

# **Time Bank**

## **General Configuration and Processing Features**

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## Overview

This document gives an overview of Time Bank features and detailed information for common functions. The purpose of this document is to explain the general functionality available using the configuration options in the Time Bank software. Detailed information for functions for specific links will be described in separate documents when that link is included in the Time Bank configuration.

Your Time Bank link may be for one or more of the many interfaces IDI provides:

Pay Data Link: Time and Attendance to Payroll

Employee Data Link: Employee Master File data between any two systems

Accrual Data Link: Employee benefit hours accruals between any two systems

Punch Link: Punch collection system to Time and Attendance

Schedule Link: Scheduling system to Time and Attendance

General Ledger (GL) Link: Payroll (optionally with time and attendance) to Accounting

Certified Payroll Link: Link to read payroll data and create certified payroll reports.

Custom Report Link: Any system (typically time and attendance) to a custom report

Other Custom Link

**Time Bank has 3 main tabs:**

- Run
- Configure
- Support



**The Time Bank Configuration tab has 5 sub-tabs:**

- Links
- Connections
- Mapping
- Tables
- Users

**Navigating through Time Bank and accessing functions is achieved using six main features.**

- 1) Navigation panes
- 2) Next/Previous buttons
- 3) Toolbar icons
- 4) Screen buttons/icons
- 5) Right click menus.
- 6) Ellipsis (...) button to browse to files or for advanced mapping options.

**Tooltips** are available by hovering over title bars, field names, drop down selection arrows, or edit boxes.

**Required selections** are designated by a  icon. Once the required selection has been configured, the  icon will no longer display. The required selections must be configured, or the application will not run.

It is recommended that you save your changes regularly by clicking the standard Save icon in the toolbar, or using the menu to select File, Save. If no changes have been made since the last save, these options will be unavailable.

## 1 Links

If the site has multiple links, select the link you want to configure on the left. If there is only one link in the site, Time Bank will automatically open to that Link.

If the Link has only one source (input) and destination (output) selection available, it will open directly to the Connections tab. If there are options for source and/or destination, however, you will have the opportunity to select exactly what you need in a screen similar to the following:

The screenshot shows a web interface with a top navigation bar containing 'Run', 'Configure', and 'Support'. Below this is a secondary navigation bar with 'Links', 'Connections', 'Mappings', 'Tables', and 'Users'. The 'Links' tab is active, showing a list of links on the left with 'Name of Link' selected. The main area is titled 'Name of Link' and contains a 'Description:' label followed by an input field containing 'Name of Link'. Below this is a white box with the text: 'This link has multiple options. Please select the correct source and destination combination.' followed by four radio button options: 'Input1 to Output1', 'Input1 to Output2', 'Input2 to Output1' (which is selected), and 'Input2 to Output2'. At the bottom right of the main area are two navigation arrows, a left arrow and a right arrow.

Click the link type you wish to configure on the left side of the screen and a list of available source and destination combinations will display in the main screen. Select the appropriate combination.

The description of the link can be edited. To change the link description that will appear throughout the Time Bank configuration, type in the edit box following the “Description:” label.

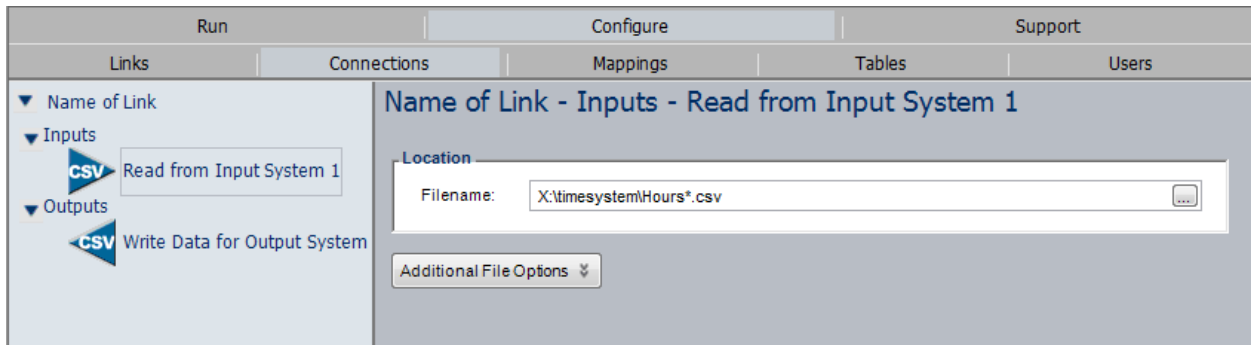
Click the Apply Changes button to save changes.

Click the right arrow at the bottom of the screen to continue to the next sub-tab or click on the Connections tab to continue.

## 2 Connections

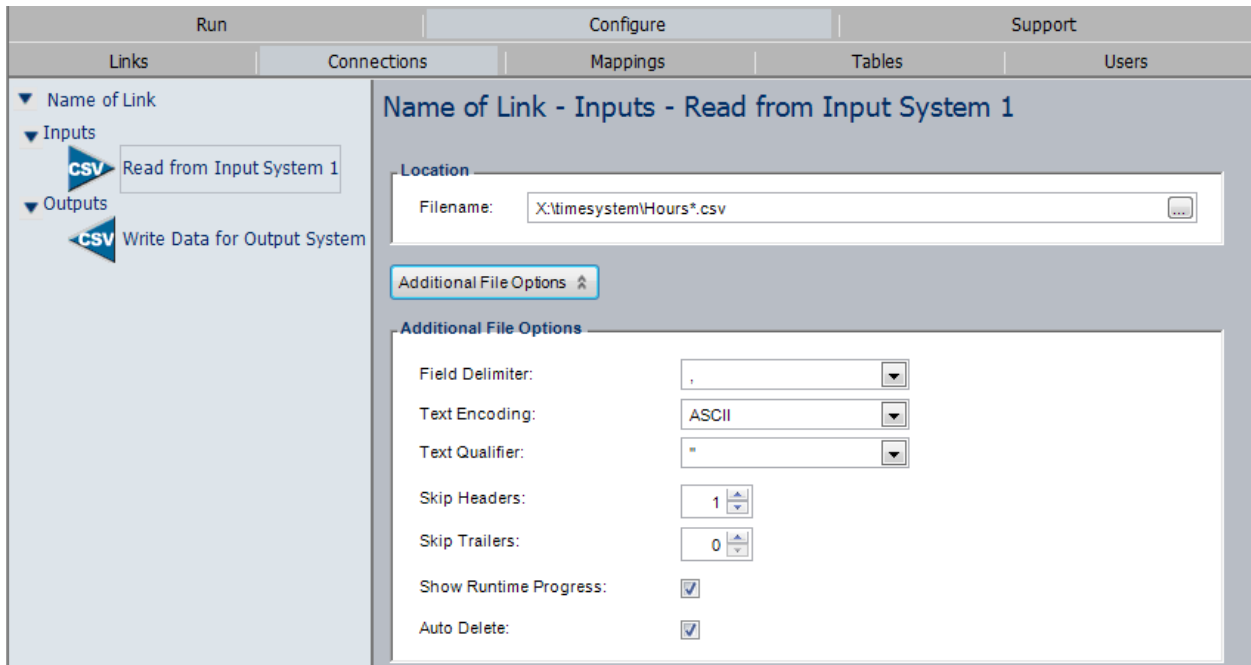
### 2.1 Input Connections/Data Layout Manager

The Input connection tells Time Bank the name of the source data and where to look for it. If your Time Bank is reading from files, you can use a wildcard \* to read more than one input file in a single process. To use the wildcard feature, all source files must be in the exact same format. In the example below, the Time Bank will read all files in the X:\timesystem\ folder that start with Hours and have a CSV extension.



#### 2.1.1 Additional File Options

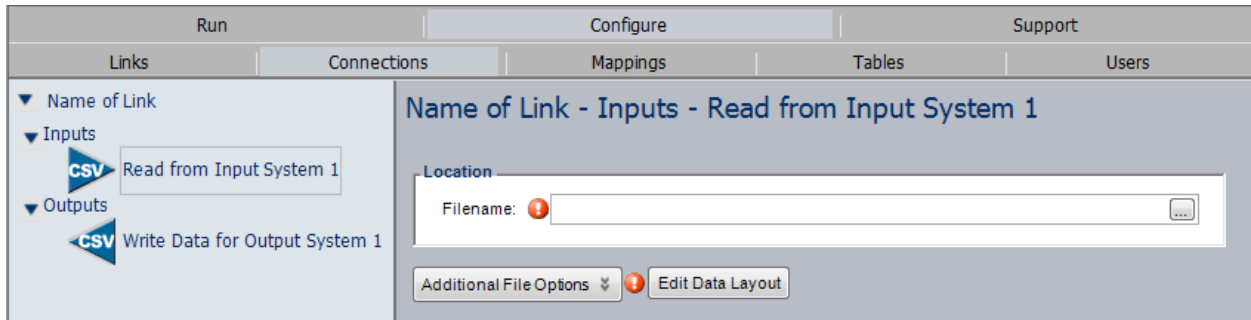
Clicking on the 'Additional File Options' button will display advanced options regarding field delimiters, text qualifiers and so on. You will rarely need to change any of these options unless you are using the Data Layout Manager.



