

Time Bank Online

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 four main features.

- 1) Navigation panes
- 2) Toolbar icons
- 3) Screen buttons/icons
- 4) Ellipsis (...) button 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 red outline around the text box. Once the required selection has been configured, the red box 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. If no changes have been made since the last save, this option will be unavailable.

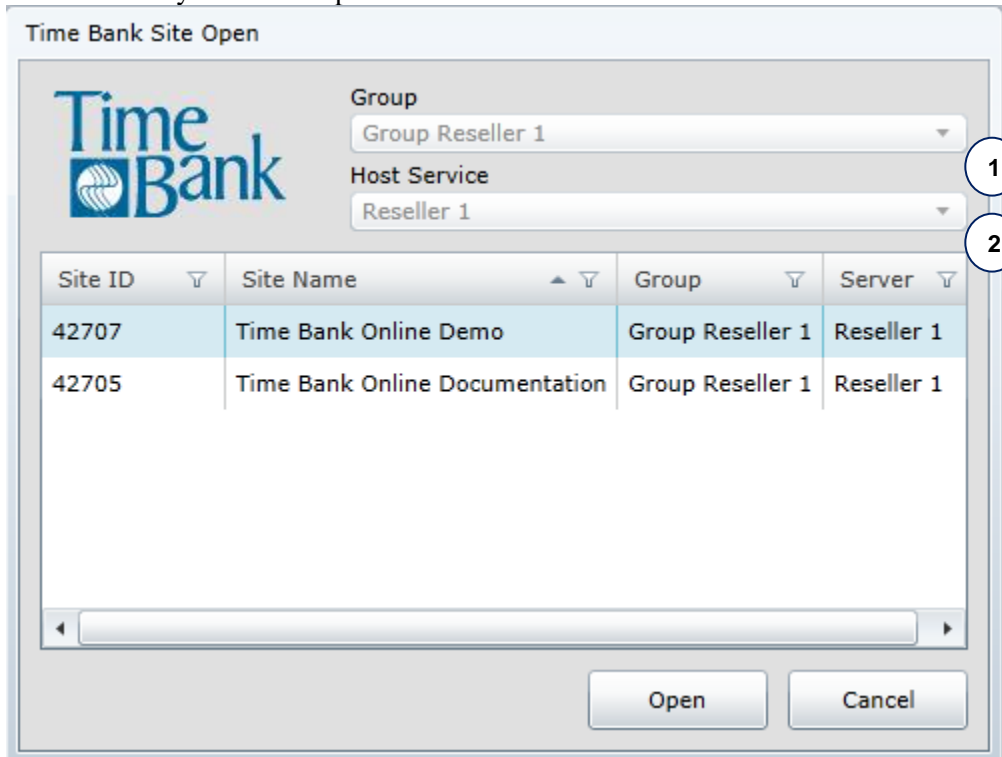
1 Opening a site

Launch Time Bank Online using the following web link:

<https://www.timebankonline.com/TBCFGWEB/>

When a user logs in, they have access to only their sites. If a user only has access to only one site, the site will open. If multiple sites are available, the Site Open window will be displayed.

Select the site you wish to open.



The dialog box titled "Time Bank Site Open" features the Time Bank logo on the left. On the right, there are two dropdown menus: "Group" (set to "Group Reseller 1") and "Host Service" (set to "Reseller 1"). Below these is a table with four columns: Site ID, Site Name, Group, and Server. The table contains two rows of data. At the bottom right of the dialog are "Open" and "Cancel" buttons. Two numbered callouts are present: "1" points to the "Group" dropdown, and "2" points to the "Host Service" dropdown.

Site ID	Site Name	Group	Server
42707	Time Bank Online Demo	Group Reseller 1	Reseller 1
42705	Time Bank Online Documentation	Group Reseller 1	Reseller 1

1. If you have access to more than one group, select the group of sites you wish to display.
2. If the resellers sites are broken into smaller groups (e.g. region), the sites can be filtered using the Host Service pull down.

2 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:

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 on the Connections tab to continue.

3 Connections

3.1 Input Connections

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:\timesysiem\ folder that starts with Hours and has a csv extension.

RUN		CONFIGURE		SUPPORT	
Links	Connections	Mappings	Tables	Users	
<div>▼ Name of Link</div> <div>▼ Inputs</div> <div> Read from Input System</div> <div>▼ Outputs</div> <div> Write Data for Output System 1</div>		<h3>Name of Link - Inputs - Read from Input System</h3> <p>Location</p> <p>Filename: <input type="text" value="X:\timesysiem\ Hours*.csv"/></p> <p>Additional File Options</p>			

3.1.1 Additional File Options



Additional File Options' displays advanced options regarding field delimiters, text qualifiers and so on.

Additional File Options

Field Delimiter:	<input type="text" value=","/>
Text Qualifier:	<input type="text" value="\"/>
Skip Headers:	<input type="text" value="0"/>
Skip Trailers:	<input type="text" value="0"/>
Text Encoding:	<input type="text" value="ASCII"/>
Run at Server:	<input type="checkbox"/>
Show Runtime Progress:	<input checked="" type="checkbox"/>
Auto Delete:	<input type="checkbox"/>

3.2 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.

