Times Desktop
For Windows PC

User Manual

Version 1.5
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August 2009

Contents

OVERVIEW

The Times Desktop application is designed to support and extend the functionality of Times for the Pocket PC. Please refer to the Times User Manual for details on the PDA application. It can also be used as a standalone solution for recording and reporting time and expenses in single or multi user environments. If you do not intend to use the PDA application we still recommend you review the Times User Manual for further explanation of shared functionality.

The Times Desktop is aimed at individuals and groups who need to record and report their time and expense activities. The application provides an accurate and efficient method of time keeping which can be used for invoicing, reporting and exporting to other systems. Support for multi-user data entry, consolidated reporting, remote deployment and flexible security roles makes this software ideal for individuals or companies who run multiple projects for a range of clients and charge by the hour.

This user manual covers the operation of the Times Desktop application. Please refer to the Times User Manual for details on the PDA application.

Features

Times has many features which distinguish it from other timesheet solutions available. In addition to the features mentioned in the PDA manual the Times Desktop features include:

- Multiple deployment options – Install all components on a single PC, or use a network SQL database to consolidate data entry
- Security Roles – Access to the application is protected by a user name and password. Each logon can be granted security roles to control available functionality and data access
- Separate project management and finance roles – Secure access to project configuration and charge out rates
- Intelligent project management – Use the linked lists to organise your projects into Clients, Jobs, Task and Activities
- Multiple data entry interfaces – Enter data in grid, card or outlook style calendar interfaces
- Adaptive charge out rates – Use the rule base rate calculation engine to specify up to 11 different rate scenarios. No other product offers such flexibility in rate determination at the Client, Job, Task and Activity level or any combination thereof.
- Flexible Reporting – Analyse and export your data using the predefined and advanced reporting wizards
- Extensible – Save and share advanced reports between users. Create your own standard formatted reports (requires external designer or Visual Studio)
- Invoicing – Create and manage invoices from time and expense entries.
- Payments – Record and manage invoice payments
- PDA Synchronisation – Support full two way synchronisation with Times for Pocket PC Professional via network
- N-Tier deployment – Use separate database, application servers and client to centralise and manage multiple users and performance.

Times has been designed with consultation from a wide range of industries including Advertising, Software contractors, Lawyers, Doctors and Builders. It has proven to be capable and flexible enough to meet the time reporting requirements in each industry.

QUICK START

If you are familiar with PC applications and just want to get started then follow the steps below.

1) **Install the application**
   a) **Open a web browser and navigate to http://www.comit.com.au/ppc/times**
   b) **Click Install**
   c) **Follow the prompts, you must accept the EULA's**
   d) **The application and any additional required components will be downloaded an installed**
2) **Start the application using the Start/All Programs/Times Desktop menu link**
3) **The first time the application is run it will prompt to create the database, follow the on screen messages and click Yes to create the database with the existing settings**
4) **When the Logon screen appears logon with**
   User Name: Times
   Password: Times
5) **When the main form appears click Tools and System Settings**
6) **Click the Times Users tab**
7) **Enter a new Times User and User ID which will identify your data.**
8) **Click Update, your new user should appear in the list above.**
9) **Click the Logons tab**
10) **Click on the Times logon in the list**
11) **Select your new Times User in the drop down list at the bottom of the form**
12) **Click Update, the Times logon will be updated in the list with the selected Times User ID**
13) **Click the Parameters Tab**
14) **Click on each parameter in turn and update the Value field as necessary, do not change the parameter name. Click Update to save after each change. DO NOT CHANGE THE VERSION PARAMETER.**
15) **Click Close to return to the main form**
16) **Select your Times User ID from the User list**
17) **Enter Lookup data. Click Maintenance**
   a) **Edit the Clients (if required)**
   b) **Edit the Jobs (if required)**
   c) **Edit the Tasks (if required)**
   d) **Edit the Activities (if required)**
   e) **Click Save, click No to update existing records**
18) **Click Data Entry**
19) **Click New to create a new Times Entry and select the defined Client, Job etc. and enter the remaining details.**
20) **Repeat for all entries and click Save**

It is recommended you read the complete manual for specific details and tips on use. Refer to the FAQ section for additional support with any errors received.

ARCHITECTURE

The Times PDA and PC application has four components as shown below.

1. PC Client Application
2. Network connection to SQL database if distributed install
3. Application server for N-Tier deployment if required
4. Desktop/Server MS SQL Database

| 1. Client Application | 2. Network to database server | 3. SQL server and/or Application server |

The client application requires a connection to a SQL 2005 server. In a Single PC install (default) this is a local SQL Express server which is installed automatically. Alternatively in a group or distributed install the client application can connect to either a network based SQL 2005 database or an application server. The application server would be configured with the remoting components which would communicate with the database.

TIP *Two connections are required for each client application. One is for security information and the other for application data. As these are separate connections they can be configured to use either same database, separate databases or even separate servers. The security database is based on the ASPNET membership model. If you already have a security database based on this model then you can utilise this, otherwise a new database will be created by default.*

If also using the PDA application the PDA would communicate directly with the SQL Database via a network or Active Sync connection. Time sheet entries can be made on either the PDA, PC or both. When the PDA is synchronised the new and changed entries will be transferred between each system.

Times is designed to be multi user, i.e. the same database can be used for multiple Times Desktop clients and be used to synchronise to multiple PDA devices. This allows a number of users to enter time sheet data on their PC's or remotely on their PDA's and synchronise to a central database. Consolidated invoicing and reporting may then be performed from the centralised database from any Client application.

SYSTEM REQUIREMENTS

PC

- Windows XP, 2000 SP4, 2003, Vista or Vista 64bit
- Min 256 MB Ram, 512MB or more recommended
- 250MB hard disk free
- MS .Net Framework 2, supplied with install if not already available.
- SQL 2005 SP2, supplied with install if not already available.
- SQL Report Viewer, supplied with install if not already available.

PDA

- Pocket PC running 2003 (ARM Only), 2003SE or Windows Mobile 5
- 10Mb Storage memory free
- 15Mb Program memory
- Refer to the PDA manual for full details on the PDA requirements.

INSTALLATION

PDA Install

Please refer to the Times User Manual for installation instructions for the PDA application.

Upgrading

If upgrading from a prior version please follow the recommended steps below:

1. If using Times on your PDA then perform a sync to ensure all data on your PC is current.
2. Uninstall Times Desktop from your PC
3. Follow the install instructions below.
4. Launch the Times Desktop application to complete the installation.
5. When starting the application your existing database will be updated. If you have used custom connection details (i.e. database name or credentials) you must re-enter these when starting the application.
6. Upgrade the PDA application to the same version before trying to perform another sync.

Migrating to a new PC

The simplest way to migrate to a new PC is to use the Export and Import database functions from within the application. These are available in version 1.4 and above. If migrating from a version prior to this we recommend first updating to V1.4 and then following the procedure below.

Steps to migrate to a new PC:
1. On the existing PC launch the Times Desktop application and use the Tools / Export Database function to create a new export file
2. Install Times Desktop on the new PC by following the steps below
3. Copy the export file create above to the new PC
4. Launch the Times Desktop application on the new PC. Allow the database to be created as normal.
5. Use the Tools/Import Database function to import all your data into the new database
6. Close and restart the application

PC and Database Install to a Single PC

The installation of the PC and Database applications has been automated as much as possible. Please follow the steps below to install all components on a single PC.

1. Before continuing please make sure you are logged on to your PC with Administrative privileges, otherwise the installation will fail
2. It is recommended that you create a system restore point. You can later use this to undo any system changes made by this installation should any critical errors occur. See FAQ Creating a Restore Point for details
3. If installing on Vista it is recommended you turn off User Account Control (UAC) during the installation. See FAQ How to Turn User Account Control Off or On in Vista for details
4. If you are using local firewall software this may prevent the database and application from starting correctly. Please review any messages which appear and permit full network access to the SQL server and Times Desktop and SQL Browser applications
5. Open a web browser and navigate to http://www.comit.com.au/ppc/times

6. Click the Install button, this will download the setup application
7. Click Run when prompted
8. Follow the onscreen prompts to download and install any required components. You must accept any EULA's displayed. Note depending on your existing PC setup and prior installs this step may download between up to 80Mb.
9. Click Install when prompted to install the Times Desktop application. This will download the application to your PC, approximately 20Mb
10. Once the application is installed use the start menu link to launch the application. Refer to the Configuring Times Desktop section for configuration details.

PC only install (remote database)

Individual and advanced component installs are not included in this manual. For advanced deployments please contact support.

Completing the Installation

When the application is started it attempts to connect to the Times and Security databases configured in the connection settings. These databases are not automatically created during the install as you may wish to customise the location and security settings to be used.

Before the databases can be created the application needs to connect to the server. If it cannot connect the message below will be displayed

Invalid Connection   ✕

The database server specified for the TimesDB connection can not be found. Please set the connection settings.

OK
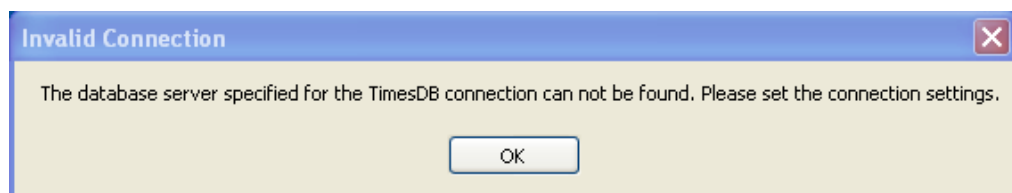
This message should NOT be displayed if the local SQL server has been installed correctly. If this does appear then you need to check your connection settings and make sure SQL server is running. See FAQ How to check if SQL is Running. Click OK and then update the connection settings. For details on configuring the settings see the Connection Settings section.

After a connection has been made to the SQL server the application checks to see if the required databases can be accessed. If not the message below will be displayed.

Database Connection Error   ✕

⚠ Server found but can not connect to TimesDB database. Do you wish to create the database using the current settings?

Click No to update the settings.

Yes   No   Cancel
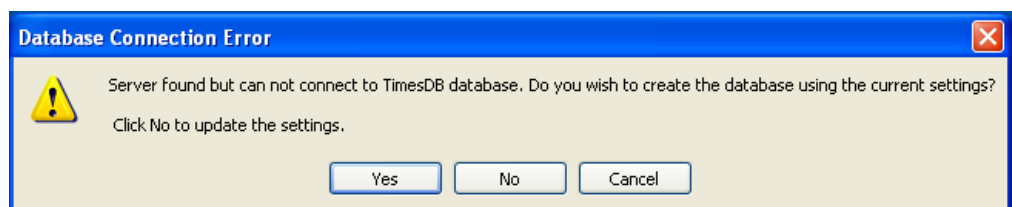
This message SHOULD be displayed the first time you start the application. If you want to customise the connection settings or database names click No, otherwise click Yes to create the databases with the default settings. Clicking Cancel will exit the application.

Connection Settings Connections settings specific the databases to use for the Times and Security information. During setup this form will be displayed if the SQL Server cannot be found or you click No before creating the databases. To open the connection settings from within the application use the Tools/Connections Settings menu.

The two tabs display the current connection information. The fields are described below:
- Server – The name of the computer running SQL Server. If using a local database set this to **(local)**
- Instance – The SQL Instance to use on the Server. If the server has multiple installs of SQL then specify which one to use for this connection. By default the local installation of SQL setups an instance called SQLExpress. To use the server default instance leave blank
- Database – The name of the database to use or create on the SQL server
- Authentication – The type of security to use when connecting to the SQL server. NT Authentication will use your windows logon details. To use DB Authentication (SQL Signon) you must first create the Logon on the SQL server. Refer to the FAQ section or your Systems Administrator in group installs.
- User Name – The SQL Sigon user name to use with DB Authentication. Not used with NT Authentication
- Password – The SQL Sigon password to use with DB Authentication. Not used with NT Authentication

If you tick Single DB or set the Data Connection and Security Connection details the same then only a single database will be created (by default both connections use a database called Times). It is recommended you use the default settings and only create one new database called Times.

Advanced Connection Setup
The Data Connection is used to store all application related information. The Security Connection is used to manage application logons and roles. The schema used for the Security database is a standard ASPNETDB utilising Memberships, Roles and Profiles. If you already have a central security database based on this schema then you can set the Security connection to point to this. The Application Name used by default is **Times**, this will be added to your Security database when the application starts. To

change the application name update the TimesDesktop.exe.config file and set the applicationName properties as required.

DATABASE UPDATE After saving the connection settings or accepting the defaults, the application will try to connect to the databases. If the databases do not existing they will be created and the form below will be displayed

After the databases have been created a message similar to below will be displayed
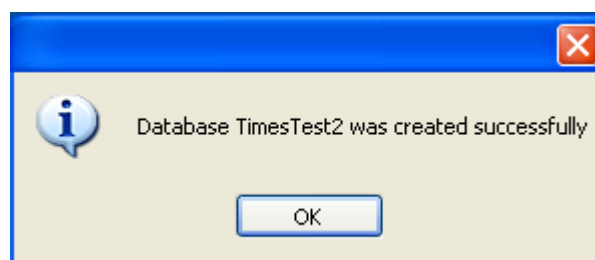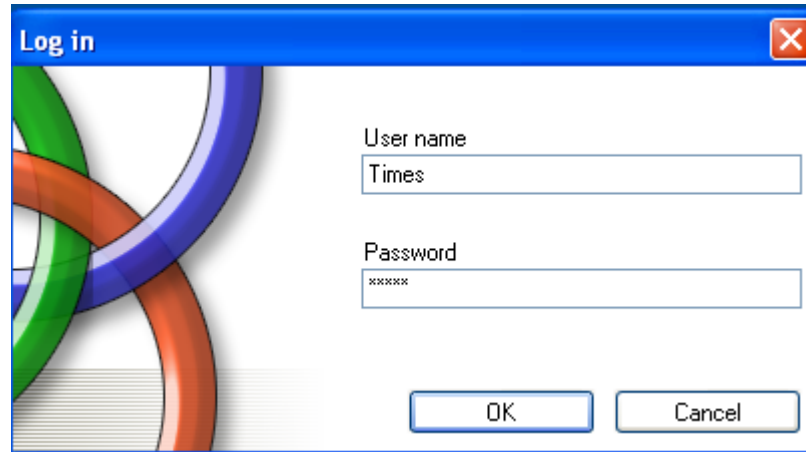
If you receive any other message or error please refer to the FAQ section. If you cannot resolve the issue then please contact support.

After the databases have been configured the application will start and display the Logon form. On subsequent restarts the previous messages should not be displayed unless there is a problem with the database connections. If so please check the connection settings, SQL server status and any firewalls which may be blocking the connection.

CONFIGURING TIMES DESKTOP

Once the application is installed a new program menu item will be available. Use the **Start/All Programs//Times Desktop** link to start the Times Desktop application. The Logon form below will be displayed

Logon Form

The default User name and Password is **Times** and **Times**. We recommend you change this after install.

Once logged on to the application the main form will be displayed. Before entering any data you must setup a Times User in the system settings to correctly identify your data. Click the Tools menu and select System Settings, the form below will be displayed.