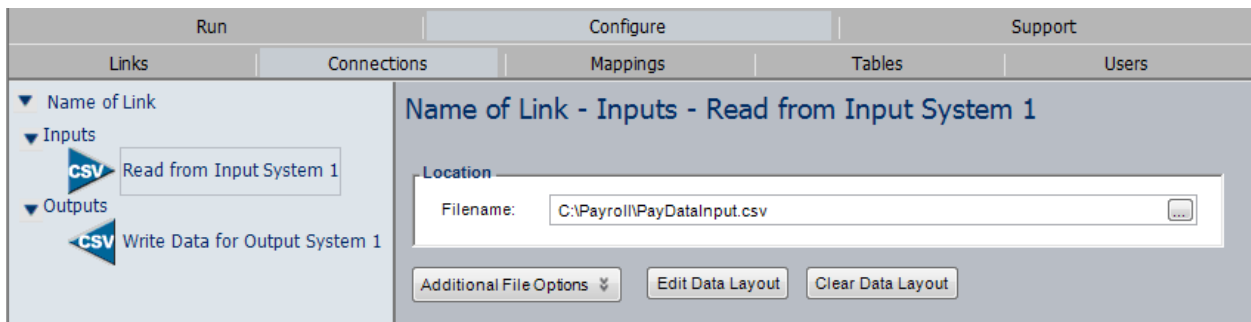
## 2.1.2 Data Layout Manager

Data Layout Manager (DLM) is included in your Time Bank when the Time Bank link is reading a source that not pre-defined in Time Bank. Although the file may be defined using the Data Layout Manager configuration tool, the file must always be created in the same format going forward.

The data layout manager option is available for the input if you see the Edit Data Layout on the input connection:



Data Layout Options:



**Edit Data Layout:** Create a new data layout or make changes to an existing layout.

**Clear Data Layout:** Not recommended. This will clear the existing data layout. This will remove all mappings tied to the data layout fields.

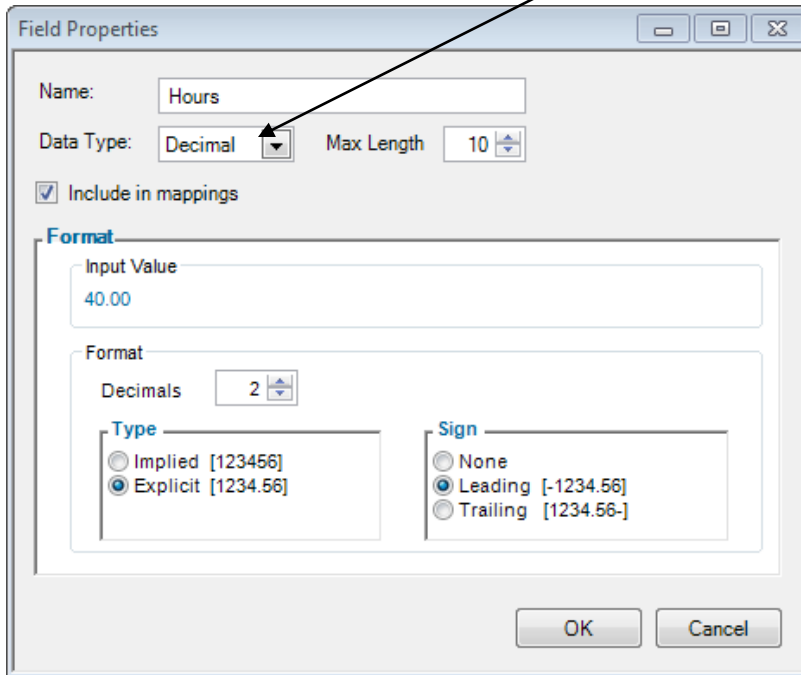
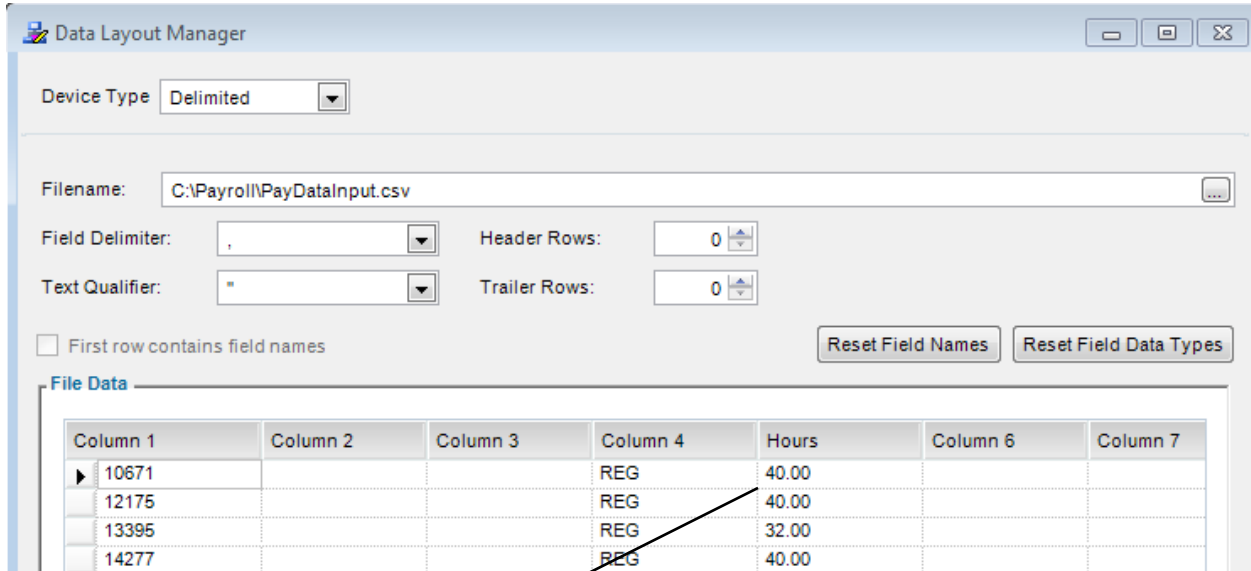
To use DLM, click the Edit Data Layout option.

Point DLM to the input file you want to create the data layout for. While the input file is open, use the DLM options to create or edit the input file format definition.





Enter options for the delimiter if the source is a delimited ASCII file. Identify the number of headers and trailers in the source file. The values shown on the column headings will be the values displayed when mapping. If the field names are included in a header record in a source file, you can specify to use those values. If not, you can right click to change the properties on each field to enter a meaningful field name to facilitate setting up the mappings.

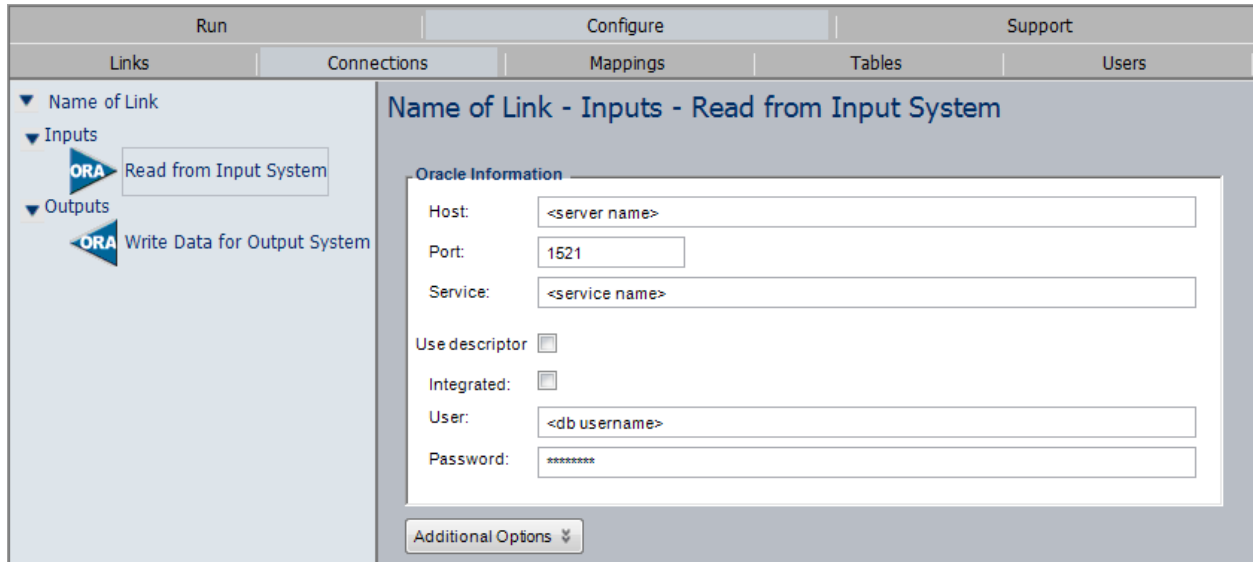


After you have completely defined the input file format using DLM, select OK to save and exit DLM.

Note that if the source file format is changed after setting up DLM, you will need to modify the DLM configuration. If the fields in the source file change positions, you will need to modify the mappings that use any fields after the change to the positions.

