Timeless Time & Expense
MAG Softwrx

Version 2.6

Timeless Time & Expense

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Foreword

It was during my first job out of college where I had my first impractical experience tracking time. At the end of every week we were to submit a preprinted form filled with our time for the week. The form was reminiscent of a government form with rows of boxes to fill in with series of codes representing project and time. It was so archaic; I kept a separate small spiral notebook to record my time to later be transcribed in code. This worked for a short time, but like everyone else, my completed form consisted of just five lines of 8 hours each. On a bad week, it may be one line of 40 hours. It turns out, that was okay because time was only being tracked for billing purposes and those billing buckets were so big, just about all work would flow into one "big bucket".

All this time spent tracking time, but there was no real value in it. You could not use it for estimating. You couldn’t even tell what you had done. On my next job I was determined to do better. I felt I had to. I was consulting on multiple client and projects at once. The clients wanted to know where their money was going. I started using a popular product of the time, but was frustrated by its inability to track detailed time.

I surveyed the other time tracking tools on the market and was dissatisfied. They could not track detailed time easily. They were all designed around "big buckets". I knew I could do better. And Timeless Time & Expense was born.......

Mark Griebling
MAG Softwrx, Inc.

1 Timeless Time & Expense

The time and expense tracking software that doesn't take all your time.

- Would you like to make better and more accurate decisions about your time management?
- Do you want to consistently be within your projected timeframe and budget when you give estimates?
- Are you 100% confident you're getting paid for all the work you do? Or is it possible you're missing out on revenue opportunities because you don't have accurate time tracking?

Whether you are tracking for time and billing or for project management, accurate time tracking is important. There is a cost to pay for inaccurate time tracking. It might be a loss of billing income. It might be in lost opportunity due to under utilized resources. It may even be in lost credibility. You don't want to pay for any of those, especially if it's because you didn't have accurate time tracking software. Use Timeless Time & Expense and make sure this doesn't happen. Timeless Time & Expense gives you accurate information.

But to get accurate information, your time tracking software has to be easy to setup and easy for those doing the tracking. It has to be just as easy to track in detail as it is at a high level. If it isn't, you won't get accurate information. Even if your software is easy to use, you won't get accurate information by filling out your timesheet at the end of the period. You need to be able to record your time as you work with as little interruption as possible.

Timeless Time & Expense does all this, and it's easy because it works the way you do. It's easy to set up. It tracks your time just as easily at a detailed level as at a general level. It is also the time tracker that allows you to track your time without interruptions!

Time and Billing
Timeless Time & Expense has the ability to bill at a variety of rates ensuring, once again, that you capture accurate information. You can set billing rates at any level you choose, including client, project, task or any of your custom defined levels. Additionally, billing rates can be set for a specific employee, activity or combined with task levels. These features are easy to use but nearly invisible if you don't need them, so Timeless Time & Expense is the time tracking software that stays easy to use.

Project Management
The first step of any project plan is to estimate the work required. You will find information that is right for billing does not have the detail to accurately estimate future work. That's where the time tracker features of Timeless Time & Expense benefits you!

Timeless Time & Expense provides up to 20 custom defined levels so you can track time at the level of detail you need. Try that with other tools that give you the standard client and task levels. With Timeless Time & Expense's flexible reporting capability, you get the information needed to accurately estimate time and costs on future tasks in addition to accurate billing information. It's easy to summarize at any level to get the information you need when you need it.

Of course, project management starts with a good plan, but it doesn't end there. Projects are dynamic; they change over time. If you don't keep track of the project, it slowly gets out of date. Soon you don't know where the project stands. You may miss opportunities to expand the project or worse, the project is late and you didn't notice soon enough to do anything about it. With many levels of detail, Timeless Time & Expense can track your project at the same level of detail as your project plan.

2 Tutorial

This tutorial will show the features of Timeless Time & Expense. It is broken up into five parts. Setup Wizard, Administration Setup and Setup is for use by administrators to get Timeless Time & Expense ready to use. The Basics will show all you need to know to get up and running quickly. Advanced Features will show the features that will allow you to get the most out of Timeless Time & Expense.

For this tutorial, we will track the time and expenses for J. Doe. J. works as a traveling computer consultant for the Acme Consulting. J. has multiple clients and multiple projects. J. is an all around busy individual who does not have a lot of time to track time and expenses.

2.1 Setup Wizard

After installing and opening Timeless Time & Expense Web, the Setup Wizard will guide you through initial setup. After completing this section you will be able to continue by adding the items you team will use to track their time, expenses and to do items.

Administrator Password
Company
Users

2.1.1 Administrator Password

Timeless Time & Expense Enterprise has a built-in administrator account. The user id is **TTEAdmin** and is limited to basic administration such as creating users and assigning permissions.

Once logged in as **TTEAdmin**, a user can assign advanced permissions to any user or even delete users and all data. So it is very important to set a password on the **TTEAdmin** user account.

Enter a password you will remember and press **Next** to continue.

2.1.2 Company

Timeless Time & Expense Enterprise uses a customizable hierarchy of Clients, Projects, Tasks, etc. At the top of the hierarchy is your company. Since each item of the hierarchy can inherit from its parent, it is easy to define items. You only enter unique information.

To start the hierarchy, Timeless Time & Expense needs to know your company name.

Enter your company name and press **Next** to continue.

2.1.3 Users

Timeless Time & Expense Enterprise uses a variety for permissions which limit what an individual user is allowed to do. During the trial, all functionality should be available. To make that happen, **all permissions** will be added to the user you create here. Later, administrators can create additional users and assign different permissions from the **Tools | Users** menu.

To add users, enter the name, user name and passwords, then press add.

Enter your company name and press **Next** to continue.

2.2 Administration Setup

This section is only for administrators when setting up Timeless Time & Expense. Other users should move on to the Basics after logging in. After completing this section your team will be ready to start tracking time, expense and to do items..

Adding Users
Task Levels
Adding Activities
Adding Expense Types
Adding Payment Methods
Task Level Security

2.2.1 Adding Users

To allow others to use Multiuser Timeless Time & Expense, you must first add users. The default administrator user (TTEAdmin) is only used for setup, but cannot be used to track time or expenses

There are many different kinds of users with different needs and requirements. Some users need to be able to run reports for other users, others should not be able to. Some users need to be able to add tasks, while others shouldn't. These different requirements can be set when creating users.

Logon as an administrator. Until you create another user with administrator rights, use the TTEAdmin user.

Because the default TTEAdmin user permissions are limited to adding users and basic maintenance and cannot add entries or create reports, you will want a user capable of doing more. To create a user, select the **Users** from the **Tools** menu. The Users dialog will open. Select **< Add User >** at the top of the user list.

Let's add our project leader, M. Jones. M. Jones needs to be able to add tasks for the project staff to work on, maintain task billing and contact information as well as run reports on these users. Enter M. Jones in the **Name** field. Enter 'mjones' as the **User Name** field. Optionally, enter and confirm the user's password. Set the user Active. Select **Run Multiuser Reports**, **Maintain Tasks** and **Maintain Contacts** permissions for this user. Press **Save**.

Now we need to add a regular employee who will just be able to add entries and report on their own time. Again, select **< Add User >** at the top of the user list. Enter the J. Doe in the **Name** field. Enter 'jdoe' as the **User Name** field. Optionally, enter and confirm the user's password. Set the user Active. Press **Save**.

We also have an employee who handles our invoicing and billing. Select **< Add User >** at the top of the user list. Enter the J. Johnson in the **Name** field. Enter 'jjohnson' as the **User Name** field. Optionally, enter and confirm the user's password. Set the user Active. Select **Run Multiuser Reports** and **Maintain Billing Information** permissions for this user. Press **Save**.

Note - Only Active users may log into Timeless Time & Expense and only Active users are required to have a license. If an employee leaves your company, you can uncheck the Active field and use the license on a new user. By setting the user inactive instead of deleting them, you keep all their entries and can still report on them.

2.2.2 Task Levels

Timeless Time & Expense allows tasks to be categorized up to twenty levels deep. Best of all, it is as easy to track time at the twentieth level as it is the first.

To add additional levels, first go to the **Administration** page by selecting the **Tools | Administration** menu item. Next select the **Task Levels** section. To change the name or add a level, highlight the task level name or and unused level. Type the new name in the **Name** field.

Unused levels are name **< Level ? >**. Unused levels are not available when adding work items at that level.

2.2.3 Adding Activities

Timeless Time & Expense allows time entries to be assigned to different activities. Activities are used to track specific types of work performed on tasks. The activities may be used later to filter reports.

Before activities can be assigned, they must be defined. To define activities, first go to the **Administration** page by selecting the **Tools | Administration** menu item. Next select the **Activities** section.

Add the activity 'Meetings' by selecting **< Add Activity >** in the activity list. Enter 'Meetings' in the name field and press **Save**. Create two more activities, 'Analysis' and 'Coding'.

2.2.4 Adding Expense Types

Timeless Time & Expense allows expense entries to be assigned to different expense types. Expense Types are used to track what an expense was for. The expense types may be used later to filter reports.

Timeless Time & Expense comes pre-loaded with some common expense types. To define additional expense types, first go to the **Administration** page by selecting the **Tools | Administration** menu item. Next select the **Expense Types** section.

Add the expense type 'Tolls' by selecting **< Add Expense Type >** in the expense type list. Enter 'Tolls' in the name field and press **Save**.

2.2.5 Adding Payment Methods

Timeless Time & Expense allows expense entries to be assigned to different payment methods. Payment Methods are used to track how an expense was paid. The payment methods may be used later to filter reports.

Before payment methods can be assigned, they must be defined. To define payment methods, first go to the **Administration** page by selecting the **Tools | Administration** menu item. Next select the **Payment Methods** section.