RUN		CONFIGURE		SUPPORT	
Links	Connections	Mappings	Tables	Users	
<div><div>▼ Name of Link</div><div>▼ Inputs</div><div> Read from Input System</div><div>▼ Outputs</div><div> Write Data for Output System</div></div>		<h3>Name of Link - Inputs - Read from Input System</h3> <div>Oracle Information<div>Host: <input type="text" value="<server name>"/></div><div>Port: <input type="text" value="1521"/></div><div>Service: <input type="text" value="<service name>"/></div><div>Use Descriptor: <input type="checkbox"/></div><div>Integrated: <input type="checkbox"/></div><div>User: <input type="text" value="<db username>"/></div><div>Password: <input type="password" value="....."/></div></div> <div>Additional File Options<div>Fetch Size: <input type="text" value="1000"/></div><div>Run at Server: <input type="checkbox"/></div><div>Show Runtime Progress: <input checked="" type="checkbox"/></div></div>			

3.3 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.

RUN		CONFIGURE		SUPPORT	
Links	Connections	Mappings	Tables	Users	
<div><div>Name of Link</div><div>Inputs</div><div>ORA Read from Input System</div><div>Outputs</div><div>ORA Write Data for Output System</div></div>		<h4>Name of Link - Outputs - Write Data for Output System</h4> <div>Oracle Information<div>Host: <server name></div><div>Port: 1521</div><div>Service: <service name></div><div>Use Descriptor: <input type="checkbox"/></div><div>Integrated: <input type="checkbox"/></div><div>User: <db username></div><div>Password:</div></div>			

3.4 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.

3.4.1 Defining the output file folder and name

Type the path and filename for the output file to be written. Web security does not allow the application to browse to a file.

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 Payroll 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.

RUN		CONFIGURE		SUPPORT	
Links	Connections	Mappings	Tables	Users	

Name of Link

▼

Inputs

▼

CSV

Read from Input System 1

Outputs

▼

CSV

Write Data for Output System 1

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

Location
Filename:

Filter
Filter:

Sort

Fields Available		Field	Order	
Employee Name	➡	Division	Ascending	⬆
Hours/Dollars Code		Department	Ascending	
Job	⬅	Employee ID	Ascending	⬆
Sort Field 1 (Character)				

Additional File Options
Filename Component:
Text Encoding:
Write Options:

3.4.2 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.

3.4.3 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*

4 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.

4.1 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:

4.2 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.

▼

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)

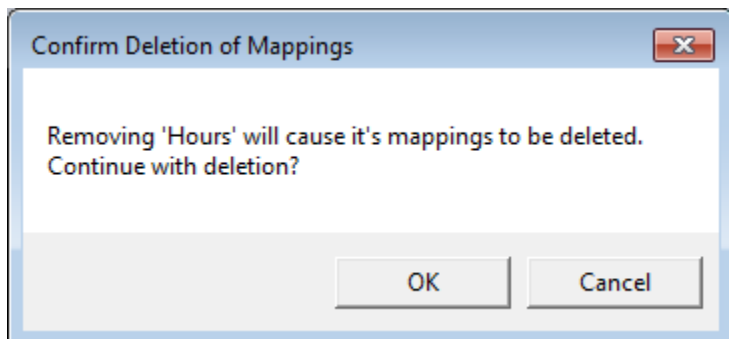
☐

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.



4.2.1 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.

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 ▼
MM/DD/YYYY
MM-DD-YYYY

Distributions (e.g. facility)

☒ Department ☐ Job
☒ Division

4.2.2 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 Codes

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)

4.2.3 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.

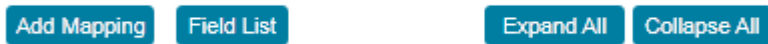
Other

☐ Employee Name ☐ Sort Field 3 (Character)
☒ Filter Field ☐ Sort Field 4 (Date)
☒ Sort Field 1 (Character) ☐ Sort Field 5 (Integer)
☐ Sort Field 2 (Character)

4.3 Mapping screen options

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

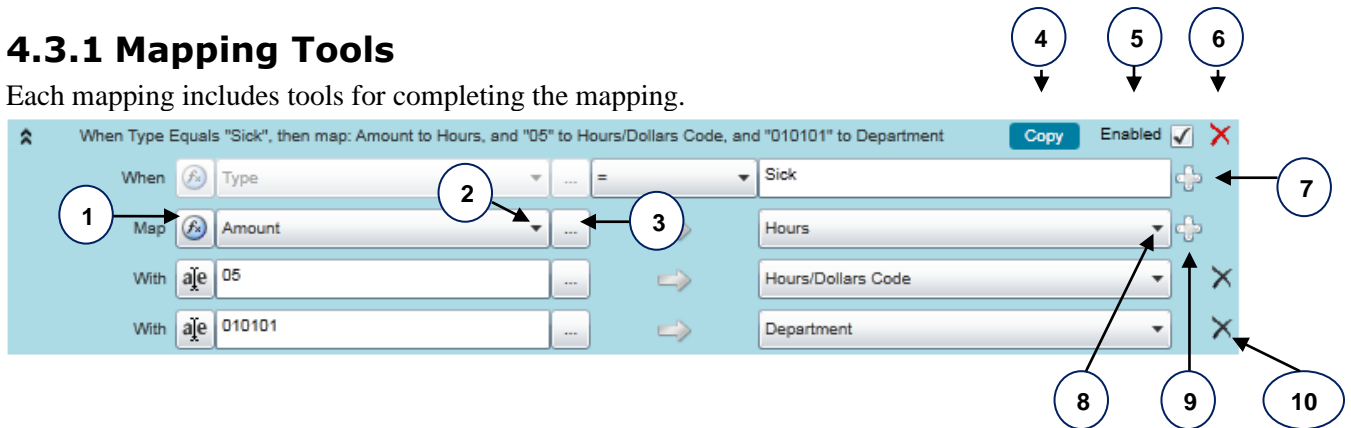
To add a new mapping, click Add Mapping. To return to the field selection screen from any of the mapping screens, click on Field List. To expand all the mappings on the active screen, click on Expand All. To collapse all the mappings on the active screen, click Collapse All.