Logons

The Logons screen manages the credentials for accessing the application. Each Logon user must have a user name, password and be assigned to one or more roles. If the Logon will be entering or viewing data they must also have a Times User specified. (See Times Users section)
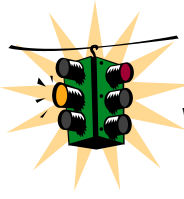
WARNING

DO NOT CHANGE the Times User associated with a logon after data has been entered against it. Otherwise existing data will not show and new data will not synchronise to the PDA
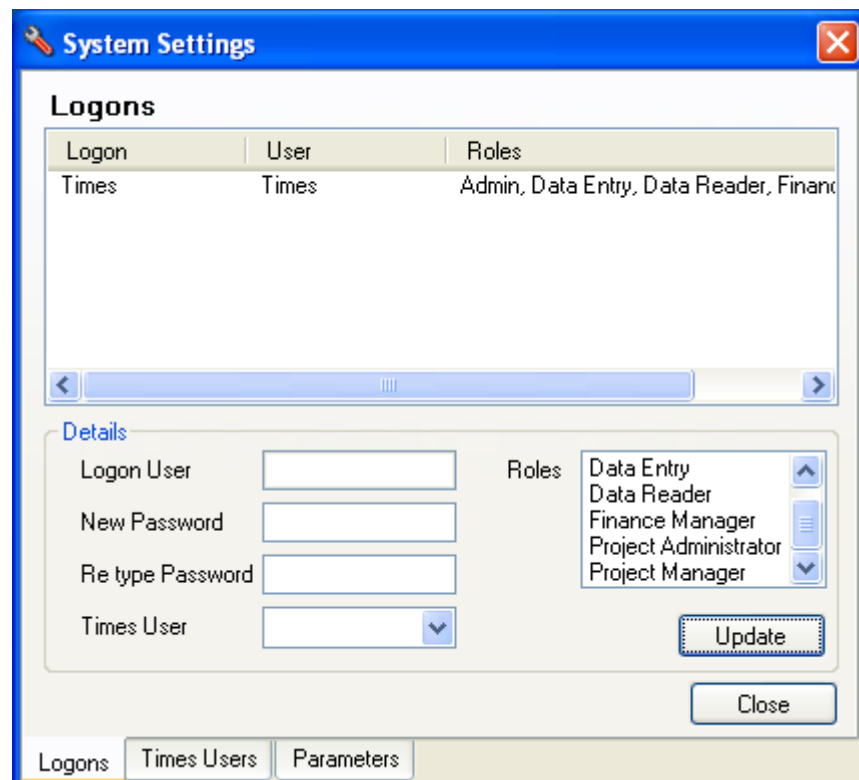
Logons vs Users *Logons manage access to the application. Users identify the owner of the data entered. Typically there will be a one to one relationship between the Logon and User, however it is possible to have multiple Logons attached to the same User, ie. Joe Blogs Logon has Data Entry permissions and enters time and expenses against the Times User Joe. Joe's manager Fred has a Logon Fred Basset which has Data Reader permissions and a Times User of Joe. Thus Fred can view all of Joe's data but cannot change any information.*

By default there is only one Logon defined called Times. This logon is part of the Admin role and can view all data and perform all administrative functions. There must always be at least one Admin Logon defined, otherwise you can no longer change the System Settings.

Application Roles
Roles determine the access level the logon has within the application. The following roles are defined:

1. Admin – Full access to all data and can update the system and connection settings.
2. Data Entry – Can enter or update time and expense entries for the specified Times User only
3. Data Reader – Read only access to the time and expense entries for the specified Times User
4. Finance Manager – Manages charge out rates, invoices and payments.
5. Project Administrator – Can view and update clients, jobs, tasks and activities for all Times Users
6. Project Manager – Can view and update clients, jobs, tasks and activities for the specified Times Users only

If you are the only user or you are not concerned with security, simply assign each logon to the Admin role. Otherwise assign the roles required for each logon based on their function.

E.g. in a company with many users, each person entering time and expense data would be granted Data Entry and Data Reader access. The person responsible for adding Clients, Jobs etc. would be given Project Administrator access and possibly Finance Manager if they also control the rates. One person would be granted Admin access for maintaining logons and settings.

Note: Each logon requires a licence which must be entered on the Registration form after logging on.

Managing Logons

To create a new Logon follow these steps:

1. Right click in the Logons list and select Add Logon.
2. Enter the new Logon User name (must be unique in the list)
3. Enter the Password
4. Re-enter the Password
5. Select the required roles
6. Select or type in the Times User (must be the same as used on the PDA for this logon)
7. Click update to save the changes

To update an existing Logon select the Logon from the list and change the required settings. Click Update to save the changes.

To delete a Logon from the system right click on the Logon and select Delete Logon.

Times Users

The Times User identifies the owner of the time and expense data and also controls which records are synchronised with a PDA. If also using the PDA application the Times User specified for a Logon MUST be the same as the User ID specified on the PDA used by that Logon. E.g. Joe Blogs enters information on both his PC and PDA. Joe's User ID on his PDA is Joe, therefore the Times User specified against his Logon MUST be Joe.
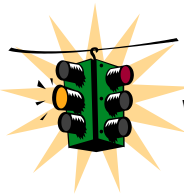
WARNING *The User ID specified on the PDA's MUST be unique. This is due to the two way synchronisation logic which can only support one PDA per Times User ID.*

Use the Times Users tab to add a user to identify your data. If you have already setup the PDA application then use your PDA Times User ID for your Times User.

Times Users are automatically added to the list based on existing data. Ie. When synchronisation occurs for a new Times User ID the user will be added to the list. Thus you cannot delete a user which has data against it.

Managing Times Users
To create a new Times User follow these steps:

1. Right click in the Times User ID's list and select Add User.
2. Enter the new Times User ID
3. Enter the first and last name (optional)
4. Enter a default Rate (optional and only used if no other rate derived from clients, jobs, tasks etc.)
5. Click update to save the changes

To update an existing Times User select the User from the list and change the required details. Click Update to save the changes.

To delete a Times User from the system right click on the User and select Delete User. Note: If the Times User has time entry data against it then it will not be deleted.

Parameters

System Parameters control global setting within the application. E.g. your company name, address, tax rate etc. Use the Parameters tab to display all the System Parameters and customise the values with your settings.
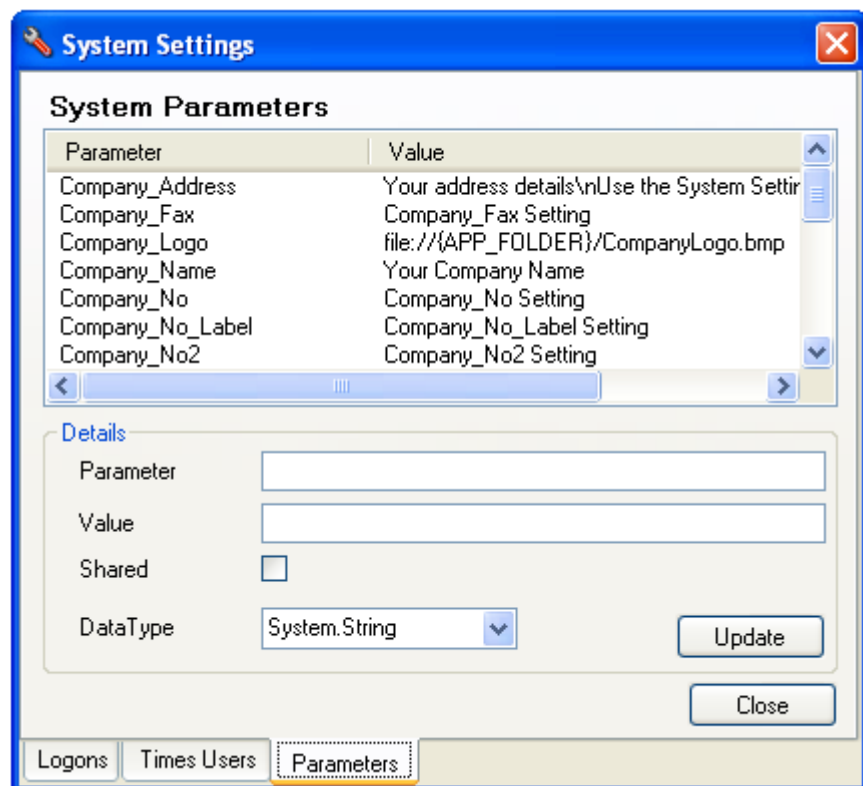
Each parameter has a value, shared flag (specifies that parameter will be copied to the PDA) and a data type (used to validate the value entered). Parameters are primarily used within reports and to control features of the application. The following table describes the default parameters.

Parameter Name	Parameter Value	Shared	Data Type	Description
Company_Address	Your address details\nUse the System Setting\nto change this\nNOTE Use backslash n to create new lines	TRUE	System.String	Address to appear on reports. To insert a new line use \n
Company_Fax	Company_Fax Setting	FALSE	System.String	Fax No which appears on reports
Company_Logo	file://{APP_FOLDER}/ CompanyLogo.bmp	FALSE	System.String	Absolute path to an image to use as the company logo. {APP_FOLDER} is automatically replaced with the application install path.
Company_Name	Your Company Name	TRUE	System.String	Company name to appear on reports
Company_No	Company_No Setting	FALSE	System.String	Text to use against the Company No Label on reports
Company_No_Label	Company_No_Label Setting	FALSE	System.String	Label to appear against the Company_No on reports
Company_No2	Company_No2 Setting	FALSE	System.String	Text to use against the Company No 2 Label on reports
Company_No2_Label	A.B.N	FALSE	System.String	Label to appear against the Company_No2 on reports
Company_Telephone	Company_Telephone	FALSE	System.String	Telephone No which appears on reports
Invoice_Footer	Change Invoice_Footer in the System parameters	FALSE	System.String	Text to appear on the bottom of the invoice report
Invoice_Header	Change Invoice_Header in the System Parameters	FALSE	System.String	Text to appear on invoice header before expense items
Invoice_Title	Invoice_Title Setting	FALSE	System.String	Title to appear on top right of invoice report
ISO_Weeks	0	True	System.Boolean	Specifies ISO Standard weeks should be used for week numbers
Lock_Dropdowns	0	TRUE	System.Boolean	Specifies whether the selection of valid Client, Job from the list is mandatory. 0 = free text entry, 1 = list selection only
Lock_Invoiced_Records	0	TRUE	System.Boolean	Specifies whether invoiced entries can be edited. 0 = unlocked, 1 = locked, no changes allowed
Lock_PDA_Invoices	1	TRUE	System.Boolean	Control access to invoice forms on the PDA. 0 = unlocked, 1 = locked
Lock_PDA_Lookups	1	TRUE	System.Boolean	Control access to the lookup maintenance on the PDA. 0 = unlocked, 1 = locked
Lock_PDA_SystemSettings	1	TRUE	System.Boolean	Control access to the System Settings on the PDA. 0 = unlocked, 1 = locked
Lock_Period	1900-01-01	TRUE	System.DateTime	Stops edits to entries on or before the date specified. Use to restrict new entries or edits to invoiced periods
Payment_Method	Cash,Account,American Express,Diners,Mastercard,Visa,Other	TRUE	System.String	Values to appear in the Methods list when entering an expense. Command separated list in order of appearance
Payment_Terms	28	FALSE	System.Int32	No days for payment on invoice report
Sync_Invoices	1	FALSE	System.Boolean	Send Invoice data to PDA's
Tax_Rate	10	TRUE	System.Decimal	Sales Tax % to add to Net Charge
Version	1.5.0.0	FALSE	System.String	**DO NOT CHANGE THIS**
Week_Start_Day	0	FALSE	System.Int32	Day week starts on. 0 = Sunday, 1 = Monday … 6 = Saturday

Managing System Parameters
DO NOT change the parameter name or data type for any of the existing parameters.
To update a parameter select the parameter from the list and change the Value field.
Click Update after each change to save the changes.

To change the logo which appears on a number of reports replace the CompanyLogo.bmp file in the install directory with your own image. Alternatively update the Company_Logo parameter to point to an existing file on your PC.

To create a new parameter (i.e. for use in a new formatted report) follow these steps:

1. Right click in the Parameters list and select Add Parameter.
2. Enter the name or the new parameter (must be unique)
3. End the value of the parameter
4. Leave the shared box unchecked
5. Select the data type
   a. Use System.String for all text values
   b. Use System.Int32 for all whole numbers
   c. Use System.Decimal for all fractional numbers
   d. Use System.Boolean for logic values 1 or 0
6. Click Update to save the new parameter

The address parameter supports multi line entries when displayed on a report. To create a new line within the parameter Value type **\n** where you wish the new line to appear.

To delete a parameter from the system right click on the parameter and select Delete Parameter.
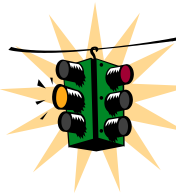
WARNING *DO NO CHANGE THE PARAMETER NAME, DATA TYPE OR DELETE ANY DEFAULT PARAMETERS LISTED ABOVE. Doing so will cause system instalbility. Only delete parameters which you have added and know are no longer required.*

Once you have finished adding your required Times User, updating the Logons and Parameters, click Close to return to the main form.

Remote User

A Remote User is used by the Times PDA application to access the PC database during the synchronisation process. In technical terms a Remote User is a SQL Signon to the SQL Server with access to the Times database and db_TimesRemoteUser role.

When installing the Times Desktop application a remote user called TimesUser is created which corresponds to the default Server user on the PDA. If you need to create a new user for a PDA then use Tools/Remote User menu function and enter the name and password required.

Note: Multiple PDA's can use the same Remote User and there is no need to create separate accounts.

The main use of the Remote User function is to change the password of an existing user. To do this simply enter the name and new password required and click Save. Remember to update the PDA Server settings accordingly.

Backup and Restore

The Times Desktop application provides functions to backup and export all data from the Times database. Backups are the preferred means of creating restore points for your data and should be used periodically. This function creates a standard SQL Database backup to the default location, typically *C:\Program Files\Microsoft SQL*

Server\MSSQL.1\MSSQL\Backup. Copy the backup file from this location if you wish to store on a separate system.

To restore from a backup you must be a member of the Admins role and have previously created a backup using the Tools/Backup Database menu function. Restore a backup using the Tools/Restore Database menu function.

Note: Before restoring, all other users must exit the application.

Import and Export

The Import and Export functions are used primarily for moving data from one system to another, i.e. when setting up a new PC. The main difference between an Export and a Backup is that the export only contains data from database and not the structure, users or procedures. This means it can be used to move data between different versions of the application or for extracting data into other systems.

To use the Import and Export functions you must be a member of the Admins roles and have full access to the SQL Server database. An export file can be created using the Tools\Export Database menu function. This will export all data to an xml file in the location specified.

To Import data locate the export file and use the Tools/Import Database menu function. Note all data in the current database will be deleted and replaced with the import data. After performing an import you must perform a Download Override Sync on all PDA's.
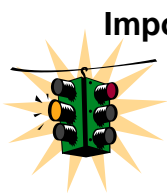
Import Warning

As the import process deletes all current data it is recommended you first perform a Backup incase you need to Restore the database.

MAINTAINING PROJECTS

The term Project is used to identify a Client, Job(s) and Task(s) against which time entries are recorded. Projects are specific to each Times User and grouped into the three hierarchical levels called Clients, Jobs and Tasks which are presented as drop down lists when creating time entries. The use of projects is optional by default (defined by the Lock_Dropdowns system parameter) but does provide a convenient way to segment and group your data for reports and invoicing.

A Client would typically be defined as the company or entity who will be billed for the activities performed. A Job defines a block of work for the related Client which you will use to report your activities against. A Task is used to break up a Job into specific smaller blocks of work. Typically Tasks would comprise the milestone objectives within a Job and be used for project reporting.

Activities are used in addition to Clients, Jobs and Tasks to group or categorise the work being performed. Activities are not tied into any project and can be used across any Client, Job or Task. E.g. Activities could be Design, Documentation, Testing etc.