Add the payment method 'Acme VISA' by selecting **< Add Payment Method >** in the payment method list. Enter 'Acme VISA' in the Name field. Select 'Company Credit Card' as the Account Type and press **Save**. Create another payment method call 'My Wallet' with an account type of 'Cash'.

2.2.6 Task Level Security

Task level security is an advanced feature that is not required to use Timeless Time & Expense. This feature may be enabled later and it is recommended you do not enable this feature until you've become familiar with all other aspects of Timeless Time & Expense.

Task level security allows you to specify which tasks individual users have access to. The users will only be able to create entries for the task they have been given access to. Users who have permission to Maintain Tasks, will only be able to modify the tasks they have access to. If a user has been given access to a task item, they will also have access to child task items unless permission is revoked on those child task items.

To enable Task Level Security select Administration from the **Tools** menu. On the **Security** section, select **Enable Task Level Security**.

Now users must be assigned to tasks. By default the only users having access to a task will be the user who created each top level task. You may have to log in as an administrator. Highlight the **Third Rate Foods** task item and select **Properties** from the **Edit** menu. Go to the **Permissions** tab. For **B. Lee** and **J. Doe** change the permissions drop down to **Allowed**.

Note: For users to see the new tasks they have been assigned to, they will have to log out of Timeless Time & Expense or refresh their browser window.

2.3 The Basics

The items contained in basics are items you should know. After this tutorial section you will be able to start tracking your project.

2.3.1 Adding Tasks

2.3.2 Adding Time Entries

Timeless Time & Expense tracks time entered by associating time entries with different tasks. At a minimum, a time entry requires a start and end time. Optionally, an activity, note and entry specific billing information may be entered.

Let's add a time entry for J. Doe. Highlight the task 'Competitive Price Lookup'. Select **New Time Entry** from the **Insert** menu. Enter a start time of 8:00AM and an end time of 10:00AM. Tab to the note field and enter 'Project initiation'. Leave Activity blank. Activities will be discussed later. Press **OK**.

Time entries may also be entered by pressing the **New Time Entry** toolbar button or by dragging a task to the Time Entry list.

2.3.3 Starting Time Entries

Timeless Time & Expense will also start a timer on a task. This reduces the amount of effort needed when changing tasks.

Let's start a timer for J. Doe. Select the task 'Web Pages' and select **Start Timer** from the **Edit** menu. If another entry is running, it will be stopped automatically when starting the new timer.

Additionally, a time entry can be started by pressing **Ctrl-G** or pressing the **Start Time Entry** toolbar button

2.3.4 Adding Expense Entries

Timeless Time & Expense tracks expenses entered by associating expense entries with different tasks. Expenses may be categorized by expense type and payment method.

Let's add a expense entry for lunch. First press the Expense Entries tab. Next, select the client 'Third Rate Foods'. Select **New Expense Entry** from the **Insert** menu. Select Lunch as an expense type and enter 12.00 in the expense amount field. Leave Payment Method blank. Payment Methods will be discussed later. Press **OK**.

Expense entries may also be entered by pressing the **New Expense Entry** toolbar button or by dragging a task to the Expense Entries list.

2.3.5 Adding To Do Entries

Timeless Time & Expense tracks items you need to do by associating then with different tasks. At a minimum, a to do entry requires a description. Optionally, a priority, due date, complete date and note may be entered.

Let's add a to do entry for J. Doe. Highlight the task 'Third Rate Foods'. Select **New To Do Entry** from the **Insert** menu. Enter a description of 'Submit time and expense report', a priority of '5' and a due date of December 16th. Leave complete date and note blank. Press OK.

To Do entries may also be entered by pressing the **New To Do Entry** toolbar button or by dragging a task to the To Do Entry list.

2.3.6 Using the Timesheet

In addition to detailed time tracking, Timeless Time & Expense has a Timesheet to easily enter time in bulk without detailed time entries. The timesheet can also be used as a quick summary of time for a week. The timesheet shows daily totals for each task during the week, but also includes blank lines for work items used in previous weeks.

We will add time for a week of Vacation. To do this, we must first setup the new work items. Add a client called Acme Consulting with a project called Vacation.

Next, switch to the Timesheet view by clicking the Timesheet tab. Now, drag the project Vacation to the Timesheet. This will add the work item to the Timesheet. Press Tab five times and enter 8:00 to assign 8 hours of Vacation to Friday. Press **Save**.

2.3.7 Editing Tasks

After a task has been created, additional details can be entered to be used in other parts of Timeless Time & Expense.

Highlight the client 'Third Rate Foods' and select **Properties** from **Edit** menu. The Task Properties will be displayed.

Enter the abbreviation '3rd Foods' in the abbreviation field. Uncheck the **Use Parent Task ID** box and enter a Task ID of 001234. Press **OK**.

2.3.8 Adding a Contact

For many tasks, someone is the main contact for information. Timeless Time & Expense provides a convenient way to associate contacts with task items.

Highlight the client 'Third Rate Foods' and select **Properties** from **Edit** menu. The Task Properties will be displayed.

Uncheck the **Use Parent Contact** box. Press the **New Contact** button. Enter a first and last name. Press **OK**.

2.3.9 Editing Time Entries

When a time entry has been created, its details can be edited.

Highlight the time entry at 8:00 and select **Properties** from **Edit** menu. The Time Entry Properties will be displayed. Double clicking a time entry will also display the properties.

Select the activity 'Meetings'. To remove the activity, press delete.

2.3.10 Editing Expense Entries

After a expense entry has been created, its details can be entered to be used in other parts of Timeless Time & Expense.

Highlight the $12.00 lunch expense and select **Properties** from **Edit** menu. The Expense Entry Properties will be displayed. Double clicking an expense entry will also display the properties.

Select the expense type 'Tolls' and the payment method 'My Wallet' now. To remove the expense type or payment method, press delete.

2.3.11 Editing To Do Entries

After a to do entry has been created, its details can be edited.

Highlight the to do entry 'Submit Time and Expense Report' and select **Properties** from **Edit** menu. The To Do Entry Properties will be displayed. Double clicking an to do entry will also display the properties.

Change the priority to 'A'. To remove the priority, press delete.

2.3.12 Complete To Do Entry

Timeless Time & Expense will easily complete an outstanding to do entry.

Select the to do entry 'Submit Time and Expense Reports' and select **Complete** from the **Edit** menu. The entry will be completed on the day selected on the calendar.

You may also use the popup menu by right-clicking on the To Do entry.

2.3.13 Adding a Task to Favorites

Timeless Time & Expense has a Favorite task list so you can easily work with common tasks. To add a task you your favorites list:

1) Select a task in the task hierarchy.
2) Select the **Favorites | Add** to Favorites menu item.

2.3.14 Creating Reports

After entering time and expenses, it is important to be able to display the right amount of information. With Timeless Time & Expense, a variety of filters are used to display just the level of detail needed.

A basic report wizard is used to create a report quickly and easily. The options presented vary by the report type selected.

Each Friday, J. Doe needs to submit a weekly time report summarized by day and project.

To create this report, select **New Report** from the **Insert** menu. The report wizard will start guiding you through the process.
For more report examples, view the sample file.

2.3.15 Purchasing Timeless Time & Expense

You are free to use Timeless Time & Expense for 30 days to see if it fits your needs. To continue using after thirty days, you will be required to purchase Timeless Time & Expense. Shortly after, you will receive a registration number that will eliminate unregistered warning messages and allow you to continue adding entries after 30 days. Registered users also receive 90 days free technical support.

To enter you registration number, select **About Timeless Time & Expense** from the **Help** menu. Press the **Registration** button and enter you name and registration number exactly as the appear on the registration confirmation you received from MAG Softwrx, Inc.

2.4 Advanced Features

The items in this section will increase your knowledge of the smaller details of Timeless Time & Expense. They will make common and uncommon tasks easier.

2.4.1 Context (Popup) Menus

Right-click here, right-click there, right-click everywhere.

Timeless Time & Expense makes it easy to accomplish tasks by providing context sensitive menus everywhere. For those using the mouse, this is often the quickest way to get things done.

Try it by right-clicking on different items on the Main screen. Right-click on a task, a time entry, an expense entry, a to do entry and a report. You will see menu appropriate for each item you click on.

2.4.2 Task Tray

Timeless Time & Expense integrates with the windows task tray to simplify starting task timers. The most recently used task list is available while Timeless Time & Expense remains minimized on your desktop. This minimizes the interruptions to normal work flow, which makes time tracking easier and more natural.

To display the most recently used task list, right click on the Timeless Time & Expense icon on the task tray. Under **Start Timer**, select the task to start.

2.4.3 View Entries By Task

When trying to find when certain work was done or an expense was incurred on a task, it is not necessary to run detail reports to find a particular entry. Timeless Time & Expense allows you to view all entries for a task, no matter when they occurred.

To view by task, select **Task** from the **View** menu. To switch back, select **Date** from the **View** menu. Timeless Time & Expense also provides toolbar buttons to change the view.

2.4.4 Moving Tasks

Sometimes we need to reorganize our task hierarchy. With Timeless Time & Expense you can move tasks around without effecting existing reports or time, expense and to do entries.

Click down on the task to move. Drag the task to a new parent task. Any child tasks will also be moved.

When moving tasks, you have to keep tasks in a descending hierarchy. This means you may have to change the task levels of tasks before moving or allow Timeless Time & Expense to automatically change the task level for the moved items.

2.4.5 Copying Tasks

In some work environments many clients or projects have similar task hierarchies. For this case a task hierarchy may be copied from one item to another.

Click down on the task to copy. Hold the CTRL key and drag the task to a new parent task. Any child tasks will also be copied, including billing rate information. Time, Expense and To Do entries will not be copied.

