iambic® TimeReporter®

The intelligent time tracking solution

iambic Software

San Jose, CA **Version 3.0**

March 1996

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Customer Support

If you encounter problems or need assistance, please take a few moments to carefully review the information in this Users Guide and the manuals that came with your Newton PDA. In most cases, this documentation will provide the answers to your questions.

If you cannot otherwise resolve a problem, contact iambic Software Technical Support via–

- Email: support@iambic.com,
  or 74772,2700 on Compuserve
- Fax: 408-882-0399
- Voice: 408-882-0390 (9am to 5pm Pacific Time)

Sources for additional information include:

- The World Wide Web at `http://www.iambic.com`
- Our forum on Compuserve (“GO IAMBIC”).

Registration

If you purchased TimeReporter directly from iambic Software you are pre-registered. Otherwise, to receive free technical support including updates and reduced cost upgrades, you must mail in your registration card.

Contents

Thank you for purchasing iambic TimeReporter—the smartest time and expense tracking solution for Newton. We think you will be pleased with the control you achieve—whether you are tracking time for your own benefit, or to produce a report that satisfies your billing department's requirements.

Here are some of TimeReporter's highlights and time-saving features:

- **Links**—Easily imports entries from, or exports to, Dates the to-do list and iambic Action Names. Links clients from Names. Turns Dates and to-do information into live data for reporting and analysis.
- **Intelligence**—Once added, a client, project or activity never needs to be entered again. Instantly summon information from popup lists. Write in a partial description or a few letters and use the Lookup command.
- **Easy Time Entry**—Record time as you go or after the fact using a variety of time-entry tools or the built-in stopwatch. Whether you use the program throughout the day, or later assign your time to clients and projects, TimeReporter always lets you modify time entries.
- **Integrated Expenses**—Track expenses using customized expense categories and associate them with a client or project if desired.
- **Reports**—Includes the daily time report, time analysis reports and professional/service invoice created for both time and expense.
- **Connectivity**—Transfer TimeReporter data to a Macintosh or Windows compatible computer using the fast data transfer utility included. Data can be used in popular spreadsheet, database and billing programs.
- **Convenience**—The TimeReporter Notepad access button makes it easy to create entries from the notepad, or drag-and-drop a client's name on top of the Notepad button to create a time entry.

Quick Tour

The first time you start TimeReporter, you will see the Time Report. Each time thereafter the program will open to the last viewed report.

Each line in the Time Report represents a separate time entry. Tap the line that you want to see to go to the associated time entry screen. Tapping a blank line will open a new entry.

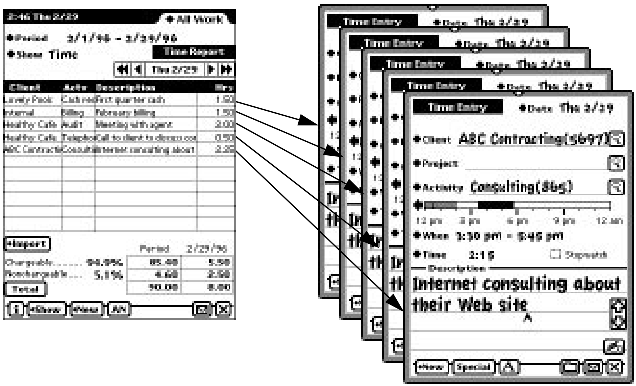


Figure 1. Familiar timesheet format. Tap a line to go to the entry slip.

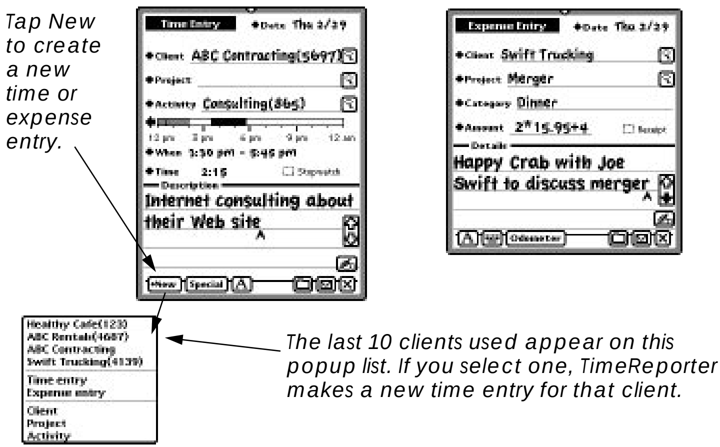


Figure 2. Easily track time and expenses.

The Time Report screen shows hours for the day and period. Switch to the expense mode to show expenses, or choose Time as Money to see what you’ve earned. Time as Money multiplies your billable hours by the applicable hourly rate to determine the total amount earned.

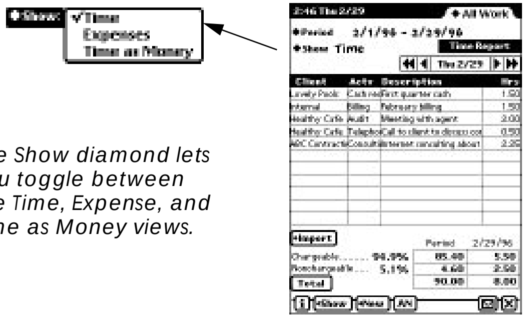


Figure 3. Time Report screen

The Time and Percentage Breakdown Analysis, Client Detail, Invoice and Overview reports are available form the show button. Reports can be printed and faxed from the action button.

TimeReporter is designed to share data with other built-in Newton applications, taking advantage of Find, Names, and Dates. See the following page for integration with Dates.

Suppose you used Dates to schedule appointments or record your day's activity.

Tap Import from the Time Report screen and indicate the type of data you want to link. Check the entries that you want to import from the popup drawer and then tap import.

TimeReporter recognizes even partial names from your client list and uses these along with the time span information to complete the Time Report.

Figure 4. TimeReporter integrates with Dates

Newton Basics

Take some time to become acquainted with your Newton. TimeReporter takes advantage of a variety of Newton features to make it easier to enter data.

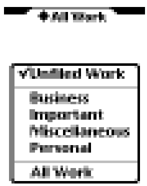
You should be familiar with the following Newton features when using TimeReporter:

♦ The diamond used to access the popup menu choices.

The X used to save and exit a screen.

The Action button used to make routing selections such as Delete, Duplicate, Print, and Fax.

The folder icon used for filing.



You can tap the folder icon to file an entry in different folders or categories, such as Personal or Business. When displaying a TimeReporter report, you can also choose to view only those entries in a particular folder. Change the folder from the diamond at the top of the screen.

Figure 5. Use the Folder icon to file entries.

You should be familiar with the Newton's handwriting correction features, such as scrubbing out mistakes and double tapping to access a keyboard.

Installing TimeReporter

Requirements

You need a Newton MessagePad or Newton compatible device with at least 200KB of free storage space for a custom install and 300KB for the full installation of all parts. TimeReporter 3.0 requires Newton OS 2.0. You will also need a personal computer with the appropriate cables.

Macintosh

- Access to a Macintosh running System 7 or later.
- DIN-8 cable male-to-male. (This is a standard Macintosh cable and comes with the Apple MessagePad.)

Windows

- Access to a PC running Microsoft Windows 95 or Windows 3.1.
- Cable with DIN-8 connector on one end and either a DB25 or DB9 connector on the other end, depending on the type of COMM ports you have. (This cable comes with the new Apple MessagePad, and previously with the Newton Connection Kit.)