Field Mapping Options

4.3.1 Mapping Tools

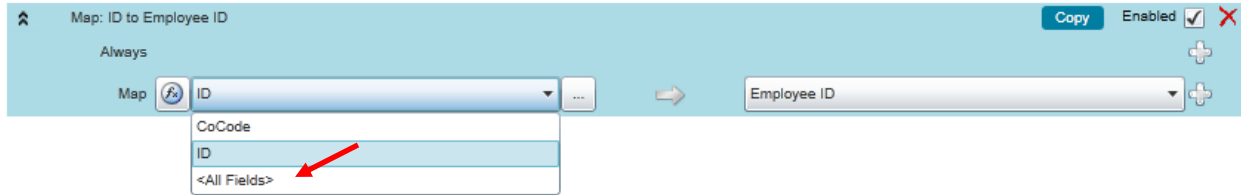
Each mapping includes tools for completing the mapping.



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

4.3.2 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.



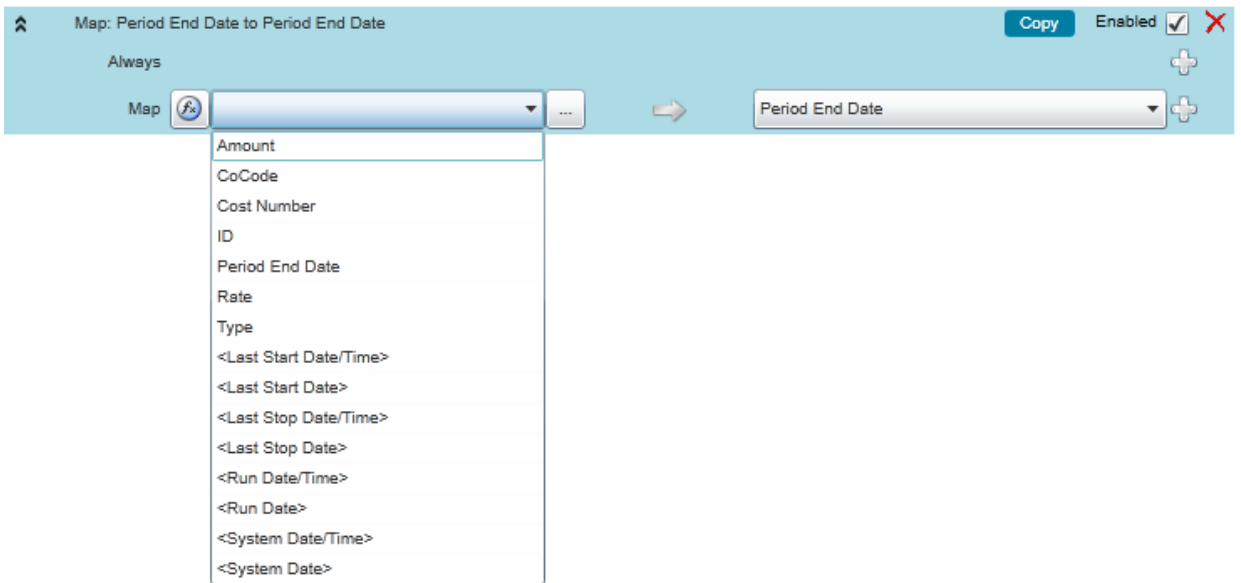
4.3.3 Mapping a constant to an output field

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.



4.3.4 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:

<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.

<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.

<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.

4.3.5 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.

4.3.6 Translating input values prior to mapping to an 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 above). Selecting the “Translations” option will open a window with two columns. The input value is to be entered in the left column. The translated value for the output is to be entered in the second column. Note that values can be imported from a comma-delimited file by selecting the import option.

4.3.7 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”.

When Input Field 4 NotEquals "101010" And Input Field 2 Equals "1", then map: Input Field 4 to Department

5 Tables

This section of the configuration will contain any tables that need to be populated. Click the at the bottom to add rows. Click the within the table to delete rows. 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. Click the Import button to import values from a file.

Project Setup

	Project Number	Report Project Number	Project Name	Project Address	Project Count
	92683		Project ABC	143 Ashley St., Ann Arbor, MI 48103	
	93410		Project DEF	1802 Main Ave., Ann Arbor, MI 48103	
	91573		Project GHI	227 E. Lake St., Ann Arbor, MI 48103	

Import Reset Settings

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.

Import data from jobs.csv

Field Delimiter: , Text Qualifier: "

Header Rows: 1

Right click column data to select data to import.

Project Nt	Project Start Date			
63000	8/8/2010	9/25/2010	Build a Road	21370 Addison Street
63525	7/25/2010	9/4/2010	Build a Bridge	21370 Addison Street