This section will walk through the creation of the projects and explain the setup options. To maintain projects you must be in either the Admin, Project Manager or Project Administrator roles. To view or edit the Rate details you must also be in the Finance Administrator role. To access the project maintenance module click the Maintenance section on the navigation panel. The All Projects form will be displayed by default.

Update Warning
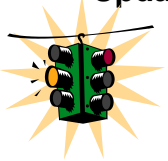
When saving your changes you will be prompted to update referenced entries. If you have updated any key fields such as Client, Job, Activity etc. and you wish to update the time, expense, invoice and payment records accordingly, then select Yes. Note if the updated record is shared, updates will also be applied to other Time Users. If you do not wish to update the reference records click No. You can recreate the links later by re-adding a record with the same key field information. I.e. Create a new Client with the original details.

Considerations

Before entering your project data we recommend you first write down and organise your information on paper. Follow these steps to create the appropriate lists:

1. List all the Users who will be logging on to the Times Desktop system
2. Determine the roles required for each user
3. List all the companies you deal with - these will be your Clients
4. For each company, list the specific Jobs you need to record time against
5. List all the Activities you perform e.g. Design, Meetings, Testing etc.
6. For each Job determine if there are any specific milestones or sub jobs and list these as Tasks. Do not confuse Tasks with Activities. A Task is specific to the Job, where as an Activity categorises the work performed regardless of Job.
7. Write down a few sample time entries specifying (if required) the Client, Job, Task and Activity. Write the hours and applied rate you would use
8. Repeat 7. for different Client, Job, Task and Activity scenarios
9. Determine which Clients, Jobs, Tasks and Activities should be shared between users, i.e. do you need the same lookups for all users?
10. Review your sample entries to determine how to configure your rates. I.e. how do you charge for the hours worked? Do you use flat rates per user,

different rates for each Client, different rates for each Job, specific rates per Client and Activity etc?

11. Refer to the Rate Calculation section for the rate determination levels. Start at the lowest level (default flat rate per Times User) and work up the list until you find the level which provides enough segmentation to assign your general rates. I.e. you may normally charge by Client, so list a rate for each Client.
12. Determine if there are any exceptions to your general rates and the appropriate level to which to assign these. I.e. for client A you may charge different rates based on the type of work being performed. Therefore list the Client, Activity and specific rate to use, these will be entered as Client Rates
13. Repeat 12. for all your different rate scenarios working up the list
14. You should now be ready to enter your lookups

Shared Projects are specific to each Times User, i.e. each user has their own specific list of Clients, Jobs, Tasks and Activities. Sharing provides a means for multiple users to share a common list of Clients, Jobs etc. All components of a Project can be shared independently between all or selected users.

A **Shared** flag is displayed on the Client, Job, Task and Activity maintenance forms. When a record is shared it is made available to all users by default. If you need to restrict which users can view shared records then click **Manage Users**. Select the required uses from the list displayed and click **Save**.
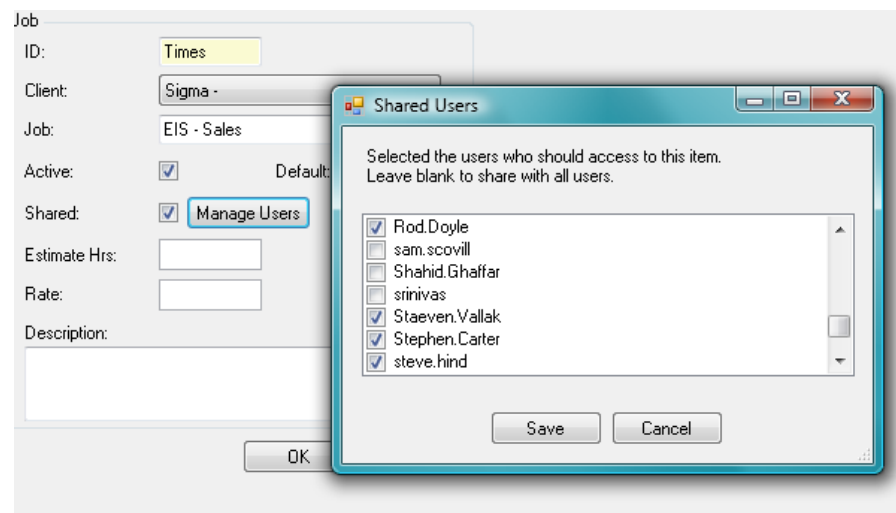
E.g. To create a single master list of all clients, create all the client records under the same Times User and ensure you select **Shared** for each. If you wish to share a client between selected users, select **Shared** and then specify the users by clicking **Manage Users**.

It is possible to override a shared project record with a Times User specific record. E.g. Client A is shared and has a rate to be used for all users. Times User Joe also has a Client A with a specific rate. The system will always use specific owned project records over shared of the same name.

Note, if a project record is shared and no users are selected, it will be available to all users.

All Projects

The All Projects form displays a tree view of all Clients, Jobs and Tasks defined.
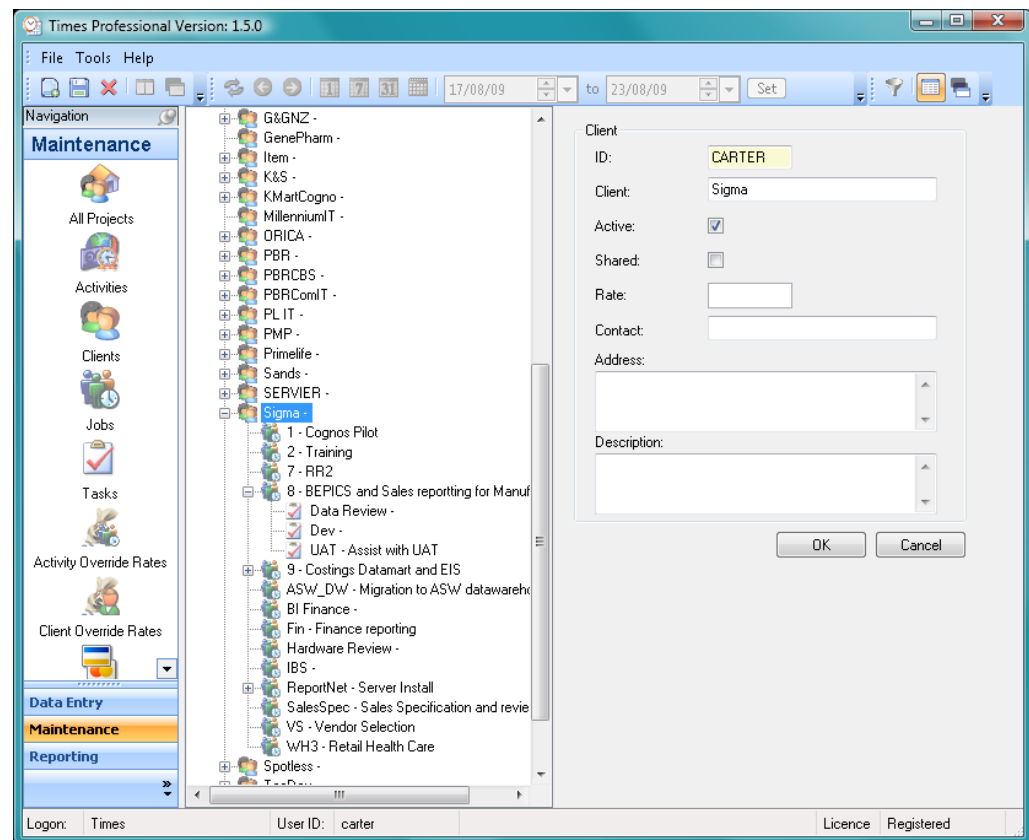
The levels in the tree are:
- Times User – The owner of the project information. Use the User filter in the tool bar to select a specific Users' projects
  - Clients – The Clients owned by the parent Times User
    - Jobs – The Jobs for the parent Client
      - Tasks – The Tasks defined for the parent Job

If there are any special activity rates defined these will appear as additional nodes in the tree under their related Client or Job.

There is a right click context menu on the tree view to perform specific tasks such as adding new Clients, Jobs etc. The available items in the menu are dependent on the type of node selected. E.g. No selected node – Only Add Client enabled. Client node selected - Add Job, Add Client Rate and Copy Client enabled etc.
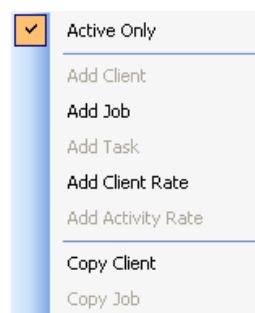
You can also use the New and Delete toolbar buttons to add or remove project items.

By default only Active project details are displayed. To view all projects uncheck the Active Only menu item as shown above.

To display the details of an existing client, job or task click on the required node in the tree and the panel on the right will display the corresponding information. As shown below the job details are being displayed for the selected job node.
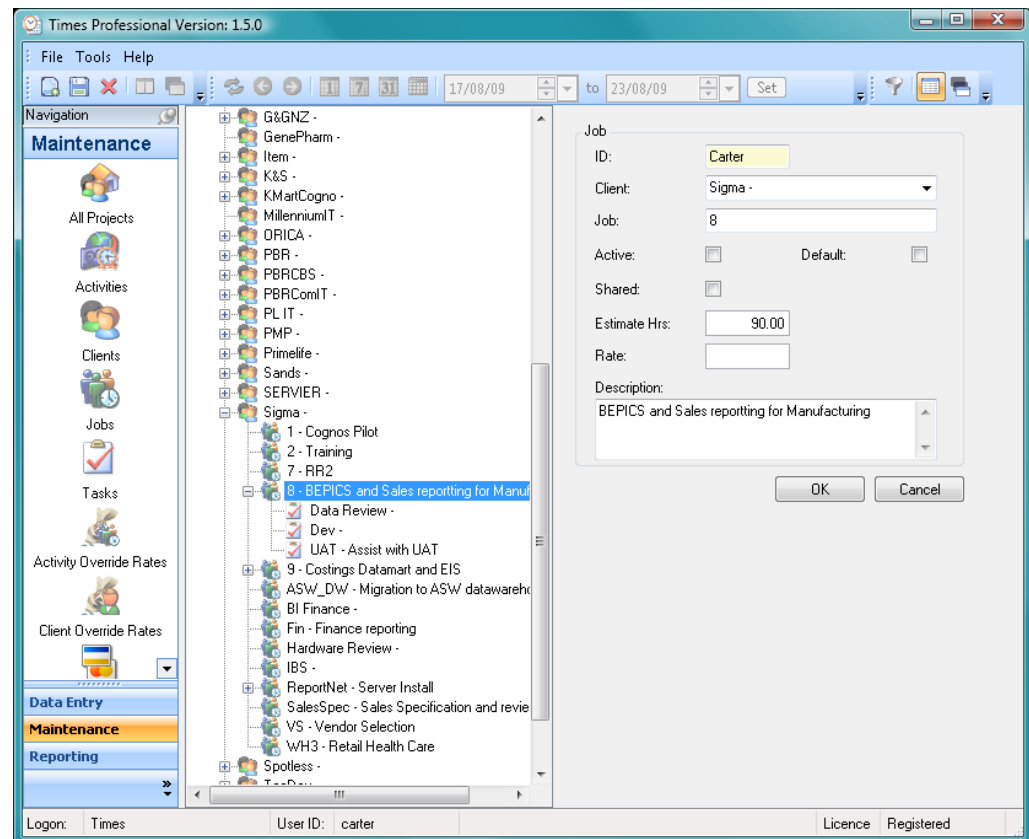

Using the tree you can view or enter all the information for all your projects. Right click on the tree or a particular node to create new Clients, Jobs and Tasks etc.

TIP If you perform the same jobs for many clients use the Copy Client function to create a new Client with all the associated Jobs, Tasks and override rates. Similarly use the Copy Job function to create a new Job within a Client with all associated Tasks and Activity rates.

Alternatively you can view a list of all your Clients, Jobs, and Tasks etc. and update them in a grid format. As the fields available in the grids are the same as those in the tree view, details for updating the project items are covered in the following sections.

Activities

Activities are used to describe the type of work being performed. As Activities are not related to a project they are typically generic and categorise time entries across multiple Clients, Jobs and Tasks. Your list of Activities could include Administration, Design, Documentation, Meetings, Support, and Testing etc.

Click the Activities button on the navigator to display the Activities form below.
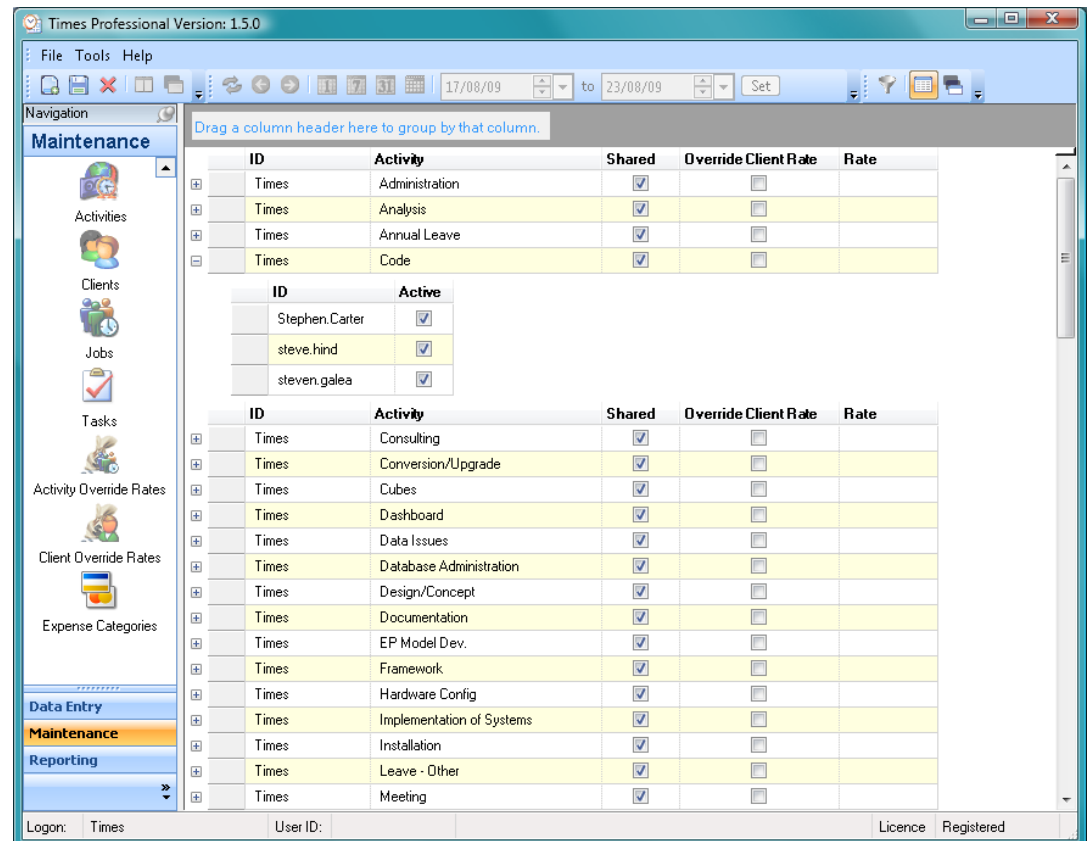
You can edit existing activities directly on the grid or create a new Activity by pressing the New toolbar button below the File menu (CTRL+N shortcut). To remove an Activity, highlight the row and click the Delete button on the toolbar.

