redistribute hours prior to linking with a project management system or exporting to Finance

Links to Project Management

- Direct integration with popular project management systems such as Microsoft Project, Project Server and Project Online, Oracle-Primavera Pro and Primavera EPPM, Hard Dollar, VersionOne, BrightWork, ARES PRISM, JIRA and Deltek EPPM
- Supports multiple project management systems and multiple versions simultaneously
- Customizable import/export function to interface with virtually any finance or ERP system including SAP, Oracle, PeopleSoft and Microsoft Dynamics
- Interface can be integrated directly into SharePoint, Microsoft Project Web Access or stand alone

Time-off Request

- TimeRequest[™] module allows vacation, personal or other leave time to be requested
- TimeRequest allows multiple levels of approval
- TimeRequest automatically populates future timesheets with approved time off

Flexible Reporting

- Excel-like reporting format allows output to any Windowscompliant printer or reports can be saved as Excel, XML or HTML files
- Reporting Wizards allow an unlimited number of reports to be created and saved for later use
- Unlimited levels of data selection, filtering and sorting
- Drill Down Analyzer provides instant ad-hoc analysis of data at any level

Expense Reports

- Users can enter non-labor costs on their timesheet
- Unlimited number of expense items per timesheet line item
- Expenses can be tracked back to a project management and/or finance system

Government Compliance

 Complies with requirements for DCAA, European Time Directives, FMLA, the California Wage Laws and Sarbanes-Oxley

Hardware Requirements

- Server:
 - Internet Information Services
 - MS SQL Server, Oracle or MySQL database
- Browsers:
- Chrome, Firefox, Safari, Edge, Mozilla and Internet Explorer
- TimeControl Mobile App:
 - Android phones and tablets, Apple phones and tablet

Available Online or On-premise

• Available for purchase for an on premise implementation or Online as a subscription in the cloud

HMS Software Partial Client List

Engineering/Construction

Aecon Construction AeroInfo Koch Business Solutions Kongsberg Devotek Thompson Beta

Gas / Utilities

Gulf South Pipeline Acergy Petrocon VenCorp Foster Wheeler

Manufacturing

Alcan Parker Hannifin Georgia Pacific Ultra Electronics Tennant Wagner Spray Tech Vision Systems Electro Motive GE Sensing Tommy Hilfiger

Defense / Aerospace

Bombardier Inc. CAE Electronics Lockheed Martin Rolls Royce SAAB Army Corps of Engineers

Government

Amsterdam Port Authorities Atlanta Airport Dutch Railway Government of Saskatchewan Railway Procurement Agency (UK) Ville de Montreal City of Winnipeg

Technology

Arivia CSI Piemonte EDS Face Technology Fuel Plus Software GE Access Microsoft Positron Psion Teklogix Inventure Fujitsu

Telecommunications

Cable & Wireless Bartel Ericsson EXFO Motorola Philips Semiconductors SARA Amsterdam Stratos Global

Financial

Standard Life Development Bank of Canada Alliance One Centre de Recherche Informatique de Montréal

Health/Pharmaceutical

Boehringer Ingelheim National Health Service (UK) Azko Nobel (Organon) RTS Thurnall Canadian Institute for Health Info Iogen Registrat

Education

Johnson and Wales University Eastern Michigan University Queens University McGill University

About HMS Software

HMS Software, a division of Montreal, Canada-based Heuristic Management Systems Inc., is a leading provider of enterprise timesheet and project management systems.

Founded in 1984, HMS Software's expertise in implementing enterprise project-management and enterprise timesheet systems is recognized worldwide by some of the world's best known



organizations. HMS's signature product, TimeControl, an enterprise timekeeping system designed to serve the needs of both Finance and Project Management, is distributed worldwide through an extensive list of distributors and dealers located on every continent with representatives in the US, the UK, Australia, Mexico, Europe, Asia, South Africa and the Middle East.

HMS Software's client list includes some of the world's leading corporations in the telecommunications, IT, finance, engineering, defense/aerospace and government sectors including such organizations as Acergy, Aecon Construction, Alcan, the Atlanta Airport, Akzo Nobel, The Canadian Business Development Bank, The City of Montreal, EDS, Ericsson, General Motors, the Government of Saskatchewan, John Deere, Kelly Services, The UK's National Health Service, Standard Life, UPS, Volvo Novabus and hundreds of others. HMS maintains offices in Montreal, Quebec and Toronto, Ontario. For more information about HMS, please visit www.hms.ca.

TimeControl

First published by HMS in 1994, TimeControl has been adopted hundreds of clients and over 150,000 users around the world. TimeControl is designed to serve the needs of both project and finance simultaneously. It allows an organization to use a single timesheet for project tracking, time and attendance, time and billing, HR tracking, R&D Tax Credits, DCAA and project costing instead of having to deploy many timesheets to serve these needs. TimeControl is available for purchase for an on-premises implementation or as a subscription as service. TimeControl's architecture is flexible and extensive supporting numerous databases such as Oracle, Microsoft SQL Server and MySQL, multiple browsers such as Internet Explorer, Firefox, Safari and Chrome and even includes a mobile interface for Smartphones

For more information about TimeControl please visit: <u>www.timecontrol.com</u>.