STANDARD TIME

How-To Guide

Scoutwest, Inc.
www.stdtime.com

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How-To Guide

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Terminology

Standard Time is a very simple program to use. It does require that you set up certain features with information about the projects you work on in order to get the most benefit. Most of this information is requested in the Startup Wizard when you first start the program. Sometimes the terminology used can be unfamiliar.

While the terms used in Standard Time are intended to be self-explanatory, we will define our usage of these terms here in this section. Hopefully this will ensure the highest possible understanding of the product.

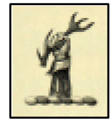
As with all the topics in this guide, each topic will begin at the top of a page and occupy only one page. This simple layout allows you to browse through this booklet scanning for topics you are interested in. Just look at the top of each page for each topic.

Project Task

A project task is a single item of work that may be assigned to a user to be performed. A project is broken down by subsystems and project tasks. When time is logged to a project task a new task record will be listed in the Time Log view. A project task contains all of the elements below.

Field	**Description**
ID	An ID used by MS Project or Standard Issue
Name	The name displayed in the Project Tasks view
Description	Text describing the work to be performed
Project	Project this task is listed under
Subsystem	Subsystem this task is listed under
Category	Describes the work to be performed
Client	Optional client the work is performed for
Start date	Date the work is to begin
Due date	Date the work is to be completed
Completed	Flag and date when the task has been finished
Reminder	Remind the user to perform this task
Duration	Estimated time this task will take
Remaining	Estimated work left to perform
Actual work	Time logged to this task by Standard Time
% complete	Amount of work performed
Status	Description of task status
Priority	Description of task urgency
Owner	Task is assigned to this user only, or all users
Assigned by	User who assigned the task
Resources	List of resources who may perform work
Billable	The task is billable to client
Quick Task	Show the task in the system tray menu
Text 1, 2, 3	User text fields for any purpose

Project



A collection of tasks that represents work performed over a period of time. Project tasks may be assigned to projects and subsystems.

To see a list of projects:

1) Open the Tools menu
2) Choose Projects…

Each project may have the following properties:

Property	Description
Active status	Display the project when it is actively being worked on.
Timesheet	Check this box to show the project in the timesheet view where users may enter time for each project they work on.
Microsoft Project File	You may optionally associate a Microsoft Project plan to a project. This allows you to automatically update the project plan with time worked.
Subsystems	Define a breakdown for the project.
Client	This project is being performed on behalf of the specified client.
Type	The kind of project this is. You may classify projects using any way you like. Usually they represent business activities your company is engaged in.
Description	Your description of the project.

TIP: Projects and categories can be made available to selected workgroups only. This hides the project for users that are not involved in that project. To do this, first create workgroups in the Users and Organization dialog, then choose the Organization button in the Projects dialog; there you can choose which groups the selected projects will be available to.

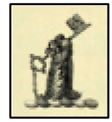
Project Type

A project type is a classification of a project. Project Types separate projects into different kinds. This allows you to see reports for the time you spent working on various kinds of projects.

To see a list of project types:

1) Open the Tools menu
2) Choose Project Types…

Category



A category represents the kind of work performed in a task, or a categorization for an expense. Every project is made up of different kinds, or categories, of tasks. This allows you to view reports that break down the work performed in a project.

To see a list of categories:

1) Open the Tools menu
2) Choose Categories…

A category contains the following properties:

Property	**Description**
Hourly rate	Determines how much to charge a client for the work performed.
Description	Your description of the category.

Client

A client describes an entity for which a project is performed. This may be your own company, a third party client company or third party individual.

To see a list of clients:

1) Open the Tools menu
2) Choose Clients…

A client contains properties that represent the company contact information. Your own company will be listed among the clients. It may be necessary to fill in your own contact information so that it may be used on invoice documents. A check box named "This Company" designates your company from the others. Standard Time will look for this check box when deciding which client to show on the invoice as your company.

Quick Task

A Quick Task is a fast way to start a new task. Quick Tasks are simply project tasks that are flagged for display in the Quick Task window, Timesheet, and Quick Task system tray menu. When you choose a Quick Task, the task starts immediately. This allows you to start a project task with a single-click.

To see a list of Quick Tasks:

1) Open the Project Tasks view
2) Make sure filtering is turned off
3) Make sure the Quick Task column is displayed
4) Project tasks with the Quick Task check mark will be displayed in the Quick Task window, Timesheet, and Quick Task system tray menu.

Quick Tasks are displayed in the Timesheet, system tray icon menu, and in the Quick Tasks window.

Expense

Standard Time maintains a list of expenses logged by each user. Each expense represents a cost to your company, and is usually passed along to your clients.

Expenses must be assigned to projects, which may be optionally associated with clients. This ensures that each expense can be traced back to the project it is related to, and that it will show up on client invoices.

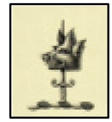
Expenses can also be associated with a trip. This allows you to view all expenses related to a trip, and to view trip reports.

Each expense must be associated with an expense type to describe the kind of expense. Typical expense types are: Airfare, meals, lodging, etc. You may edit this list of expense types to include your own types. You may also remove the default types if they do not apply to your business.

Several expense and trip reports are available to help with company and client reimbursement. Each expense contains checkbox fields for billing and reimbursement purposes. Most expense and trip reports use these fields to determine which expenses are reimbursable.

Expenses may be logged on a PDA using the method described in this article: www.stdtime.com/pdaexpenses.htm .

Mileage



Mileage records are a type of expense. The expense amount is automatically calculated when you enter the starting and ending mileage. This amount is based upon the default mileage rate. The default mileage rate can be modified in the Options dialog. Choose Tools, Options, and click on the General tab.

Each mileage record can calculate the amount based upon an independent mileage rate. When each record is initially created, the default mileage rate is used for the calculation. You may change this rate for each record. Changing the default mileage rate does not alter existing mileage records.

Trip reports and some expense reports show mileage totaled independently of expenses.

Invoice

You may generate invoices for a client that include time, mileage, and expenses for a given project and date range. After creating invoices, you can accept payments from clients, and view client balances, and the status of any given invoice.

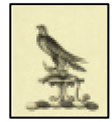
To view a list of invoices:

1) Choose View, Billing.
2) Optionally click a client in the panel at the left to filter the view by clients.
3) Click on an invoice to edit it.
4) Click Save and Close to generate a new invoice document.
5) Right-click on an invoice to accept payments.

Before creating invoices, choose Tools, Clients, and update your company information as well as the clients you will be sending the invoice to. This will allow Standard Time to generate an invoice document that contains full contact information for both your company and your client.

Standard Time uses billing rates found in categories to compute costs for time worked. Choose Tools, Categories, and click on each category to set the billing rate.

Payment



After creating invoices you can accept payments from clients and post them against a selected invoice. You can also view the payment history for a client invoice, and view the remaining balance.

To enter a payment:

1) Choose View, Billing
2) Right-click on an invoice record
3) Choose Enter Payment

To view all payments:

1) Choose View, Billing
2) Right-click on an invoice
3) Choose View, Payments

To view a client balance

1) Open the Reports section in the left panel
2) Open the Invoices section
3) Click on the Client balances

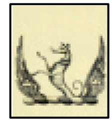
System Tray Icons

Standard Time displays icons in the system tray at the bottom of the screen for ease of use. These icons are shown below.