☐ Overwrite

Import Cancel

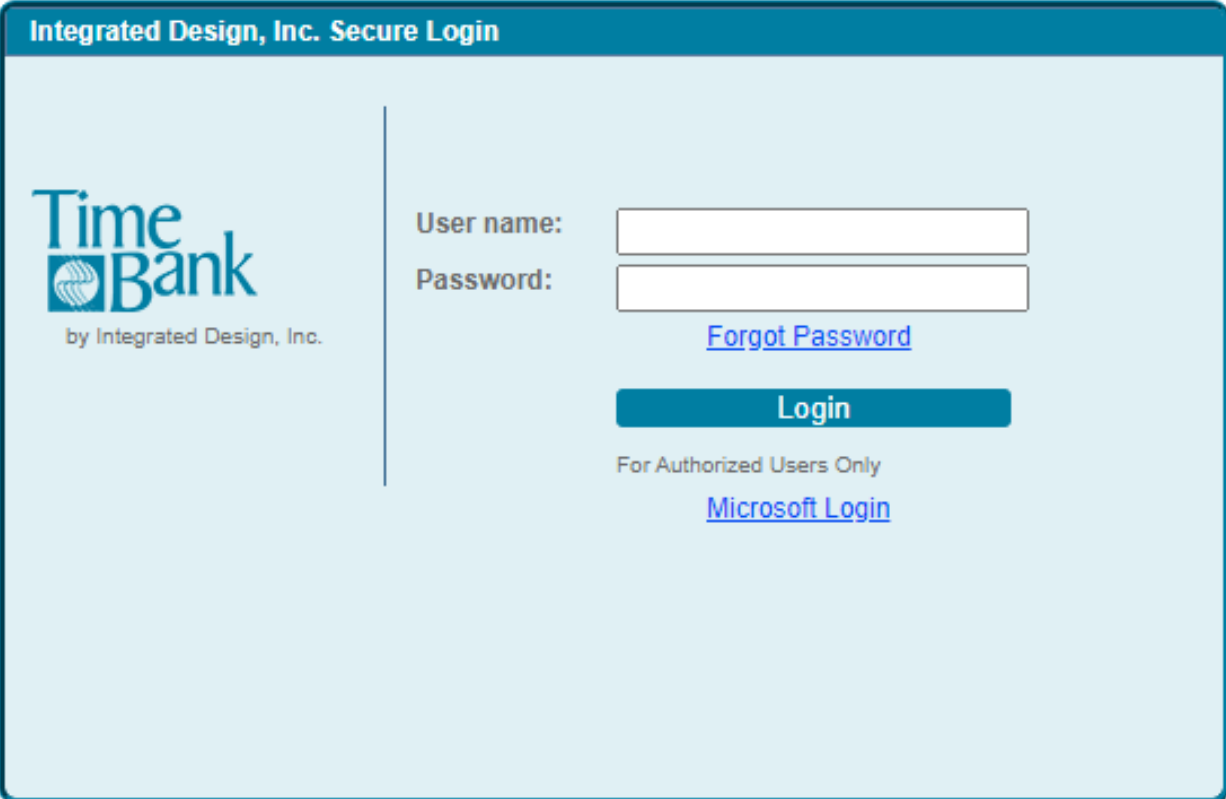
6 Adding/Maintaining End Users

A user, who has been setup by as an Admin User for a site, can add additional users to a site and can change passwords for existing users.

6.1 Logging in to the Security Portal

The Online Security Portal is run from the following Time Bank Online web site:

<https://www.timebankonline.com/IDISP/>



Integrated Design, Inc. Secure Login

Time Bank
by Integrated Design, Inc.

User name:

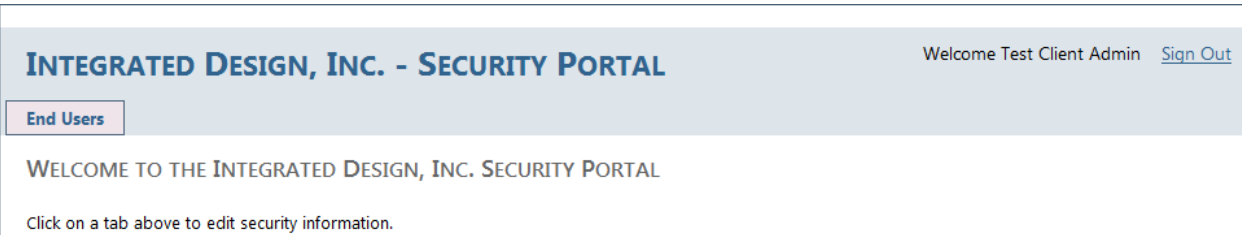
Password:

[Forgot Password](#)

Login

For Authorized Users Only

[Microsoft Login](#)



INTEGRATED DESIGN, INC. - SECURITY PORTAL

Welcome Test Client Admin [Sign Out](#)

End Users

WELCOME TO THE INTEGRATED DESIGN, INC. SECURITY PORTAL

Click on a tab above to edit security information.











Click on the End Users tab to manage End users.

INTEGRATED DESIGN, INC. - SECURITY PORTAL






Welcome User 1 Test [Sign Out](#)