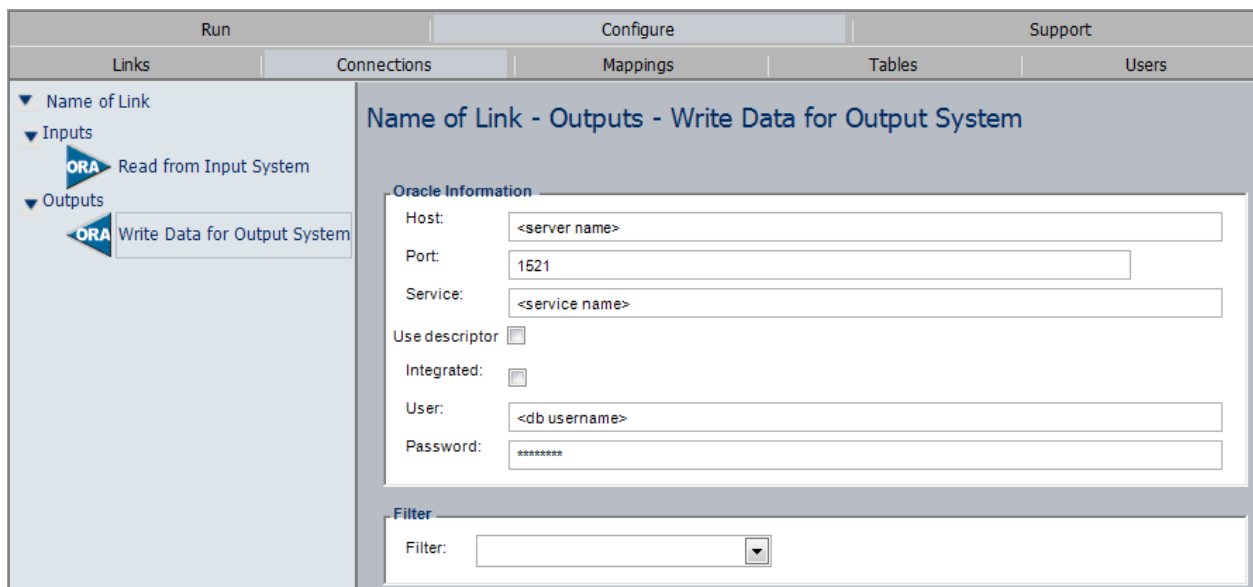
## 2.2 Input Connections/Database Read

The Input connection tells Time Bank the name of the source data and where to look for it. If your Time Bank is reading from a database, the connection string must be configured. Time Bank read options may include XML, web service call (WCF), ODBC, SQL Server. In the example below, the Time Bank is reading from an Oracle database.



## 2.3 Output Connections/Database output

The Output Connection tells Time Bank where to write the output. If your Time Bank is writing to a database, the connection string must be configured. Time Bank write options may include XML, web service call (WCF), ODBC, SQL Server. In the example below, the Time Bank is writing to an Oracle database.



## 2.4 Output Connections/File output

The Output Connection tells Time Bank where to write the output. You can also specify various output parameters for how the data should be written. If your link has one or more pre-defined outputs, the output name and location will be displayed first followed by the sort and filter options.

### 2.4.1 Defining the output file folder and name

When writing to files, you can browse to the location by clicking on the ellipsis.

If multiple output files are required based on a value that is mapped, a variable of {0} can be specified in the output file name. The variable will be replaced by the value in the field specified as the Filename Component in the advanced options. When using this feature, the field selected as the Filename Component must always be at the highest level in the sort order.

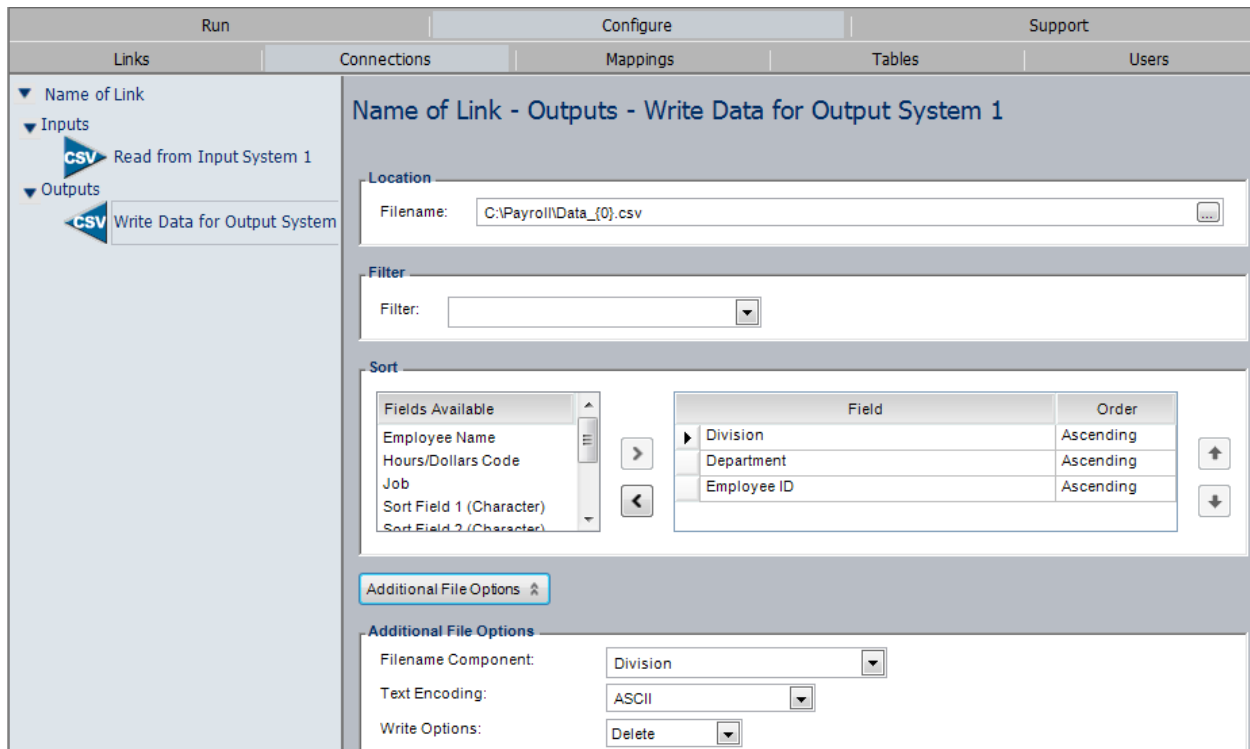
In the example below, if there are three values for division being mapped, 01, 02, and 03, Time Bank will output three files in the Time Bank folder:

Data\_01.csv

Data\_02.csv

Data\_03.csv

The Write option set to delete means that Time Bank will first delete all files that meet the criteria of Data\_\*.csv will be deleted before new files are written. This is the recommended write option when writing multiple files using the Filename Component option.



The screenshot displays the configuration window for 'Name of Link - Outputs - Write Data for Output System 1'. The interface is organized into several sections:

- Location:** A text field for 'Filename' containing 'C:\Payroll\Data\_{0}.csv' with a browse button (three dots).
- Filter:** A dropdown menu for 'Filter'.
- Sort:** A section with 'Fields Available' and 'Field Order' lists. The 'Fields Available' list includes 'Employee Name', 'Hours/Dollars Code', 'Job', 'Sort Field 1 (Character)', and 'Sort Field 2 (Character)'. The 'Field Order' table is as follows:

| Field       | Order     |
|-------------|-----------|
| Division    | Ascending |
| Department  | Ascending |
| Employee ID | Ascending |
- Additional File Options:** A section with three dropdown menus: 'Filename Component' set to 'Division', 'Text Encoding' set to 'ASCII', and 'Write Options' set to 'Delete'.

## 2.4.2 Defining the output sort order

The “Fields Available” list will display fields that are included in the output. To designate a sort order, select the fields from the “Fields Available” list and click the right arrow to show them in the ‘Field’ box. You can use the up and down arrows to the right to arrange the sort fields. Time Bank will sort using the fields from top to bottom. Use the ‘Order’ field to designate if the output should be sorted ascending or descending. If you need to sort the output by an input field, select one of the Sort Field (n) fields. You must map the input field to that Sort Field when you get to the Mappings section. For example, if you want to sort the file by hourly and salaried and your input file has an Employee Type field that indicates hourly or salaried, but your output file does not have an hourly/salaried field. In the Output Connection Sort, select Sort Field 1. In the Mappings, map Employee Type to Sort Field 1.

## 2.4.3 Defining an output filter

For a pre-defined output, the filter option allows the inclusion or exclusion of specific records based on values in a specified output criteria field. As in the case with the sort option, if you need to filter based on an input value, select the Filter Field on the output connections screen. In your mappings, map the desired input field to the Filter Field. In specifying the filter value, you may use a wildcard to include or exclude on multiple values. For example, if you want to filter the file by hourly and salaried and your input file has an Employee Type field that indicates hourly vs salaried, but your output file does not have an hourly/salaried field. If the Employee Type field has values of Hourly FT and Hourly PT, you would enter Hourly\* in the filter value. In the Output Connection Filter, select Filter Field, then in your Mappings, map Employee Type to Filter Field.

Name of Link - Outputs - Write Data for Output System 1

Location

Filename: C:\Payroll\Data\_{0}.csv

Filter

Filter: Filter Field Include Hourly\*

## 3 Mappings

The majority of the Time Bank functionality is contained in the mappings section. This section defines how values are populated in the output. Values can be mapped from the input fields, a combination of input fields, or constant values.