Click on these icons to open either a menu or Quick Info panels. These icons are used to access the most common features in Standard Time.

To turn these icons on or off, choose Options from the Tools menu and click the General tab.

Quick Info



Quick Info panels display useful summarization information about the time you work.

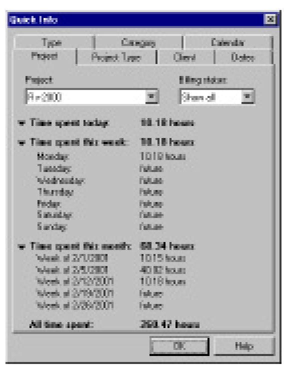
To view Quick Info:

1) Open the View menu
2) Choose Quick Info

Each panel is described below:

Panel	**Description**
Project	Time spent working on each project.
Project Type	Time spent on each type of project.
Client	Time spent working for a client.
Dates	Time worked during a date range.
Type	Pie chart showing percentage of time working on each project type.
Category	Pie chart showing time worked in each category.
Calendar	Amount of time worked each day.

A screen display of the project panel:



Subsystem

Subsystems are a breakdown of projects. A hierarchy of subsystems helps further categorize the work that you perform within projects, or a further categorization of expenses.

To see a list of subsystems:

1) Open the Tools menu
2) Choose Projects
3) Select a project in the list
4) Click the Subsystems button

The subsystems dialog allows you to build a hierarchy of work within a project. Project tasks may be assigned to projects and subsystems. This is useful in planning the breakdown and tasks for an entire project. Information in project tasks "rolls up" to the subsystem and project level allowing you to see how long a project or subproject may take.

Users

Standard Time permits access to the database to authorized users only. A hierarchy of users allows you to position users within groups, assign passwords, and grant administrative rights.

To view the hierarchy of users:

1) Open the Tools menu (you must have admin access)
2) Choose Users and Organization

To change user rights:

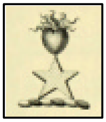
1) Choose Tools, Users and Organization
2) Click on the user
3) Click Rights
4) Place a check mark next to the rights you wish to grant
5) Click Workgroup Rights
6) Uncheck any rights your group should not have

Each user may be located within a group or subgroup under the main "Company" group. Placing users in a hierarchy allows you to view reports for entire groups of users. Each user must be granted the right to view reports for groups.

You may log into Standard Time as another user by choosing Change User from the File menu. You must know the user name and password of the user to perform this operation.

Removing checks next to certain rights for the entire company is an easy way to hide features of the program that you don't use. This simplifies the user interface.

ODBC Data Source

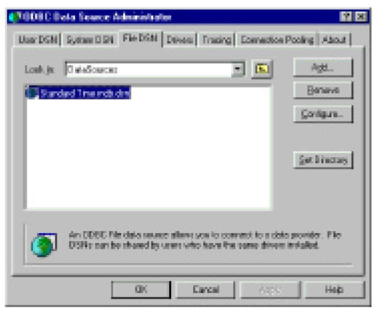


Standard Time uses Open Database Connectivity (ODBC) databases to store its time and project information. A data source is the configuration used to access that database. They simply contains a data source name, the pathname of the database file, and some advanced configuration information to help the ODBC driver access the database.

To view the data source for Standard Time:

1) Open the Options dialog from the Tools menu.
2) Click the Database tab.
3) Click the ODBC Administrator button. 
4) Click the “File DSN” tab.

The ODBC Administrator is shown below.



Standard Time uses only File DSN data sources. This type of data source is the best for shared access. This means that your entire workgroup can put their time logs into one single database file (usually located on a file server).

How Do I?

This section is designed to help you use Standard Time to solve real issues. It poses common usage questions, and then answers them with simple step-by-step instructions. There is little or no commentary, just fast answers.

Use this section to learn the specific steps to perform certain tasks. The Feature Summary section contains information on each feature of Standard Time. You may consider reviewing the information in both sections to get the most information.

Each topic in this section is presented on a single page with common "How Do I" questions shown at the top of each. Simply scan through the pages to find answers to your questions.

How do I add a new project?

1) **Open the Tools menu**.

2) **Choose the Project menu item**. A list of all projects will be displayed in the dialog box.

3) **Click the Add button**. A new project will be added.

4) **Type the name** of the new project and press Enter.

5) **Click Subsystems** to build a project hierarchy.

6) **Choose a client from the combo box**. This client represents the company you will be doing the work for. If the project is being done for your own company, you can use a client called "My company".

7) **Choose a project type from the combo box**. This project type is a way for you to further categorize projects. You may choose to have project types like "Development projects" and "Web projects", "Books", etc. Use project types to categorize projects that have some commonality.

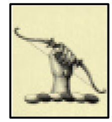
8) **Optionally set up** a Microsoft Project plan to associate with this project.

9) **Type a description for this project**. This is useful to help you and others remember the details of this project.

10) **Click the Close button** to close the dialog.

Your new project will be displayed in a number of places within Standard Time including the Project Task view, Timesheet, Quick Info, Quick Tasks and various reports.

How do I organize subsystems and project tasks?



1) **Open the Project Task view**.

2) **Choose Insert, New Project Task**. The Project Task dialog opens.

3) **Enter a name for the project task**, and fill in other task information.

4) **Choose a project and subsystem**. This will cause the project task to be listed under the project and subsystem in the Project Tasks view. A complete hierarchy for the project may be displayed. This is useful for planning projects.

5) **Click Save and Close**. The project task will be displayed in the hierarchy.

During the process of creating project tasks you may need to create subsystems that represent the hierarchy of the project. You will notice that durations and other information contained in project tasks "roll up" to the subsystems and project level.

How do I bill clients for my time?

1) **Open the Project dialog** from the Tools menu.

2) **Review the assignment of clients** to each project.

3) **Add or assign clients** to each project you wish to bill time for, and update the client data for your company.

4) **Close the Project dialog**.

5) **Open the Categories dialog** from the Tools menu.

6) **Review the hourly billing rate** for each category. As you log tasks with these categories you will be accruing billable time at the rates specified here.

7) **Modify the billing rates** for each category to fit your price structure.

8) **Close the Categories dialog**.

9) **Log tasks toward billable projects** using the categories most appropriate for the work performed.

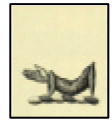
10) **Choose Insert, New Invoice** to create an invoice for a client, project, with a start and stop date.

11) **Click Save and Close** to create a new invoice document.

12) **Review the invoice document** to make sure it contains correct client and invoice information.

13) **Print the invoice** and mail it. Payments may be entered against an invoice. Right-click on an invoice and choose Enter Payment.

How do I log time to Microsoft Project?



1) **Choose Tools, Projects**, and choose a project from the list.

2) **Click on Microsoft Project Integration** to associate the selected project with a Microsoft Project MPP file or with Project Server. Complete the Wizard.

3) **Make sure the Project plan contains tasks that are assigned to you**. The resource name used in Project must match the name used by Standard Time. Choose Tools, Users and Organization to obtain the correct resource names.

4) **Choose View, Refresh Project Tasks** to refresh the tasks in Standard Time from the original Project plan. The project task view will show a hierarchy of tasks from the project plan.