The fields within an Activity are described below:

ID　The ID is the Times User ID who owns the Activity record.

Activity　The activity name for this Activity record

Shared　Refer to Considerations Shared

Override Client Rate　When a rate is set on the activity you have the option to also specify whether this rate should override any client rate. Refer to the Rate Calculation section for further details.

Rate　The hourly charge out rate to use for time entries against this activity. This rate is optional can be superseded by client, job, task and override rates. Refer to the Rate Calculation section for details. (Optional)

Clients

To display the list of clients click the Clients button on the navigator. The Clients form below will be displayed
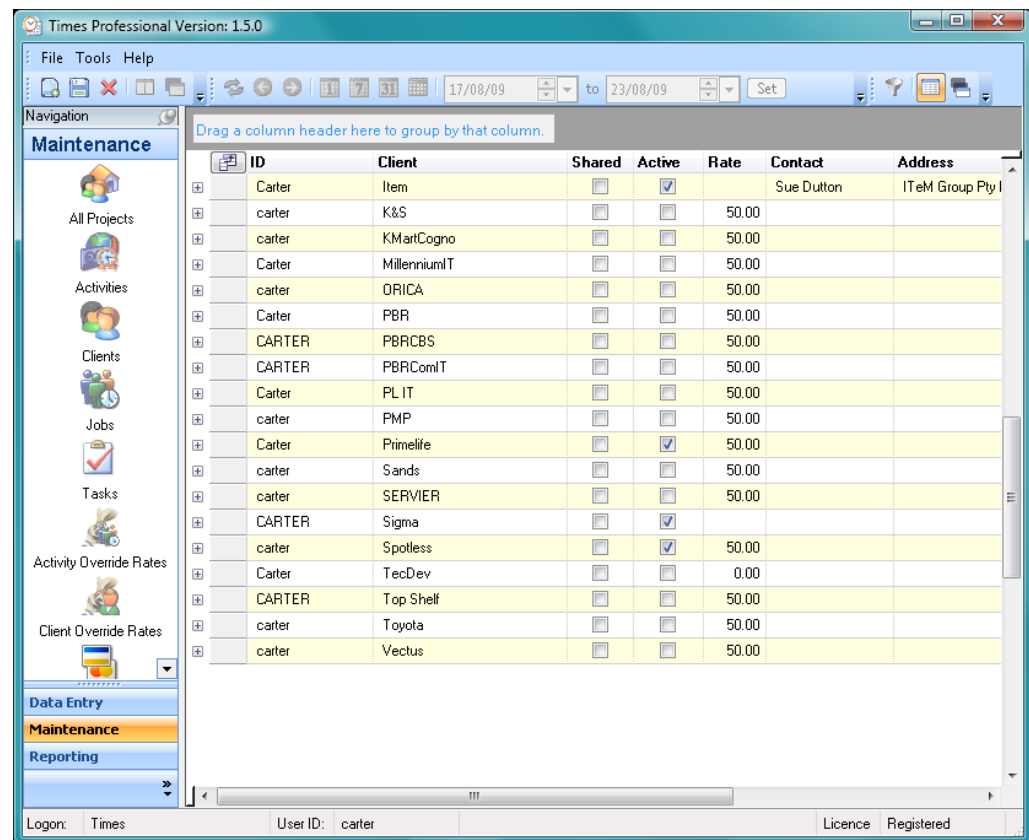
The fields within a Client are described below:

ID The ID is the Times User ID who owns the Client record.

Client The client code identifying this Client record. Must be unique for the Times User

Active The **Active** flag determines which clients are currently open and can have new time entries placed against them. Inactive clients will not show in the times main form client list but will still be available when reporting. Typically you would set a client as inactive when you have completed all jobs for the client and closed all outstanding invoices. The **Active** flag is also available on Jobs and Tasks

Shared Refer to Considerations Shared

**Rate** The hourly charge out rate to use for time entries against this client. This rate is optional and can be superseded by Job, Task and override rates. Refer to the Rate Calculation section for details. (Optional)

Contact The contact name for the Client. (Optional)

Address The client address details. (Optional)

Description The full client name or description relating to the client code. (Optional)

Delete Warning
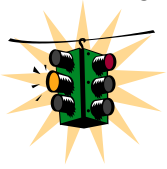
Deleting a client will also delete all related jobs, tasks and client override rates. If you delete these records the rate calculation will not be able to determine the charge for any Times entries not yet invoiced. It is suggested you do not delete clients or the related records but set them to inactive instead.

Jobs

To display the list of jobs click the Jobs button on the navigator. The Jobs form below will be displayed

The fields within a Job are described below:

ID   The ID is the Times User ID who owns the Job record.

Client   The client code identifying the parent Client for this Job record

Job   The job code identifying the job for the parent Client. Must be unique within the Client.

Active   Refer to Clients Active for details

Shared   Refer to Considerations Shared

Default   The **Default** flag is used to specify a default job within the client. When **Default** is checked the current job will automatically be set on the time entry form whenever the parent client is selected. **Note:** Only one job within each client can have **Default** set, all other jobs for this client will automatically be reset.

Estimated Hours   You can specify the estimated duration for this job in the **Est Hrs** field. This can be used for reporting actual to estimated hours or monitoring job progress. Estimates can

also be specified at the task level. When task estimates are used the job estimate hours will automatically be updated to the sum of the corresponding task estimate hours. Do not specify job estimate hours if using task estimate hours. (Optional)

Description The full job name or description relating to the job code. (Optional)
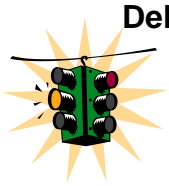
Delete Warning Deleting a job will also delete all related tasks and activity override rates. If you delete these records the rate calculation will not be able to determine the charge for any related Times entries not yet invoiced. It is suggested you do not delete jobs or the related records but set them to inactive instead.

Tasks

To display the list of tasks click the Tasks button on the navigator. The Tasks form below will be displayed

The fields within a Task are described below:

ID The ID is the Times User ID who owns the Task record.

Client The client code identifying the parent Client for this Task record

Job The job code identifying the parent Job for this Task record

Task The task code identifying the task for the parent Job. Must be unique within the Job.

Active Refer to Clients Active for details

*Shared* Refer to Considerations Shared

Default   The **Default** flag is used to specify a default task within each job. When **Default** is set the current task will automatically be set on the time entry form whenever the current client and job is selected. **Note:** Only one task for each job can have **Default** set, all other tasks for this job will automatically be reset.

Estimated Hours   You can specify the estimated duration for this task in the **Est Hrs** field. This can be used for reporting actual to estimated hours or monitoring job progress. Refer to Job Estimated Hours section for additional details. (Optional)

Rate   The hourly charge out rate to use for time entries against this client and job and task. This rate is optional and can be superseded by override rates. Refer to the Rate Calculation section for details

Description   The full task name or description relating to the task code. (Optional)
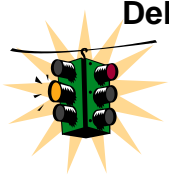
Delete Warning   If you delete a task the rate calculation will not be able to determine the charge for any related Times entries not yet invoiced. It is suggested you do not delete tasks but set them to inactive instead.

Activity Override Rates

Activity Override Rates are used to apply particular rates for time entries against specific Client, Job and Activity combinations. These provide a high degree of control over the rate applied to each time entry. Refer to the Rates Calculation section for detail on the rate determination levels.

It is recommended you only use these rates if absolutely necessary due to their complexity and time to configure, i.e. Every time you add a job for a client you must specify the new Activity Override Rates which apply to that job. If possible consider Client, Job, Activity or Client Override Rates first.

Before entering these rates you must first setup your Client, Job and Activity lookups. To display the list of rates click the Activity Override Rates button on the navigator, the form below will be displayed. Note you must have Finance Administrator permissions to view and edit Activity Override Rates.
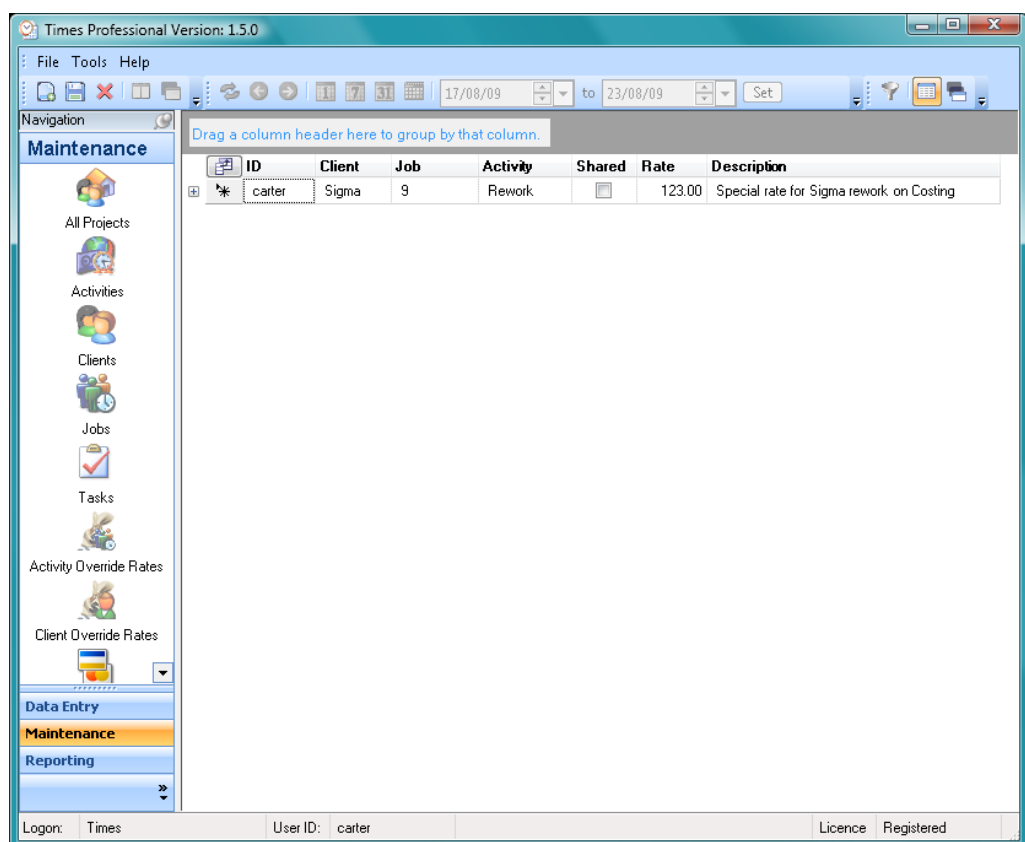
The fields within an Activity Override Rate are described below:

ID The ID is the Times User ID who owns the Activity Override Rate record.

Client The client code identifying the parent Client for this record

Job The job code identifying the parent Job for this record

Activity The activity code identifying which Activity to apply the rate to

Shared Refer to Considerations Shared

Rate The hourly charge out rate to use for time entries against this client and job and activity. This rate is mandatory. Refer to the Rate Calculation section for details

Description A description detailing the use of this rate. (Optional)

Client Override Rates

Client Override Rates are used to apply particular rates for time entries against specific Client and Activity combinations regardless of Job. These provide a good degree of control over the rate applied to each time entry without having to specify rates at the job level. Refer to the Rates Calculation section for detail on the rate determination levels.

It is recommended you use these rates if you have predefined agreements with each client for the rate charged by activity. Once setup these rates would then automatically apply to apply to all jobs created for that client. If you do not need to segment your rates by Client and Activity consider specifying rates at the Client, or Activity level only.

Before entering these rates you must first setup your Client and Activity lookups. To display the list of rates click the Client Override Rates button on the navigator, the form below will be displayed. Note you must have Finance Administrator permissions to view and edit Client Override Rates.
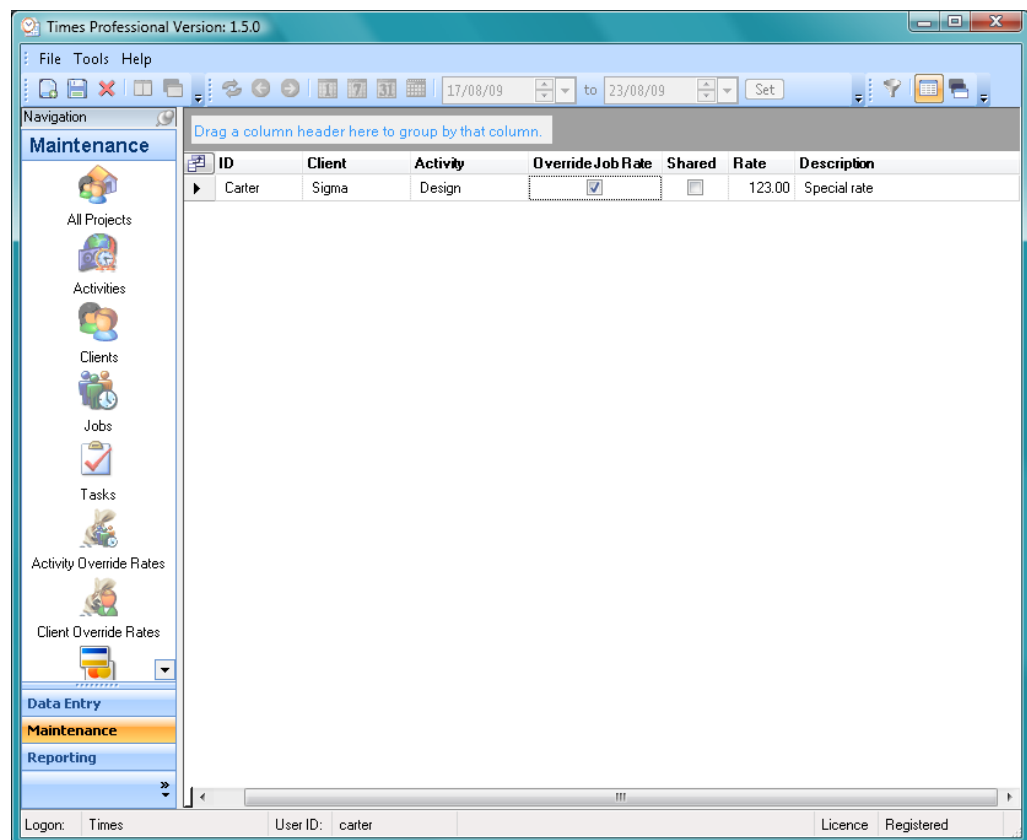
The fields within a Client Override Rate are described below:

ID The ID is the Times User ID who owns the Client Override Rate record.

Client The client code identifying the parent Client for this record

Activity The activity code identifying which Activity to apply the rate to

Override Job Rate　Client Override Rates are not related to any particular job. You can use the **Override Job Rate** flag to specify that this rate should be used over any rate specified on the job. Refer to the Rate Calculation section for more details.