Resellers
End Users

Display Users for Site: Time Bank Online Documentation ▼

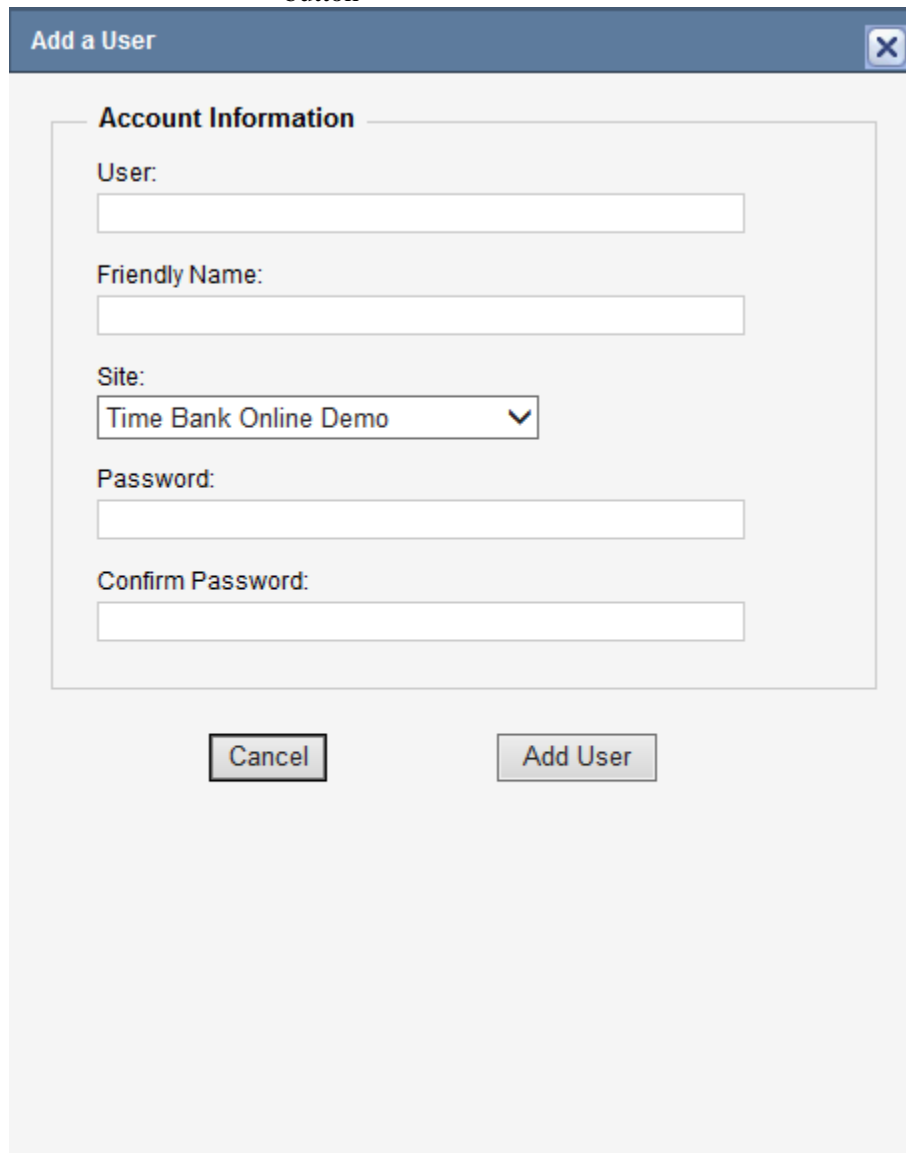
User Name	Friendly Name	Locked Out?	Is Admin	Actions
 End_UserAdmin@customersite.co	Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>	    Change Password
 End_User@customersite.com	End User	<input type="checkbox"/>	<input type="checkbox"/>	    Change Password

Add New End User

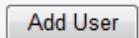
Display Users for Site:	Time Bank Online Documentation ▼	This drop down lists sites you have access to. If you have access to more than one site, use this drop down to select the site you would like to work with.
		This icon displays blue if a user is enabled or red if a user has been disabled.
User Name		This the name used to log into Time Bank online Security Portal.
Friendly Name		Name of End User.
Locked Out?		Locks the End User account so the End User cannot login.
Is Admin		The End User is an admin. <i>Admin users can add additional users to the site.</i>
		Disable End User.
		Save User changes.
		Undo changes.
	<input type="button" value="Change Password"/>	Change the End User's password.
	<input type="button" value="Add New End User"/>	Add a new End User.
		Links to navigate other pages.

6.2 Adding A New End User

Click on the  button

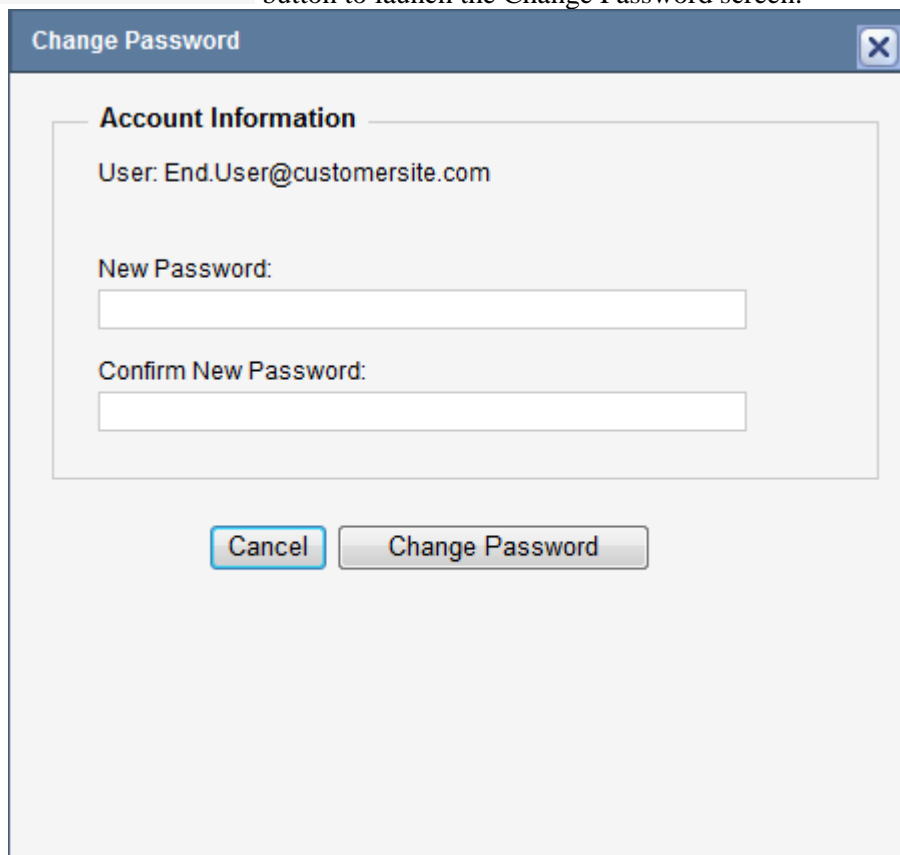


The image shows a dialog box titled "Add a User" with a close button (X) in the top right corner. Inside the dialog, there is a section titled "Account Information" which contains five input fields: "User:" (text box), "Friendly Name:" (text box), "Site:" (dropdown menu showing "Time Bank Online Demo" with a downward arrow), "Password:" (text box), and "Confirm Password:" (text box). At the bottom of the dialog, there are two buttons: "Cancel" and "Add User".