5) **Right-click on a task** and choose Start Timer. The Standard Time icon in the system tray will turn red, indicating that you are logging time.

6) **Choose Stop** to stop the timer.

7) **Notice that the time worked for the task updates**, and that all time rolls up to the subsystem and project level. The time worked, time remaining, and % complete will all update inside the original Project plan, and will also roll up to the project level within Standard Time.

How do I integrate with QuickBooks?

1) **Run QuickBooks**, and choose File, Timer, Export Lists for Timer. This is a cascading menu. QuickBooks explains the process you will be performing.

2) **Export an IIF List file**. This file contains company, project and human resource information from QuickBooks. Note the directory and file name of this file. It will be used by Standard Time in the steps below.

3) **Choose Integration Options from the Tools menu** in Standard Time and turn on QuickBooks integration.

4) **Click the Browse button** to locate the QuickBooks IIF List file that you exported earlier. (This file will be automatically imported by Standard Time).

5) **Click the Browse button** to choose a location and file name for a QuickBooks IIF Timer file. Make sure to use the extension: ".IIF". (This file will be automatically exported by Standard Time).

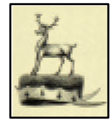
6) **Choose an employee from the list** or enter your name.

7) **Click OK** to save the changes.

8) **Start and stop a task**. Standard Time automatically imports the IIF List file from QuickBooks and exports an IIF Timer file. The Timer file will be updated with each task you log.

9) **Using QuickBooks**, choose File, Timer, Import Activities from Timer. This import into QuickBooks should only be necessary when you wish to create invoices or view QuickBooks reports for time worked.

How do I analyze and improve my efficiency?



1) **Open the Options dialog** from the Tools menu. Choose Reminders, and choose to be reminded more frequently when not logging time. The first step to understanding your work habits is to record all the time you spend working.

2) **Be very detailed** in the granularity of tasks you log, i.e. don't log one single task for the entire day. Break your time down into every possible category. Admittedly this requires a discipline that may take a very long time to cultivate, but keep at it. Use Quick Tasks to quickly switch between tasks.

3) **Use the Quick Info Categories panel** to show how much time you spent in each kind of task for each project.

4) **Use the Project Breakdown report** to show where you spent time during the life cycle of each project.

5) **Make value and priority assessments** about the relative importance of each category within the cycle of the project. For instance, spending time in research and design at the beginning of a project will shorten the implementation phase, and spending less time of "secondary" issues helps you focus on the "real" job.

6) **Slowly make course corrections** to improve your efficiency.

7) **Compare later projects with early ones** looking for increased efficiency and shorter overall project times.

How do I stop logging time to go to lunch?

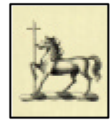
1) **Choose Pause from the Log menu** while logging a task. The Pause dialog will allow you to temporarily stop a task to do something else, like go to lunch, and then resume the task when you return.

You will notice that the Pause dialog remains the top-most window at all times even when the Standard Time program is not the active window. This helps you remember that you were pausing a task, and that you should eventually return to resume it.

2) **Click the Resume button** when you are ready.

3) **Or, choose alternate tasks** to resume, and then click the Resume button.

How do I find out how much I've worked this week?



1) **Open the Quick Info panel** from the Tools menu.

2) **Choose the Project tab**.

3) **Choose the project** you are interested in or choose "<All>".

4) **Time spent this week** is displayed in bold.

5) **You may also click the "down button"** to the left of the text to check the amount of time spent last week.

6) **Choosing the Calendar tab** shows you a calendar view for each day of the month. This is also helpful in displaying the number of hours spent for each day.

7) **Choose Timesheet from the View menu**. This shows the number of hours spent on each project for each day.

How do I find out if I've forgotten to log my time?

1) **Open the Quick Info panel** from the Tools menu.

2) **Choose the Calendar tab**.

3) **Examine each day** of the month to determine if time has been logged for each day.

4) **Change the month** using the combo box or arrow buttons.

5) **Alternatively, choose the Timesheet view**. Here you may enter time for each project on the days you worked.

How do I email a status report to my boss?

1) **Open the Export dialog** from the File menu. This dialog offers a list of report formats to choose from. It also allows you to export the information in several file formats including, but not limited to, Excel, Lotus 1-2-3, Rich Text and Word for Windows.

2) **Choose the project** to export.

3) **Choose the date range** of tasks to export if necessary.

4) **Choose the report format** which best summarizes your status. If your file will be imported into Standard Time then you must choose a report format from the "For Import" folder. These reports create a "Tab-separated values" file that can be imported directly into Standard Time.

5) Click the **Email the results to** checkbox.

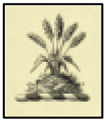
6) **Fill in the email address**.

7) **Click OK**.

8) **Choose the File** to save as, and click Save. If your file will be imported back into Standard Time, you must choose the "Tab-separated values" format.

An email message will be created using your default email program. It will contain an attachment file containing your exported tasks. You simply click "Send" in your email program to send it.

How do I view my time logs in a spreadsheet?



1) **Open the Reports menu**.

2) **Choose a report** which best describes the format of the time logs you wish to see. The Report Viewer window opens to show the report.

3) **Click the Export button**  in the Report Viewer window.

4) **Choose the spreadsheet format** from the Format list.

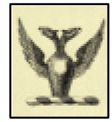
5) **Choose "Application"** from the Destination list.

6) **Click OK**. The spreadsheet program will open with the report data. The file used to display the data is temporary. You will need to save the file if you wish to have a permanent copy.

7) **An alternate way of displaying time logs** in a spreadsheet program is to simply select the rows from within the Time Log View, and paste them into a blank spreadsheet window.

The Timesheet window also shows time worked in a spreadsheet style, using columns for Monday through Sunday.

How do I interrupt what I'm doing for a hot task?



1) **Choose Interrupt…** from the Log menu.

2) **Choose a new Project** from the list.

3) **Choose a new Category** from the list.

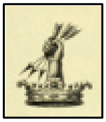
4) **Type new text** describing the task you will begin.

5) **Click the Start button**. The new interrupt task will now be logging time. The Interrupt dialog will remain open and on top of all other windows to remind you that you are temporarily interrupting a task to do another.

6) **Click the Resume button** to close the dialog and resume work on the original task.

7) **Should you decide that you no longer wish to resume work on the original task, click the Close button**. The interrupt task will continue to be logged.

How do I hide columns I don't use?



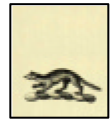
1) **Choose Columns…** from the View menu.

2) **Choose the column** you wish to hide from the list on the right.

3) **Click the "Remove" button** to move the column to the list on the left. This column will not be displayed in the view.

4) **Chose a column from the list on the left**, and click "Add" to show that column.

How do I round my time to the nearest minute?



1) **Choose Options** from the Tools menu.

2) **Click the Rounding tab**.

3) **Click the checkbox** to turn on task rounding.

4) **Enter the number of minutes** to be used as the rounding interval.

5) **Choose whether you want to round** up and down, or whether you wish to round up only.

6) **If you choose to round up and down**, then choose if you want to always round up if the result is zero. This prevents small increments of time from being rounded down to zero and lost.

How do I make new reports?