Shared　Refer to Considerations Shared

Rate　The hourly charge out rate to use for time entries against this client and activity. This rate is mandatory. Refer to the Rate Calculation section for details

Description　A description detailing the use of this rate. (Optional)

Expense Categories

Expense Categories are used to describe the type of expense being claimed. Click the Expense Categories button on the navigator to display the form below.
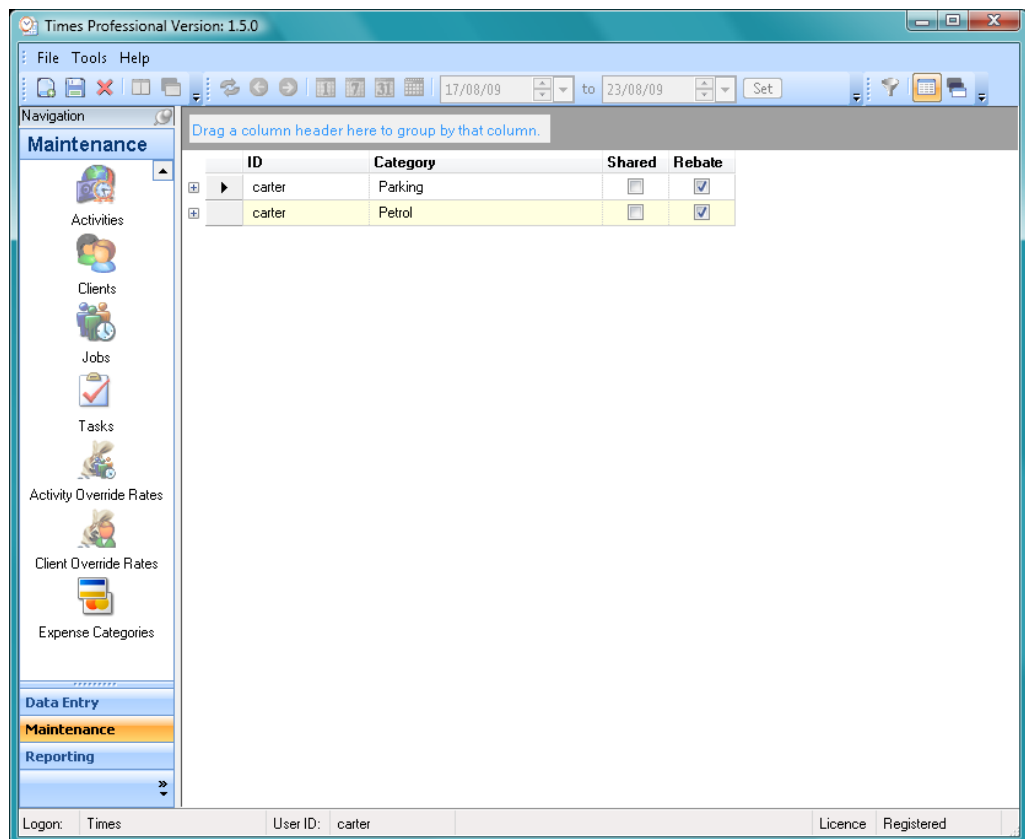
You can edit existing categories directly on the grid or create a new by pressing the New toolbar button below the File menu (CTRL+N shortcut). To remove a Category, highlight the row and click the Delete button on the toolbar.

The fields within an Activity are described below:

ID　The ID is the Times User ID who owns the Activity record.

Category　The Expense Category name

Shared　Refer to Considerations Shared

Rebate　Specifies whether expenses recorded against this category can be reclaimed.

TIME ENTRIES

Time entries record the amount of time each user has spent on a particular client, job, task or activity. Each entry relates to one segment of work, i.e. a meeting with a client, design work on a particular job etc. Typically a user would make multiple entries per day to account for their work and break times.

After logging on to the application the default display is the Time Entry data grid as shown below. Use this grid to view, add, edit and delete you time entries.

Time Entry Grid

Navigator   Use this to view the different modules within the application

User Filter   If logged on with Admin or Project Administrator permissions you can select the Times User you wish to impersonate. Otherwise the filter is not displayed.

Record Actions   Use these buttons to Add, Save, Delete, Append and Duplicate records. The action performed will depend on the module displayed, i.e. on the Time Entry module these will add, save and delete time entries. The Append and Duplicate actions will copy an existing entry and create a new entry either following the existing or with the same details as the existing.

Data Filter   Use the data filter to view or refresh the current selected period. First select the Day, Week or Month button (1, 7, and 31 on the toolbar) and then use the left and right arrows to display prior and next periods. To view custom periods specify the start and end dates in the Data Filter and click Set.

Display Mode   Display modes consist of a filter, grid and card view. Use the Filter button to display column filters in the grid to permit custom filtering of the data selected. Use the Grid and Card buttons to change the view of the data displayed.

Creating Time Entries

To create a new time entry you must first be logged on with Data Entry or Admin permissions. Use the New button on the toolbar or press CTRL+N to create a new record. Complete the entry details by typing or selecting the values from the lists and pressing TAB to move to the next field. Repeat for all entries and click Save when finished.

The default fields within a Times Entry are described below:

ID   The ID is the Times User ID who owns the entry.

Date   Select the date on which the work took place

Start   Specify the time the work started. Highlight and delete the existing time text and enter the new time using any standard time format. The following formats are amongst those supported; 09:00 AM, 9:00 AM, 09:00, 9:00, 900, 0900.

End   Specify the time the work finished. The Hrs will automatically be updated to the difference between the start and end times

Hrs   Enter or select the duration for this entry. The End time will automatically be updated to the start time plus duration.

Breaks   Breaks are non chargeable periods to be deducted from the Hrs entered, i.e. Start at 8am, End at 5pm with a lunch Break of 1hr. Thus a total chargeable time of 8 hrs.

No Charge (N/C)   Check this field if you do not want to charge for this time entry

Client   The client code identifying who the work is for. Type or use the drop down list of available clients. Refer to Maintaining Lookups for details on creating the client list. (Optional)

Job   The job code identifying the job for the selected client. Type in or use the drop down list of available jobs. The list of jobs is dependent on the selected client. First select the client and then select the required job. Refer to Maintaining Lookups for details on creating the job list. (Optional)

Task   The task code identifying the task for the selected client and job. Type in or use the drop down list of available tasks. The list of tasks is dependent on the selected client and job. First select the client, select the job and then select the required task. Refer to Maintaining Lookups for details on creating the tasks list. (Optional)

Activity   The Activity to record against the time entry. Type in or use the drop down list of available activities. (Optional)

Details   A description detailing the use of this rate. (Optional)

Amt   The overriding flat charge to use for this time entry. This overrides all other rates. If specified the Rate field should be left blank. Refer to the Rate Calculation section for details. (Optional)

Rate   The overriding rate to use when calculating the charge, i.e. Rate * (Hrs – Breaks). If specified the Amt field should be blank. Refer to the Rate Calculation section for details. (Optional)

Time Entry Form

The Time Entry form provides an alternate view to enter the time details. To open the view first create or select the required entry and then double click on any field to display the form below.

The view displays one entry at a time. Use this to update the details on the entry and click OK to close the form. Click cancel to undo any changes and close the form. Refer to Creating Time Entries for details on each field

Calendar View

The calendar view provides an alternate view or your time entries in an outlook style calendar display. This view can be used to display a single day, multiple days, a week or a month. To display the calendar click Calendar View on the navigator.

To create a new entry use the New toolbar button or double click on the required period. To view and edit an existing entry double click entry in the view.

Month View
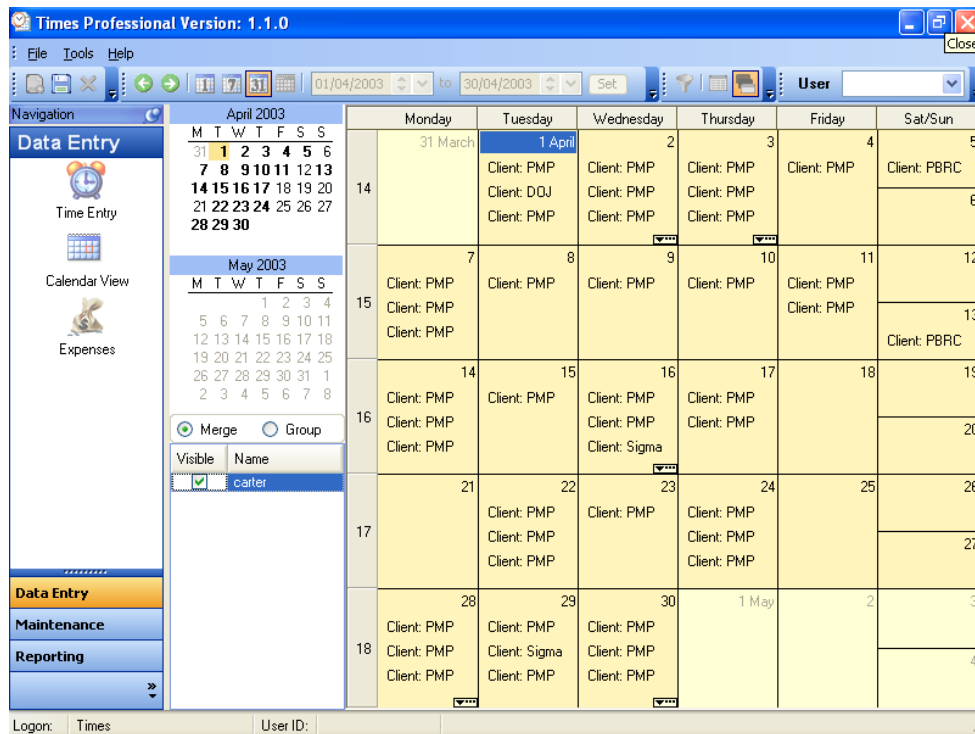
The current selected day will appear highlighted in the calendar to the right of the navigator. Click on different days within the month to display the time entries for that day. To change the view displayed use the 1, 7 or 31 buttons in the date filter toolbar.

Week View
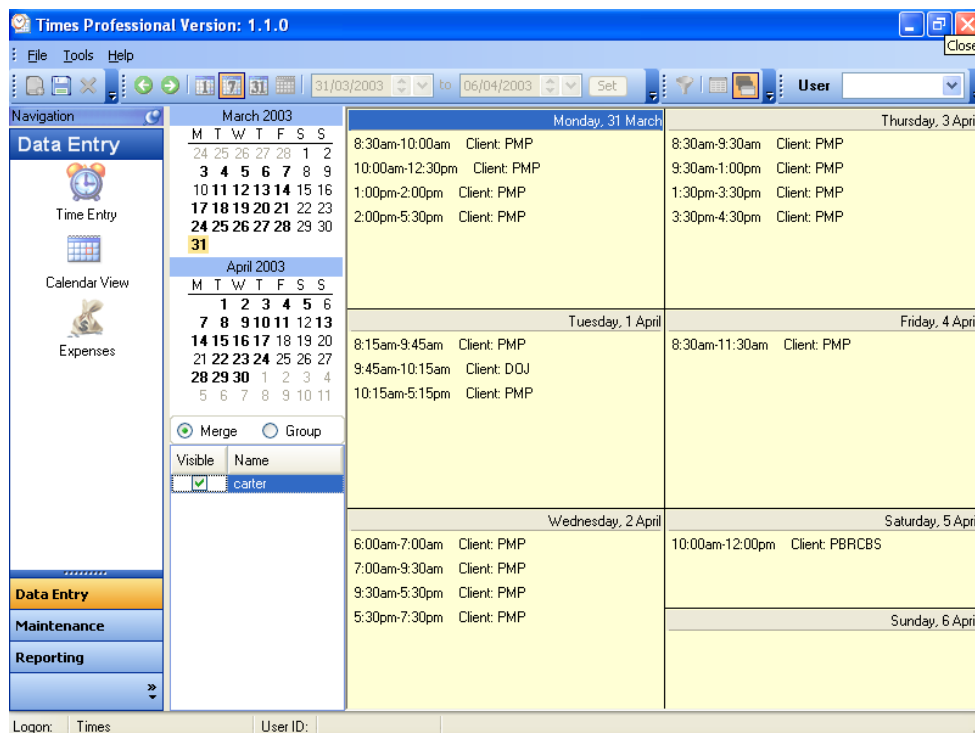
To navigate between months use the Prior and Next toolbar buttons.

Day View
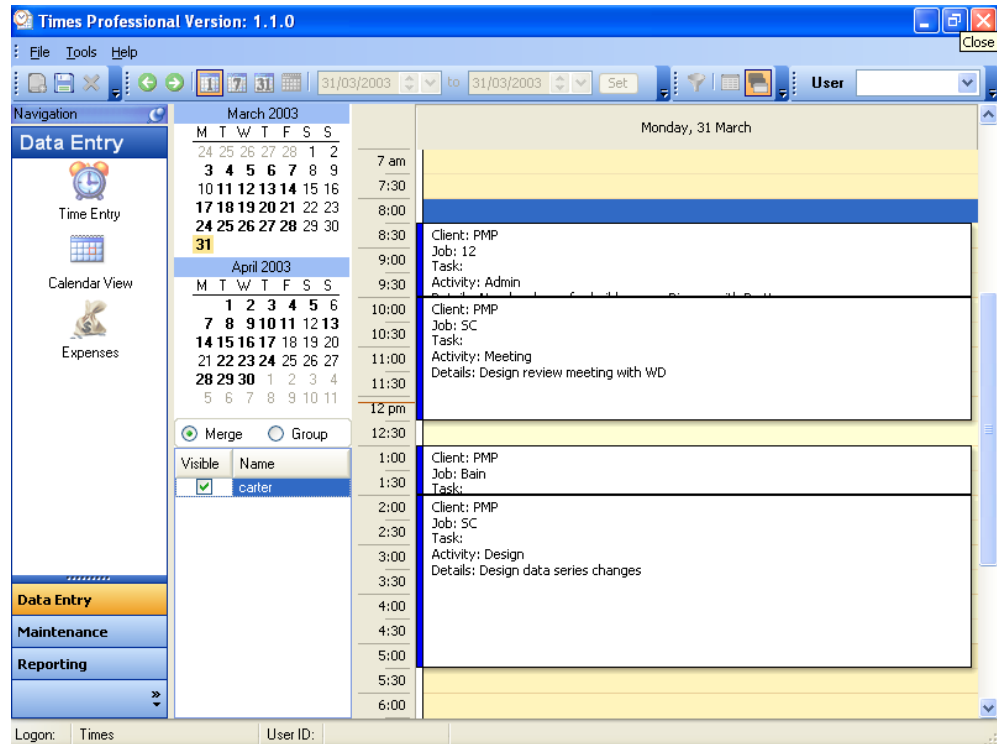
When in the day view you can highlight multiple days on the calendar to display a series of days together. Click and hold the mouse down on the first day and drag the mouse to select all the days require

Multi Day View
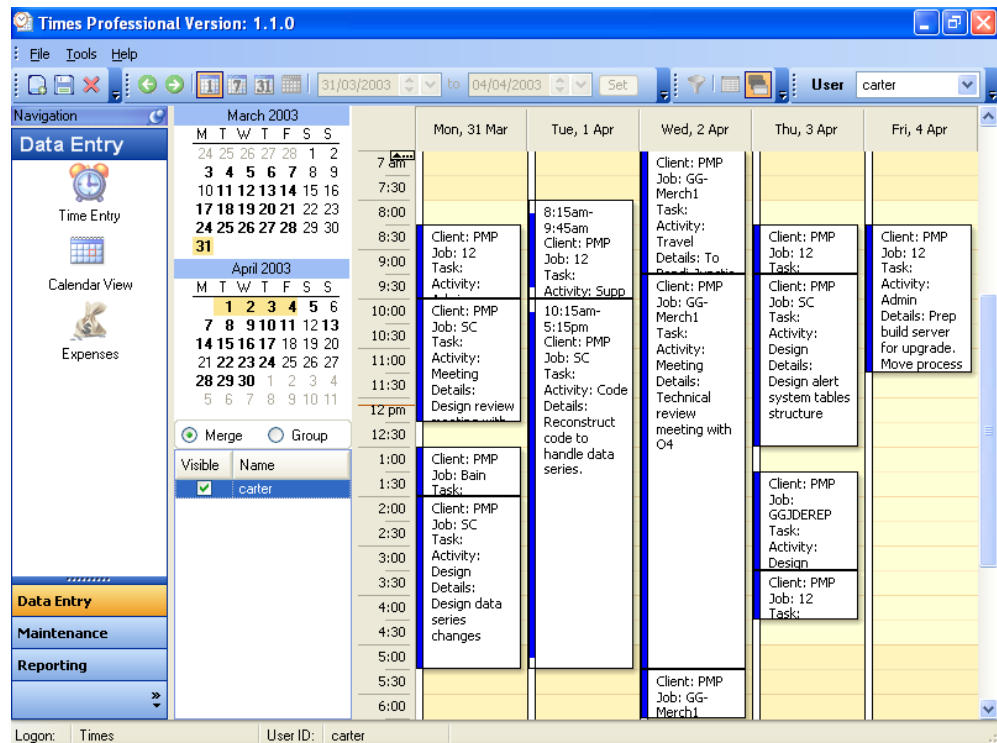
If you are logged on as an Admin or Project Administrator you can view the time entries for multiple users together in the same display. To display the data for all users first select All Users from the user drop down filter. All users with data for the selected period will then be displayed in the user list to the bottom right of the navigator. Tick the Visible box next to each user you wish to view.