### 3.1 Defining a mapping filter

There is a filter available to include or exclude selected records based on an input data field. This filter will apply to all records in the source data. Records excluded using this filter will never be written to any output. For example, if your input data includes a field named “Employee Type” and values include “TEMP FT” and “TEMP PT”. To exclude these records from being written to any output, you would select the Filter Field “Employee Type”, select “exclude”, and enter “TEMP\*” as the value to exclude.

Name of Link - Map from Input 1 to Output 1

Filter: Input Field 5 Exclude TEMP\*

## 3.2 Field Selection

The first screen that displays in the Mapping subgroup is a list of all available fields that can be written. This Field Selection screen is specific to the output layout you have selected. Supported output file fields are displayed by category. Each category will appear as its own mapping page as you progress through the configuration. Select all the fields that you require to map to the output file. Special fields for output filtering and sorting appear in the “Other” section.

Fields that have optional formats will have a window with a drop-down option. Use the drop down to select the format required for your output system for the selected field.

An additional filtering option for including or excluding specifying records is available at the top of the Field Selection screen. This filter will limit the records processed by Time Bank by either specifying specific records to be included or excluded. In the example shown, all employees with a value that begins with TEMP in the Group Name field of the source file will be excluded from processing.

Run | Configure | Support

Links | Connections | Mappings | Tables | Users

▼ Name of Link

▼ Map from Input 1 to Output 1

- Key Field (e.g. ID or Account)
- Dates (e.g. period or posting dates)
- Distributions (e.g. facility, dept, job)
- Amounts (e.g. hours or dollars)
- Other

Name of Link - Map from Input 1 to Output 1

Filter: Input Field 5 | Exclude | TEMP\*

Please select the fields you wish to populate:

Key Field (e.g. ID or Account)

Employee ID

Dates (e.g. period or posting dates)

Period End Date

Distributions (e.g. facility, dept, job)

Department |  Job

Division

Amounts (e.g. hours or dollars)

Dollars |  Hours

Other

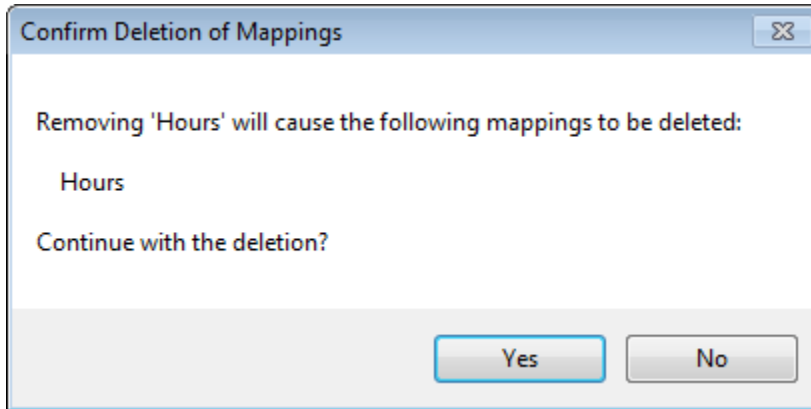
Employee Name |  Sort Field 3 (Character)

Filter Field |  Sort Field 4 (Date)

Sort Field 1 (Character) |  Sort Field 5 (Integer)

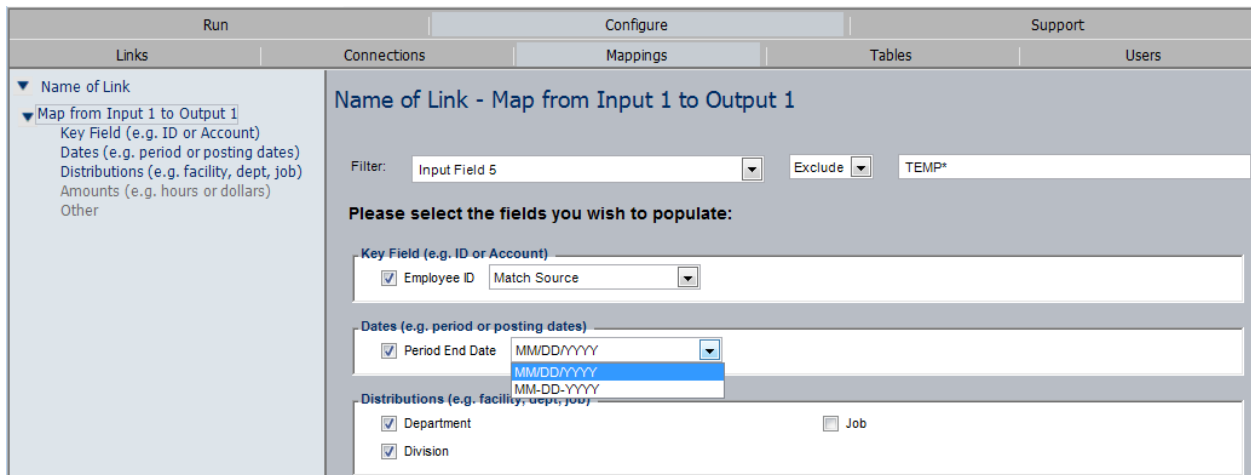
Sort Field 2 (Character)

Deselecting a field on the Field Selection screen will result in the deletion of all mappings to that field that may have been previously entered. You will see a warning that states this function when deselecting a field even if mappings have not yet been created.



### 3.2.1 Output field formatting options

Certain fields will provide additional formatting options via a dropdown list next to the field name. If the output field has optional formats available, a drop-down arrow will appear to the right of the field name. Formatting options might include adding leading zeros to a key field, specifying the number of decimals in a numeric field, or a specific date format. Options are available only when supported by the specific output system configured in your Time Bank link.



### 3.2.2 Conditional table population

Some Time Banks may be configured with a table that holds values that can be used as a conditional value for specific mappings. This is most frequently used for pay data links where the time and attendance pay types can be populated in a table to use as the conditional criteria for when to map hours. When conditional tables are configured, values can be imported to populate the table from the field selection screen.

**Please select the fields you wish to populate:**

**Key Field (e.g. ID or Account)**

Employee ID    Match Source

**Dates (e.g. period or posting dates)**

Period End Date    MM/DD/YYYY

**Distributions (e.g. facility, dept, job)**

Department                       Job

Division

**Amounts (e.g. hours or dollars)**

Dollars                               Hours                     


**Other**

Employee Name                       Sort Field 3 (Character)

Filter Field                               Sort Field 4 (Date)

Sort Field 1 (Character)               Sort Field 5 (Integer)

Sort Field 2 (Character)



### 3.2.3 Mapping to Filter or Sort fields

If you selected to use one or more Sort Fields or the Filter Fields when the output connection was configured, you must select them on the field selection screen. They will appear in the “Other” category.

**Other**

Employee Name                       Sort Field 3 (Character)

Filter Field                               Sort Field 4 (Date)

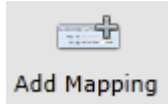
Sort Field 1 (Character)               Sort Field 5 (Integer)

Sort Field 2 (Character)

### 3.3 Mapping screen icon options

The following icons are available on the bottom of each mapping screen.

To add a new mapping, click on the Add Mapping icon



To return to the field selection screen from any of the mapping screens, click on the Fields icon.



To expand all the mappings on the active screen, click the Expand All icon.



To collapse all the mappings on the active screen, click the Collapse All icon.



To sort mappings, click on the drop down under "Sort Options".



Valid Sort Options are:

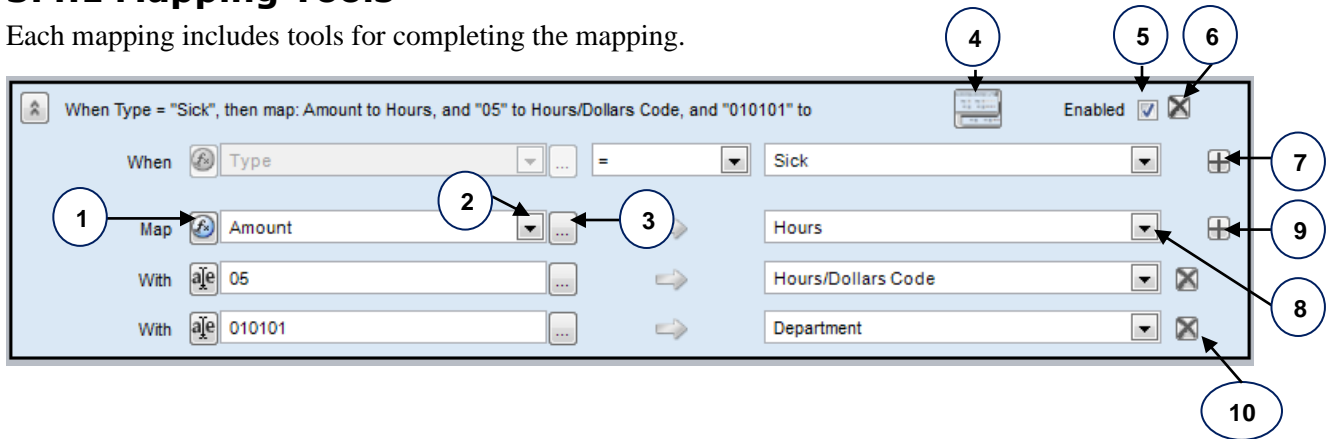
- Description = Sorts by the description in the upper left corner of the mapping.
- From Value = Sorts by the from field/value on the left side of a mapping.
- To Field = Sorts by the to field on the right side of a mapping.