Reports offered in Standard Time are created and edited using a product called Crystal Reports, by Business Objects version 8.5 or higher. Companies wishing to create new reports or edit the existing reports that are included with Standard Time should use the Crystal Reports editor. To create new reports use the following procedure.

1) **Begin using the Report Expert** in the Crystal Reports editor.

2) **Click the database button**.

3) **Open Standard Time mdb.dsn** tree from the Data Explorer.

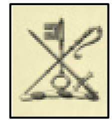
4) **Add the Tasks table** and others you feel are necessary for your report, and then click Close.

5) **Click Next**, and choose table fields and make further report choices. Click Finish when done. The report will be displayed.

6) **Choose Report Options** from the File menu and turn off the "Save Data With Report" option. Click OK.

7) **Save the report in Reports directory** of Standard Time. Under the Reports directory you will see several other report related directories. You may create new directories or save your report in any of the existing ones. Standard Time will discover and enumerate all the reports in these directories, and will list them in the Report menu and Export dialog.

How do I set up a new database?



1) **Open the Options dialog** from the Tools menu and choose the Database tab. NOTE: It is highly recommended that you use the Microsoft Access database that ships with Standard Time. You may wish to create copies of the empty database that Standard Time started with. To do this, you will find a file called Empty.mdb in the Standard Time program directory.

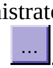
2) **Click the ODBC Administrator button** .

3) **Click the File DSN tab**. Standard Time uses *only* databases that have been set up under the File DSN tab.

4) **Click the Add button**, choose your database type, name the data source, and click Finish.

5) **Select a database file** to be used. *It is highly recommended that you use a copy of the Empty.mdb file that installs with Standard Time.*

6) **Click OK** to close the ODBC Administrator.

7) **Click the Browse ODBC button** . This will open the ODBC Administrator again to allow you to choose the data source you set up.

8) **Choose the data source** you set up and click OK. The data source name is copied into the Database Options dialog.

9) **Click the ODBC Check button**  to perform a verification of the database and its data source connection.

10) **Click OK** to close the Options dialog.

How do I use a shared database for my workgroup?

1) **Copy the Standard Time.mdb file** from the Standard Time program directory to a file server.

2) **Make sure your users can access the file server** and the directory where you placed the new database in.

3) **Open the Options dialog** from the Tools menu on each of the user's machines.

4) **Click the Database tab**.

5) **Click the ODBC Administrator browse button.** ...

6) **Click New** to create a new File DSN which points to the database file on your file server. Name the new DSN "Standard Time mdb shared".

7) **Select the new data source** in the list.

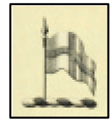
8) **Click OK** to close the ODBC Administrator.

9) **Verify that the new data source is shown** in the field.

10) **Click OK** to close the Options dialog.

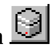
TIP: As a shortcut, after creating the first File DSN on the first user's machine, you can copy it from c:\program files\common files\ODBC\DataSources to the same directory on each of the user's machines. The file name will be "Standard Time mdb shared.dsn".

How do I move an ODBC database to a new place?



1) **Copy "Standard Time.mdb"** to the new directory or to a new machine.

2) **Open the Options dialog** from the Tools menu and click the Database tab.

3) **Click the ODBC Administrator button** 

4) **Click the File DSN tab**.

5) **Choose "Standard Time mdb.dsn"** from the list.

6) **Click the Configure button**. The ODBC Microsoft Access Setup dialog will appear to allow you to configure the DSN.

7) **Click the Select button**. This allows you to choose the actual database file that this DSN refers to.

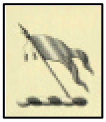
8) **Navigate to the directory** of the new file.

9) **Choose the new file** and click OK. Click OK to close the configuration dialog and the ODBC Administrator dialog.

10) **Click OK** to close the Options dialog. The data source for Standard Time has now been moved to refer to a database in another location.

Also see: How do I set up a new database?

How do I view reports for my whole group?



1) **Set up your ODBC database** to be shared by all users. (See “How do I use a shared database for my workgroup”).

2) **Open the Users and Organization dialog** from the Tools menu.

3) **Add groups and users** to the tree to represent your company hierarchy.

4) **Make sure each of the users** who will be sharing the database enters a unique user name into the User tab in the Options dialog. These user names are the same names you use in the Users and Organization dialog, and are usually Windows login names.

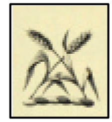
5) **Enter passwords for each of the users and groups.** This prevents users from viewing other user information and high-level group or company wide reports.

6) **Close the Users dialog**.

7) **Hold the shift key down** while clicking on a report in the navigation pane at the left side of the main window.

8) **Choose the group or user** to view the report for.

How do I associate projects with workgroups?



1) **Open the Users and Organization dialog** from the Tools menu and create a hierarchy of your company organization, with workgroups and users under those groups. User names must be identical to those used in the Options dialog, and are usually Windows login names.

2) **Open the Projects dialog** from the Tools menu and choose the project that you wish to associate with one or more workgroups.

3) **Click the Organization button**. The Assign dialog is opened.

4) **Place a check mark** next to each group you wish to associate this project to.

5) **Click OK**.

Projects that are associated with workgroups will only be visible to users in those groups. This allows you to make projects available to users who work on them and not to others. The same association may be made for categories and reports.

How do I ActiveSync with a Pocket PC?

1) **Install the Pocket PC version** of Standard Time using the installation setup program. To do this you should have your Pocket PC handheld device connected to your computer and have Microsoft ActiveSync running.

2) **Restart your computer** to make sure the installation changes are in effect.

3) **Click the Options button** in Microsoft ActiveSync.

4) **Click on Standard Time** in the list.

5) **Place a check mark** next to Standard Time in the list.

6) **Click Settings** to adjust the number of days you wish to synchronize tasks with the Pocket PC device.

How do I HotSync with a Palm OS Handheld?

1) **Install the Palm OS version** of Standard Time using the installation setup program. To do this you should have your Palm OS handheld device connected to your computer and have the HotSync manager running.

2) **Restart your computer** to make sure the installation changes are in effect.

3) **HotSync your Palm OS device** to make sure Standard Time has been installed onto the handheld device.

4) **Click on the HotSync icon** on the system tray.

5) **Choose Custom…** from the menu.

6) **Choose Standard Time** from the list.

7) **Click the Change… button**.

8) **Adjust the number of days** you wish to synchronize tasks with the device. The smaller the number, the faster the HotSync will complete. *It is recommended that you keep the number of days as small as possible for older Palm OS devices*.

9) **HotSync again** to ensure that all projects, categories and tasks are synchronized with the device.

How do I migrate to Microsoft SQL Server?

1) **Visit** http://www.stdtime.com/SQLMigrate.htm for detailed instructions for migrating the Standard Time database to MS SQL Server. The instructions below are just a high-level overview of the process you will follow. The web site above displays every dialog you will encounter during the process. The entire process may take from ten to sixty minutes depending upon your familiarity with the Microsoft tools (e.g. SQL Server Enterprise Manager and ODBC Administrator).

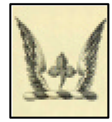
2) **Create an SQL Server database** for Standard Time using the DTS Services from within the SQL Server Enterprise Manager. This will copy all tables, columns and data from the MS Access database you have been using. The Standard Time database will now be completely copied to SQL Server.