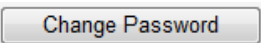
1. Click in the text box under "User:" to add the user name.
2. Click in the text box under "Friendly Name:" to add the name for the user.
3. Click on the black arrow at the end of the drop down box under "Site:" and select the Site that the end user is associated with.
4. Click in the text box under "Password:" to add the password for the user. Please see below for password rules.
5. Click in the text box under "Confirm Password:" to confirm the password for the user.
6. Click on the  button to add the user to the End Users list.
7. If the End User is to have admin rights to the site, select the Admin checkbox and then Save.

6.3 Changing An End User Password

Click on the  button to launch the Change Password screen.



The image shows a 'Change Password' dialog box. It has a title bar with the text 'Change Password' and a close button (X). Inside the dialog, there is a section titled 'Account Information' which displays 'User: End.User@customersite.com'. Below this, there are two input fields: 'New Password:' and 'Confirm New Password:'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Change Password'.

1. Enter the End User's New Password in the box below "New Password:".
2. Enter the End User's New Password once more in the box below "Confirm New Password:".
3. Click on the  button.

Password Rules

- 8 long minimum
- At least one upper letter
- At least one lower case letter
- At least one numeric
- At least one special character (non-numeric, symbol)

6.4 User Restrictions

Users can be restricted from access to Time Bank features such as Mappings, Tables, and documentation. Restrictions are set by tab and link. The restrictions can be set for all or by specific link/feature. Check the box to restrict the user from a feature.

Below are some examples of restrictions for the end user logins.

6.4.1 Example 1 – Configuration restricted

In this example, User 1 has all Configuration options restricted.

User 1 Test

Friendly Name:	<input type="text" value="User 1"/>	<input type="checkbox"/> Admin
User name:	<input type="text" value="User1@customersite.com"/>	
Set User Restrictions Below		
RUN	CONFIGURE	SUPPORT
<input checked="" type="checkbox"/> Restrict All		<input type="checkbox"/> Show Run Information from all users

6.4.2 Example 2 – Run options

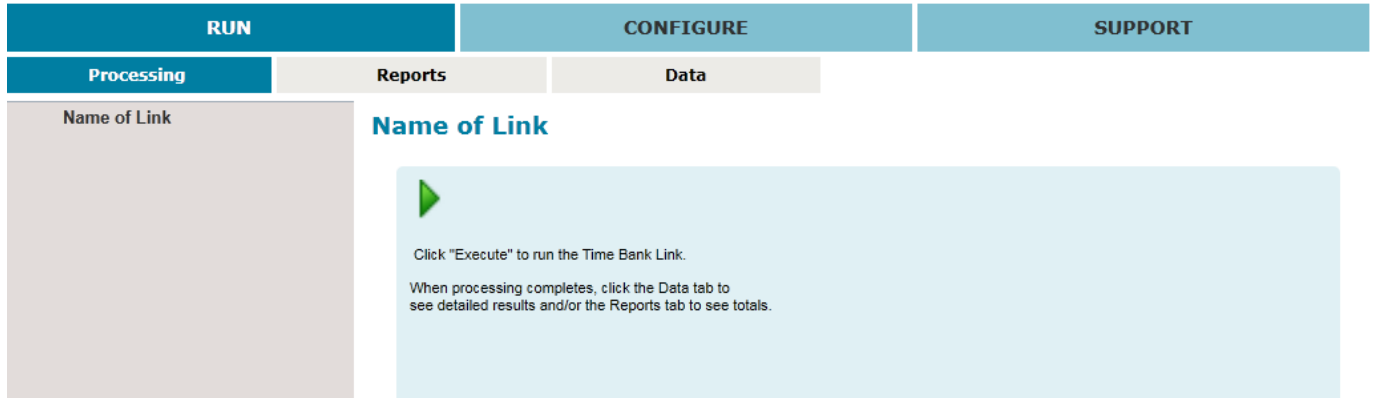
In this example, a non-admin end user is set to be able to view run information for all users who run the link.

RUN	CONFIGURE	SUPPORT
<input type="checkbox"/> Restrict All		<input checked="" type="checkbox"/> Show Run Information from all users
Process	Reports	Data
<input type="checkbox"/> Restrict All		

7 Running Time Bank

7.1 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 green run button will be available.

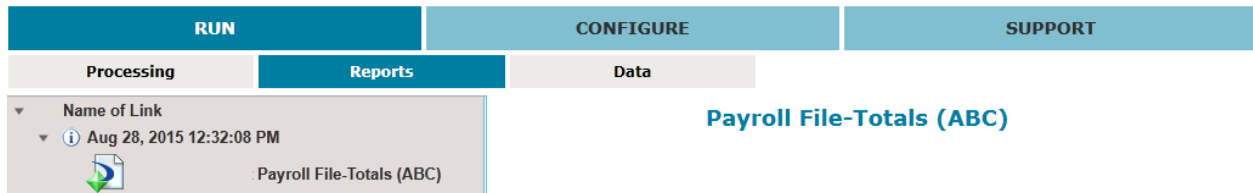


While running, Time Bank will display the processing log. If processing fails, errors will be displayed. Historical logs can be viewed via the Run >> Processing screen.