## 3.4 Field Mapping Options

### 3.4.1 Mapping Tools

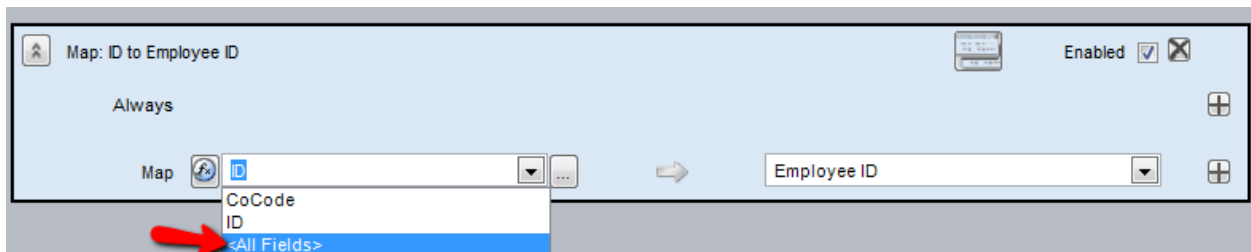
Each mapping includes tools for completing the mapping.



1. Toggle between mapping fields/constants.
  - a.  field
  - b.  constant
2. Field selection pull down
3. Enter Advanced Mapping screen
4. Duplicate/Copy Mapping
5. Toggle to Enable/Disable Mapping
6. Delete entire mapping
7. Add mapping condition
8. Destination Field list pull down (only fields selected on the field list in this category will be available)
9. Add related mapping
10. Delete related mapping or condition

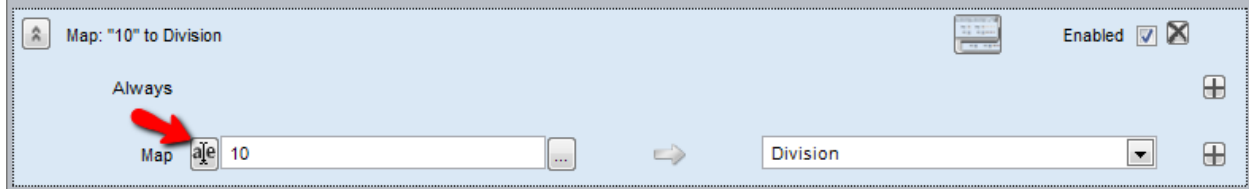
### 3.4.2 Mapping an input data field to an output field

In all mappings, the fields on the left side indicate where the value is coming from and the fields on the right indicate where the value is going to. The first tab in the dropdown shows input fields of the same category as the output field you're mapping to. Click the <All Fields> to see all input fields as well as system-generated fields.



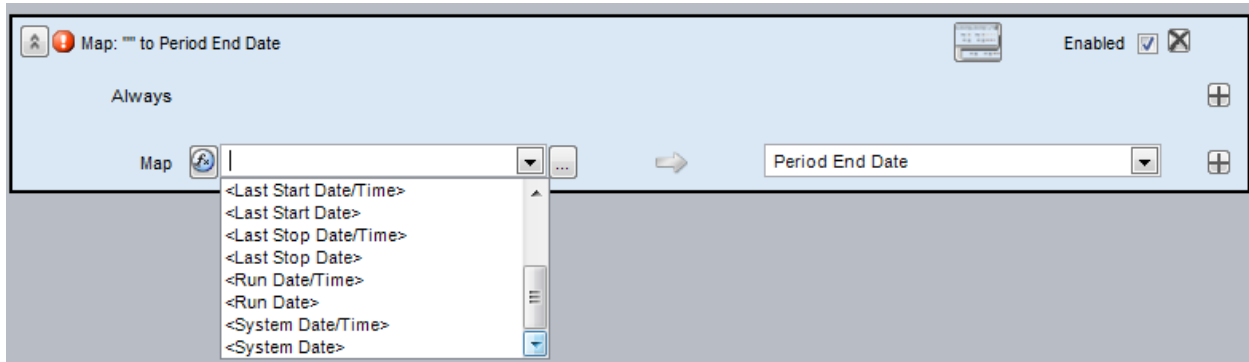
### 3.4.3 Mapping a constant to an output field

To map a constant to an output field so that the same value appears on every output record, select the field/constant toggle, and enter the constant value.



### 3.4.4 Special Fields for Mappings and/or Conditions

All Time Banks are configured with select special fields. Click the <All Fields> to see the system-generated fields. These fields are easily recognized by the < > enclosure around the field name.



Special fields include:

<System Date> and <System Date Time>: These fields hold the current (or system) date or date/time of the computer where Time Bank is running at the time the mapping occurs.

<Run Date> and <Run Date Time>: These fields hold the current (or system) date or date/time of the computer where Time Bank is running when the Time Bank process was initiated for this link.

<Last Start Date> and <Last Start Date Time>: These fields hold the date or date/time when Time Bank was last initiated for this link based on the date of the computer where Time Bank is running.

<Last Stop Date> and <Last Stop Date Time>: These fields hold the date or date/time when Time Bank last successfully completed for this link based on the date of the computer where Time Bank is running.

### 3.4.5 Advanced Mapping Options

To select specific positions of an input field and/or to combine input fields to map to a single output field, click on the ellipsis to the right of the source field/left hand selection box. This will open the advanced mapping options.

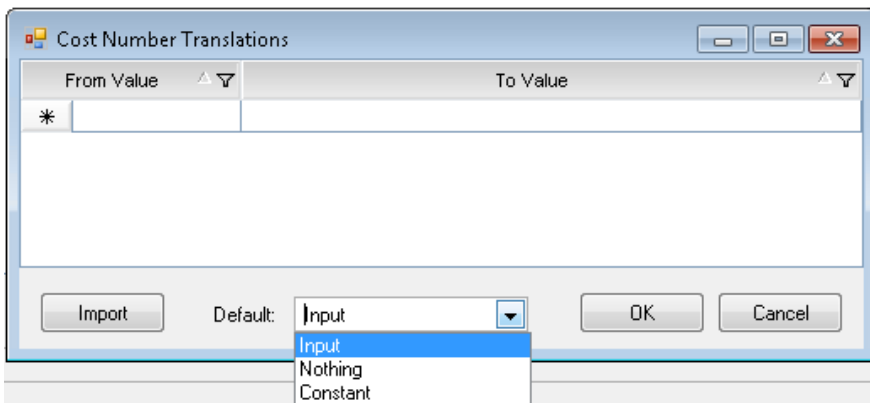


#### Field Manipulation Options

- To substring field values, select an Offset (0 represents the beginning of the field) and a Length (how many characters you wish to substring).
- To concatenate a field, add additional fields or a constant value (type in the empty row for a constant value) to build the string as needed.
- To replace a character in the source field with a different character, click in the Replace Value Option. Selecting the “Replace Value” option will open a new window with two columns. The value to be replaced is to be entered in the left column. The new value for the output is to be entered in the second column.
- To translate incoming values, click in the Translations field and enter the source value along with the translation.
- The Trim checkbox will trim trailing spaces if they exist in the source value.
- The Format pull down will allow you to format decimal fields.
- The buttons in the lower left corner for Replace Values and Translations will perform the replacement and translation on the built value as opposed to the individual components.

### 3.4.6 Translating input values prior to mapping to output field

To define input value translations, click on the ellipsis to the right of the source field/left hand selection box. If you are translating a single input field, use the first row of the Advanced Mapping options (see bullet point in section 3.4.5 above). Selecting the “Translations” option will open a window with two columns.



The input value is to be entered into the “From Value” column. The translated value for the output is to be entered into the “To Value” column.

Click on the drop down next to “Default” to choose what Time Bank does when there is no match in the translation list:

**Input:** Choosing “Input” will cause Time Bank to pass whatever the source data value is to the destination field when a match is not found in the “From Value” of the translation list.

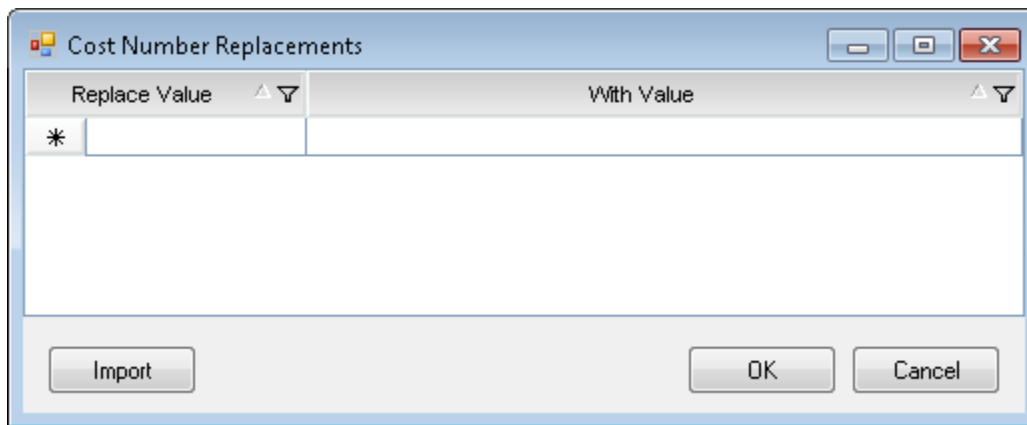
**Nothing:** Choosing “Nothing” will cause Time Bank to pass a null to the destination field when a match is not found in the “From Value” of the translation list.