Multi Day Group View
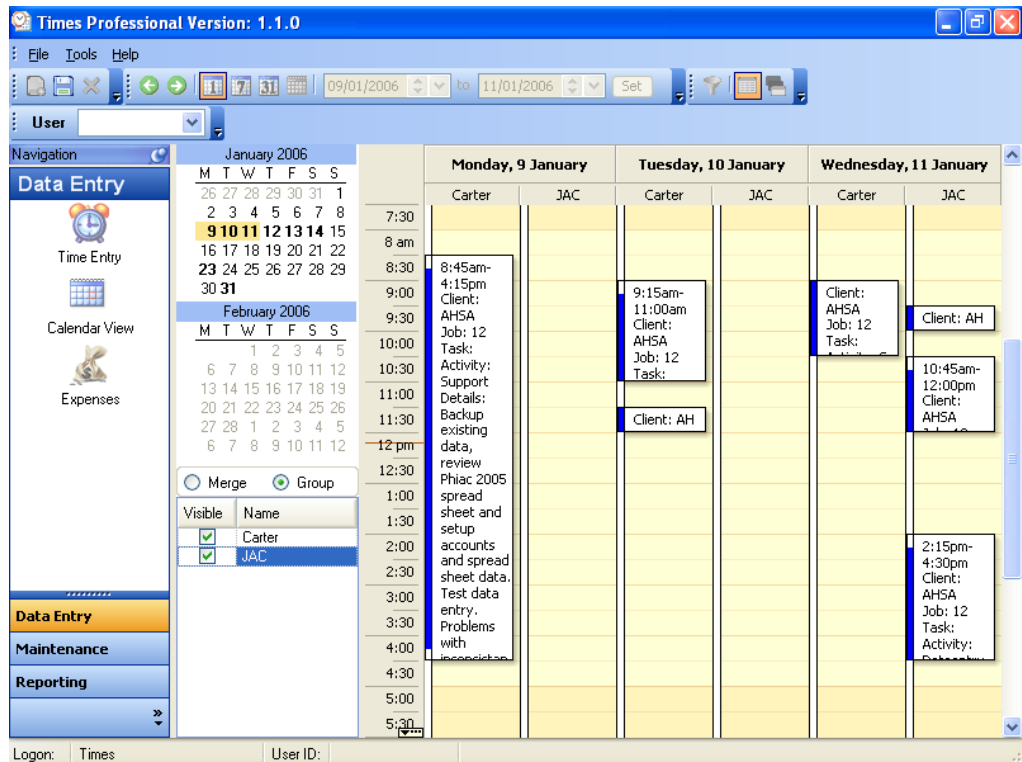
There are two types of view when you have multiple users displayed:
- Group – Create a separate column for each user per period
- Merge – Use a single column for all users

To change the view type, click Merge or Group above the users list.

Multi Day Merge View
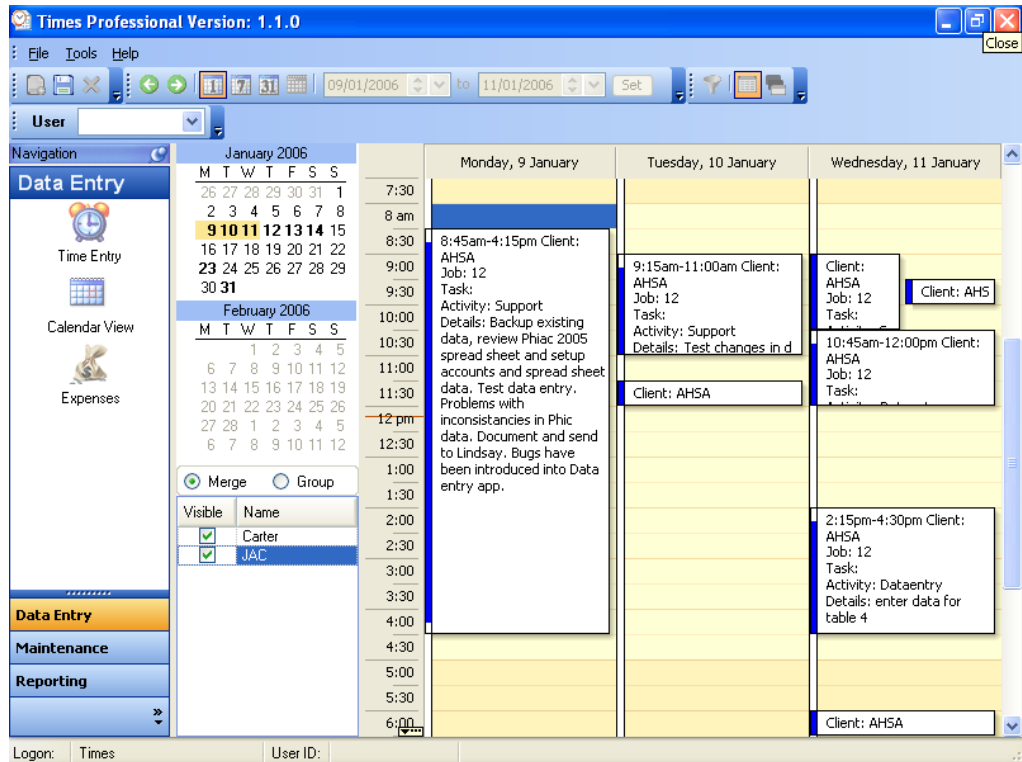
EXPENSES

Expenses are additional chargeable items you wish to record and invoice to a client. Typically an expense would relate to a job or activity such as travel, taxi fares, accommodation or parts supplied. However expenses can also be used to provide discounts or reductions on invoice by entering a negative amount.

Expenses can be entered or edited at any time before, during or after invoicing. Typically an expense would be entered on the date it occurred. During invoicing all non invoiced expenses would be listed for inclusion on the invoice.

To create expenses click the Expenses button on the navigator

Expenses Form

To create a new expense entry you must first be logged on with Data Entry or Admin permissions. Use the New button on the toolbar or press CTRL+N to create a new record. Enter the expense details by typing or selecting the values from the lists and pressing TAB to move to the next field. Repeat for all expense entries required and click Save when finished.

The fields within an Expense Entry are described below:

ID The ID is the Times User ID who owns the expense.

Expense Date Select the date the expense was incurred

Invoice No Displays the Invoice No on which this expense was included, otherwise 0. This cannot be updated unless you are in Admin role and automatically set during the invoicing process. To remove expenses from an invoice use the Expense Remove

Client option on the Invoices Details form.

Displays the date of the Invoice on which this expense was included, otherwise blank. This cannot be updated unless you are in Admin role. Automatically set during the invoicing process.

Client The client who should be billed for the expense. Refer to Maintaining Lookups for details on creating the client list.

Job The job code relating to the expense if required. Refer to Maintaining Lookups for details on creating the job list. (Optional)

Method The payment method use to pay the expense. Refer to System Settings for details on updating the list or payment methods. (Optional)

Net The expense amount before tax. If you enter this value the Tax and Gross amounts will be automatically calculated based on the Tax % provided

$$\text{E.g.} \quad Net * (Tax\%/100) = Gross$$

Tax % The tax % to use for this expense. Defaults to the Tax Rate System Parameter

Tax The tax amount based on Net * Tax %. If you override this amount then the Gross amount will be updated to equal the Net + Tax amounts

Gross The Gross amount after tax. If you enter this amount the Net and Tax amounts will be automatically calculated.

RATE CALCULATION

Times uses a rule based rate calculation engine to cater for all possible billing scenarios. A rule defines the rate to be used based on a combination of Client, Job, Task and Activity specified on the Times entry. There are eleven rules available though in reality most users will require only one or two rules e.g. hourly rates defined per Client or Activity etc. The flexibility is available however to use all rules simultaneously and produce a multi tiered rate structure.

The Net chargeable amount for any given Times entry is calculated based on the following rules in order of precedence. Each Times entry is evaluated against each rule until a Rate or Fixed Amount is derived. Where a rate is derived the rate is multiplied by the chargeable duration on each Times entry (Hrs minus Breaks) to produce the Net chargeable amount.

E.g. Net Charge = (Hours – Breaks) * Rate

RATE CALCULATION RULES

1. Times Override Amount (Amt entered on the Main Form against a particular Times Entry) – Fixed Amount regardless of duration
2. Times Override Rate (Rate entered on the Main Form against a particular Times Entry) – Rate to use for this Times Entry regardless of any other rates specified
3. Activity Override Rate – Rate specified against a Client, Job and Activity
4. Task Rate – Rates specified against a Client, Job and Task
5. Client Override Rate – Rate specified against a Client and Activity where the Override Job Rate flag is set
6. Job Rate – Rates specified against a Client and Job
7. Client Override Rate – Rate specified against a Client and Activity where the Override Job Rate flag is NOT set
8. Activity Rate – Rate specified against an Activity where Override Client Rate flag is set
9. Client Rate – Rate specified against a Client
10. Activity Rate – Rate specified against an Activity where Override Client Rate flag is NOT set
11. Default rate – Rate specified for the Times User on the System Setting form

The rules are ordered by degree of scope with specific first and generic last. Specific rules relate to a single or small group of records which meet the criteria and should have a particular rate applied. Generic rules such as Client or Activity rates apply to a wider range of records and should be defined when the rate is constant across all jobs, tasks etc.

A typical rate configuration could be a base rate for each Client but a general rate for Travel across all Clients. This is configured using these steps:

1 Create the Client records and specify their related rates
2 Create an Activity record for Travel, specify the general travel rate and select Override Client Rate

The following table displays various rate configurations and their effect on the Net charge. For each Times entry the applied rate is shown as derived using the rules above. For simplicity no rates are repeated to highlight where the rate was derived from. It is advised that you familiarise yourself with this table to understand the rate structure before setting up your rates.

EXAMPLE RATE
DERIATIONS

Activities

Activity	Override	Rate
Meetings	No	
Support	No	90
Travel	Yes	75

Clients

Client	Rate
Client A	100
Client B	150
Client C	

Jobs

Client	Job	Rate
Client A	Job 1	200
Client A	Job 2	
Client B	Job 1	50
Client B	Job 2	

Tasks

Client	Job	Task	Rate
Client A	Job 1	Task 1	125
Client A	Job 1	Task 2	
Client A	Job 2	Task 1	

Client Activity Override

Client	Activity	Override	Rate
Client A	Meeting	No	80
Client A	Travel	Yes	60
Client C	Travel	No	40

Time Entries

Client	Job	Task	Activity	Applied Rate
Client A				**100**
Client A	Job 1			**200**
Client A	Job 1	Task 1		**125**
Client A	Job 1	Task 1	Travel	**125**
Client A			Meetings	**80**
Client A	Job 1		Meetings	**200**
Client A	Job 1		Travel	**60**
Client A	Job 1	Task 2	Travel	**60**
Client A	Job 1	Task 2	Meetings	**200**
Client A	Job 2		Meetings	**80**
Client A	Job 2	Task 1	Support	**100**
Client B			Travel	**75**
Client C			Travel	**40**
Client C			Support	**90**
Client B	Job 1		Travel	**50**
Client B	Job 2		Meetings	**150**

To correctly specify your rates refer to the Maintaining Looks – Considerations section

Note you can update and create new rate records at any time and these will be reflected against all non invoiced Times entries.

Invoiced Rates Rates will typically be updated over time. Therefore when an entry is invoiced Times saves the current derived rate against the Times record. This locks in the rate which is used in preference to any other rate that may be derived from the current rate tables. Thus rate changes after an entry has been invoiced will not affect the Net amount for the Times entry.

If you re-invoice a Times entry the current rates will be applied.

REPORTING

There are three types of reporting functions provided:
- Standard - Predefined formatted reports suitable for printing
- Advanced - Adhoc queries for data exploration, specific analysis or exporting
- Invoices - Creating and managing invoices from your time and expense data

This section will outline each reporting function and describe the customisations that can be made. To view the reporting modules click Reporting on the navigator.

Report Parameters A number of report parameters are defined in the System Settings – Parameters form. E.g. Company name, address etc. Refer to the Managing System Parameters for details.

Standard Reports

Standard reports are designed using the MS SQL Reporting tool. A range of summary and detail reports are included with the standard installation. These can be extended if you have the appropriate tools such as Visual Studio 2005. Refer to Appendix A for details on creating new reports or our web site to download additional reports.

To use a standard report click the Standard Reports button on the navigator
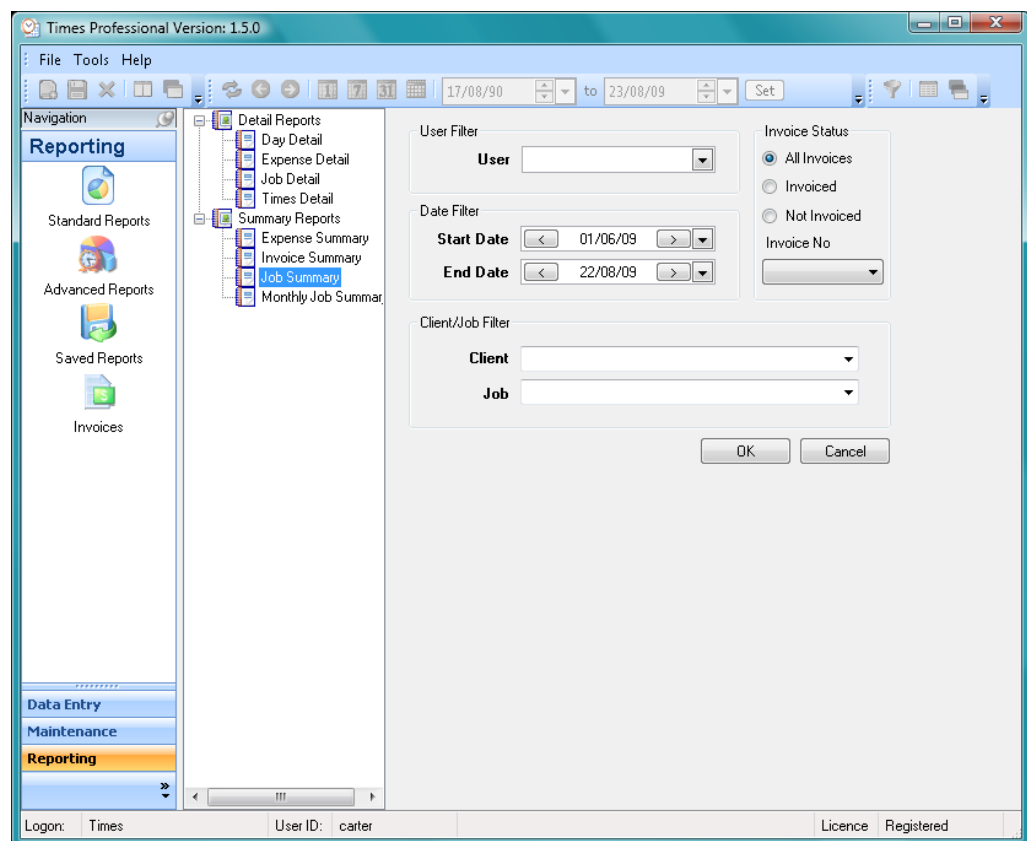
Available standard reports are displayed in the tree view as shown above. To run reports first select the report name. The filter panel will be shown as above if the report requires filters. Use the following steps to create a filter for the report:

1. Select the Times User to filter on, leave blank for all users
2. Select the required date range of time entries to include. Click on the down arrow to display a calendar to choose the required dates.