When copying tasks, you have to keep tasks in a descending hierarchy. This means you may have to change the task levels of tasks before copying or allow Timeless Time & Expense to automatically change the task level for the copied items.

2.4.6 Rounding Time Entries

Timeless Time & Expense will round timer entries to 1, 3, 5, 6, 10, 15, 30 or 60 minute intervals.

To change the rounding interval used, go to the Time Entry Options by selecting Options from the Tools menu. Select the Time Entries tab and change the **Round to Nearest** selection.

Timeless Time & Expense will round the start and end times either up or down depending on which is closer. It does not round the total time of the entry.

2.4.7 Elapsed Time Format

Timeless Time & Expense will display elapsed time on reports and time entries in either time or decimal format.

To change the elapsed time format, go to the Time Entry Options by selecting **Options** from the **Tools** menu. Select the Time Entries tab and change the **Time Format** selection in the **Show Elapsed Time As** section.

2.4.8 Automatically Displaying Time Entry Properties

Timeless Time & Expense will automatically display a time entry's properties when starting and/or stopping the timer. This is useful for capturing activities and notes associated with a time entry when the event occurs.

To enable the automatic display of time entry properties, go to the Time Entry Options by selecting **Options** from the **Tools** menu. Check the boxes to display the time properties when desired.

2.4.9 Adjusting Overlapping Time Entries

Timeless Time & Expense will assist you in correcting overlapping entries. If you create a new time entry that overlaps another, you will be given the option of how to correct the overlap.

To demonstrate, create a new time entry that goes from 9:00 - 11:00. This will overlap with our existing entry from 8:00 - 10:00. Press **OK**. When prompted, choose to adjust other time entries. Look at the time entries. You notice that the first entry was automatically adjusted to end at 9:00.

This is especially useful when you forget to start a timer. By adjusting the start time of the running entry, you can correct both entries at once.

You can allow overlapping entries by changing the Time Entry Options.

2.4.10 Adding Entries from Existing Entries

With Timeless Time & Expense, you can add new entries from existing entries. This allows you to add entries quickly for the tasks you have used recently.

Right click on the 8:00 time entry and select **New Time Entry**.

2.4.11 Drag Task to Create Entries

Entries may also be created by dragging a task to the time, expense or to do entry list.

Select the **Expenses** tab. Select and drag the 'Competitive Price Lookup' project to the expense list. Create a Dinner expense.

2.4.12 Deleting Tasks

Sometimes when reorganizing or consolidating the task structure you will want to delete tasks. Timeless Time & Expense will allow you to delete a task and will optionally move all existing entries to the deleted task item's parent task.

Highlight the Task 'Web Pages'. Select **Delete** from the **Edit** menu. Confirm that you want to delete the task. When are asked if you would like to rollup entries, answer **Yes**. Notice that the time entries have changed from 'Web Pages' to 'Competitive Price Lookup'.

2.4.13 Quick Detail Reports

When you need to print the entries displayed in the current view, Quick Detail Reports do it for you without creating a report. Time, Expense or To Do entries may be printed from either Date or Task View.

With the desired entry list displayed, select **Print** or **Print Preview** from the **File** menu.

2.4.14 Assigning User Rates

In addition to task based billing rates, Timeless Time & Expense lets you set different billing rates for each user.

J. Doe is very experienced and can charge a higher billing rate for work at Third Rate Foods. To change J.Doe's billing rate, highlight the client 'Third Rate Foods' and select **Billing** from **Edit** menu.

Select **< Default Billing Rate >**. Uncheck the **Use Parent Billing Information** box if checked. Press the **Save** button. Next, select **< Add User Specific Billing Rates >**.   Select J. Doe from the list and enter $120.00 and press **Save**.

J. Doe will use this new rate. All other users will use the Default rates.

3 How To...

3.1 Add Address to Invoice Report

An address or other information may be added to the top of all Invoice reports. This is a single setting that will apply to all Invoice reports.

1. Select Options from the Tools menu.
2. Select the Invoice Tab.
3. Enter an address or other invoice information.

Tip

- Press Ctrl-Enter to start a new line.

3.2 Add Sub Tasks

Tasks may be added up to 20 levels deep providing as much or as little detail as is needed.

1. Select the task to add sub tasks to.
2. From the Insert menu, select the type of sub task to add.
3. Type the name of the new item.

Tips

- Right click on a task item to add a subtask directly
- Task level names are defined in Task Options

3.3 Adjust Overlapping Time Entries

Overlapping time entries can automatically adjusted, saving the effort to adjust multiple time entries.

1. When a time entry is started, stopped or changed and it overlaps with another entry, the Time Entry Conflict dialog will appear.
2. Select how to resolve the conflict.
    - Automatically adjust other Time Entries to fit around this Time Entry. Selecting this option will keep the new entry as entered. Other entries will be adjusted as needed including splitting entries or deleting them.
    - Automatically adjust this Time Entry to fit around other Time Entries. Selecting this option will keep other entries as entered. The new entry may have the start or end time adjusted. It may also be split or deleted.
    - Manually adjust this entry. Select this entry to go back to the time entry properties and manually adjust the entry.

Tips

- All entries time entry conflicts are resolved at once.

3.4 Add Activity Rates

With Timeless Time & Expense, you can use specific billing rates based on the activity applied to a time entry.

1. Select an existing task.

2. Select Billing from the Edit menu.
3. Select **< Default Billing Rates >**.
4. Uncheck Use Parent Billing Information.
5. Check Billable Task and Use Activity Rates.
6. Uncheck Default for the activity to change.
7. Enter Activity rate information.
8. Press OK.

3.5 Associate a Contact with a Task

With Timeless Time & Expense, you can associate contact information with a task.

1. Select an existing task.
2. Select Properties from the Edit menu.
3. Uncheck Use Parent Contact.
4. Press New Contact.
5. Enter Contact information.
6. Press OK.

Tips

- An existing contact can be selected using the contact drop down.
- One contact can be applied to multiple tasks.
- Contacts can also be edited or created in the Contacts Dialog from the **Tools | Contacts** menu item

3.6 Automatically Display a Time Entry's Properties

A timer entry's properties can be automatically displayed when the entry is started or stopped.

1. Select the Tools-Options menu item.
2. Click the Time Entries tab.
3. Check the boxes to show properties when starting and/or stopping a task.

Tips

- This makes it easier to remember to enter a note or to change the activity for a timer entry.
- This makes it easy to adjust the start time if you forgot to start the timer for a new task on time.

3.7 Automatically Round Timer Entries

Timeless Time & Expense will round timer entries to 1, 3, 5, 10, 15, 30 or 60 minute intervals.

1. Select the Tools-Options menu item.
2. Click the Time Entries tab.
3. In the Round Time combo box, select the interval to round timer entries to.

Tips

- Timeless Time & Expense will round the start and end times either up or down depending on which is closer. It does not round the total time of the entry.

3.8 Change Activities

An unlimited number of activities may be defined according to your needs. Activities are another way to categorize a time entry. An Activity is something that is done to accomplish a specific task, but is not a task by itself.

1. Select the **Tools-Administration** menu item.
2. Click the Activities section.
3. Select an activity or select **< Add Activity** > to create a new activity.
4. Edit the activity name.

Tips
- Activities can be used to filter time entries in reports.
- Activities can be used to further define time entries without creating similar sub tasks for all tasks.

3.9 Change Expense Types

An unlimited number of expense types may be defined according to your needs. Common expense types are predefined.

1. Select the **Tools-Administration** menu item.
2. Click the Expense Types section.
3. Select an expense type or select **< Add Expense Type** > to create a new expense type.
4. Edit the expense type name.

Tips
- Expense Types can be used to filter expense entries in reports.

3.10 Change Payment Methods

An unlimited number of payment methods may be defined according to your needs.

1. Select the **Tools-Administration** menu item.
2. Click the Payment Method section.
3. Select an payment method or select **< Add Payment Method** > to create a new payment method.
4. Edit the payment method name.
5. Enter account number and type if applicable.

Tips
- Payment Methods can be used to filter expense entries in reports. Creating reports using payment methods makes it easy to reconcile your accounts.

3.11 Change Task Level Names

Up to twenty task levels may be defined according to your needs.

1. Select the **Tools-Administration** menu item.

2. Click the Task Levels section.
3. Select the task level to change or select **< Level ?** > to add a task level.
4. In the Level Name field, enter or change the selected level's name.

Tips

- A level name must be entered before a subtask can be added at that level.
- To display a level's details in time and expense entries, check the box.

3.12 Create a Quick Report

A detail report may be printed for the entries in the current window. The Time, Expense, To Do and Timesheet tabs have quick reports. This makes it easy to print the contents of the tab without creating a report.

1. Select tab to printed.
2. Press the Print button on the toolbar.

Tips

- Quick Detail reports can be for either Date or Task view.

3.13 Enter a Default Mileage Rate

A default mileage rate may be entered that will automatically be used when creating expense entries with an expense type of 'Mileage'.

1. Select the **Tools-Administration** menu item.
2. Click the General section.
3. Enter the new default mileage rate in dollars and cents (or your local currency) (.405 = 40.5 cents per mile).

Tips

- Changing the default mileage rate will not change existing entries.
- Mileage rate may be overridden for any expense entry.

3.14 Get Updates from our Web Site

Program updates, utilities and additional information can be obtained from the MAG Softwrx, Inc. web site.

1. Connect to the Internet using your internet browser.
2. Enter the address http://www.magsoftwrx.com in your browser.
3. Go to the Download and Support pages.

Tips

- Links to full version downloads can also be found at the MAG Softwrx website.

3.15 Inactivate a Task

Tasks can be Inactivated and optionally hidden from view or locked to prevent new entries from being added.

1. Select the Task to inactivate.

2. Select Inactive from the Edit menu.
3. To hide inactive tasks, select Hide Inactive from the View menu.
4. To lock inactive tasks, go to the Tasks Option page and check the box to **Lock Inactive Tasks**.