Install Using Either Newton Backup Utility or Newton Package Installer

Use either the Newton Package Installer (NPI) or Newton Backup Utility. The Newton Backup Utility (NBU) comes free with the purchase of Newton 2.0 and can also be downloaded from major on-line services. TimeReporter comes bundled with the Newton Package Installer (NPI) in case you do not have access to the Newton Backup Utility.

☞**Tip:** If you have any problems while installing this software, or are unable to run the software immediately after loading it; reset the Newton. This may eliminate the problem.

Step 0. Preparing to Upgrade (For Previous Users Only)

If you are installing TimeReporter for the first time, or are upgrading from version 2.0, skip this step and begin with Step 1. The data formats between versions 2.0 and 3.0 are the same.

If you are upgrading from TimeReporter version 1.X, you need to complete the following steps before installing TimeReporter 3.X:

1. Back up and print your existing TimeReporter data. Do not risk your irreplaceable records to the upgrade process.
2. Remove TimeReporter 1.X from your Newton. Your data will remain as long as you have not checked the box in TR preferences to remove data.
3. Load the Convert.pkg program on your Newton and tap on that icon to convert your existing data to TimeReporter 2.X / 3.X compatible format. You cannot run TimeReporter 1.X on your data once it has been converted.
4. After converting your data, remove the Convert.pkg from your Newton and proceed with Step 1.

Step 1. Unpacking the software onto your computer

Modules

TimeReporter comes in the following modular pieces. All modules other than the TimeRptr.pkg are optional and can be omitted from the installation procedure if those feature are not desired. This will reduce the memory required by TimeReporter.

The TimeReporter pieces and memory requirements are:

- **TimeRptr.pkg**: Contains the core TimeReporter engine with reports. This is required to run TimeReporter and any of the modules listed below.
- **Expense.pkg**: Adds expense tracking. Expense tracking has been enhanced in version 3.0 of TimeReporter.
- **TRPapers.pkg**: Adds printing and faxing to the reports.
- **Help.pkg**: Installs TimeReporter's on-line documentation.
- **IA.pkg**: Enables tracking time using the Newton Intelligent Assistant.
- **Notepad.pkg**: Adds a Notepad access button for entering time and expenses without having to open TimeReporter. Load this 5KB program into internal memory rather than onto the PCMCIA card to avoid getting an error message —"Newton

still needs the card".

- **Btn4AN.pkg**: Adds an access button into Action Names if Action Names is on your Newton. Leave this off if you don't have Action Names loaded.
- **TRDTTool.pkg**: For downloading data from TimeReporter in conjunction with the TimeReporter Data Transfer Utility for Macintosh and Windows PCs.

Steps for loading the software modules using either the Newton Package Installer or Newton Backup Utility.

1. Installing the files onto your desktop computer

Insert the diskette containing TimeReporter into your computer.

- Windows 95 users from the Start menu choose Run and type a:\setup.exe, then hit ENTER;
- Windows 3.1 users should use the File Manager and double-click `a:\install.exe`; and
- Macintosh users should double-click iambic TR Installer.

This decompresses the software and copies TimeReporter, its README file, and the package installer to your hard disk. The TimeReporter *.PKG files copied to your hard drive are Newton software packages you need to install to your Newton PDA in able to run.

2. Prepare Newton PDA to Receive Packages

TimeReporter packages can be stored in either internal memory or on a PCMCIA storage card. If TimeReporter packages are stored on a card, then those TimeReporter functions will not be available when the card is removed from the Newton. If you expect to remove your PCMCIA storage card frequently, it is recommend that TimeReporter be installed in internal memory. If a PCMCIA card is inserted in the Newton a card icon will appear in the extras drawer. Make the storage selection by selecting the card icon and checking or unchecking store new items on card.

Initiate the connection first on the PC as described in steps 3a and 3b, below. Then on the Newton, open the Extra's drawer and tap the Connection icon. Select the type of connection and then tap

Continue.

Due to a problem with the serial driver used in the NBU if you connecting to a Windows PC, do not attempt to connect at speeds greater than 9600 bps. Use “Windows -9600 Serial” ONLY to connect from your Newton.

☞ **Note**: If the connection fails, check that the preferences (edit menu) of the NPI application are set correctly and that all hardware cables are connected properly. If connecting via Appletalk, be sure it is active before attempting to connect.

3a. Using the Newton Backup Utility (NBU)

These instructions assume that you already have the NBU installed. Please refer to the NBU documentation for instructions. The NBU or a mail-in coupon should have been included free with the purchase or upgrade of your Newton. This utility can also be downloaded from the Newton libraries on most commercial on-line services, including Apple Computer’s World of Newton homepage at `http://www.info.apple.com/newton`.

From your personal computer, launch NBU being sure to select the correct communication port on the PC. Initiate the connection from the connection icon in the Extras drawer of the Newton. Choose Install Package and select the Action Names packages from the directory (or folder) you chose during installation.

3b. Using the Newton Package Installer (NPI)

Macintosh

On your Macintosh, double-click the applicable module icon, e.g. TimeRptr.pkg. This launches NPI. Select the type of connection. Initiate the connection from the connection icon in the Extras drawer of the Newton.

Windows

~~From the TimeReporter program group in the Windows Program~~

~~Manager, double-click the module, e.g. TimeRptr.pkg. This will launch NPI for Windows. Select the correct COMM port from preferences in the Edit menu. From the File menu, select Install Package and choose TimeRptr.pkg. Initiate the connection from the connection icon in the Extras drawer of the Newton~~.

There is a bug in the NPI for Windows. At the time of printing this manual, the NPI for Windows cannot load large packages like TimeRptr.pkg. Use the NBU instead.

Setting Preferences

Before using TimeReporter, you may want to customize preferences.

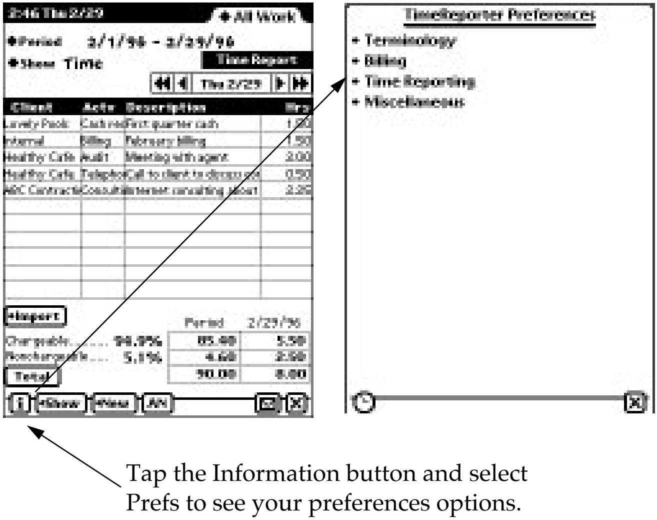


Figure 6. Preferences Overview screen.

Tapping a bulleted item in the Preferences Overview screen positions you in that topic. Because the Preferences list fills more than one screen, you can use the universal scroll arrows in the Newton icon bar to scroll between categories.

Terminology

The Client, Project and Activity headings can be changed to classifications that suit your business. Select from a list of alternatives or write in your own. For example, you might use Customer instead of Client, Engagement for Project, and Task for Activity.

Billing

Chargeable vs. Nonchargeable

Choose to determine chargeability by either client or activity.