3. Select the Client and Job filters if required. **Note:** To select a Job first select a Client. Only Jobs for the selected Client will then be displayed.
4. Select an existing Invoice if required. **Note:** If selecting an existing invoice all other filter selections will be ignored.
5. Select the required Invoice status; Invoiced, Not invoiced or All. I.e. To only include entries not yet invoiced select Not Invoiced.
6. Click OK to run the report
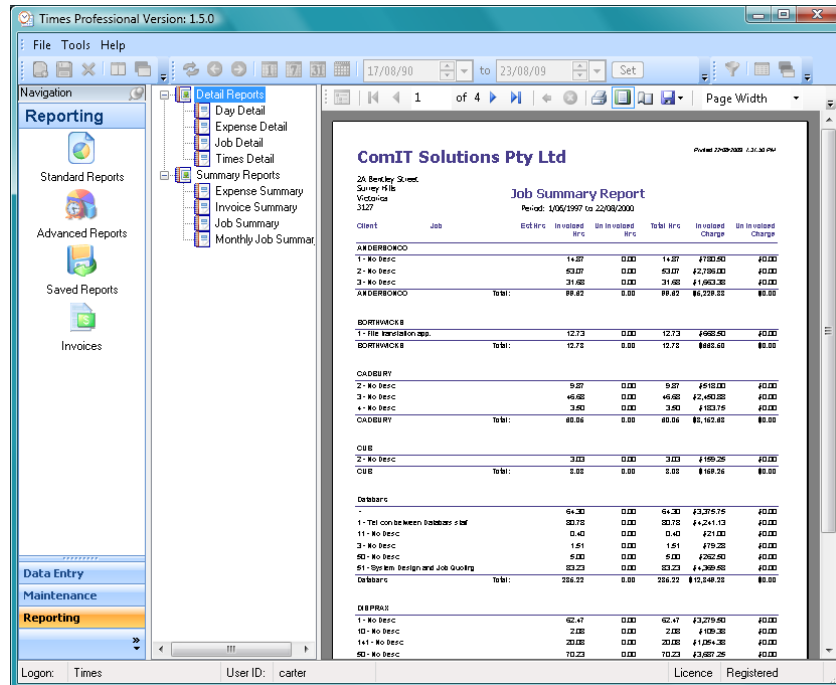
Use the report toolbar to print and navigate through the report. To export the report use either the Save icon on the report toolbar or the File and Export menu on the main toolbar. Export options include CSV, Excel, PDF and XML. To change the report filters or run another report select the report name again on the tree view.
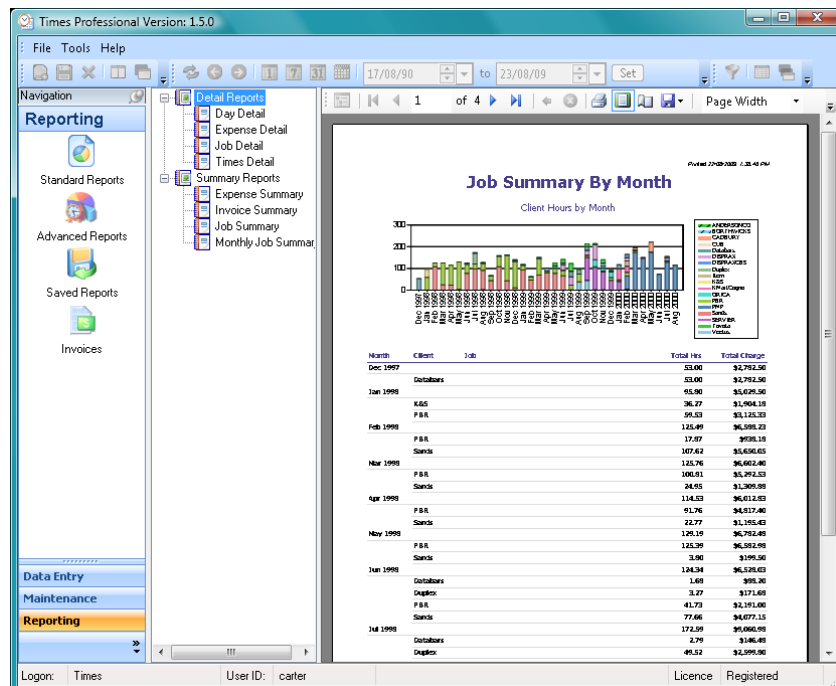
Advanced Reports

Advanced reports are used to create adhoc queries of your data based on a list of available fields. To start the advanced report wizard click Advanced Reports on the navigator. The field selection lists will be displayed.
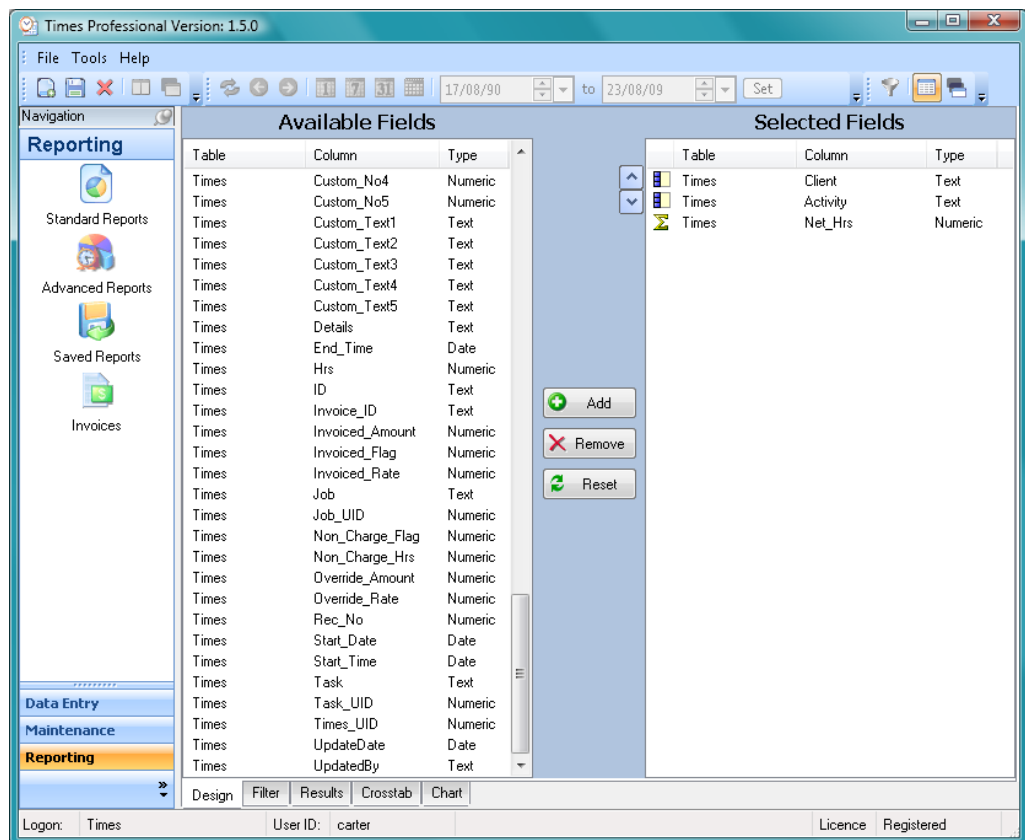
To use advance reports it is assumed that you have a basic knowledge of databases and relationships. In particular the following definitions are used:

- Database - A collection of information organised into tables
- Table – An object consisting of rows and columns used to store data
- Field - The column in each row that stores the data value within the Table
- Metric – A field representing a quantitative measure E.g. Hours, dollars etc.
- Aggregation - Summarises information from multiple rows to return a single or distinct value
- Relationship - A link between tables that references the primary key in one table to a foreign key in another table. Defines joins between tables to select related records and information

To create a report you first need to understand the relationships between the tables to ensure you are selecting the correct fields.

Database Schema The schema for the Times database is shown below. This includes all tables and relationships available through the Advanced form. The main transaction table is called Times. All other tables are used to provide additional referential information such as rates, job descriptions, date grouping etc.

Clients

Column Name	Data Type	Allow Nulls
UID	int	
ID	dtID:nvarchar(8)	
Client	dtClient:nvarchar...	
Client_Desc	dtDescription:nv...	☑
Client_Rate	dtRate:money	☑
Client_Active_Flag	dtFlag:bit	
Client_Shared_Flag	dtFlag:bit	
Rec_No	dtRecNo:int	
UpdateDate	datetime	☑
UpdatedBy	dtName:nvarcha...	☑

ClientActivityRates

Column Name	Data Type	Allow Nulls
UID	int	
ID	dtID:nvarchar(8)	
Client	dtClient:nvarch...	
Activity	dtActivity:nvarc...	
Client_Activity_Rate_...	dtDescription:nv...	☑
Client_Activity_Rate_...	dtRate:money	
Client_Activity_Rate_...	dtFlag:bit	
Client_Activity_Over...	dtFlag:bit	
Rec_No	dtRecNo:int	
UpdateDate	datetime	☑
UpdatedBy	dtName:nvarcha...	☑

Times

Column Name	Data Type	Allow Nul
UID	int	
ID	dtID:nvarchar(8)	
Start_Date	datetime	
Start_Time	datetime	
End_Time	datetime	
Client	dtClient:nvarchar...	☑
Job	dtJob:nvarchar(50)	☑
Task	dtTask:nvarchar(...	☑
Activity	dtActivity:nvarc...	☑
Hrs	dtHrs:float	☑
Non_Charge_Hrs	dtHrs:float	☑
Non_Charge_Flag	dtFlag:bit	
Details	dtDetails:nvarch...	☑
Override_Rate	dtRate:money	☑
Override_Amount	dtAmount:money	☑
Invoiced_Flag	dtFlag:bit	
Invoice_ID	nvarchar(50)	☑
Invoiced_Rate	dtRate:money	☑
Invoiced_Amount	dtAmount:money	☑
Custom_No1	float	☑
Custom_No2	float	☑
Custom_No3	float	☑
Custom_No4	float	☑
Custom_No5	float	☑
Custom_Text1	nvarchar(50)	☑
Custom_Text2	nvarchar(50)	☑
Custom_Text3	nvarchar(50)	☑
Custom_Text4	nvarchar(50)	☑
Custom_Text5	nvarchar(50)	☑
Rec_No	dtRecNo:int	

Jobs

Column Name	Data Type	Allow Nul
UID	int	
ID	dtID:nvarchar(8)	
Client	dtClient:nvarchar...	
Job	dtJob:nvarchar(50)	
Job_Desc	dtDescription:nv...	☑
Job_Rate	dtRate:money	☑
Job_Active_Flag	dtFlag:bit	
Job_Est_Hrs	dtHrs:float	☑
Job_Shared_Flag	dtFlag:bit	
Job_Default_Flag	dtFlag:bit	
Rec_No	dtRecNo:int	
Time_Project	dtDescription:nv...	☑
UpdateDate	datetime	☑

Activities

Column Name	Data Type	Allow Nul
UID	int	
ID	dtID:nvarchar(8)	
Activity	dtActivity:nvarc...	
Activity_Rate	dtRate:money	☑
Activity_Shared_Flag	dtFlag:bit	
Activity_Override_Cli...	dtFlag:bit	
Rec_No	dtRecNo:int	
UpdateDate	datetime	☑
UpdatedBy	dtName:nvarcha...	☑

Tasks

Column Name	Data Type	Allow Nul
UID	int	
ID	dtID:nvarchar(8)	
Client	dtClient:nvarchar...	
Job	dtJob:nvarchar(50)	
Task	dtTask:nvarchar(...	
Task_Desc	dtDescription:nv...	☑
Task_Active_Flag	dtFlag:bit	
Task_Est_Hrs	dtHrs:float	☑
Task_Rate	dtAmount:money	☑
Task_Shared_Flag	dtFlag:bit	
Task_Default_Flag	dtFlag:bit	
Rec_No	dtRecNo:int	
UpdateDate	datetime	☑

ActivityRates

Column Name	Data Type	Allow Nul
UID	int	
ID	dtID:nvarchar(8)	
Client	dtClient:nvarchar...	
Job	dtJob:nvarchar(50)	
Activity	dtActivity:nvarc...	
Activity_Rate_Desc	dtDescription:nv...	☑
Activity_Rate_Rate	dtRate:money	
Activity_Rate_Shared...	dtFlag:bit	
Rec_No	dtRecNo:int	
UpdateDate	datetime	☑

Calendar

Column Name	Data Type	Allow Nulls
Start_Date	datetime	
Day_Code	dtCode:nvarchar...	
Day_Name	dtDescription:nv...	
ISO_Code	dtDescription:nv...	
Weekday	smallint	
Weekday_Code	dtCode:nvarchar...	
Weekday_Name	dtDescription:nv...	
Week_Start_Date	datetime	
Week_End_Date	datetime	
Week_No	smallint	
Weekend	dtFlag:bit	
Month_Code	dtCode:nvarchar...	
Month_Name	dtDescription:nv...	
Month_Start_Date	datetime	

Creating an Advanced Report To create Advanced reports follow the steps below:

1. Select the required fields by scrolling through the Field Selection list and highlighting them. Typically use the fields from the Times table in preference to fields of the same name on reference tables. E.g. Use Client from Times instead of Client from Clients.
2. Click the **Add** button to add the selected fields to the report
3. Repeat 1 & 2 for all required fields
4. Specify the aggregation method for each field if necessary. Right click on a selected field to display the aggregation options
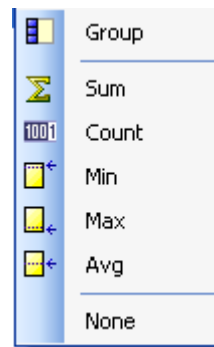
5. Use the Up and Down arrows next to the Selected Fields list to set the order the fields will appear in the report
6. Click the **Filter** tab to specify the report filter
7. Set the required filter and click **OK** to view the report output

TIP *The Calendar table provides fields to group your Times entries into weeks, months, quarters and years. Use this to define time based reports aggregated to the required period.*

TIP *The Advanced report automatically groups records based on the fields selected. I.e. the report will only display distinct combination of values for the fields selected. If you wish to see all records either include the Times.UID field or set the aggregation to None for all fields.*

To change the design of the report click the Design tab and update the fields as necessary. To export or print the data use the File and Print or Export menu items.