3.16 Move a Task

Task items can be moved to reorganize the task hierarchy.

1. Click down on the task to move.
2. Drag the task to a new parent task.

Tips
- All child task items will also be moved.
- To copy the task items, hold the CTRL key while dragging.

3.17 Pause the Timer

A timer can be paused and later resumed.

1. Select Pause Timer from the Edit menu.
2. To resume timer, select Resume Timer from the Edit menu.

Tips
- The timer may also be paused from either the Tray icon or from the toolbar.
- Pausing and resuming will not display the time entries properties even if selected in the General Options.

3.18 Purchase

Timeless Time & Expense can be purchased using credit card, check or purchase order.

After purchasing, you will receive your registration number to unlock Timeless Time & Expense by e-mail. The registration number will eliminate all 'unregistered' messages as well as allow you to continue to use Timeless Time & Expense past the 30-day trial period.

Ordering
You can order by Fax, postal mail, e-mail, Internet or phone.

Internet
Place secure credit card orders through the Internet using the Order link on the MAG Softwrx home page at http://www.magsoftwrx.com.

By Fax or Phone
Place you order via the Internet using the Order link on the MAG Softwrx home page at http://www.magsoftwrx.com. Choose the Phone or Fax option when filling out your order.

3.19 Relative Time Frames in Reports

Relative time frames can be used to create standard weekly, monthly, etc. reports.

1. Open report's properties.
2. Click the Dates tab.
3. Select a **Time Frame** of Current Week, Previous Month, etc.
4. Run report weekly, monthly etc.

3.20 Rollup Time and Expense Entries

Time summary reports can have time entries rolled up to parent task summaries. This results in a report where your can see the total time for a task and all its subtasks at once.

1. Open the time summary report's properties.
2. Click the Summarize tab.
3. Check the **Rollup Entries to Parent Tasks** checkbox.

Tips

- Expense reports can have expense amounts rolled up also.

3.21 Sort Entries

Time and expense entries displayed in the day's entries list may be sorted by any of the fields displayed.

1. Click the column header of the field to sort by.

3.22 Start a Recent Task

Your most recently used tasks can be started easily.

1) Click the **Recent** panel below the task hierarchy to expand the **Recent Task List**
2) Select the task to start and press the **Start Timer** button

Tips

- You can sort the recently used tasks alphabetically or by order used on the General Options.
- You can change the number of tasks to display on recent task list on the General Options.

3.23 Start a Favorite Task

Your favorite tasks can be started easily.

1) Click the **Favorite** panel above the task hierarchy to expand the **Favorite Task List**
2) Select the task to start and press the **Start Timer** button

Tips

- You can sort the recently used tasks alphabetically or by order used on the General Options.
- You can change the number of tasks to display on recent task list on the General Options.

3.24 Start a Timer from a Previous Entry

With Timeless Time & Expense, you can start the timer from existing entries. This allows you to start timers quickly for the tasks you have used recently.

1. Select a time or expense entry to start the time on.
2. Select Start Timer from the Edit menu or press CTRL-G.

Tips

- Time and Expense entries can also be added from existing entries.

3.25 Start a Timer Entry from a To Do Entry

With Timeless Time & Expense, you can start the timer from to do entries. This allows you to start timers quickly from your To Do list, eliminating the need to find the associated task.

1. Select a to do entry to start the time on.
2. Select Start Timer from the Edit menu or press CTRL-G.

Tips

- The to do entry's description is carried forward into the new timer entry's note.

3.26 Summarize Time Summary Reports by Activity

Time summary reports can be summarized by activity .

1. Open the time summary report's properties.
2. Click the Summarize tab.
3. Select Activity from the Summarize Task Level combo box.

Tips

- Expense reports can be summarized by expense type or payment method.

3.27 View By Task

Time, expense and to do entries may be viewed by task in addition to by date.

1. Select **Task** from the **View** Menu or press the **Task view** toolbar button.

4 Reports

Timeless Time & Expense provides a variety of views into you data. These reports will help you report on current projects, as well as estimate and plan for future projects.

4.1 Time Detail Report

The time detail report provides a list of entries based on the criteria selected in the report properties. This report can be thought of as extension of the time details list. More detail is provided and a wider range of entries may be reported on. Daily and report totals are included.

Using the Detail Report Options, you can specify how the Task Name appears in the report.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.2 Time Summary Report

The time summary report provides summarized totals of time based on the criteria selected in the report properties. This report can be summarized by any level in the task options in addition to activity. Different date ranges are used to create different time buckets for each summarized item. Finally, totals are provided for each date and summarized item.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.3 Expense Detail Report

The expense detail report provides a list of entries based on the criteria selected in the report properties. This report can be thought of as extension of the expense details list. More detail is provided and a wider range of entries may be reported on. Daily and report totals are included.

Using the Detail Report Options, you can specify how the Task Name appears in the report.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.4 Expense Summary Report

The expense summary report provides a summarized totals of time based on the criteria selected in the report properties. This report can be summarized by any level in the task options in addition to expense types. Different date ranges are used to create different expense buckets for each summarized item. Finally, totals are provided for each date and summarized item.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.5 To Do Detail Report

The to do detail report provides a list of entries based on the criteria selected in the report properties. This report can be thought of as extension of the to do details list. More detail is provided and a wider range of entries may be reported on.

Using the Detail Report Options, you can specify how the Task Name appears in the report.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.6 Time & Expense Summary Report

The time and expense summary report provides summarized time and expense totals based on the criteria selected in the report properties. This report can be summarized by any level in the task options. Different date ranges are used to create different time and expense buckets for each summarized item. Finally, totals are provided for each date and summarized item.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.7 Billing Summary Report

The billing summary report provides summarized billing amount totals based on the criteria selected in the report properties. This report can be summarized by any level in the task options in addition to activity. Different date ranges are used to create different billing amount buckets for each summarized item. Finally, totals are provided for each date and summarized item.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.8 Invoice Report

The invoice report provides a summarized totals of time and expenses in an invoice format based on the criteria selected in the report properties. This report can be summarized by any level in the task options. Different date ranges are used to create different time and expense buckets for each summarized item. A final total is included as well as optional terms and taxes.

Reports can be printed, viewed, exported or printed to pdf from the report list.

4.9 Progress Report

The progress report provides a quick report of project status. This report summarizes the total time for task items which is used along with estimates and project to do entries to show status. This report always reports on all dates.

Reports can be printed, viewed, exported or printed to pdf from the report list.

5 Administration

The following administrative options in Timeless Time & Expense Enterprise Web can be accessed using the **Tools | Administration** menu item.

General
Task Levels
Activities
Expense Types
Payment Methods
Invoice Options
Security
Licenses

Users can be access using the **Tools | Users** menu item

5.1 General

This page is where you configure a variety of options that control how Timeless Time & Expense works for all users.

Allow Elapsed Time Entry
If checked, a time entry may be added with only elapsed time. If not checked, both start and end time must be entered. This option must be checked if you want to enter time using the timesheet.

Allow Entries to Overlap
If checked, time entries may overlap. If not checked, entries cannot overlap.

Round Start and End to Nearest
Select to round both start and end time to the nearest Round Interval when starting or stopping an entry.

Always Round Time Up
Select to round elapsed time up based on the Round Interval.

Lock Inactive Tasks
Select to prevent entries from being added to inactive tasks.

Default Mileage Rate
The default mileage rate used when entering a mileage expense. You can override this on individual expense entries.

5.2 Task Levels

This section is where you configure the task levels to your organization.

Task Level List
List of all task levels available to add to the task hierarchy. Unused levels are indicated with **< Level ? >**. Select an existing Task Level to edit it.

Name
Enter the name of the Task Level.

Save
Press to save the changes to the Task Level.

Cancel
Press to cancel the changes made to an Task Level.

5.3 Activities

An unlimited number of activities may be defined according to your needs. Activities are another way to categorize a time entry. An Activity is something that is done to accomplish a specific task, but is not a task by itself.

Example: If a project was to make dinner. Part of making dinner is to make soup and a cake. The activity of **Stirring** applies to both, but would not be a task itself.

Activity List
List of all activities available to assign to Time Entries. Select an existing activity to edit it.

< Add Activity >
Select to add a new Activity.

Name
Enter the name of the Activity.

Save
Press to save the changes to the Activity.

Cancel
Press to cancel the changes made to an Activity.

Delete
Press to delete the selected Activity.

5.4 Expense Types

This section is where you configure the types of expenses available for expense entries. Expense types are used for categorizing expenses and reporting on expenses. Edit the list to include the expense types in your organization.

Expense Type List
List of all Expense Types available on the expense entry properties. Select an existing Expense Type to edit it.

< Add Expense Type >
Select to add a new Expense Type.

Name
Enter the name of the Expense Type.

Save
Press to save the changes to the Expense Type.

Cancel
Press to cancel the changes made to an Expense Type.

Delete
Press to delete the selected Expense Type.

5.5 Payment Methods

This page is where you configure the payment methods available for expense entries. Payment Methods can be used to filter expense entries in reports. Creating reports using payment methods makes it easy to reconcile your accounts. Edit the list to include the payment methods in your organization.

Payment Methods List
List of all Payment Methods available on Expense Entries. Select an existing Payment Method to edit it.

< Add Payment Method >
Select to add a new Payment Method.

Name
Enter the name of the Payment Method.

Account Number
Enter an account number for this payment method.

Account Type
Select the account type of this payment method.

Save
Press to save the changes to the Payment Method.

Cancel
Press to cancel the changes made to an Payment Method.

Delete
Press to delete the selected Payment Method.

5.6 Invoice Options

This is where you add an address to print on Invoices and where you set the next Invoice number. This section can be found in the administrative options by selecting the **Tools | Administration** menu item.