3) **Create an ODBC data source** for the new database. This involves using the ODBC Administrator to create a new "File DSN" data source that points to the new SQL Server database.

4) **Set up Standard Time** to access the new SQL database. Each Standard Time client needs to use a File DSN data source to access the SQL Server database. After creating the File DSN data source for each client you must set Standard Time up to use it. To do this, choose Tools, Options, Database from the Standard Time menu, and enter the ODBC data source you created earlier.

5) **Restart Standard Time**, and it will access the SQL Server database.

How do I work offline with my laptop?



1) **Open the Options dialog** from the Tools menu.

2) **Choose the Database tab**.

3) **Make sure the ODBC data source is referring to a database file that is not located on your laptop**. This may be a shared database accessed by other users.

4) **Click OK** to close the Options dialog.

5) **Choose Exit** from the File menu to close Standard Time. NOTE: Clicking the close button does not close Standard Time. It only hides the main window.

6) **Remove your laptop from the network**.

7) **Start Standard Time** again. Notice that the time logs are now gray and read-only. This is because the computer is disconnected from the network and the ODBC database is unavailable. Because the database is unavailable, you will also receive an error. Click the "Do not show this dialog when errors occur" checkbox and close the Errors dialog box.

8) **Log a new task**. Notice that the new task is marked with red text. This is to indicate that it cannot be written to the database.

9) **Exit Standard Time** again.

10) **Reestablish a connection** with the network and database.

11) **Restart Standard Time**. Notice that your red tasks, which were logged when the database was unavailable, are soon added to the database and are no longer red.

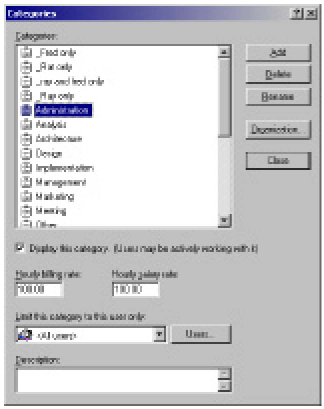
Feature Summary

This section describes each of the major features of the Standard Time program. It is organized in alphabetical order for easy reference. Simply scan through the pages to locate the topic you are interested in.

You may also consider looking through the previous section. It contains simple "How-to" topics that address everyday issues you may face when using the program.

Categories

To access the list of categories, choose Categories… from the Tools menu. The following dialog is displayed.



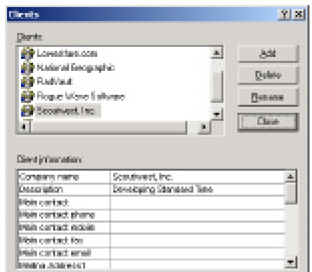
A category contains the following properties:

Property	**Description**
Billing rate	Determines how much to charge a client for the work performed. The rate is used in invoices and some reports.
Salary rate	A rate you will use to pay employees who perform tasks with this category.
Limit	Show this category for the selected user only.
Description	Your description of the category.

Categories are used to classify the kind of work that is performed in a task, and to define the hourly rate charged for this activity.

Clients

To access the list of clients, choose Clients… from the Tools menu. The following dialog is displayed.

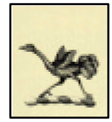


Each client contains properties that represent the contact information for a company or individual for which projects are performed.

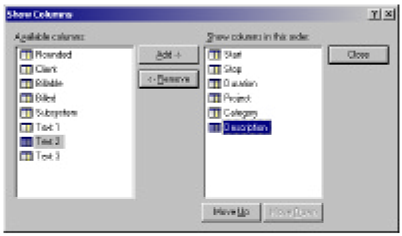
When creating a new project, you should assign a client to it, even if it is your own company. This associates the project with the client so that reports and Quick Info can generate accurate information.

Before creating invoices, make sure your contact information, and contact information for your clients, is updated here. Your company should be designated with a check next to “This company.”

Columns



To show or hide columns choose Columns… from the View menu. The Columns dialog allows you to choose any column to show or hide.



Data for hidden columns is still maintained in the Standard Time database even while the column is not visible.

Note: Normally tasks in the Time Log view are sorted by the start date. This conveniently places the last tasks you log at the bottom of the view. Standard Time keeps the list scrolled to the bottom so you can easily see the last tasks you logged. You may choose to sort the list by any visible column. To do this, click within the header area of the column. The tasks will be sorted ascending by that column. Click again to toggle the sort to descending.

Expenses

To log mileage and expenses, choose View, Expenses, or click on the Expense tab at the top of the main view, and then choose Insert, New Expense.

The Expense dialog has the following sections:

Section	**Description**
Amount and Description	Mileage odometer, expense amount, payee, and description.
Expense Information	Expense type and trip.
Project Information	Project, Subsystem, category, and client.
Extras	Billable, billed, reimbursement, and user defined fields.

Trips
Expenses may be associated with a trip. This allows you to view a trip report that shows you how much you should be reimbursed for out-of-pocket expenses. To add a new trip, choose Tools, Expense Trips.

Types
Each expense must be assigned an expense type to categorize the expense. To add a new type, choose Tools, Expense Types.

Project, subsystem, and category
Each expense must be assigned to a project and category, and optionally a subsystem. This helps further categorize each expense. Project and category information is also used when creating invoices.

Expense Reports

To view expense reports, open the Expense section under Reports in the navigation panel at the left, and then click on the desired report.

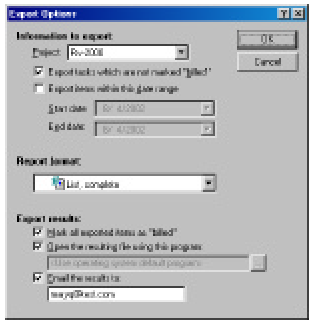
Trip Report
The trip report allows you to view a brief summary of expenses for a specified trip. Since expenses may be associated with a trip, the trip report creates an expense report that can be used for company or client reimbursement. To add a new trip, choose Tools, Expense Trips. After adding a new trip, you may assign expenses to it and view the trip report for those expenses.

The trip report requires you to choose a trip and enter the amount you were given as a cash advance. The reimbursable expenses are subtracted from the advance to determine how much you owe the company. If the expenses exceed the advance then the amount you are reimbursed is displayed.

Expense Reports
Most of the remaining expense reports are organized as lists. These help you to list and summarize the expenses for a certain project, trip, period of time, or other criteria.

Export

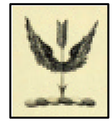
To export time logs choose Export from the File menu. The following dialog is displayed.



The Export dialog has the following options.

Option	**Description**
Project	Export tasks belonging to this project, or All.
Not billed	Only export tasks that are not billed.
Date range	Export tasks within this date range.
Report format	The format of the exported data.
Mark billed	Mark them billed when the export is complete.
Open using	Open a program with the results.
Email to	Email the resulting file to this address.

Filter

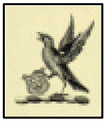


To filter rows in most views, click on the item in the navigation panel at the left. For instance, click on the name of a project to show only items belonging to that project. The view will be filtered and the filter criteria are displayed at the top of the view in the dark gray area. An example is shown below.