**Constnat:** Choosing “Constant” will cause Time Bank to pass a constant value to the destination field when a match is not found in the “From Value” of the translation list.

Note that values can be imported from a comma-delimited file by selecting the import option.

### 3.4.7 Replacing input values prior to mapping to output field.

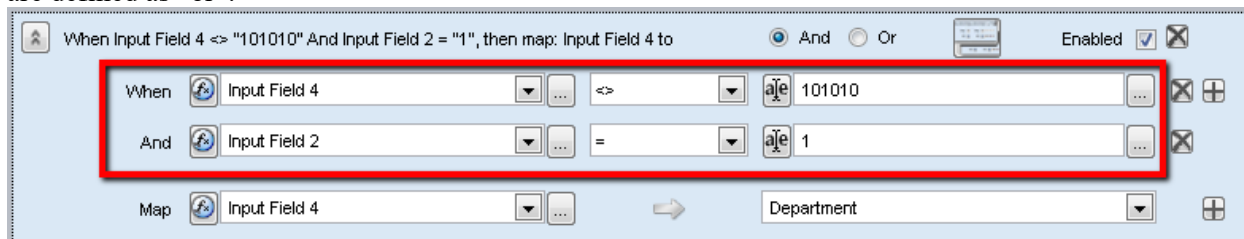
To define input, replace values, click on the ellipsis to the right of the source field/left hand selection box. If you are replacing a single input field, use the first row of the Advanced Mapping options (see bullet point in section 3.4.5 above). Selecting the “Replace Values” option will open a window with two columns.



The input value is to be entered into the “Replace Value” column. The value to replace it with is to be entered into the “With Value” column.

### 3.4.8 Mapping values based on one or more conditions

To restrict when a mapping occurs based on values in one or more input fields, one or more conditions can be added to any mapping. For example, a specific value is only to map when the employee is active and the input value is not zero, both of these can be added as conditions on the mapping to restrict when the value will appear in the output file. Multiple conditions can be defined as “and” or they may be set to “or”. The two options cannot be combined. Either all conditions are defined as “and” or all conditions are defined as “or”.



## 4 Tables

This section of the configuration will contain any tables that need to be populated. Values can be imported from a comma-delimited file or entered directly into the table or a combination of importing and entering can be used.

Fields can be moved around or pinned so they do not scroll. In addition, filtering can be setup. Refer to the [6.3.1 Data View Tools](#) section for details on these features.

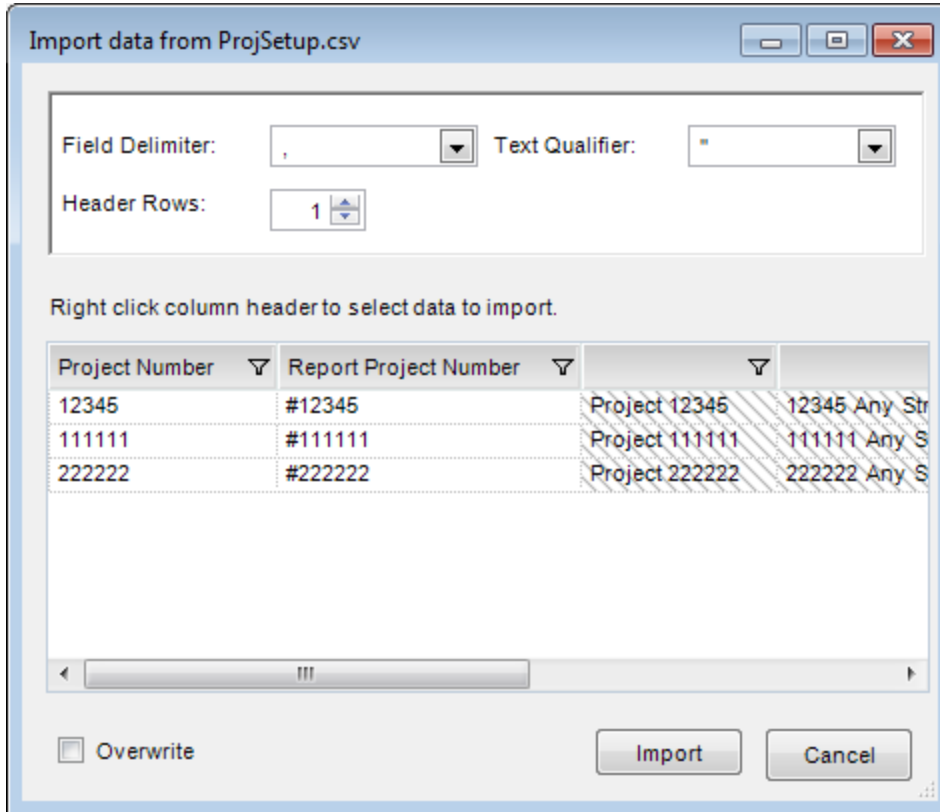
Reset Settings, returns the table to its default state – no filters and column in their original positions.

The screenshot displays the 'Project Setup' configuration window. On the left, a sidebar shows 'Tables' with 'Codes' and 'Project Setup' options. The main area features a table with the following data:

| Project Number | Report Project Number | Project ID | Project Name   |
|----------------|-----------------------|------------|----------------|
| 111111         | #111111               |            | Project 111111 |
| 12345          | #12345                |            | Project 12345  |
| 222222         | #222222               |            | Project 222222 |
| *              |                       |            |                |

At the bottom of the window, there are two buttons: 'Import' and 'Reset Settings'. A red arrow points to the 'Import' button.

When the Import option is selected, a second window will open. Browse to the source file and select the columns to be imported by right clicking the header row. Clicking the Overwrite option will delete all data from the table and overwrite it with data from the file. It is expected that you will not use this function unless the source file maintains all rows and columns for the table.



## 5 Users

This section allows you to set up different users and restrict what functions the users can perform with Time Bank. End users can be configured with an “Integrated Login” option that will use their network login and password when logging into Time Bank. The “Log on Automatically” option allows the user to go directly into the application without logging on. The “Log on Automatically” is independent of the Integrated Logon function. To discontinue use of the automatic logon, log off of Time Bank and deselect the option.

### 5.1 Super User

The default user provided with every Time Bank is the SuperUser login that is used initially and has full administrative rights. The password for the SuperUser login is “admin”. This user will not display unless SuperUser is logged in. It is recommended that the SuperUser password be changed/maintained by a system administrator. IDI does not have access to the SuperUser password after it is changed. If the password is lost or forgotten, IDI can reset the password upon the request of an authorized user.

### 5.2 Creating Admin User Logins

New users that have full administrative rights can be created. Click the “Admin” option to allow administrator rights. This login would be maintained by a system administrator and would have full access to all Time Bank features (completely unrestricted).

### 5.3 Disabling/Enabled User Logins

Existing users can be disabled/enabled. Click the “Enabled” option to toggle between enabled/disabled.

### 5.4 Creating an End User Logins

It is recommended that a new user(s) to be created for the person(s) at the client site running and maintaining Time Bank that is restricted to exclude access to Mappings, Tables, and Users on the Configuration tab and only has access to Documentation on the Support tab. All options on the Run tab could be unrestricted.

Example of restrictions for the end user logins. In this example, the end user has all options for the Run functions, Configuration options except for Mappings, all Table functions and all User functions.

The screenshot displays the 'End User' configuration page. On the left, a sidebar shows a tree view under 'Users' with 'End User' and 'Super User' listed. The main area is titled 'End User' and contains the following fields and options:

- Display Name:** End User (text input)
- User Name:** EndUser (text input)
- Admin:**  Admin
- Enabled:**  Enabled
- Integrated:**  Integrated
- Set Password:** (button)

Below these fields is a section titled 'Set User Restrictions below' with a sub-tabbed interface:

- Restrict All:**  Restrict All
- Restrict All:**  Restrict All
- Name of Link:**  Name of Link
  - Map from Input 1 to Output 1:**  Map from Input 1 to Output 1
    - Key Field (e.g. ID or Account)
    - Dates (e.g. period or posting dates)
    - Distributions (e.g. facility, dept, job)
    - Amounts (e.g. hours or dollars)
    - Other