Address
Enter your address as you would like it to appear on all invoices.

Default Tax Rate
Enter the default tax rate to use on all Invoices. This can be changed on each invoice.

Default Terms
Enter the default terms to use on all Invoices. This can be changed on each invoice.

Next Invoice Number
Enter the invoice number to use for the next invoice. This number is automatically incremented each time an invoice is printed. The number can be changed on each invoice.

5.7 Security

Task level security allows you to specify which tasks individual users have access to. The users will only be able to create entries for the task they have been given access to. Users who have permission to Maintain Tasks, will only be able to modify the tasks they have access to. If a user has been given access to a task item, they will also have access to child task items unless permission is revoked on those child task items.

To enable Task Level Security, select **Enable Task Level Security**.

Note: For users to see the new tasks they have been assigned to, they will have to log out of Timeless Time & Expense or refresh their browser window.

5.8 Licenses

This is the where registration name and numbers are entered. Registration number may be combined to add additional users. Be sure to use the same Name for all registrations. To see a count of total registered and active users, select Users from the Tools menu to display the Users Dialog.

Name
This is the registration name provided by MAG Softwrx. This is usually your company name and must be identical for each registration number entered..

License List
List of all licenses already entered. Select an existing License to enable the delete button.

< Add License >
Select to add a new License.

Number
Enter the number provided.

Save
Press to save the new license.

Cancel
Press to cancel entering a new License.

Delete
Press to delete the selected License.

5.9 Users

This is where you can create, modify and delete Timeless Time & Expense users. All users are shown, both active and inactive. You can access this page using the **Tools | Users** menu item.

User List
List of all users.

Registered Users
The count of registered users. This number is the total is based on the registrations numbers entered on the Registrations screen. If this count is not what you expect, a registration number may have been entered incorrectly.

Active Users
The count of active users. Except during the trial period, active users must be less than or equal to registered users.

< Add User >
Select to add a new User.

Name
The full name of the user. This the name that shows on reports.

User Name
The name used by the user to log into Timeless Time & Expense.

Password
The user's password.

Confirm
Confirmation of the password

Active User
Check to set this user as active. The total of active user's must be less than or equal to the registered users

Permissions
The user's permissions in Timeless Time & Expense.

Administrator -maintain Users and Task Levels, and run database maintenance operations.
Run Multiuser Reports - create and run reports with multiple users.
Maintain Tasks - Create, modify and edit tasks.
Maintain Activities - maintain activities used on time entries.
Maintain Expense Types - maintain expense types used on expense entries
Maintain Payment Methods - maintain payment methods used on expense entries.
Maintain Contacts - maintain contact information
Maintain Billing Information - maintain task billing information
View Billing Information - view billing information including on reports
Create Shared Reports - create reports that can be used by everyone

Save
Press to save the changes to the User.

Cancel
Press to cancel the changes made to an User.

Delete
Press to delete the selected User.

6 Windows

6.1 Assignments

Task may be assigned to different users. When making an assignment, an assignment to do entry is created for the user. This creates an assignment to do entry and the time estimates are used in the progress report. To add assignments, select a task item and select the **Edit | Assignments** menu item or press the **Assign work item** toolbar button.

Assignment List
List of all assignments made for this task item.

< Add Assignment >
Select to add a new Assignment.

User
The user this assignment is for.

Hours Estimate
Enter the expected time to be incurred for this user on the task.

Cost Estimate
Enter the expected cost to be incurred for this user on the task.

Priority
Select the priority for this task.

Due Date
Enter the date the task should be finished.

Note
Enter the to do entry note with details of the assignment.

Save
Press to save the changes to the Assignment.

Cancel
Press to cancel the changes made to an Assignment.

Delete
Press to delete the selected Assignment.

6.2 Billing

This is where the billing information of a Task are entered. To add assignments, select a task item in the task hierarchy and select the **Edit | Billing** menu item.

Billing Rate List
List of billing rates for this task item.

< Add User Specific Billing Rate >
Select to add a billing rates for a specific user.

< Default Billing Rates >
Select to edit the default billing rates for this item. If a user does not have specific rates, they will use the default rates.

User
The user this billing information applies to.

Use Parent Billing Information
Check to use the parent task's billing information.

Billable Task
Check if this task is Billable

Rate
Enter the regular rate for the task.

Overtime Multiplier
Enter the amount to multiply the regular rate by to get the Overtime rate.

Use Activity Rates
Check to use specific rate based on the activity.

Activity Rates
List of activities and their associated rates. Each activity can use the rate assigned above (default) rate, or use their rate information.

Default
Use the same rate as above.

Billable
Check if this Activity is billable

Rate
Enter the rate for this activity.

Save
Press to save the changes to the Assignment.

Cancel
Press to cancel the changes made to an Assignment.

Delete
Press to delete the selected Assignment.

6.3 Contact Properties

This is where the details of a Contact are modified. Contacts may be associated with tasks on the General Task properties or created independently through the Contacts dialog.

First
Enter the contact's first name

Middle
Enter the contact's middle name or initial

Last
Enter the contact's last name

Address
Enter the contact's address information

Phone
Enter the contact's phone number

Fax
Enter the contact's fax number

E-Mail
Enter the contact's e-mail address

6.4 Contacts

This is where contacts can be created, deleted or modified. Contacts may also be directly created on the General Task properties.

Contact List
Shows the list of contacts previously entered.

New
Press to create a new contact.

Edit
Press to display the Contact Properties to edit the selected contact.

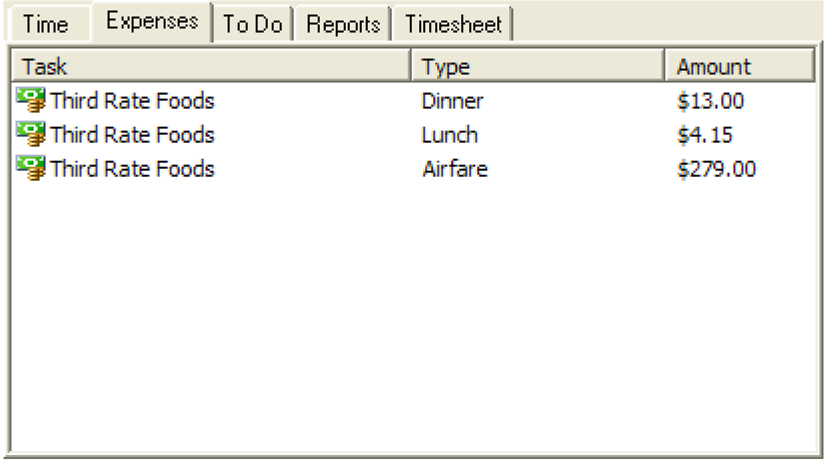
Delete
Press to delete the selected contact.

New Copy
Press to create a new copy of the selected contact.

6.5 Expense Entry List

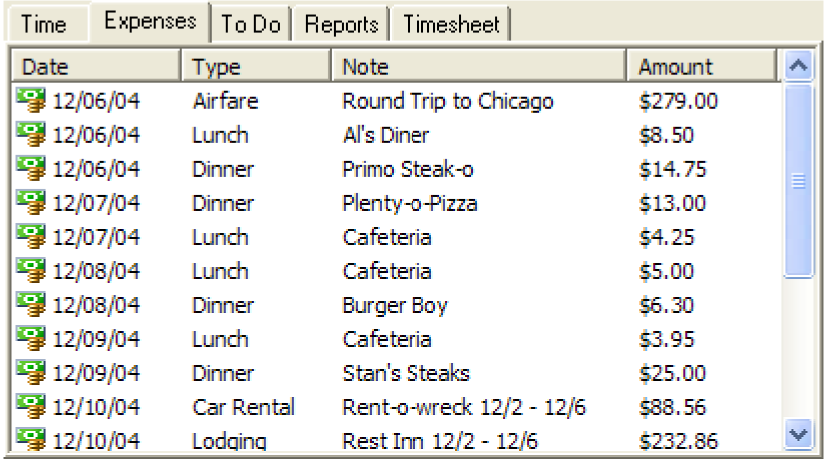
The expense entry list shows all entries by date or task. Switch between the two views using the View menu or toolbar buttons.

Date View - Displays all entries made on the date selected in the calendar.



Task	Type	Amount
Third Rate Foods	Dinner	$13.00
Third Rate Foods	Lunch	$4.15
Third Rate Foods	Airfare	$279.00

Task View - Displays all entries for the task selected in the task hierarchy.



Date	Type	Note	Amount
12/06/04	Airfare	Round Trip to Chicago	$279.00
12/06/04	Lunch	Al's Diner	$8.50
12/06/04	Dinner	Primo Steak-o	$14.75
12/07/04	Dinner	Plenty-o-Pizza	$13.00
12/07/04	Lunch	Cafeteria	$4.25
12/08/04	Lunch	Cafeteria	$5.00
12/08/04	Dinner	Burger Boy	$6.30
12/09/04	Lunch	Cafeteria	$3.95
12/09/04	Dinner	Stan's Steaks	$25.00
12/10/04	Car Rental	Rent-o-wreck 12/2 - 12/6	$88.56
12/10/04	Lodging	Rest Inn 12/2 - 12/6	$232.86

6.6 Expense Entry Properties

This is where the details of an Expense Entry are entered. The expense entry properties are displayed when creating a new expense entry or by highlighting an expense entry in the expense entry list and selecting Properties from the Edit menu.

Expense Type
Select the expense type of this entry.

Miles/Km Driven
Enter the miles driven for this entry. Only available with a Mileage expense type.

Rate
Enter the rate per mile/Km driven. Only available with a Mileage expense type.

Expense Amount
Enter the amount of this expense. Calculated for expenses with a Mileage expense type.