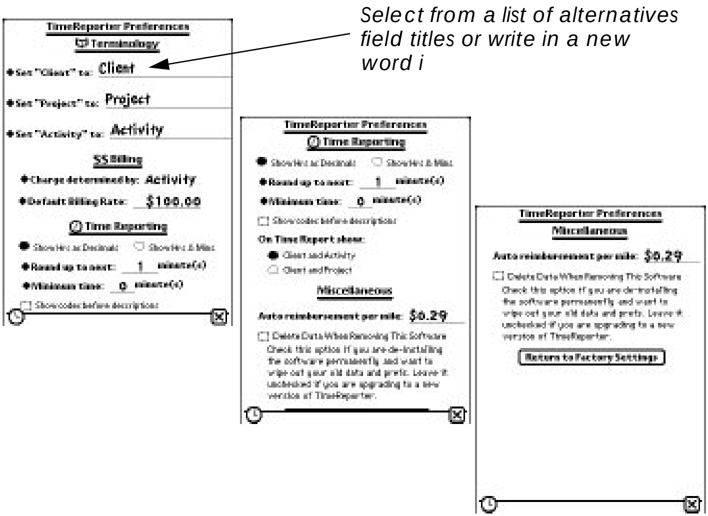


Figure 7. TimeReporter can be highly customized.

Default Billing Rate

Define a default billing rate to calculate Time as Money and to use in producing an invoice.

Time Reporting

Show Hours As...

Indicate whether you want hours displayed using decimals (such as 1.5 h) or as hours and minutes (such as 1:30).

Round Up to Next...

Choose to have time rounded up, for example to the nearest quarter hour. Actual hours remain recorded and displayed in the Entry screen, but the hours displayed in the Time Report and other reports is rounded up.

Tap the diamond to select a number of minutes to round up to or write in the number.

☞**Tip:** Select "6 minutes" from the diamond popup menu to round time to the nearest 0.1 hour.

Minimum Time

A minimum time interval can be set. For example, choose a minimum time of 15 minutes, but record only 10, 10 minutes is recorded in the Entry worksheet, but the interval in the Time Report will be 0.25 hours, or 15 minutes.

Tap the diamond to select a minimum time interval or write the number of minutes in the entry area.

Show Codes First

Some businesses assign billing codes or numbers to projects or cases and refer to work by billing number as well as or instead of name. If you use codes in your business you can select to display the code before the description in reports. This ensures that the code will be displayed and printed even if the available display space is limited.

On Time Report Show...

You can choose to display projects instead of activities in the Time Report screen. Both will appear on the printout, however due to the limited screen size, only one may be viewed on screen.

Miscellaneous

Mileage

Write the cents per mile (or km) to be used in calculating mileage cost for mileage entered in the expense module.

Delete Data When Removing this Software

If you are permanently removing TimeReporter and want to remove your data and preferences, select this option. If you are upgrading to a new release of TimeReporter, do <u>not</u> select this option.

Return to Factory Settings

To quickly return to the default preferences tap this option. This also clears diamond pop-up lists but not data.

Starting TimeReporter

Open TimeReporter from the Notepad or backdrop application access button.

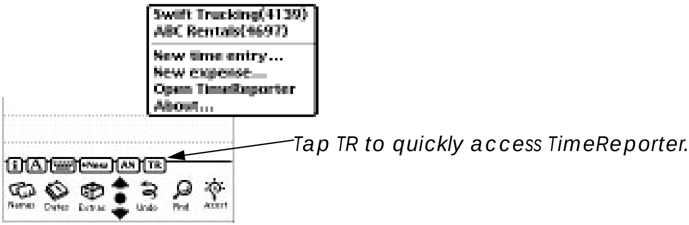


Figure 8. Opening TimeReporter from the Notepad.

The TR button on the Notepad:

- Opens a time entry for the last 10 clients used
- Brings up a blank Time Entry.
- Brings up a blank Expense Entry.
- Opens TimeReporter.
- Brings up About which shows the software date and version.
- Creates a time entry when a client name is dragged and dropped onto the button.

If another application other than the Notepad is set to be the backdrop the TR Notepad button is designed to appear in the status bar of that application instead. Wether it appears depends on how the backdrop application was written and there is available space in its status bar area. Refer to the Newton Users Guide for information on setting the backdrop application.

TimeReporter can also be opened from the Extras drawer. The TimeReporter icon looks like this:

The first time TimeReporter is opened the registration screen appears. Enter the serial number printed on the inside cover of this manual.

Creating a Time Report

Entering time:

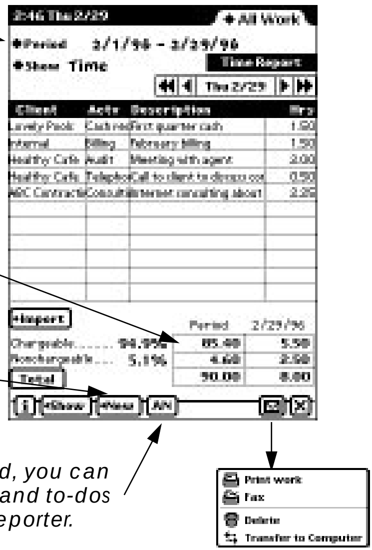
1. While on the Time Report, tap Period to display the date picker. TimeReporter keeps a running total of hours for a selected time period. To change the start or end dates for the period, use the date picker.

Enter a time period.

Select Show Time to see hours worked.

Chargeable, non-chargeable and total hours worked for the day and period are shown.

Tap New to record a new entry or tap on a blank line.



If iambic Action Names is installed, you can schedule phone calls, meetings, and to-dos from the AN button within TimeReporter.

Select Transfer to Computer from the Action menu to export records to your Macintosh or Windows PC.

Figure 9. Completing Time report.

2. Scroll through the days in the time period using arrows to the right and left of the date. Days that have no entries are skipped. Tap the date to pop up the date picker to view another day. Tap the double arrows to move to the first or last day of the period.

3. Create a time entry by tapping New and selecting Time Entry

from the popup menu. You can also tap a blank line on the time report. This displays a new Time Entry Form. Filling out an Entry form is described on page 18.

4. Exit the Entry Form to return to the application that was open prior to opening the time entry form.

TimeReporter shows the total hours for the day. Tap the Total button to calculate and show hours worked during the time period also.

☞**Tip:** From the Time Report screen you can see a summary of entries by tapping the dot between the up and down arrows in the Newton icon bar.

The Time Report overview lets you see a summary of entries for the period.

Figure 10. See a summary of entries for the period.

Importing from Dates

Calendar entries can be imported into the Time Report from Dates. Tap Import to show a list of calls, meetings or to-dos for the time period. Select to import and tap Done. TimeReporter creates an entry for checked items. Calls are only available if you have iambic Action Names installed.

TimeReporter will try to guess the correct client, project, and activity based on the title and description of the activities that are imported. The text of the title and description is compared one by one against the client, project, and activity lists and the first match is accepted. The text is compared against both the descriptions and codes.

If Action Names is installed and a there are phone calls, meetings, events, or to-dos linked with a contact in the Names file, TimeReporter will make a match if the same name exists in the TimeReporter client list. If there is no match, TimeReporter will look at the company name for the contact and look for a name in the client list that matches. Finally, if neither method produces a match a new client will be created on the fly for the Name card that is linked to the activity.