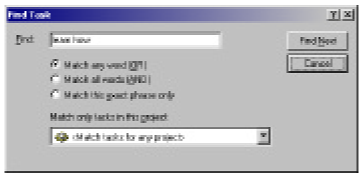
To remove a filter from a view, find the small "X" in the dark gray area at the top of the view and click it. This removes the filter.

When tasks are being filtered you will also see an indicator in the status bar reminding you. The indicator will look like this.

Find

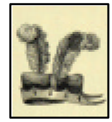


To open the Find dialog choose Find from the Edit menu. You can use this dialog to find any text including dates, projects, subsystems, categories or text within a task description. The Find dialog is shown below.



Pressing F3 will perform additional searches even after the Find dialog has been dismissed.

Import



To import time log records into the Time Log view choose Import… from the File menu. The import operation is somewhat advanced because you must ensure that the import file is formatted correctly. The import file uses the following tab separated format to identify the fields for each record. To import Microsoft Project tasks, see Microsoft Project Integration in the Projects dialog.

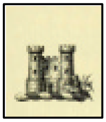
Each line within the file represents a single record and must contain all of the following information.

Data	**Description**
Start date	Text representing the starting date for the task
Tab	Tab character
End date	Text representing the ending date
Tab	Tab character
Duration	Number of seconds the task lasted
Tab	Tab character
Project	Name of a new or existing project
Tab	Tab character
Category	Name representing a new or existing category
Tab	Tab character
Billed field	True or False to indicate the task was billed
Tab	Tab character
User	Name of the person this task belongs to

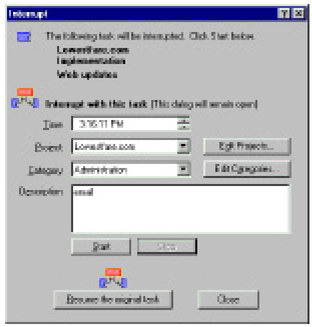
An error will be generated if the import is incorrect for any line within the file, but will continue with the import operation.

Import reads correctly formatted records within the tab-separated file and adds new tasks to the Time Log view. If tasks are imported, which belong to users other than the current user, a message will be displayed indicating which users were imported. Those tasks will be displayed in the Time Log until Standard Time is restarted.

Interrupt



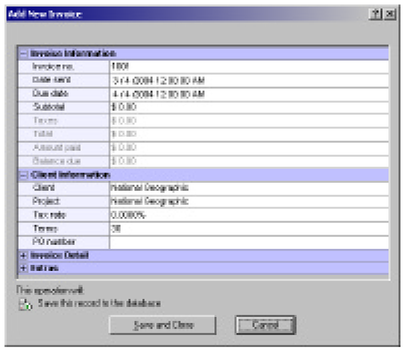
To interrupt the task you are working on to start another, choose Interrupt… from the Log menu. Interrupt allows you to temporarily suspend the task you are working on to start one or more other tasks. The Interrupt dialog is shown below.



The interrupt dialog has the following options.

Option	**Description**
Time	Start time when the interrupt task will begin.
Project	Choose a project for the new task you will start.
Category	Choose a category for the new task.
Description	Enter a description of the new task.
Start	Start the new task. This operation will stop the task that is currently running and start the new interrupt task. Simply click Resume to go back to the previous task or Close to continue this one.
Stop	Stop the new interrupt task. This operation will not automatically restart the previous task.
Resume	Restart the task that was running when this dialog was opened. The name is shown at the top.
Cancel	Do not interrupt. Continue with the same task.
Close	Continue with the interrupt task. Do not restart the original task.

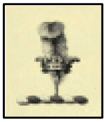
To create an invoice that includes time, mileage, and expenses, choose View, Billing. Next choose Insert, New Invoice. The New Invoice dialog will appear.



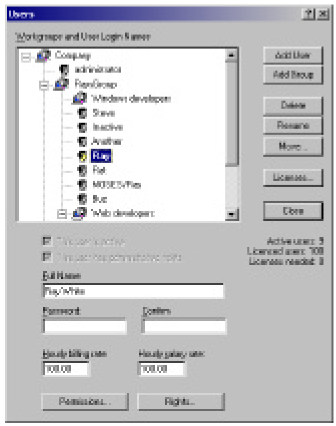
Choose the client you will be sending the invoice to, and the project you performed work on. Enter a starting and ending date for the work performed. Enter other optional information, and click Save and Close. A new invoice document will be generated and displayed.

Examine the invoice document to determine if all the information is correct. You may need to update your company client information in Standard Time, and other invoice data to ensure that the document contains all the correct information. You can edit the invoice and generate a new document with the updated information. When you receive payments from your client, right-click on the invoice and enter the payment amount.

Organization



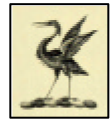
To view and organize the hierarchy of groups and users choose Users and Organization from the Tools menu. The Users dialog allows you to represent each workgroup in your company for the purpose of viewing high-level group or company reports. The Users dialog is shown below.



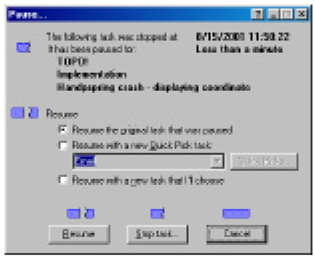
The Users dialog has the following options.

Option	**Description**
Users and groups	Displays a hierarchy of all groups and users within the organization
Active	Inactive users are not displayed
Administrative	Rights to create projects and other items
Full name	Name displayed in the program
Password	Password protection for users and groups
Permissions	Grant users the right to view group reports
Rights	Rights to use features of Standard Time

Pause



To pause tasks choose Pause… from the Log menu. This feature allows you to temporarily stop logging time to a task while you do other things. The Pause dialog is shown below.



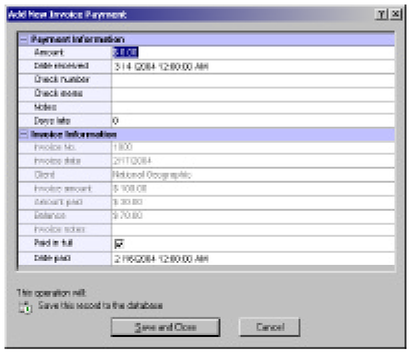
The pause feature is intended for cases where you wish to temporarily stop logging time to a task, then resume it again at a later time. This may be times like going to lunch or running an errand.

The Pause dialog will display the time you stopped and the amount of time that has elapsed. Simply click Resume to start the task again. On some occasions, when you return to the Pause dialog, you may realize that you would actually like to start another task instead of resuming the same one. In these cases, simply choose the radio button option that best describes the task you wish to start and then click Resume.

If you return to your computer and realize that you will not be resuming the task you can choose the Stop button to stop the task at the time you paused.

Payments

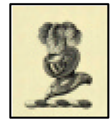
Payments may be posted against existing invoice records. To post a new payment, first choose View, Billing. Find the invoice that this payment was made for, and right-click on it. Choose Enter Payment. The Add New Invoice Payment dialog appears.