Billable
Check if this entry is billable.

Payment Method
Select the method used to pay this expense.

Note
Enter a note for this entry.

6.7 Favorite Task List

The Favorite Task List allows you to quickly work with a task item without finding it in the task hierarchy. The items on the Favorite Task List work just like the items in the Task Hierarchy.

You can manage your favorites tasks by selecting the favorite and using the Favorites menu.

6.8 Find Task Dialog

This page is where you enter a part of a word to search for in the task hierarchy.

To Search
1) Enter part or all of the name of the task you are searching for.
2) Press the **Search** button to display all task items containing the search text.
3) Select the task and press the **Go To** button move to the task in the task hierarchy. The hierarchy will expand to display the item if needed.

Hover your mouse over the task item to see the full path of the task.

6.9 General Options

This page is where you configure Timeless Time & Expense Enterprise Webto your preferences. The program options are displayed from the **Tools | Options** menu item.

Number of Tasks on List
Number of recent tasks to put on the Recent Task List.

Recent Task Order
The order used to display the most recently used tasks.

Default Mileage Rate
The default mileage rate used when entering a mileage expense.

6.10 Performance Options

This page is where you can show or hide elements of the Timeless Time & Expense Enterprise Web interface. These elements enhance the user experience but increase the time taken to perform actions. You may want to hide some items if you have a slow connection or are geographically far from the web server running Timeless Time & Expense.

Hide Menu Icons
Check this option to hide icons on the main and popup menus.

Hide Toolbar
Check this option to hide the toolbar.

Hide Task Tips
Check this option to eliminate the tips displayed when hovering over the task in Favorite, All and Recent task lists.

Hide Entry Tips
Check this option to hide the full task name displayed when hovering over a Time, Expense or To Do entry.

6.11 Main Window

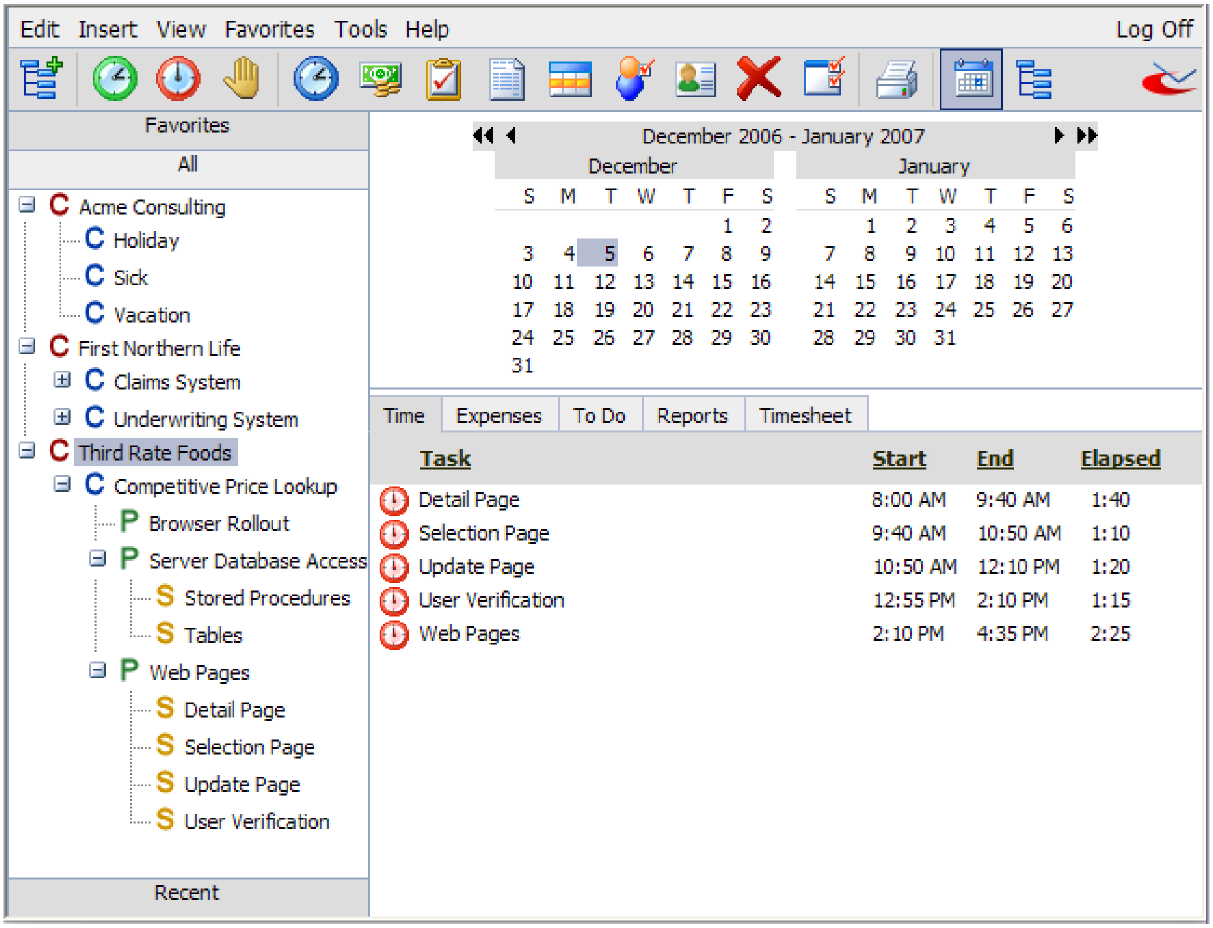
This is the main application window of Timeless Time & Expense. The main window is separated into 4 major areas.

Task hierarchy - Displays all the task items created including icons indicating the user defined task level. In Task View, selecting a task changes the items displayed in the list screen.

Calendar - Shows the current date selected and allows for selection of a different date. In Date View , selecting a date changes the items displayed in the list screen.

List Screen - This list displays the time, expense and to do entries based on the View settings and selected date or task. Selecting a tab changes the type of entries displayed. The reports tab shows all reports regardless of date or task view. The timesheet tab provides a place to view and edit a week of time.

Menu and Toolbar - The menus and toolbar are used to create, edit and control Timeless Time & Expense.


Edit
Insert
View
Favorites
Tools
Help
Log Off
Favorites
All
Recent
December 2006 - January 2007
December
January
Time
Expenses
To Do
Reports
Timesheet

- C Acme Consulting
  - C Holiday
  - C Sick
  - C Vacation
- C First Northern Life
  - C Claims System
  - C Underwriting System
- C Third Rate Foods
  - C Competitive Price Lookup
    - P Browser Rollout
    - P Server Database Access
      - S Stored Procedures
      - S Tables
    - P Web Pages
      - S Detail Page
      - S Selection Page
      - S Update Page
      - S User Verification

Task	Start	End	Elapsed
Detail Page	8:00 AM	9:40 AM	1:40
Selection Page	9:40 AM	10:50 AM	1:10
Update Page	10:50 AM	12:10 PM	1:20
User Verification	12:55 PM	2:10 PM	1:15
Web Pages	2:10 PM	4:35 PM	2:25

6.12 Notes Page

This is where additional notes are entered. The notes page is used by time entries, expense entries, to do entries and tasks.

Notes
Enter notes in this field. You can press Ctrl-Enter to insert line breaks in the notes.

6.13 Payment Method Properties

This is where the details of a Payment Method are entered. Payment methods are used to categorize expense entries. The payment method properties dialog is used by the Payment Method options tab.

Name
Enter the name of the Payment Method.

Account Number
Enter an account number for this payment method.

Account Type
Select the account type of this payment method.

6.14 Registration Reminder

This screen reminds you how much time is left on your trial period. When your trial period expires you will need to purchase Timeless Time & Expense to continue using it. You can still report on your time even after the trial has expired.

6.15 Reminder Dialog

This is where a to do reminder is displayed. Reminders are displayed automatically based on the reminder set in the To Do properties.

Reminder List
List of all current reminders. Select a reminder to edit the associated To Do entry.

Description
Enter what to do.

Priority
Select the priority this item has.

Assignment Entry
When checked, this entry is used to track task completion in the Progress Report. A task item can have as many to do entries as needed, but only one can be the assignment entry. The assignment entry box is checked and disabled when an assignment has been made in the task assignments or through an imported project.

Due Date
Enter or select the date this item needs to be completed by. To leave the Due Date blank, uncheck the check box.

Complete Date
Enter or select the date this item was completed or leave blank if it has not been completed. To leave the Complete Date blank, uncheck the check box.

Note
Enter a note for this entry.

Remind Me
Check this to be reminded about this To Do entry.

On
Enter of select the date to be reminded about this To Do entry.

At
Enter the time to be reminded about this To Do entry.

In
Select to be reminded again after the selected amount of time. Press the Snooze button after selecting the snooze time.

At
Select to be reminded again at the specified date and time. Press the Snooze button after selecting the reminder date and time.

Snooze
Press to dismiss the reminder and be reminded again as specified by the Snooze settings.

Snooze All
Press to dismiss the all reminders and be reminded again as specified by the Snooze settings.

Dismiss
Press to dismiss the reminder and not be reminded again.

Dismiss All
Press to dismiss the reminder and not be reminded again.

Start Timer
Press to dismiss the reminder, not be reminded again and start the timer on the To Do entry's task.

Complete
Press to dismiss the reminder, not be reminded again and mark the To Do entry as complete.

Save
Press to save the selected To Do entry.