Recording Time:

1. By default, the date is set to the date displayed in the Time Report, or today's date if accessed through the notepad. To change the date of an entry, tap the Date diamond to display the date picker.
2. Filling out the Client, Project, and Activity fields is optional. There are a variety of ways to fill in these fields, see "Filling in a Client, Project or Activity" on page 21.

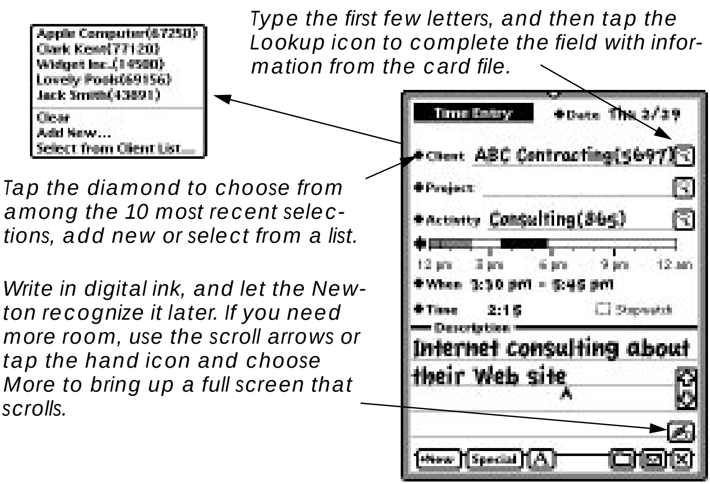
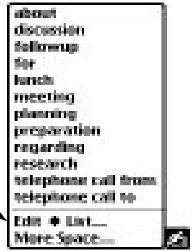


Figure 11. Creating a new Time entry.

3. Enter the number of hours worked. see "Entering Hours" on page 23 for time entering options.
4. To include a written description of work tap the writing hand icon to pick from a list of phrases that you have predefined.

Tap the hand icon to select from 20 pre-defined phrases. Tap Edit ♦ list... to add or modify a phrase.



Tap an existing description to modify or replace it. Then tap change to make the change. Use the universal up and down arrows in the Newton icon bar to scroll.

Or write a new description in the space provided and tap Add.

Figure 12. Using the pick list in Description field.

5. Tap Special to override whether the entry is billable or non-billable, and to select the type of work, for example, regular or overtime. Selecting the type of work has no effect on reporting in TimeReporter buy may be of use if you plan to export data to a desktop program.

Figure 13. Special tags for Time Entries

6. A Time Entry can be copied back to Dates. Select Copy to Dates from the Action button if you want that time entry entered in Dates as a meeting.

7. Tap the X to return to the Time Report or the application that

was open prior to creating the time entry.

☞**Tip:** Create time entries at the end of the day from the Time Report using the link from Dates.

Tap New to create a new entry with a starting time equal to the ending time of the previous entry. Use Duplicate from the Action popup menu to create a similar entry and change the time span.

Navigating the Time Entry Slip

Selecting a Date

Use the calendar popup to select a date; scroll to the appropriate month and tap the desired day.

Filling in a Client, Project or Activity

These three fields work in a similar manner to each other. You can pick from among the most recently used items, pick from a list of all items, enter data directly, or use a dialog box to enter a new item.

Using the Quick Pick Lists

Pick from a quick pick list of the last 10 selections after tapping Client, Project or Activity.

Selecting from the Client, Project or Activity Lists

Tap Select from Client List... to view your client list. Tap the client you want to select. The Project and Activity lists work in a similar manner. Scroll these lists using the scroll arrows in the Newton icon bar, or the A-to-Z alphabet selector.

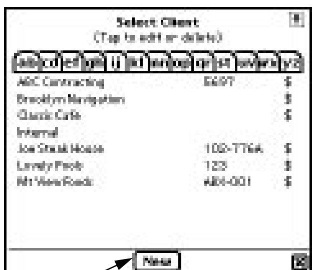


Figure 14. Selecting from the client list.

Using Direct Entry

You can write or type the first word or first few letters of the client, project, activity or code if you use codes. Tap the Lookup icon and TimeReporter fills in the remainder of the description or gives you a list of choices from the diamond pop up. If the name is not recognized, a dialog box appears asking if you would like to add that item to the appropriate list. If you close a Time Entry slip with a client that is not in your client list, TimeReporter will also prompt you to add the client.

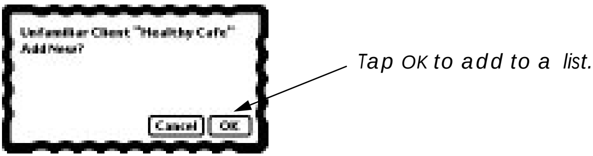


Figure 15. Recognize and add new clients.

Adding a New Item to the List

Tap Add New... from the diamond popup menu on the Entry screen to add a new client, project, or activity. TimeReporter displays a dialog box for creating a new item.

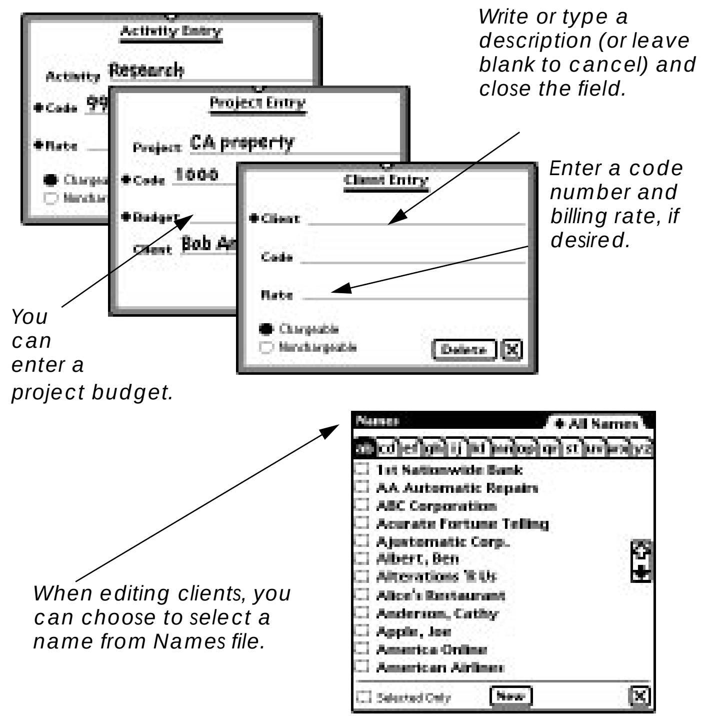


Figure 16. Create new items.

Entering Hours

There are a variety of methods that can be mixed and matched to enter hours. You can use the stopwatch, write in or pick start and stop times or hours worked, or use the time bar.

Entering Hours Directly

Write begin and end times and let TimeReporter calculate hours worked. Or enter hours worked, and let TimeReporter calculate the end time. If you need to keep track of your hours worked only, just use the Time picker and ignore the start and stop times.