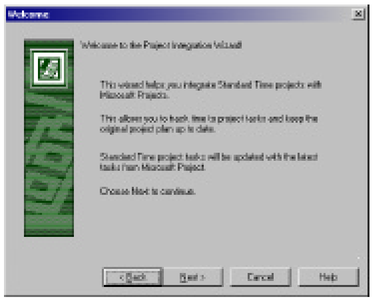
Enter the amount of the payment, and other optional data, and press Save and Close. Right-click on the invoice and choose View, Payments. This will show all payments made against the selected invoice, and the balance due.

You can also obtain a client balance for all invoices you have sent them, by opening the Reports, Invoices section, and running the Client balances report. Other reports show the status of outstanding invoices and payments.

Project Files, MPP and Project Server



Standard Time integrates with Microsoft Project 2000 and can display and track time to tasks in Project Server and MPP files. Each Standard Time project may have an associated MPP Project file or Project Server project. These are associated with Standard Time projects in the Projects dialog. See Tools, Projects.



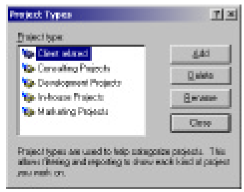
When an MPP file or Project Server project has been associated with a Standard Time project, that name will appear in the Project Tasks view. See View, Project Tasks.

Each task in the MPP file or Project Server that has been assigned to you will be displayed in this view. Right-click on the task and choose Start Timer to begin logging time. When you have completed work on the task simply choose Log, Stop. Standard Time will update the time worked, time remaining, and percent complete for each task you log time to.

To ensure that Project tasks are displayed for each member of the team, make sure that the tasks are assigned to the correct resources in Microsoft Project. Resource names used in Microsoft Project must match the ones used by Standard Time in the Tools, Users and Organization dialog.

Project Types

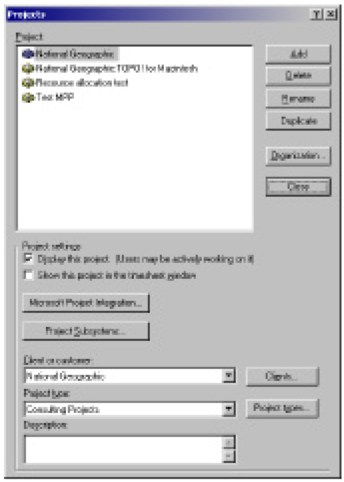
To edit the list of project types choose Project Types… from the Tools menu. Project types help classify the kinds of projects you work on. The Project Types dialog is shown below.



Creating a list of project types is simple. Simply decide upon a classification that best describes each of the different kinds of projects you work on and enter them here. When you create a new project just assign one of the project types to it. This will allow you to use Quick Info and reports to determine how much time you spend working on each kind of project. Project type names are also sent to QuickBooks and matched with the CLASS field in QuickBooks. Some examples are shown below.

Occupation	**Possible project types**
Architect	Residential, Commercial, Government
Consultant	Client related, in-house
Zoo keeper	Construction, Maintenance, Public relations
Software	Products, In-house tools, Desktop, Web

To edit the list of Projects choose Projects… from the Tools menu. All tasks in Standard Time are logged using a project or "<None>". The Projects dialog is shown below.



Microsoft Project plans may be associated with a project. This allows you to update the project plan with time worked. Standard Time updates the time worked, time remaining, and the percent complete for each task in an MPP file or Project Server project.

You may build a hierarchy of subprojects using the subsystem dialog. Project tasks may be assigned to a project and subsystem to create a complete project plan.

QuickBooks

To share timer information with QuickBooks make sure that Standard Time is set up correctly. See: "**How do I share timer information with QuickBooks?**" in this guide.

Standard Time replaces the timer utility for QuickBooks. It automatically imports ***IIF List files*** that were exported from QuickBooks, and writes out ***IIF Timer files*** that can be imported by QuickBooks.

After setting up Standard Time to perform this operation, there is little else you need to do. Each time you log a new task in Standard Time it automatically writes that task to the QuickBooks IIF Timer file.

When you need to create invoices or view QuickBooks reports you can import the IIF Timer file into QuickBooks. When the import is complete, QuickBooks will clear all the tasks in the file.

You never have to perform imports or exports of IIF files from Standard Time. All this is handled automatically for you.

If you use Standard Time for the Web you will be required to use File, Export to generate QuickBooks Timer files. Standard Time for the Web uses a simple web browser, and therefore cannot generate QuickBooks files.

Quick Info

Choose Quick Info from the View menu to display the Quick Info panels. These panels are intended to show information about time and expenses. Several of the panels allow you to choose a specific project, client, or other criteria to filter the view. The information in these panels is usually personal to you, and is not available to other users of the product.

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Quick Tasks

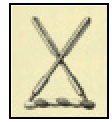
Show or hide the Quick Task window using the Quick Task menu item in the View menu. Quick Tasks are used to start and stop project tasks with a single click. The Quick Task window is shown below.

To start a task from the Quick Tasks window just click on the check box of the item you wish to start. The task will be immediately started. If another task was being logged, it will be stopped with no dialog. This allows you to make single-click task context switches.

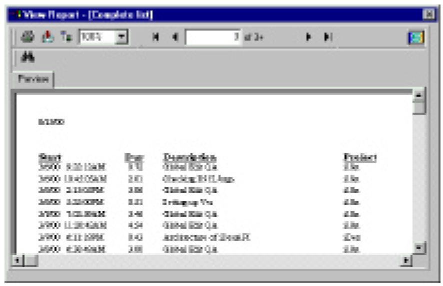
The Quick Tasks window has the following options.

Btn	**Command**	**Description**
	Start	Start a new task.
	Stop	Stop the current task.
	Stop Now	Stop the current task with no dialog.
	Pause	Pause the current task, then resume.
	Interrupt	Interrupt the current task, then resume.
	Quick Info	Show Quick Info panels.
	Main window	Open the main grid window.

Reports



The Reports menu enumerates all reports that were installed with Standard Time. These reports are also available in the navigation panel at the left side of the main window. Simply choose a report that represents the data you wish to view. The View Report window will appear as shown below.



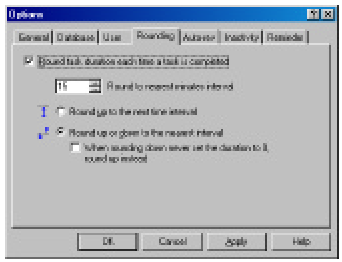
The View Report window has the following options.

Btn	Command	Description
	Print	Print the report as it is displayed.
	Export	Export the report.
	Preview	Open the preview window to allow you to see each section of the report. You may click on a section to navigate to it.
	Zoom	Change the zoom display factor.
	Pages	Change pages from 1 to the maximum.
	Find	Find text within the report.

Some reports will display a dialog that prompts you for additional information before the View Report window opens. You may also set up global reports on a file server that all users can access. See Reports, Global Reports.

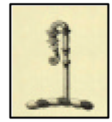
Rounding

You may round all your task durations up or down to the nearest interval of time of your choice. When task durations are rounded the start and stop times are not affected; only the duration is altered. To enable task duration rounding choose the Options menu item from the Tools menu, and then choose Rounding. The following dialog is displayed.