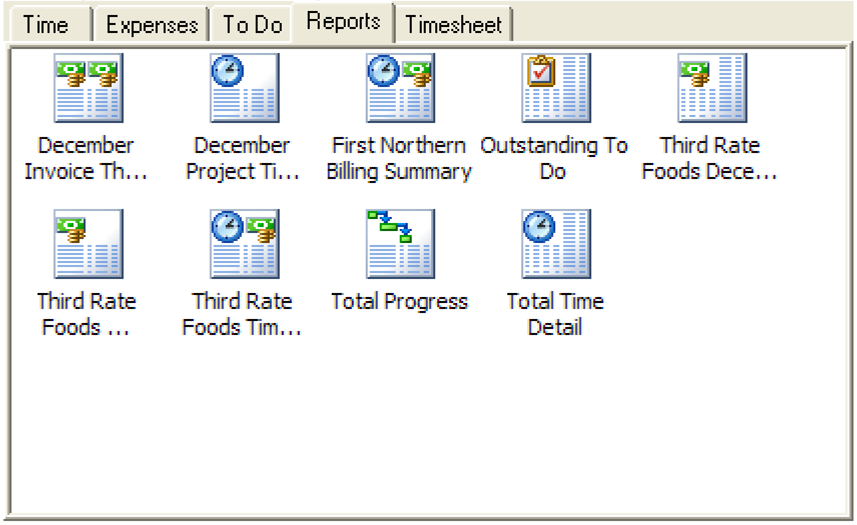
Cancel
Press to cancel editing the selected To Do entry.

Delete
Press to dismiss the reminder, not be reminded again and delete the To Do entry.

Close
Press to Close the Reminder dialog

6.16 Report List

The report list shows all reports.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To Do
Reports
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December Project Ti...
First Northern Billing Summary
Outstanding To Do
Third Rate Foods Dece...
Third Rate Foods ...
Third Rate Foods Tim...
Total Progress
Total Time Detail

6.17 Report Wizard Activities Page

This page is used to select the activities to include in a report.

All
Select to report on all activities.

Selected
Select to report only on selected activities.

Activity List
Select activities to include in report.

6.18 Report Wizard Date Page

This page is used to select the date range reported on. Relative time frames can be used to make reports more reusable. For example: if you are required to submit a time report on the first of the month for the previous month, you can use the "Previous Month" time frame. Every time you view this report, it will show the previous month.

Report Time Frame
Select the date range to report on.

Start Date
Enter or select the start date of this report.

End Date
Enter or select the end date of this report.

6.19 Report Wizard Expense Type Page

This page is used to select the expense types to include in a report.

All
Select to report on all expense types.

Selected
Select to report only on selected expense types.

Expense Type List
Select expense types to include in report.

6.20 Report Wizard Field Display Page

This page is used to select additional fields to include in a report. Items below are available depending on the report type.

Task ID
Check to show task id on report.

Billing Rate
Check to show billing rate on report.

Start Time
Check to show start time on report.

End Time
Check to show end time on report.

Activity
Check to show activity on report.

Note
Check to show note on report.

Billing Amount
Check to showing Billing Amount

Miles/Km
Check to show mileage on report.

Mileage Rate
Check to show mileage rate on report.

Expense Type
Check to show expense type on report.

Payment Method
Check to show payment method on report.

Complete Date
Check to show complete date on report.

Priority
Check to show priority on report.

Due Date
Check to show due date on report.

Status
Check to show to do status on report.

6.21 Report Wizard Invoice Page

This page is used to enter additional information to display on Invoices.

Recipient
Enter the recipient of the invoice.

Use next number
Check to use the next invoice number as set in the Invoice Options.

Use this number
Check to enter a specific invoice number.

Invoice Number
Enter the specific invoice number.

Add Tax
Check to add tax to the billing amount of the invoice.

Rate(%)
Enter the tax rate to apply to the billing amount of this invoice.

Show Invoice Terms
Check to show invoice terms on this invoice.

Terms
Enter the payment term for this invoice.

6.22 Report Wizard Name Page

This page is used to enter a name for the report.

Name
Enter the name of this report.

View report when done
Check to automatically view report when finished creating.

6.23 Report Wizard Payment Method Page

This page is used to select the payment methods to include in a report.

All
Select to report on all payment methods.

Selected
Select to report only on selected payment methods.

Payment Method List
Select payment methods to include in report.

6.24 Report Wizard Print Options Page

This page is used to configure how the report will appear when printed

Print Orientation
Select what the orientation of the paper when printing.

Font Size
Press to change the font size used on the report.

Image
Select the image to include as a logo at the top of your report. Only images placed in the /logos folder of the web installation will be available.

6.25 Report Wizard Personal-Shared Selection

This page is used to select if the report will be a personal or shared report. Only users with permissions to create shared reports will see this page.

Personal
Select if this report will be only used be you.

Shared
Select if this report will be used by other to report their time in a predefined format. Shared reports report only on the time entered by the person running the report.

6.26 Report Wizard Summarization Page

This page is used to select the criteria used to summarize a report.

Task Level
Select the task level to summarize the report by.

Time Frame
Select the time frame to summarize the report by.

Rollup Entries to Parent
Check to rollup summary totals to parent tasks on report.

Show Totals
Check to show totals on report.

Show Empty Rows
Check to show empty summary rows on report.

6.27 Report Wizard Task Selection Page

This page is used to select the entries to include in the report. Items below are only available on certain reports.

All
Select to report on all tasks.

Selected
Select to report only on selected tasks.

Task
Select the tasks to report on.

Include Billable Entries
Check to include billable Entries in report.

Include Non-Billable Entries
Check to include non-billable Entries in report.

Include Child Entries
Check to include entries for all task under the selected task.

Include Outstanding Entries
Check to include outstanding to do items on report.

Include Completed Entries
Check to include completed to do entries on report.

6.28 Report Wizard Type Page

This page is used to choose the type of report to create.

Time Detail
Select to create a report that summarizes time entries.

Time Summary
Select to create a report that lists time entry details.

Expense Detail
Select to create a report that summarizes expense entries.

Expense Summary
Select to create a report that lists expense entry details.

Time & Expense Summary
Select to create a report that summarizes time and expense entries.

Billing Summary
Select to create a report that summarizes billing amounts.

To Do Detail
Select to create a report that lists to do entry details.

Invoice
Select to create an Invoice.

Progress
Select to report showing progress of tasks.

6.29 Report Wizard Users Page

This page is to select the users whose information will be included in the report. This page is only available on Personal report and only for users with permission to run multiuser reports will see this page.

All
Select to report on all users.

Selected
Select to report only on selected users.

User List
Select users to include in report.

6.30 Task General Properties

This is where the details of a Task are entered. The task properties are displayed by highlighting an task in the task hierarchy and selecting Properties from the Edit menu.

Abbreviation
Enter an abbreviation to use for this task.

Task Level
Select this task's task level.

Hours Estimate
Enter a time estimate for this task in hours.

Cost Estimate
Enter a Cost Estimate for this Task

Use Parent Task ID
Check to use the parent task's task ID.

Task ID
Enter a task ID associated with this task.

Use Parent Contact
Check to use the parent task's contact.

Contact ID
The Contact name for this task

Contact Details[...]
Press to edit the Contact's information.

New Contact
Press to create a new contact.

6.31 Time Entry Conflict

This dialog allows overlapping time entries to be automatically adjusted.

Automatically adjust other time entries to fit around this time entry
Selecting this option will keep the new entry as entered. Other entries will be adjusted as needed including splitting entries or deleting them.

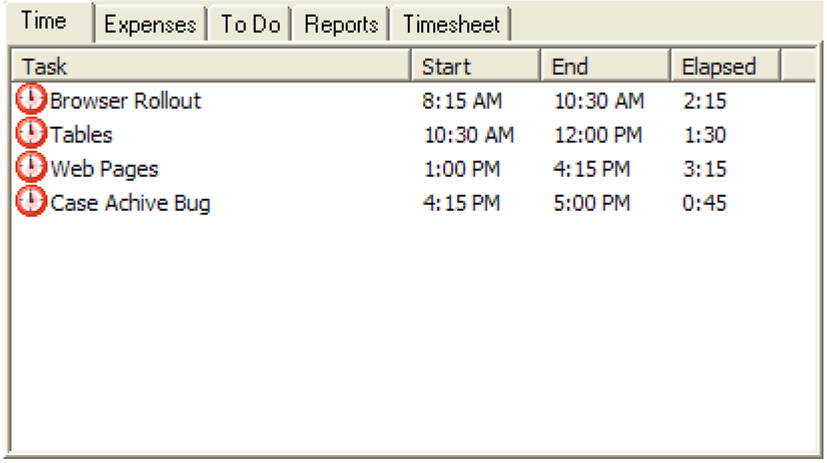
Automatically adjust this time entry to fit around other time entries
Selecting this option will keep other entries as entered. The new entry may have the start or end time adjusted. It may also be split or deleted.

Manually edit this time entry
Select this entry to go back to the time entry properties and manually adjust the entry.

6.32 Time Entry List

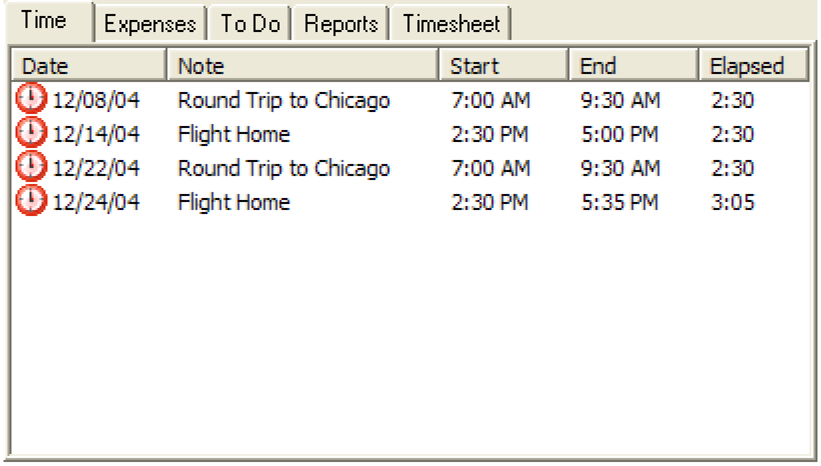
The time entry list shows both active and stopped entries by date or task. Switch between two views using the View menu or toolbar buttons.