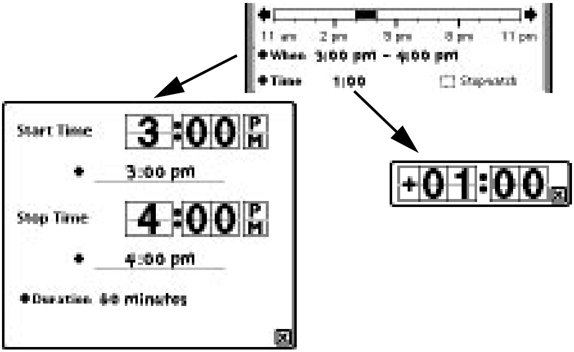


Figure 17. Time pickers

Using the Start and End Time Popup Menus

Tap the Start diamond to pick a starting time. The popup choices let you adjust your time by 15 minute intervals. Tap the Stop diamond to pick from the list of ending times. The Stop time choices are based on the Start time. If you picked 9:00 am from the Start diamond, the Stop range would be from 9:00 am to 12:00 noon.You can also write in a time, or use the digital clocks to set the time.

Using the Stopwatch

The stopwatch control is displayed next to the time pickers and above the divider bar that reads Description. The begin and end times are tracked as well as total hours. If the begin time is adjusted while the stopwatch is running, the running time will be adjusted accordingly.

If the stopwatch is restarted on an entry, an option of creating a new entry or continuing to accumulate time on the current entry will be available. When the stopwatch has been run on a single entry more

Figure 18. Starting the timer on an entry that already has time on it

than once, the begin and end times are replaced with ****. If the stopwatch is restarted on work that was done on a previous day, TimeReporter creates a new entry for the current day.

Figure 19. Timer reminder

If you leave the Entry screen with the stopwatch running a dialog box reminds you the timer is still running and gives the option to stop or keep timing. An asterisk next to the entry on the Time Report indicates an entry with the timer still running. A flashing star also appears at the top of the screen as a reminder that the timer is running, even if you exit TimeReporter. To return to an Entry with the timer running tap the star and choose the entry. If the Newton is reset, the star will disappear although the timer will continue to run.

Note: The stopwatch works by keeping track of start and end times. Therefore, the stopwatch can continue running even when the Newton is off. Resetting the time or timezone while the stopwatch is running will affect the elapsed time accordingly.

Using the Time Bar

The length of a time entry can be set using the time bar.The entry you

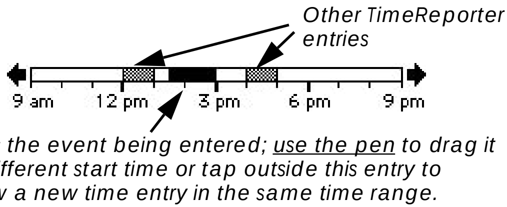


Figure 20. Quickly set hours using the time bar.

are recording is shown in black, and other events recorded on the same day are shown in gray. You can move the black bar by placing a pen on it and dragging it to another time. The gray bars can't be moved.

To change the length of the activity you are scheduling draw in a new black bar. When a new time and duration is drawn or moved, the time is adjusted to the nearest 15-minute increment. Due to its size, the time bar can only be set to 15-minute intervals.

☞**Tip**: To avoid grabbing and dragging the black bar when you want to change the length, tap outside the range and then redraw.

Entering a Description

Write or type a description in the space provided or tap the hand icon to select from a list of phrases you have predefined.

There is space for up to 20 phrases that can be changed or deleted. Phrases selected are added to text in the description field and can be edited as necessary. Phrases be combined with each other and with other text.

A description can also be entered in digital ink with the Newton recognizing it later if desired. To change the font used in the description area, use the Styles tool from the Extras Drawer.

Recording Expenses

Tap the Show button from any report or the New button from the time entry screen and select Expense Entry from the popup menus. Selecting the TimeRptr Expense icon in the Extras Drawer will also bring up an expense entry. To use the integrated expense tracking you must load the Expense.PKG module.

Filling out the client and project fields is optional and can be done using one of the methods described in “Filling in a Client, Project or Activity” on page 21. Choose a category of expense from the diamond popup menu. Select Edit list to modify the list of choices. Write in the amount of the expense in the space provided, or pick from the diamond popup menu.

Supply a formula, and let TimeReporter calculate the total expense. Enter = to evaluate it.

Figure 21. Let TimeReporter calculate the expense.

For expense categories containing the term mileage, tap the Odometer button and enter miles or kilometers instead of entering a currency value in the Amount field. The amount is calculated using the cost/mile or km that was specified in preferences as described on page 13.

A more detailed description of the expense can be written in the space provided. Tap the scroll arrows or hand icon if you need more room to describe the expense. A description can be entered using either handwriting recognition or digital ink.

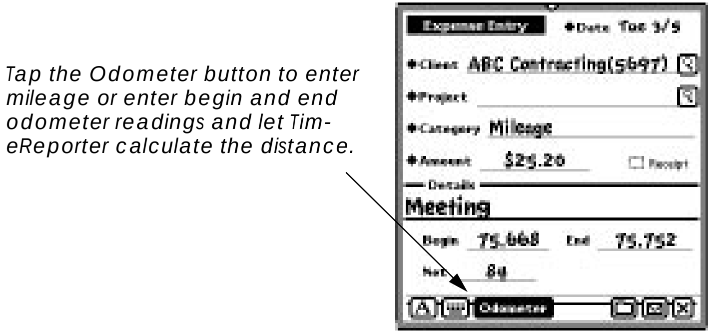


Figure 22. Let TimeReporter track your mileage.

From the Time Report screen, you can toggle the show button to Expense mode to view expenses. The Expense report works the same as the Time Report

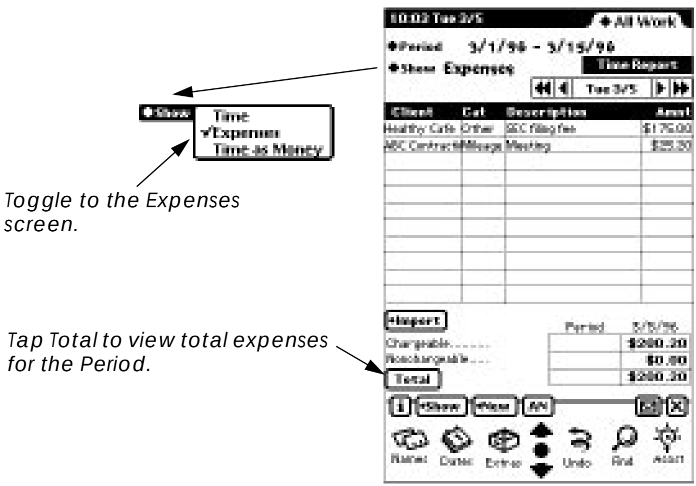


Figure 23. Report shows total expenses for the period and the day.

Using Reports and Lists

TimeReporter lets you view and analyze data in a variety of ways in addition to the Time and Expense report discussed earlier. You can also choose to see:

- Detailed information about all entries for a particular client.
- The percent of time and total hours spent on each client for a given period.
- The percent of time and total hours spent on each activity for a given period.
- An invoice to bill clients.
- An overview of all entries.
- The Client, Project and Activity lists.

To view a report, tap the Show button at the bottom of any screen and then tap the desired report.

Client Detail Report

The Client Detail report displays all time or expense entries for that client over a selected period. You can choose to view only hours and expenses for a given project under that client, or all hours/expenses for that client. Tap Total to calculate and display

You can view either time or expenses for a client.

Choose the client from the diamond pop-up menu.

Then choose the project; choose All or leave blank to view all projects.

Tap Total to display and total the report.

TimeReporter displays total hours or costs, as well as the amount budgeted as set up in the project.

Figure 24. Display all time or expenses for a client.

Breakdown Reports

A breakdown can be presented by either client or activity as selected from the diamond pop-up menu.