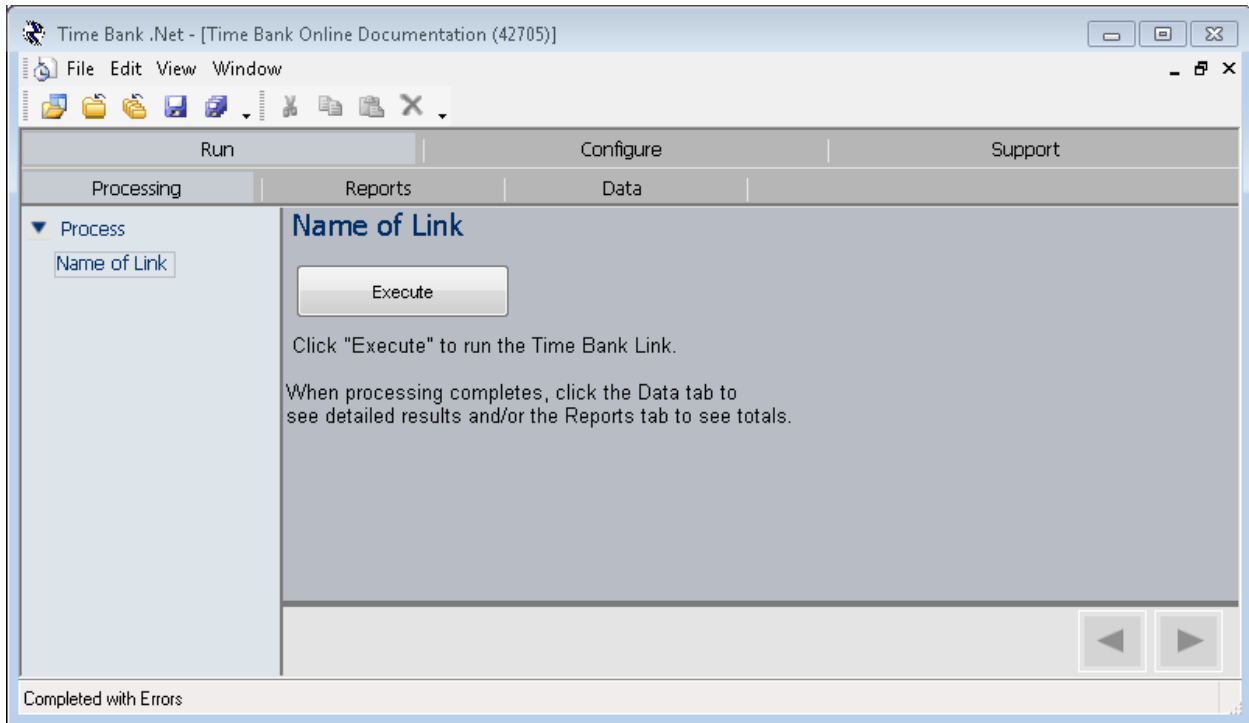
At the bottom of the configuration area, there is an 'Add User' button and two navigation arrows (left and right).



## 6 Running Time Bank

### 6.1 Processing

When at least one link has been fully configured, the interface can be run. This is done initially by clicking the Run tab, then the Processing sub-tab. If no errors or omissions are detected in the configuration, the Execute button will be available.



While running, Time Bank will display the processing log. If processing fails, errors will be displayed. Historical logs can be viewed via the Run >> Processing screen.

## 6.2 Reports

Depending on the Time Bank configuration, there may be reports available for view. These are Crystal Reports that may display totals for specific link types or may be the report generated by a custom report link.

Historical reports are retained for viewing via the Reports sub-tab.

Double-click the report name to view the report.

The screenshot shows the SAP Crystal Reports interface. The title bar reads "Payroll Import File-Payroll Hours Totals". The left sidebar shows a tree view with "Reports" expanded, containing "1. Pay Data Link" and "2. Punch Link". The main report area displays the following data:

**Payroll Totals**  
2/15/2016

Client ID: CL12

| <u>Code</u> | <u>Hours</u> | <u>Add'l Earnings</u> |
|-------------|--------------|-----------------------|
| B           |              | 150.00                |
| DT1         | 2.00         |                       |
| DT2         | 40.00        |                       |
| OT1         | 62.00        |                       |
| OT2         | 40.00        |                       |
| OTA         | 24.00        |                       |
| REG1        | 3,084.50     |                       |
| REG2        | 172.00       |                       |

At the bottom of the report window, it shows "Current Page No.: 1", "Total Page No.: 1", and "Zoom Factor: 100%".

## 6.3 Data Views

While processing, Time Bank stores data in temporary data tables that can be viewed from the Data sub-tab. The data views can be sorted or filtered to facilitate ease of finding specific values. Data views are typically used initially during testing to verify the Time Bank results or for issue resolution once in production.


Data views are typically available for the initial input data and for the data just prior to writing to the final destination. Complex custom configurations may also have intermediate data views displayed. Data views can be seen by clicking on the Data sub-tab.

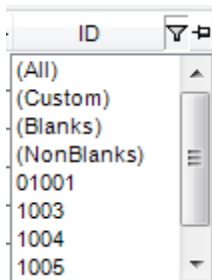
Historical data views are retained for viewing via the Reports sub-tab.

| Input Field 1 | Input Field 2 | Input Field 3  | Input Field 4 | Input Field 5 | Input Field 6 |
|---------------|---------------|----------------|---------------|---------------|---------------|
| ABC           | 00001         | 12-2311-345688 | 12            | Regular       | 15            |
| ABC           | 00001         | 12-2311-756289 | 16            | Regular       | 15            |
| ABC           | 00001         | 12-2311-986478 | 12            | Regular       | 15            |
| ABC           | 00001         | 12-2311-345688 | 1.5           | Overtime      | 15            |
| ABC           | 00002         | 12-2311-345688 | 32            | Regular       | 15            |
| ABC           | 00002         | 12-2311-756289 | 8             | Regular       | 15            |
| ABC           | 00002         | 12-2311-345688 | 12            | Overtime      | 15            |
| ABC           | 00003         |                | 32            | Regular       | 15            |
| ABC           | 00003         |                | 8             | Vacation      | 15            |

### 6.3.1 Data View Tools

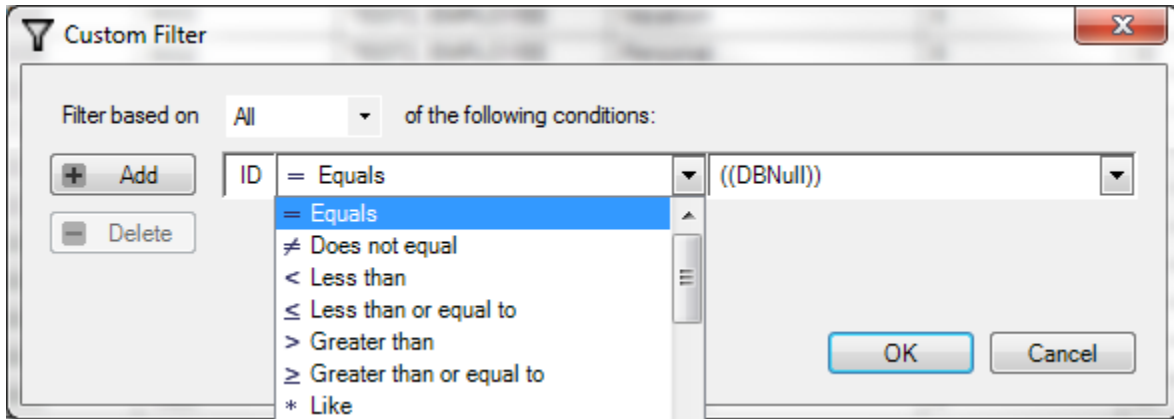
#### 6.3.1.1 Filters

 - Filters the column



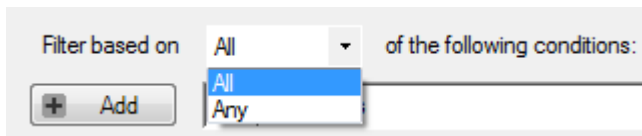
Columns can be filtered based on current values, blanks, non-blanks or by custom filters.

### 6.3.1.1.1 Custom Filters

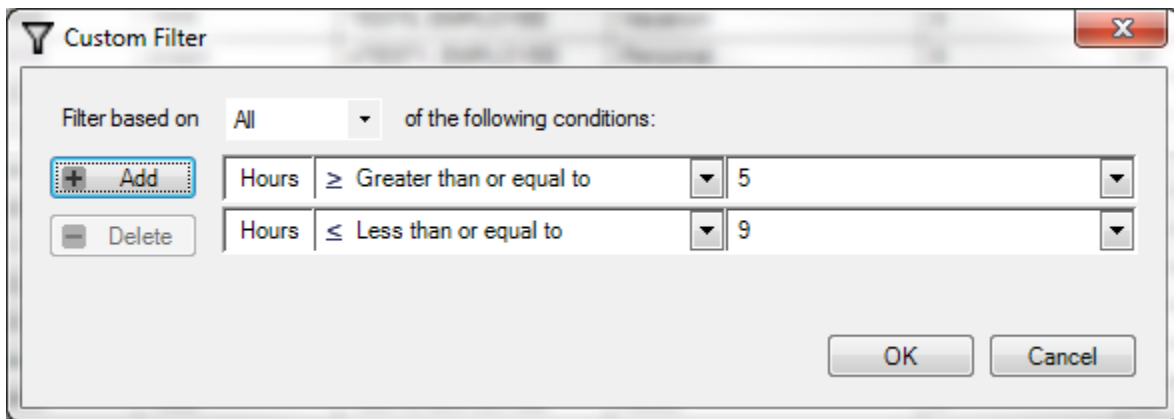


### 6.3.1.1.2 Conditional Filters

Filters can be based on one or many conditions.




At the top of the Custom Filter screen, you can select “All” or “Any” to filter the data view based on conditions that you define.



In the Custom Filter above, the data view will be filtered based on records where the hours field is greater than or equal to five and where the hours field is less than or equal to ten.

### 6.3.1.2 Pin Column

 - Pins the column so you can scroll thru the data view and keep the pinned column viewable.