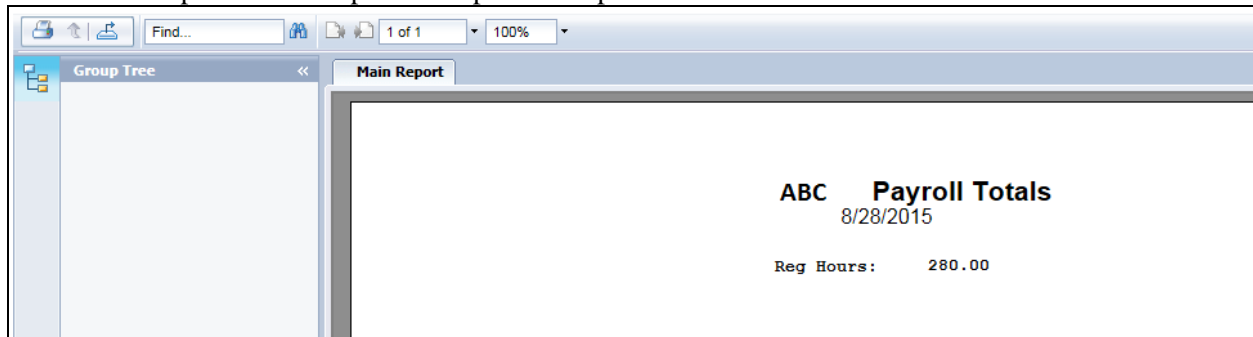
7.2 Reports

Depending on the Time Bank configuration, there may be reports available for view. These are Crystal Reports that may display results 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.



Click on the report and the report will open in a separate window.



7.3 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. For pay data links, totals by payroll codes can be viewed.

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

Table: TimeInputDetail Page Size: 10

	_ID	Input Field 1	Input Field 4	Input Field 5	Input Field 7	Input Field 2
1	12175	REG	40			
2	13395	REG	40			
3	19060	REG	40			
4	19590	REG	40			
5	19590	Tip			40	
6	2015	REG	40			
7	7683	REG	40			
8	8410	REG	40			

Reset Settings

7.4 Scheduled Task

With the addition of a Time Bank runtime application installed on your local PC, your Time Bank Online link can be run as a scheduled event. You can use the application of your choice to schedule the task.

The Time Bank maintenance window is daily, from 3am to 6am Eastern Time. Do not schedule your tasks during this time.

Plan to run your scheduled event when all other users are expected to be logged out of Time Bank Online.

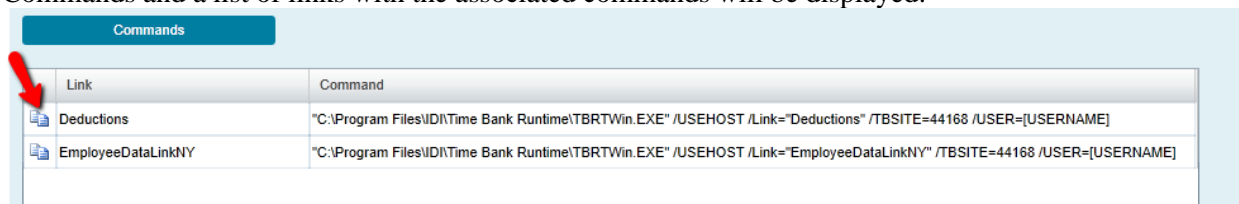
7.4.1 Install TBLA (Time Bank Local Application)



TBLA (Time Bank Local App) is a separate application that must be downloaded and installed to the local environment. Review the system requirements for this local application at <https://idi-resource-center.idesign.com/help/what-technical-specifications-do-i-need-to-know-about-time-bank> in the Time Bank Online system requirements document.

Install TBLA. Download files available at <https://idi-resource-center.idesign.com/help/what-files-do-i-need-to-download-to-run-time-bank>. If you change the default directory, make note of the location for the scheduled task command.

7.4.2 Command for 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.



Commands	
Link	Command
 Deductions	"C:\Program Files\IDI\Time Bank Runtime\TBRTWin.EXE" /USEHOST /Link="Deductions" /TBSITE=44168 /USER=[USERNAME]
 EmployeeDataLinkNY	"C:\Program Files\IDI\Time Bank Runtime\TBRTWin.EXE" /USEHOST /Link="EmployeeDataLinkNY" /TBSITE=44168 /USER=[USERNAME]

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

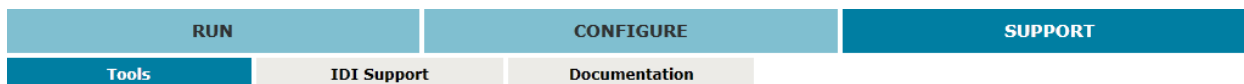
Paste the command into the scheduled task tool you are using and modified the necessary elements:

1. Verify the path to the TBRTWin.EXE.
 - a. The default location is "C:\Program Files\IDI\Time Bank Runtime\"
 - b. If the 32 bit application is installed on a 64 bit machine, the default location is "C:\Program Files (x86)\IDI\Time Bank Runtime\"
2. Modify the [USERNAME] with a valid Time Bank Online end user name that has rights to run the link being scheduled:
 - a. It is recommended that you create a user name that is unique to running the scheduled event (for information on adding a user, refer to [Section 6.2 - Adding A New End User](#)). Log into Time Bank with this scheduled event user at least one time prior to running the scheduled event.
 - b. It is recommended that the scheduled event user be restricted to only running the interface. For information on setting up user restrictions, refer to [Section 6.4 - User Restrictions](#).