The Client Breakdown report displays total hours and percent of time spent on each client for a given time period in descending order.

The Activity Breakdown report displays total hours and percent of time spent on each activity for the selected time period.

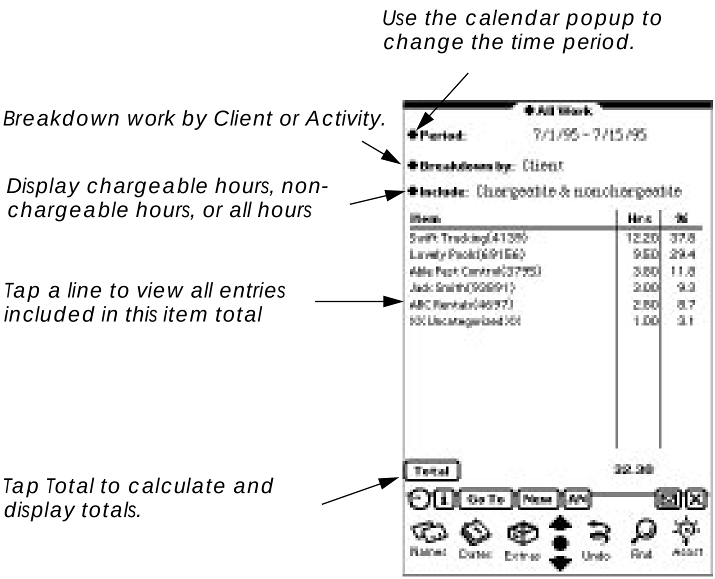


Figure 25. Display a breakdown of time by hours and percent of all hours for either clients or activities

Invoice

Create a bill directly from the Newton. Select a period and client—TimeReporter fills out the invoice and totals the bill when you tap Total. The report can be limited to a particular project by specifying a project on the Project line. Leave the project field blank or write All to include all projects.

Select from standard terms, such as Net 45, Due on Receipt of include a custom message. When done, tap the Action button to print or fax the invoice. If the client's address is in Names, TimeReporter will print the address on the invoice.

Figure 26. Create an invoice.

The rate used to determine the invoice amount is the default hourly rate set in preferences. An override rate to be used instead of the default rate can be specified by client or activity.

Time Entries List

To see an overview of all entries, select Time Entries from the Show button or tap the dot in the Newton icon bar. Use the scroll arrows in the icon bar to scroll.

Tap a column heading to sort the entries on that field.

Tap on an item to display that Entry screen.

Figure 27. See an overview of all time entries.

Note: Entries that do not contain a field, such as Activity, do not appear if you sort on that field. Because all entries must have date and hour data, sorts on these fields show all entries.

Client, Project and Activity Lists

These lists show all the clients, projects, and activities which you have set up in TimeReporter. A “$” in the far right column indicates that a client or activity is considered chargeable. It is not necessary to setup a client, project, or activity before using it. Tap on a line item to edit or delete an item.

When entering clients you can choose a person or company from the Names file. The popup list for client keeps track of the last eight names that you entered anywhere on your Newton as well as letting you pick any name from the Names file. The popup lists for code and rate display the last eight codes and billing rates you used when creating new clients, projects, and activities in TimeReporter.

If you change the name of an existing client, project, or activity, you will have to go back and reassign any work or expenses that belong to that item.

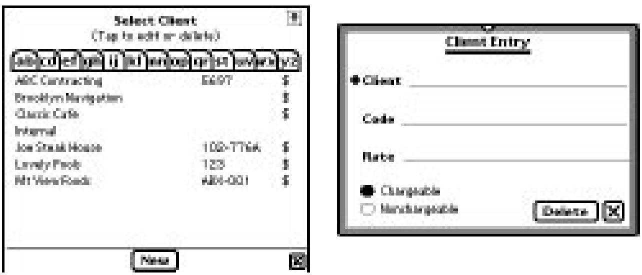


Figure 28. Easily Add or delete clients and activities.

Note: If you delete a client, project, or activity, it is not removed from existing entries. However, it will not be available for future entries.

Printing Reports

To print from any report view, tap the Action button and choose Print Report. The time Report can print in two formats, A and B.

Format A shows the begin and end time and the net time; format B shows only net time. Format B allows more space for client, project, and activity descriptions and codes. The expense report can be printed separately. If you have problems printing or faxing, refer to “I can’t print or fax a report.” on page 46.

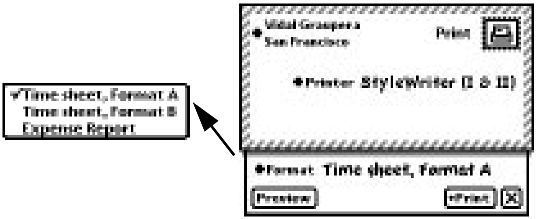


Figure 29. Time & Expense report printing options

☞**Tip:** If you encounter an out-of-memory alert when printing, close TimeReporter and print from the Out Box in the Extras Drawer.

Faxing

Choose fax from the Action Button. Shorter reports have a greater chance of success due to the mechanics of the faxing process.

E-Mailing and Beaming

E-Mailing and Beaming are available from the Action button of the TimeEntry slip. The recipient should have the same clients and activities for this to be effective. You can e-mail a textual representation of an Entry along with comments. If you are using NewtonMail to send mail to another Newton user, you can attach the original data which can be added to the recipients TimeReporter data.

Deleting Entries

It's easy to clear old entries. Select Delete from the Action button to delete entries older than a specified number of days. This operation cannot be undone.

Figure 30. Deleting old entries is easy

Import from Time Report

In the Time Report, the Import button will show a list of phone calls, meetings, events, and to-dos. These items can be selected and linked into the Time Report. If TimeReporter does not recognize the entry as an existing client, project or activity, the information is added to the Description field and the Client, Project and Activity fields are left blank. The unrecognized elements can be dragged up from the Description area into the Client, Project, and Activity fields to create new items.

Info button

Tap the Info (i) button to view TimeReporter's on-line help, to get information about TimeReporter or to access the preferences screen.

Show button

Use the Show button to move between lists, reports, and the Entry screens.

Find

Search for TimeReporter entries using Newton's Find and Date Find from the Find button.

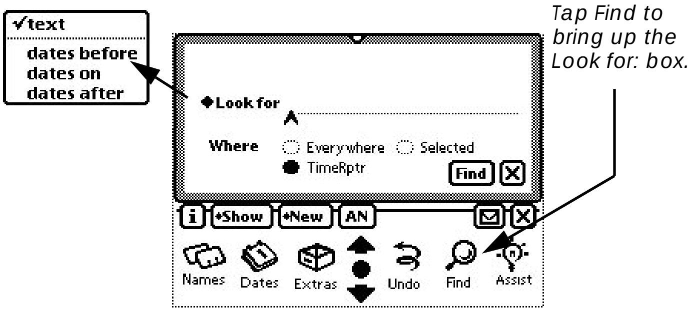


Figure 31. TimeReporter takes advantage of Newton's built-in Find and Date Find

Find lets you search for TimeReporter entries for a particular client, project, activity, or for entries with a description that includes a particular word or phrase. You can also search for entries on, after, or before a certain date.

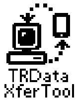
Universal Scroll Arrows and Dot

If you can't see all of a report on the screen, use the universal arrows in the Newton icon bar to scroll up or down. In the Entry screen, the arrows scroll from entry to entry. Tapping the dot between the arrows displays an overview of all entries made. The Overview report is described on page 30.