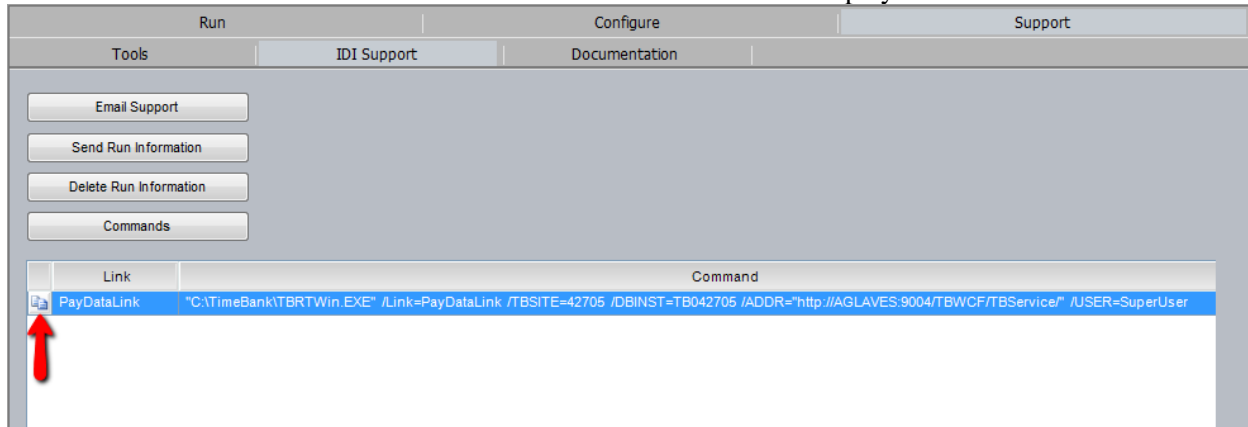
 - Resets stored settings for data views

## 6.4 Shortcut/Scheduled Task

A shortcut can be created to run a Time Bank link. In addition, the Time Bank link can be run as a scheduled event. You can use the application of your choice to schedule the task.

### 6.4.1 Command for Shortcut/Scheduled Task

The command to use for the Scheduled Task can be found on the Support -> IDI Support tab. Select Commands and a list of links with the associated commands will be displayed.



Select the Copy icon to copy the command to the clipboard.

Paste the command into the shortcut/scheduled task tool you are using and modified the necessary elements:

1. Verify the path to the TBRTWin.EXE.
2. Modify the User with a valid Time Bank end user name that has rights to run the link being scheduled. It is recommended that you create a user name that is unique to running the scheduled event. Log into Time Bank with this scheduled event user at least one time prior to running the scheduled event.

### 6.4.2 Create Shortcut

These are general steps to create a shortcut. Contact your IT department for assistance.

1. Click with the right mouse button on your desktop to bring up the Right click Menu.
2. Select "New" and then "Shortcut".
3. Paste in the shortcut information and click on the [Next] button.
4. Type a name for the shortcut and click on the [Finish] button.

If the Login Automatically option has not been selected for the user, the prompt for username and password will appear when the shortcut is executed.

## 7 Support

### 7.1 Tools

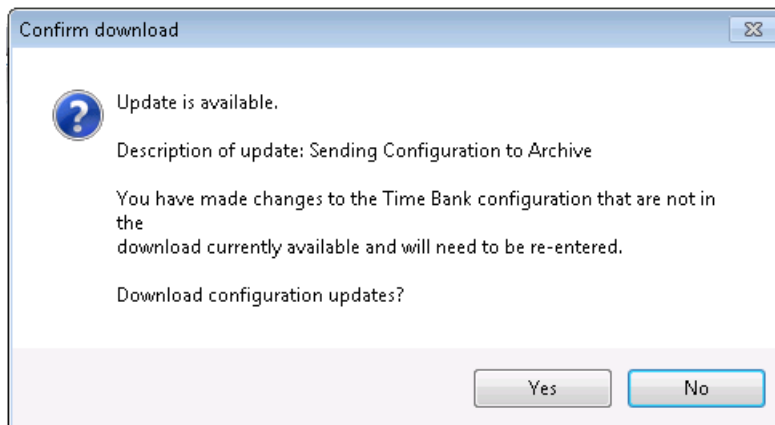
#### 7.1.1 Configuration Updates

The “Configuration Updates” box in the Tools support tab will display configuration updates when a Time Bank update is available to be downloaded, allow you to archive your configuration at Integrated Design and to move your Time Bank interface to a new service.



#### Loading an updated configuration

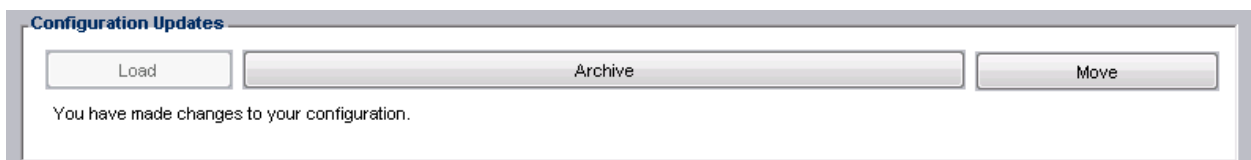
Clicking the [Load] button will connect to the IDI web server and apply the update. You will also see a warning message (Your changes will be lost) if you have made configuration changes and there is a configuration update available from the IDI web server.



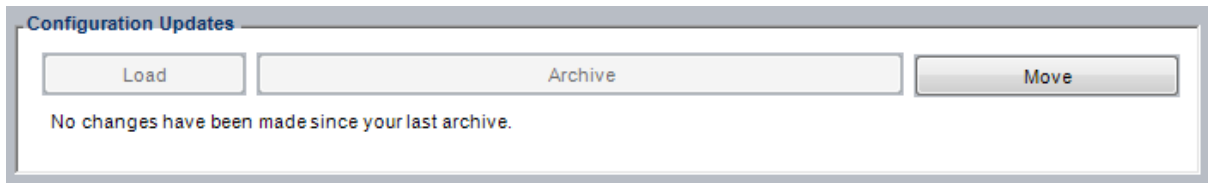
When you click on the [Yes] button, the latest configuration will be downloaded from IDI and applied to your database.

#### Archiving a Configuration

When an update is not available and if configuration changes have been made to the site, an [Archive] button will be displayed.



Clicking the [Archive] button will connect to the IDI web server and archive your configuration. It is strongly recommended that whenever configuration changes have been made that the changes be archived. If no changes have been made since the last update and if a download is not available, a message will be displayed that the site cannot be archived.



### Moving a Time Bank Configuration to a New Server

The purpose of the Time Bank ‘MOVE’ function is to facilitate uninstalling a Time Bank configuration from one location and to make the Time Bank site license key active to install the Time Bank configuration in another location. Refer to the Moving a Time Bank installation document for instructions on using the Time Bank Move function.

### [What technical specifications do I need to know about Time Bank?](#)

#### Time Bank (Premise)



Time Bank can be installed and run within an existing infrastructure so that additional hardware expenditures aren't needed. The software can include one or many "links" between employee data systems such as payroll, [HR](#), accounting packages, or time and attendance.

- [System requirements and install instructions](#)
- [Installation considerations](#)
- [General configuration features](#)
- [Moving a Time Bank installation](#)

### 7.1.2 Site Information

This tab will also display basic site information including the Time Bank version, site name, number, capacity, and required disk space.



### 7.1.3 Downloads

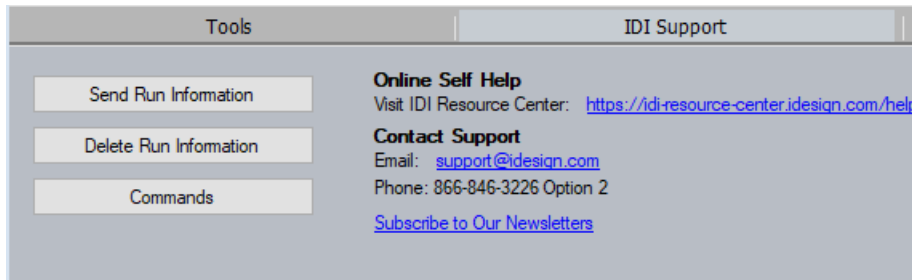
Any files that need to be downloaded for add on programs will also be displayed on this tab.

| Description             | Saved As | Downloaded | Download |
|-------------------------|----------|------------|----------|
| ▶ Standalone QuickBooks |          |            | Download |

### 7.1.4 Options

When the Testing checkbox is checked, Testing allows you to run the Time Bank configuration using copies of the Input/Output connections. When the checkbox is un-selected, the Time Bank configuration will run using the normal Input/Output connections.

## 7.2 IDI Support



The IDI Support tab has 3 options.

1. To send the Run Log information to IDI, select the Send Run Information button. You will be prompted to select the date(s) of the run(s) to include.
2. Run information is automatically deleted after a specific number of runs, depending on your configuration. If your configuration uses prior run information as part of the link logic, your custom configuration documentation will explain when to use the Delete Run Information button.
3. The Commands option is used for running Time Bank as a scheduled event. Refer to the [Command for Shortcut/Scheduled Task](#) section of this document.

## 7.3 Documentation

The documentation tab provides access to the latest documentation available for Time Bank generally and custom client documentation, if any. Double-click on the document you want to open. Documentation can be viewed, printed, or saved once opened.