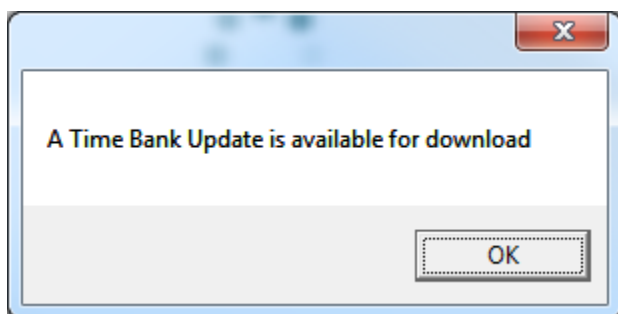
8 Support

8.1 Tools

Time Bank options for updating and archiving configuration changes are available on the Support/Tools tab:

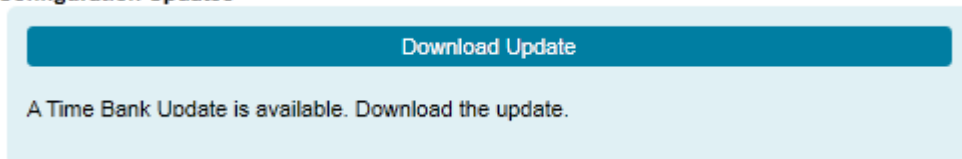


When there is a Time Bank update available for download, a message box will appear when logging into Time Bank and Time Bank will open to the Support/Tools tab.

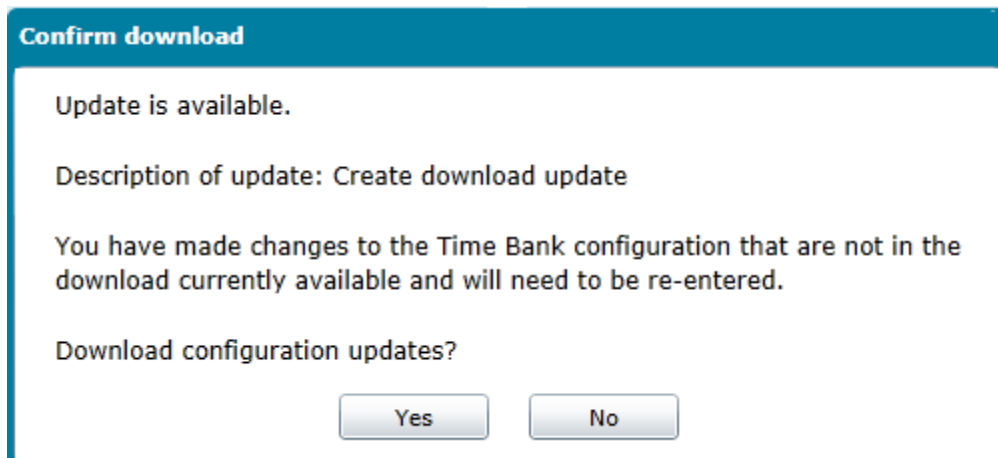


Click the Support/Tools Download Update button to apply the update.

Configuration Updates

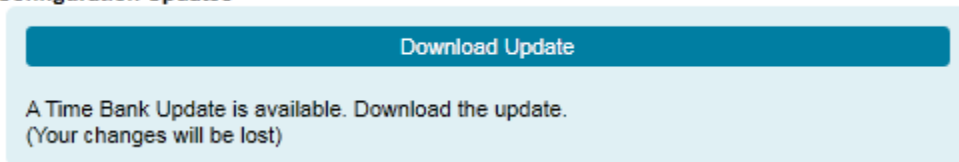


You will be prompted to confirm that the update should be loaded. Clicking Yes will connect to the IDI web server and apply the update.



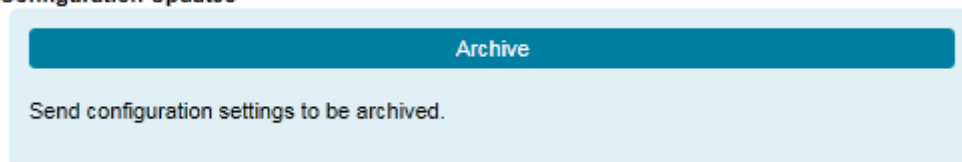
If you have made changes that were not archived and therefore not included in the update, you will see a comment (Your changes will be lost).

Configuration Updates



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

Configuration Updates



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.

The Support/Tools tab will also display basic site information including the site name, number, capacity, and required disk space. Note that if there are no changes to archive and no update to download, the Configuration Updates will not have an active button.

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

Example Support /Tools tab:

RUN		CONFIGURE		SUPPORT	
Tools		IDI Support		Documentation	
Configuration Updates			Options		
No changes have been made since the site was last archived.			<input type="checkbox"/> Testing		
Site Information					
Site Name: Time Bank Online Documentation Site ID: 42705 Customer ID: N/A			Time Bank Version: 4.3 Site Version: 20 Config Version: 4.3.15239.1147		
Downloads					
Description		Saved As		Downloaded	

8.2 IDI Support

The IDI Support tab has 4 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 Scheduled Task](#) section of this document.
4. The Test TBX Connectivity option is used for testing the Time Bank connection with the TBXfer software from with Time Bank Online site.



8.3 Documentation

The documentation tab provides access to the latest documentation available for Time Bank generally and custom client documentation, if any. Documentation can be viewed, printed, or saved locally from this tab.