Transfer to Computer

Transfer to the Computer

This option invokes the iambic TimeReporter Data Transfer Tool. The tool allows a way to download entries from TimeReporter to a tab-delimited file on Macintosh and Windows PCs. It is not a desktop version of TimeReporter. You can also launch the data transfer utility from the Extras Drawer. It’s icon looks like this:



The data transfer utility has two parts: a Newton package you install on the Newton PDA and an application program which runs on either your Macintosh or Windows PC. You need to have TRDT-Tool.PKG module loaded on your Newton and TRDataTool installed on your Macintosh or Windows PC in order to invoke this capability.

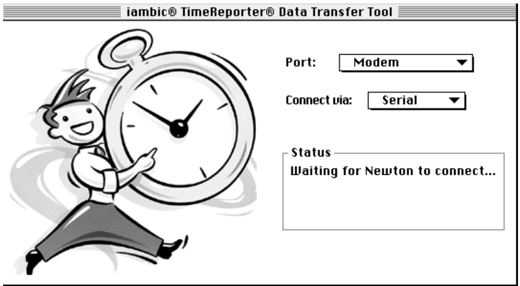
Figure 32. Data Tool Connection Slip on Newton

How to Use

Physically connect your Newton PDA to your PC in the same way you would connect your Newton PDA to use the Newton Backup Utility or Newton Package Installer. The data transfer utility supports serial and LocalTalk connections to Macintosh PCs and serial connections to Windows-compatible PCs.

On your PC, shut down the Newton Backup Utility or Package Installer, if they are running, and launch the TimeReporter data transfer program (“TRDataTool”). When the PC program launches it always immediately begins listening for the Newton to connect.

The first time you run the PC data transfer program it will try to connect via serial using COMM2 under Windows or the Modem port on a Macintosh system. If this is not correct for your setup, change the Port (and Connection) settings on the PC program. Whenever you change the connection settings on the PC program, it will immediately try to reconnect using the new settings.



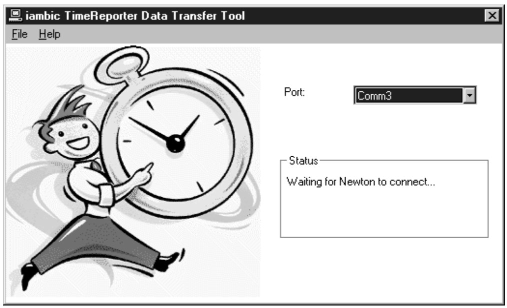


Figure 33. Connection Window
(Macintosh and Windows versions)

Once the PC program is running with the proper port selected and is displaying the message “Waiting for Newton to connect....”, tap the Computer icon on the data transfer tool connection slip on your Newton. Make sure you have selected either serial or LocalTalk depending on your setup. If you have trouble connecting on the Newton side, reset the Newton and try again.

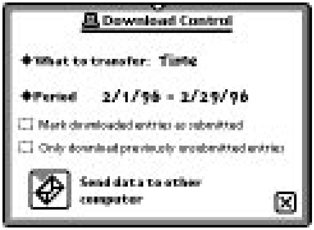


Figure 34. Download Control on Newton

Once the connection is established, the PC program will display the message “Connected to Newton PDA.” On the Newton, the data tool will display a Download Control that allows you to download either time, expense, client, project, or activity entries. For time or expense entries, you can select the time period to download. Also for time and expense entries, two checkboxes allow you to specify whether to download only entries that have not been marked as submitted, and to mark entries submitted as they are downloaded.

When you send records from the Newton to your PC, a File Save dialog will open on the PC. The TRDataTool suggests a unique name for the data from each download. The file name is the type of entries being downloaded plus the date and time of the download, e.g.

March 1, 1996 at 9:28 am becomes 0396-0928. You can rename the file if you wish.

Figure 35. Saving TimeReporter data (Macintosh and Windows versions)

Your TimeReporter data is written to a tab-delimited file. The first row is reserved for the names of the column headings. The order of the columns is fixed.

If you are downloading to a Macintosh computer the creator of the text file is set to Microsoft Excel (it's not really an Excel file, just a text file). You can use any program that can read text files to edit the file, including SimpleText, TeachText, BBEdit, Microsoft Word and Excel on Macintosh computers, and Notepad, Wordpad, Microsoft Word and Excel, Lotus 1-2-3, etc. on Windows compatible PCs.

If you use TimeSlips you can import the file using TSIMPORT. Refer to the TimeSlips manual for setting up an import filter.

You can disconnect or cancel the connection by closing either the Newton or PC connection programs. The PC program also has choices under the File menu for Disconnect and Reconnect. The connection to your Newton stays up until you disconnect it or quit the program.

Troubleshooting

If you have trouble connecting:

1. Try resetting the Newton and re-booting the PC.
2. Double check the cable connections, and check that you have selected to connect via the correct port.
3. Close other applications trying to use the same port.
4. Make sure you have enough heap space on your Newton.Close other applications while the TRDTTool is running. There are third party utilities which help optimize the use of Newton heap memory space.
5. If using a PowerBook that has an internal modem, is the modem turned off?
6. If using a Macintosh computer, make sure you have the Apple Modem Tool version 1.5.3 and the Apple ADSP Tool extensions in your Extensions folder. Try rebooting the Macintosh with all extensions off. Also, if connecting via AppleTalk you might try connecting via serial.

Using the Intelligent Assistant

From within TimeReporter you can link data from Dates as shown on page 4. In addition, the Intelligent Assistant can link data entered in Dates or the Notepad from outside TimeReporter. Here's how:

1. In the Calendar or Notepad, write or type go followed by a client name. Go is a keyword that lets the Intelligent Assistant know that this is a TimeReporter entry. You can also use the keyword "track".

   You only need to supply the first portion of the client name or the code if you use codes. TimeReporter will supply the rest. The client name must be a person or company in Names to be recognized.

2. For Notepad entries, a date can be entered. Calendar entries use the associated calendar date. Dates written, 2/18, today, or Monday are all recognized.
3. Highlight the entry by holding the pen down until you hear a beep and then draw the pen across the entry.
4. Tap Assist. The entry appears in the intelligent Assistant dialog box. Tap Do to create a TimeReporter entry.
5. Make any changes on the Entry screen that appears.

From the Notepad

Suppose you made the following entry on the Newton notepad:

go lovely 961 Monday

You could highlight this entry and tap Assist. The TimeReporter entry would be created as shown on the following page:

From Dates

Suppose you made this entry in Dates.:

go Jack 220

and then you tap Assist. Your screen would appear as follows:

In addition to generating the TimeReporter entry, the Intelligent Assistant completes the calendar entry as shown

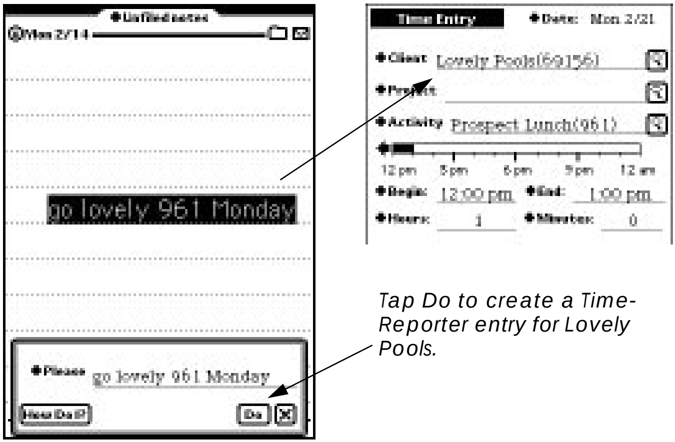


Figure 36. Using Intelligent Assistant from the Notepad.