Date View - Displays all entries made on the date selected in the calendar.



Task	Start	End	Elapsed
Browser Rollout	8:15 AM	10:30 AM	2:15
Tables	10:30 AM	12:00 PM	1:30
Web Pages	1:00 PM	4:15 PM	3:15
Case Achive Bug	4:15 PM	5:00 PM	0:45

Task View - Displays all entries for the task selected in the task hierarchy.



Date	Note	Start	End	Elapsed
12/08/04	Round Trip to Chicago	7:00 AM	9:30 AM	2:30
12/14/04	Flight Home	2:30 PM	5:00 PM	2:30
12/22/04	Round Trip to Chicago	7:00 AM	9:30 AM	2:30
12/24/04	Flight Home	2:30 PM	5:35 PM	3:05

6.33 Time Entry Options

This page is where you configure time entry options to your preferences. The options are displayed from the **Tools | Options** menu item.

Elapsed Time Format
Select whether elapsed time is displayed as a decimal or in time format.

Places
If decimal time format is selected, you may select the number of places after the decimal to show.

Round To Nearest
Select at what interval timer entries are rounded, Manually entered entries are not rounded.

Display Properties when Starting

The time entry's properties are displayed when starting a timer. The properties are not displayed when resuming a Paused entry.

Display Properties when Stopping
The time entry's properties are displayed when stopping a timer. The properties are not displayed when pausing an entry.

Stop Timer at Midnight
If checked, a running timer will stop at midnight. If unchecked, a new entry will be started on the next day.

Default on New Entry
Select the items to default when adding a new entry. The values are defaulted to the last value entered for the task item.

6.34 Time Entry Properties

This is where the details of a Time Entry are entered. Entries may be entered with start and end times, or elapsed time if allowed in time entry options. The time entry properties are displayed when creating a new time entry or by highlighting an time entry in the time entry list and selecting Properties from the Edit menu.

Start Time
The time the task started

End Time
The time the task ended

Elapsed Time
The elapsed time for this entry.

To change the start time, end time or elapsed time, use the left and right arrow keys to position on Hours, Minutes or AM/PM. Enter a value or use the up and down arrow keys or spin buttons to change the time.

Activity
Select the Activity for this entry.

Note
Enter a note for this entry.

Use Billing Defaults
Check to use the billing default for this task. If task uses activity rates, this entry will use the correct rate based on the activity selected.
Uncheck to enter rate information specific to this entry.

Billable
Check if this entry is Billable, uncheck if not billable.

Rate
Enter a rate for this entry.

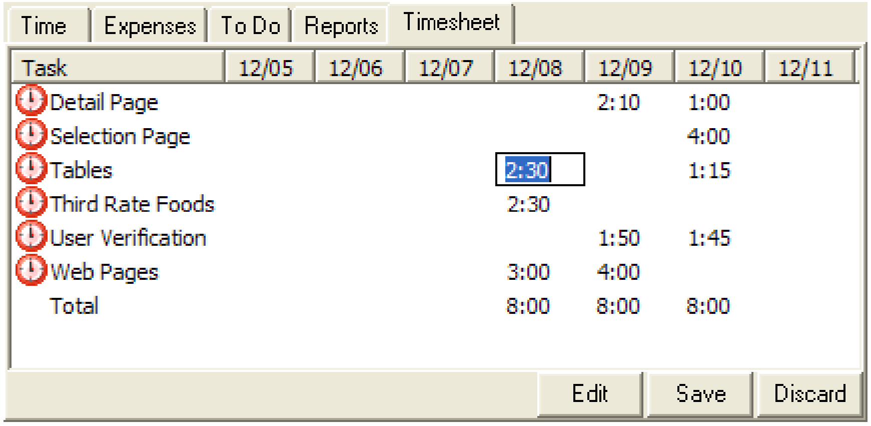
Overtime
Check if this entry is overtime. Overtime multiplier will be used to calculate billing rate.

Multiplier
Enter the multiplier to use when calculating overtime rate.

6.35 Timesheet

The timesheet view shows daily totals for all tasks in the week selected in the calendar. Daily totals may be edited by pressing the Edit button or clicking in a cell. New tasks may be added to the timesheet by dragging from the task hierarchy to the timesheet.

To edit the timesheet, you must allow elapsed time entries in the Time Entry Options. This is because timesheet entries are created as elapsed time entries.



Task	12/05	12/06	12/07	12/08	12/09	12/10	12/11
Detail Page					2:10	1:00	
Selection Page						4:00	
Tables				2:30		1:15	
Third Rate Foods				2:30			
User Verification					1:50	1:45	
Web Pages				3:00	4:00		
Total				8:00	8:00	8:00	

6.36 To Do Entry Properties

This is where the details of a To Do entry are entered. The to do entry properties are displayed when creating a new time entry or by highlighting an time entry in the to do entry list and selecting Properties from the Edit menu.

Description
Enter what to do.

Priority
Select the priority this item has.

Assignment Entry
When checked, this entry is used to track task completion in the Progress Report. A task item can have as many to do entries as needed, but only one can be the assignment entry. The assignment entry box is checked and disabled when an assignment has been made through an imported project.

Due Date
Enter or select the date this item needs to be completed by. To leave the Due Date blank, uncheck the check box.

Complete Date
Enter or select the date this item was completed or leave blank if it has not been completed. To leave the Complete Date blank, uncheck the check box.

Note
Enter a note for this entry.

Remind Me
Check this to be reminded about this To Do entry.

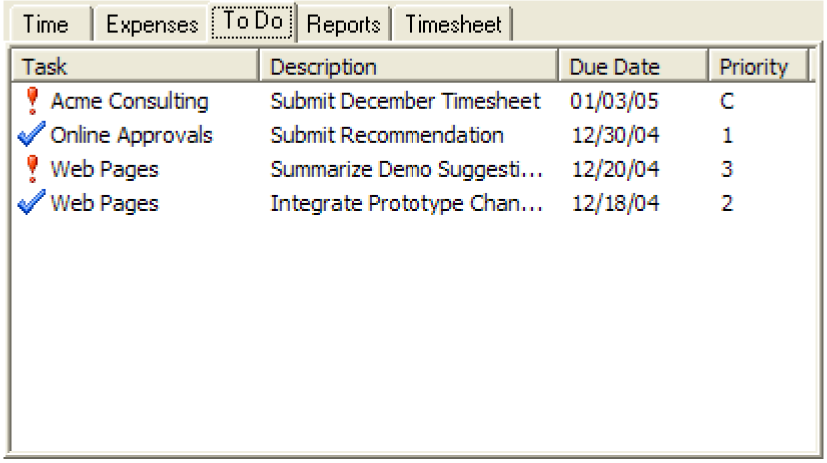
On
Enter of select the date to be reminded about this To Do entry.

At
Enter the time to be reminded about this To Do entry.

6.37 To Do List

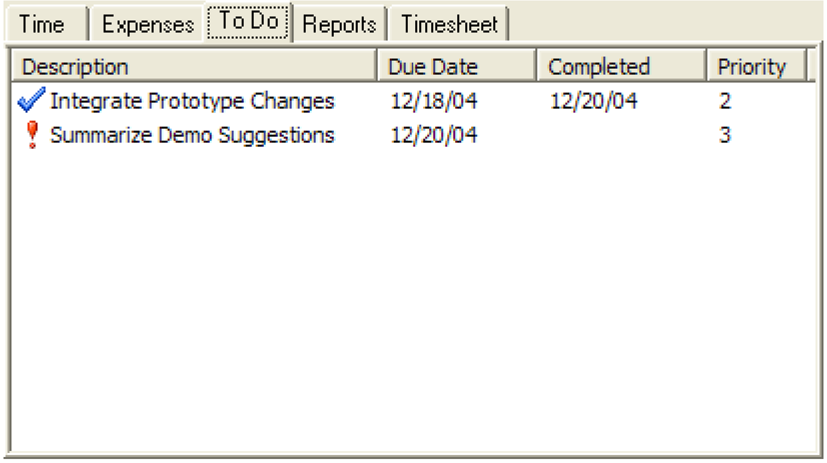
The to do entry list shows completed, outstanding and overdue entries by date or task. Switch between two views using the View menu or toolbar buttons.

Date View - Displays all outstanding and overdue entries based on the date selected in the calendar. Entries that have been completed on the selected day will also be displayed.



Task	Description	Due Date	Priority
! Acme Consulting	Submit December Timesheet	01/03/05	C
✓ Online Approvals	Submit Recommendation	12/30/04	1
! Web Pages	Summarize Demo Suggesti...	12/20/04	3
✓ Web Pages	Integrate Prototype Chan...	12/18/04	2

Task View - Displays all completed, outstanding and overdue entries for the selected Task.



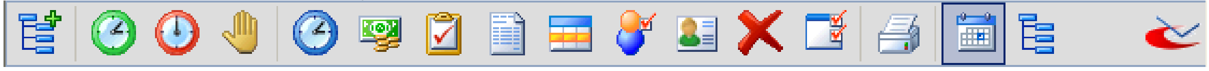
Description	Due Date	Completed	Priority
✓ Integrate Prototype Changes	12/18/04	12/20/04	2
! Summarize Demo Suggestions	12/20/04		3

6.38 Toolbar

The menus provide standard ways to accomplish tasks in Timeless Time & Expense. The toolbar provides quick ways to accomplish the most common tasks.

Edit Menu
Insert Menu
View Menu
Favorites Menu
Tools Menu
Help Menu

The toolbar provides quick ways to accomplish common tasks.



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