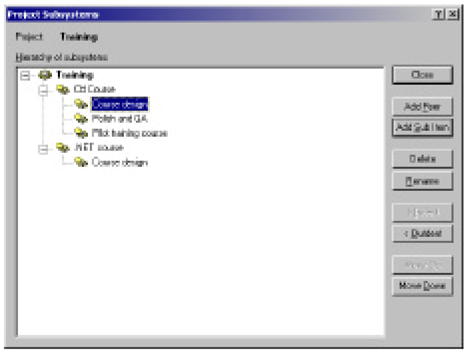


Choose the number of minutes to be used as the rounding interval. Tasks may be rounded up or down based on your settings here.

Subsystems



Each project may contain a hierarchy of subsystems that can help to further categorize the work that you do. To add subsystems to a project, choose the Project dialog from the Tools menu, click a project, and click the Subsystems button. The Subsystem dialog will be displayed.

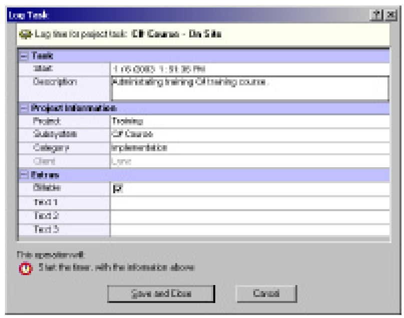


The Subsystems dialog allows you to build a complete hierarchy of your project breakdown. You can create peer and sub items, promote and demote subsystems to build the hierarchy.

When you are creating project tasks, you can refer to a subsystem to help categorize the work performed and build a complete project hierarchy.

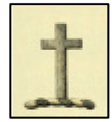
Start

The Start command in the Log menu opens the Start Logging dialog to allow you to fully describe the task you are about to perform. It is recommended that you start tasks based on project tasks, and describe the work to be performed completely here. The Start Logging dialog is shown below.

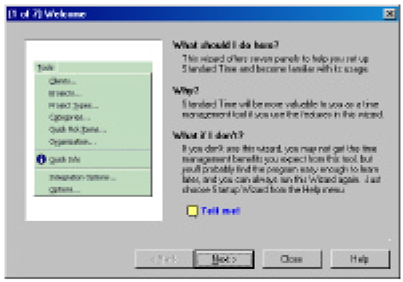


The information you enter here will be shown in the Time Log view, Quick Info, and in reports.

Startup Wizard



The Startup Wizard opens when you run Standard Time for the first time. You may also open the Startup Wizard from the Help menu. This series of Wizard panels prompts you to set up the most essential elements of Standard Time. The Welcome panel is shown below.

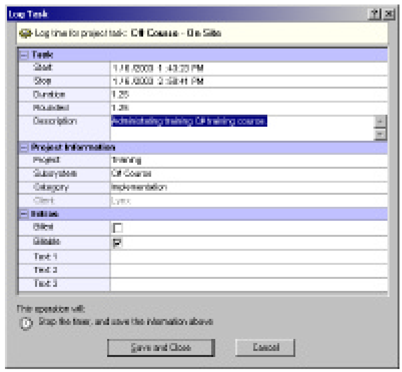


Panels displayed in the Startup Wizard are described below.

Panel	**Description**
Welcome	Describes the panels to follow.
Projects	Complete list of all your projects.
Categories	Kinds of tasks you perform.
Quick Info	Time log summary information.

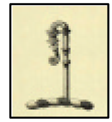
Stop

The Stop command in the Log menu opens the Stop Logging dialog and allows you to make last minute changes just before logging the task. The Stop dialog is shown below.



The Stop Logging dialog has the same properties as the Start dialog, except that you must enter a stop time or duration. The Rounded duration is shown for your convenience.

Stop Now



The Stop Now command stops logging the current task immediately without opening the Stop dialog. The task is logged as usual, but you are not given the last minute opportunity to enter a description for the task. If you wish to change the task project, category or description you should open the Time Log view and make the changes there.

In cases where you wish to make changes to the task before stopping it you should choose the Stop command. This command opens the Stop dialog, which allows you to make last minute changes before logging the task.

Switch

Choose Switch from the Log menu to change from the current task to another. Switch opens the Stop dialog to allow you to fully describe the task you are currently working on, and then opens the Start dialog to fully describe the new task.

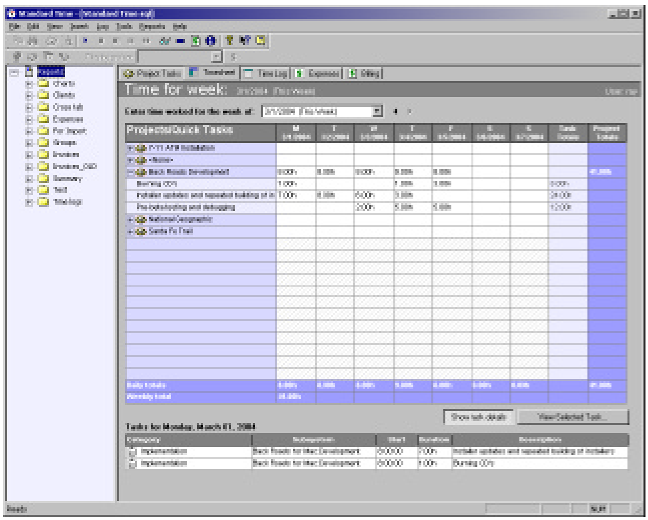
While this technique is effective in gathering all the information you may consider using Quick Tasks instead. Quick Tasks are displayed in the Timesheet, system tray icon menu, and in the Quick Task window. Quick Tasks change tasks without the use of dialog boxes. This allows you to make context switches with a single click, but does not give you the opportunity to enter a description for the task. Default descriptions are used instead.

Using Quick Tasks has another advantage. Since Quick Tasks represent project tasks you can see time worked “roll up” to the subsystem and project level.

See: Start and Stop.

Timesheet

To open the timesheet view, choose Timesheet from the View menu or click on the tab containing Timesheet in the main view. The timesheet shows all time worked for each project, for each day of the week. You can quickly enter time worked by clicking on a cell that represents the project or task you performed work on, the day the work was performed, and then entering the number of hours for that day. The timesheet view is shown below.



Task details for the selected cell may display multiple tasks. The durations of these tasks will add up to the number shown in the upper grid. Modifying the time worked for any day may add or remove tasks from the details section.

Toolbars

Standard Time offers the following toolbar commands. Toolbars may be removed from the main window or docked on all four sides of the window.

Standard Toolbar

Btn	Command	Description
	Copy	Copy the selected text or selected rows.
	Find	Find text within the selected column.
	Print	Print the main grid window.
	Preview	See a preview before printing.
	Start	Start logging a task.
	Stop	Stop logging the current task.
	Stop now	Stop logging without a dialog.
	Pause	Pause the current task.
	Interrupt	Interrupt the current task.
	View Task	View all properties of the selected task.
	Task	Enter a task you have already completed
	Quick Info	Display the Quick Info panels.
	About	Display the About box.
	What's This	Display help for the item you click.
	Help	Open the help window.

Filter Toolbar

Btn	Command	Description
	Show All	Show all the tasks – no filtering.
	Project	Show only tasks with this project.
	Date range	Choose a range to dates to display.
	Type	Show only tasks of this project type.
	Dropdown	Choose the project or project type.
	Billed	Show only tasks that are not billed.

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