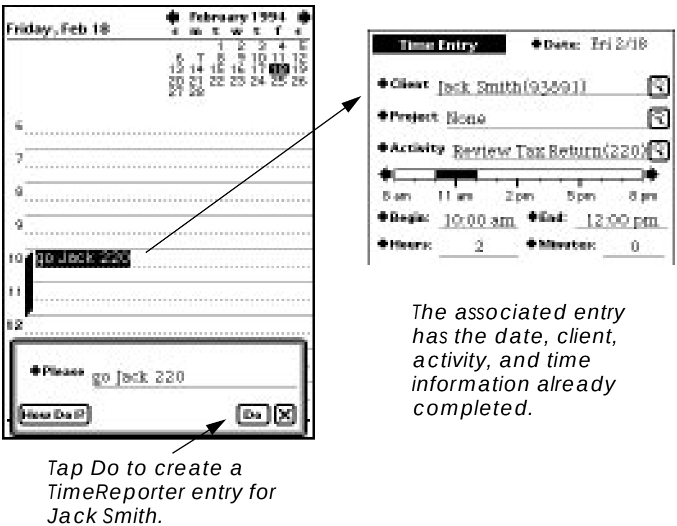


Figure 37. Using Intelligent Assistant from Dates.

The {TR} indicates that a TimeReporter entry was created from this appointment.s

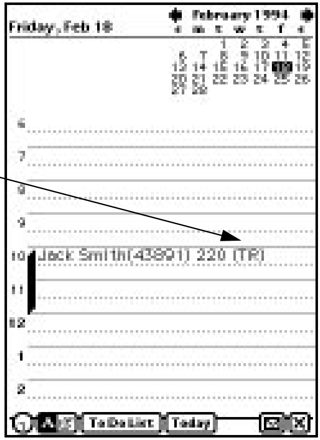


Figure 38. TimeReporter entries are identified in Dates.

Should I load TimeReporter into internal memory or onto a PCMCIA storage card?

You can do either. If the program is on the PCMCIA card it will not be available when the card is removed.

I can't print or fax a report.

Here are some tips to troubleshoot a printing problem.

- Print something from the Notepad to eliminate the possibility that the problem is not related to TimeReporter.
- Is the TRPapers.PKG module loaded onto your Newton?
- Reset the Newton and try printing again. The Reset switch is located inside the battery compartment.
- Select Print from the Action button; tap Print Later and then close TimeReporter and any other open applications.Try to print from the Outbox.
- Break the report down into shorter time periods and try printing.
- Does the report appear correct on the screen? Is there anything unusual about any of the entries?
- Select Print Preview instead of Print. Does this work?
- If there are defects in the printout such as items not printing correctly or missing, you can fax a copy of the printout to iambic Software technical support at 408-882-0399. Please mark on the printout what exactly is missing or wrong, and the version of TimeReporter you are using.

I don't have a printer that the Newton recognizes. How can I print?

You need the Newton Print Pack to communicate with DOS and Windows compatible printers. Without this or a supported Apple printer, you will not be able to print. Tip: To get a hard copy without a printer try faxing the report to yourself.

How do I use the Time Bar?

Refer to "Using the Time Bar" on page 26.

Is my data being backed up with the Newton Back Up Utility?

Yes.

I have plenty of space on my PCMCIA card or internal memory, but the Newton still gives me an out-of-memory message or spontaneously restarts. Why?

The amount of free space available to store new programs and data is not the problem. This message appears when you run out of heap memory which is a fixed amount of internal space on every Newton. There is a practical limit to how many applications you can load on a Newton PDA. Try archiving or deleting programs you don't need. TimeReporter was made as modular as possible, so you can unload modules you are not using.

Can I upload lists of clients, projects, and activities from my desktop computer to TimeReporter?

This is under development. If you need to enter a lot of data, you might consider using the Newton keyboard for now.

How can I send my TimeReporter data to TimeSlips or other desktop programs?

The key is whether the other program will accept tab-delimited text files. Using the TimeReporter data transfer software you can create tab-delimited export files of TimeReporter data on your PC. TimeSlips, for example, comes with a utility called TSImport which can read tab-delimited files.

TimeReporter is on my PCMCIA card. When I remove the card to fax using my PCMCIA fax modem, the reports in my outbox won't fax. What should I do?

Make sure that the TRPapers.PKG module is loaded in internal memory. With TimeReporter still installed, print or fax your report and choose "Print later" to queue it to the Outbox. You can then remove your PCMCIA card with TimeReporter, but not TRPapers.PKG, then print or fax the report from the outbox.

What is the relationship between Clients, Projects and

Activities?

Clients, projects and activities are labels. Think of them as label #1, label #2, and label #3, where labels #1 and #3 are independent of each other, and label #2 can either be independent or dependent on label #1. Feel free to change the labels through preferences.

You can run a breakdown report for and a billing rate can be assigned to labels #1 and #3 but not #2. Label #2 can be marked as specific to exactly one client or global to all clients.

Which rate is used by TimeReporter?

Clients and activities can have an override rate associated with them. The override rate is used for a client if chargeability is determined by client, and an override rate is assigned to the client. The same is true for activities. In all other cases, the default billing rate is used.

Text I write vanishes or is not recognized. Handwriting recognition is not working in certain fields.

Make sure you start the pen stroke in a live area and don't stroke to close to any popup buttons or diamonds. Note that it is not necessary to start writing at the cursor. Wherever you write, text will appear at the cursor. If the Newton handwriting recognizer cannot figure out what you are trying to write, it may remove what you have written without converting it. Also, if you are very low on heap space the handwriting recognizer may fail to operate.

How are the Macintosh and Windows versions different?

The Newton software is the same. You can load TimeReporter onto your Newton from either diskette on either class of machine if you have the right software.

Does TimeReporter 3.0 work on Newton OS 1.X?

No, it is specific to Newton OS 2.0. Use TimeReporter 2.04 for older Newtons.

Are there known software conflicts?

At the time of printing this manual, there are no known conflicts with any other software on the Newton platform.

However, any third-party utilities that load, remove, or freeze software packages; try to clean up or “fix” your soup data; or reclaim or optimize heap space are not recommended and should be used with extreme caution at your own risk. Use of such utilities could corrupt the TimeReporter software and your data.

Utilities that fix data or try to reclaim heap space in particular are not recommended or supported. Sometimes these utilities identify data used by TimeReporter as orphaned or corrupt when it is not.

TimeReporter has been tested for compatibility with Action Names and the applications built into the Newton 2.0 ROM. There is no guarantee that the operation of this software when used in conjunction with any other Newton application will meet your requirements or be error-free.

If you still have questions or problems...

Send electronic mail to **support@iambic.com**, visit our homepage on the World Wide Web **http://www.iambic.com**. You can also visit our forum on CompuServe (“GO IAMBIC”). iambic Software has a 24 hour fax on demand system at 408-985-1640.

Please be ready to tell us what other software is loaded on your Newton, the error message number or behavior noticed, and how we can reproduce the problem. If you notice a defect in a printout, please fax a copy to **408-882-0399** and mark on the printout what you believe is defective and why.