TIP *Use the Group and Summary options to create a basic report layout. Export the data to a spreadsheet using the File/Export/ExcelFormatted menu, then open in Excel and update the format. Add charts as necessary.*

Crosstab

Crosstab provides a function to pivot the Advanced Reports Results based on the values in one of the fields. This is similar to the Pivot Table function provided in Excel. Crosstabs are idea when you wish to create a report with separate columns for like data, e.g. Separate column for each month, client, activity etc.

To create a crosstab report first create an advanced report, view the results and then click the Crosstab Tab, this will display the crosstab designer below.
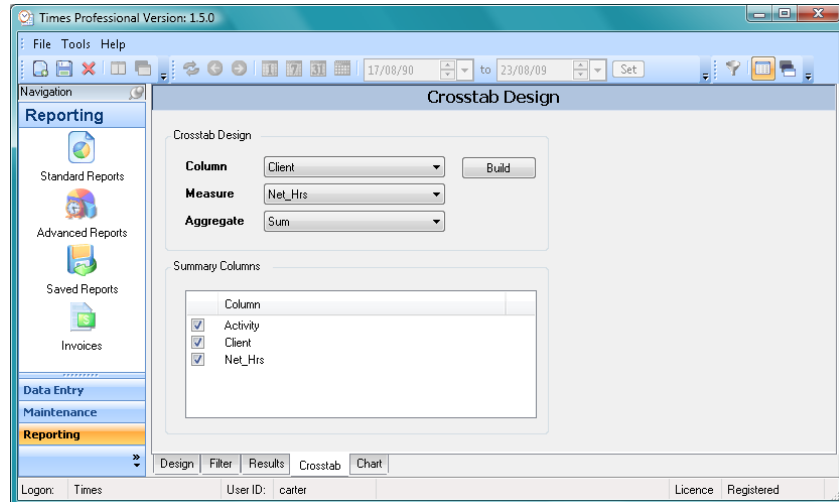
Follow these steps to define a crosstab:
1. Determine which field contain the values you wish to use as columns and select this from the **Column** selection list.
2. Select the metric (numeric values to appear in the grid) required from the **Measure** selection list. **Note:** Only numeric fields will be displayed in the Measure list
3. Select the **Aggregate** method to use when aggregating the measure values
4. Deselect any fields you do not need in the report. Typically all other metric fields should be deselected so not to cause unnecessary grouping. E.g. Records.

Click **Build** to create the Crosstab and display it in the Results grid.

Charts

Charts can be produced to graphically display the Advanced Report Results in a Column, Stacked Column, Pie or Line graph. The only requirement is that the numeric data you wish to plot must be the last column(s) in the Results grid.

To create a chart first create an advanced report and view the results, then click the Chart Tab, a graph will be created and displayed as below.
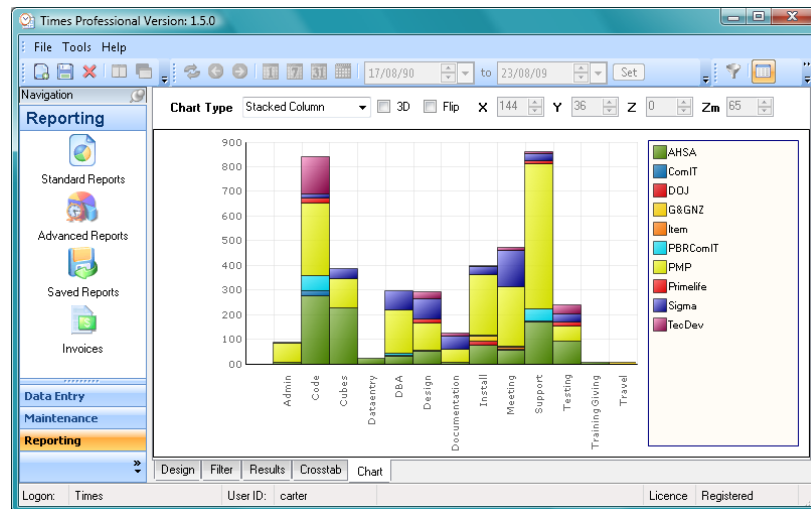
Use the chart toolbar to customise the graph
- Chart Type – The type of graph to render. Line, Column Pie etc.
- 3D – Displayed the selected chart in 3D mode
- Flip – Swap the X and Y data of the graph
- X, Y, Z & Zm – Change the orientation of a 3D graph by rotating in the X, Y Z axis. Use Zm to zoom in and out of the graph. You can also drag the orientation by pressing the Alt key whist dragging the chart displayed.
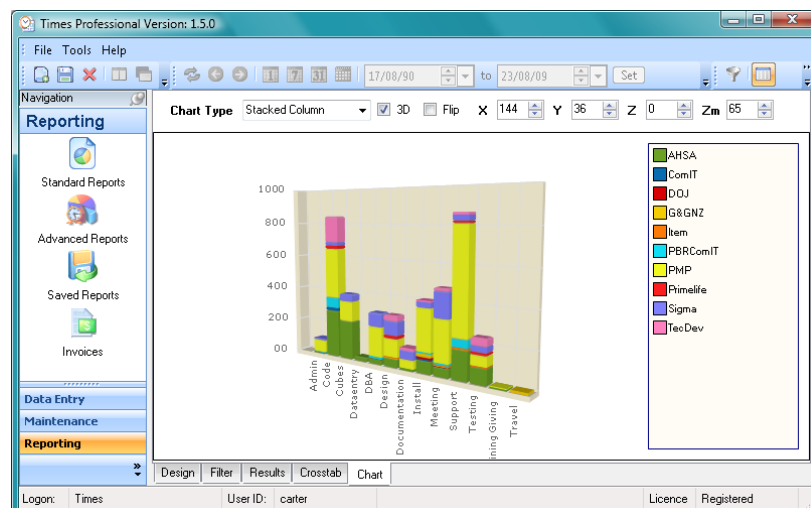
To save a chart image right click on the chart and select Save Chart Image. Specify the file name and type and click Save.

Saved Reports

Advanced report designs can be saved and later reused by all users. After creating an advanced report and viewing the results, use the Save toolbar button to create a new saved report. To view existing Saved reports use the Saved Reports button on the navigator.
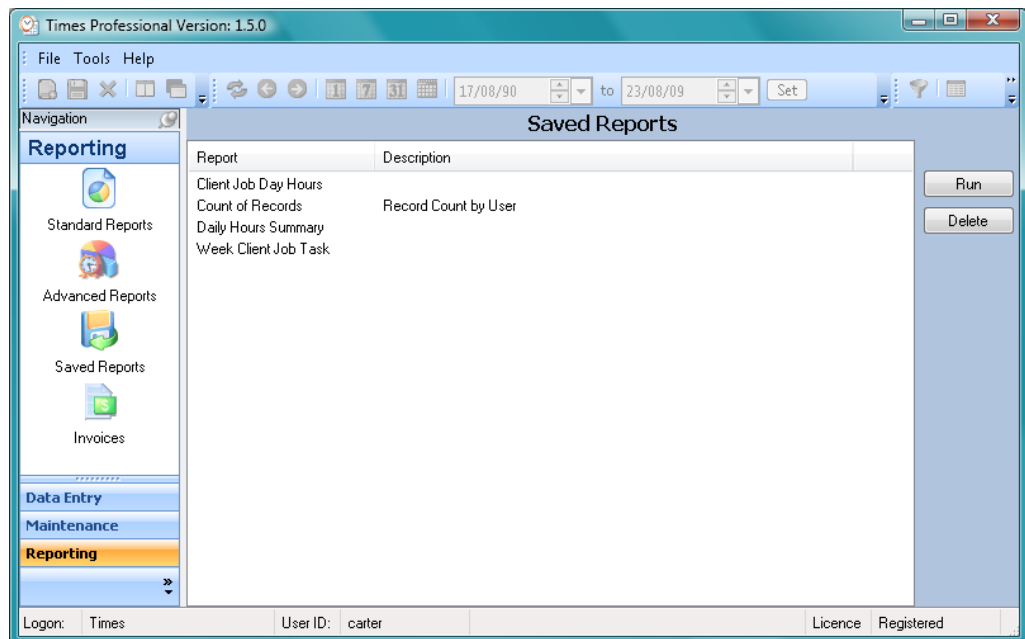
All saved reports available are listed as shown above. To run a saved report either double click on the report item or select the report and click Run. The report design will be displayed on the Advanced Report design page. Update and run the report as necessary. Refer to Advanced Reports section for details.

INVOICING

Invoicing summarises your time and expense data and produces a professional formatted report. To view existing invoices or create a new invoice click the Invoices button on the Reporting navigator. Note you must be part of the Finance Manager role.

The Summary tab displays all your existing invoices grouped by invoice number and client. Note it is possible to create a single invoice which contains multiple clients. This is useful if you are a contractor working through an agency and need to create a single invoice for all the clients you have worked for.

To display the details of an existing invoice either double click on the invoice row or highlight the row and click the Details tab.

Invoice Lines When creating an invoice the selected time entries are summarised by Client and Rate to form the invoice lines. These invoice lines are then recorded against the invoice and appear in the Summary of services provided section on the invoice report. If you only create invoices with single clients at the same rate, you will only see one invoice line per invoice.

Invoice lines cannot be updated directly. To change the invoice line data you must update the time entries and recreate the invoice.

Expenses Expenses included on this invoice are displayed in the middle of the Details tab. These can be added, removed, deleted or updated at any time. For details on using the Expense grid refer to the Expenses section.

Right click on the Expense grid to display the context menu of actions available.
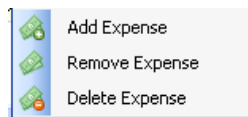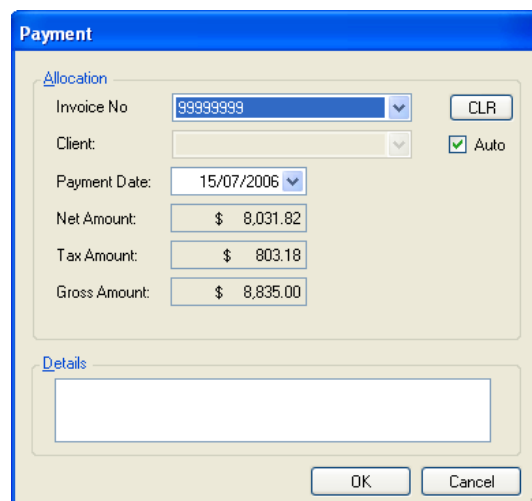
- Add Expense - Creates a new Expense record and sets the invoice details to the current invoice number and date.
- Remove Expense – Removes an expense from the current invoice but does not delete it
- Delete Expense – Deletes the expense record and removes it from the invoice

Payments Payments recorded for the invoice are displayed at the bottom of the Details tab. Payments can be added, updated or deleted at any time. To update a payment edit the details directly in the payments grid. To add or delete a payment use the right click context menu on the payments grid.
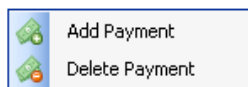
When adding a payment the Payment form below will be displayed. The fields on the payment form are automatically populated with the invoice number, date and total outstanding amounts. I.e. the **Net**, **Tax** and **Gross** amounts will automatically be set to the total outstanding amount for the selected invoice. If the invoice contains multiple clients the amounts displayed will reflect the total outstanding amounts for all clients.

If the payment information is correct then update the details field (if necessary) and click OK. Alternatively click the CLR button to manually specify the payments details using one of the two techniques below.

Client Payment

To create a new client payment click CLR to reset the invoice and client lists. Select the required client from the Client list and the Invoice list will be filtered for the selected Client. Select the required invoice and the Net, Tax and Gross amounts will automatically be set to the outstanding amounts.

Update the payment details if necessary and click OK to save the Payment.

Invoice Payment

Select the required invoice number from the Invoice list. The Auto check box will be set and the total outstanding amounts displayed. To manually select the client on the invoice, clear the Auto checkbox. The Client list will be filtered to only display the clients on the selected invoice. Select the required client from the list and the outstanding amount for that client will be displayed.

If the Auto check box is checked then payments will automatically be allocated for each Client with an outstanding amount on the selected invoice. **Note:** Auto allocate can only be used if paying the outstanding invoice amount in full. To partially pay an invoice select the client and specify the payment amount manually.

Payment Example The following steps explain the simplest method to apply a full payment:
1. Open the Invoices module
2. Double click on the require invoice
3. Right click on the Payments grid and select Add Payment
4. Check the payment amount and Click **OK** to save the Payment

To apply partial payments perform the following:
1. Open the Invoices module
2. Double click on the require invoice
3. Right click on the Payments grid and select Add Payment
4. Clear the Auto check box
5. Select the client from the Client list
6. Set the Gross amount for the partial payment
7. Click **OK** to save the Payment

Invoice Printing

To view and print invoices first highlight the required invoice rows in the Summary tab and then click the Print tab. To output the invoice to PDF format use the drop down arrow next to the save icon and select PDF.

Creating Invoices

To create or update an invoice click the Invoices button on the navigator. Make sure the Summary tab is displayed and click the New button on the toolbar. The invoice selection form will be displayed as below.
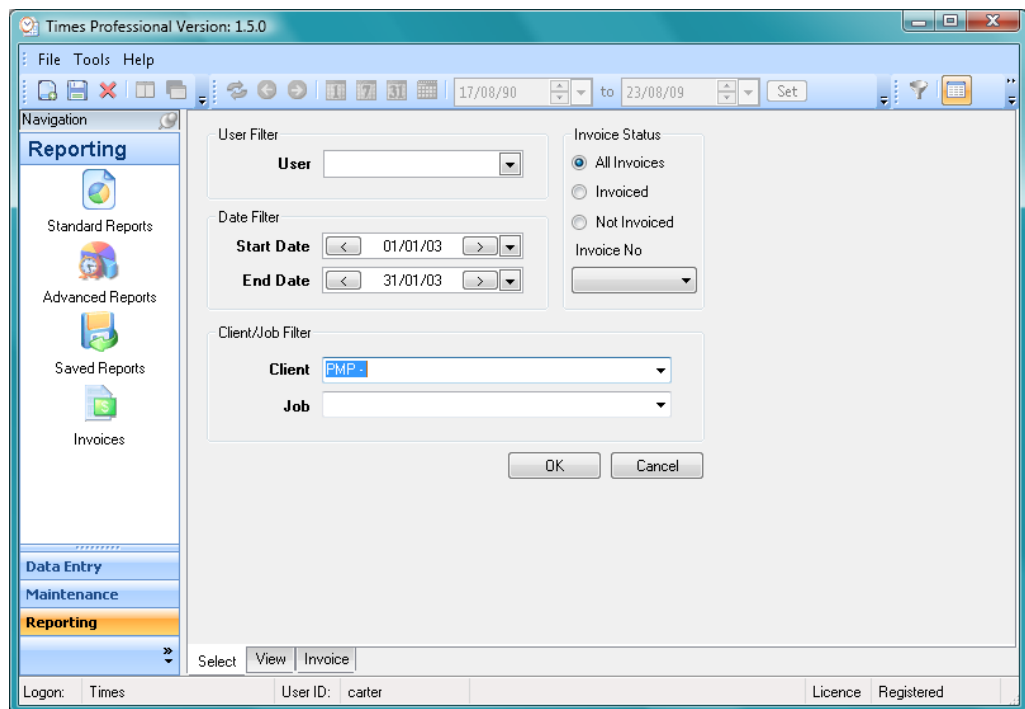
Enter the filter details to select the time entries you wish to invoice. Typically you would set a date range, the Not Invoiced status and a client if necessary. Click OK to view a summary of the time entries which will be included on the invoice.
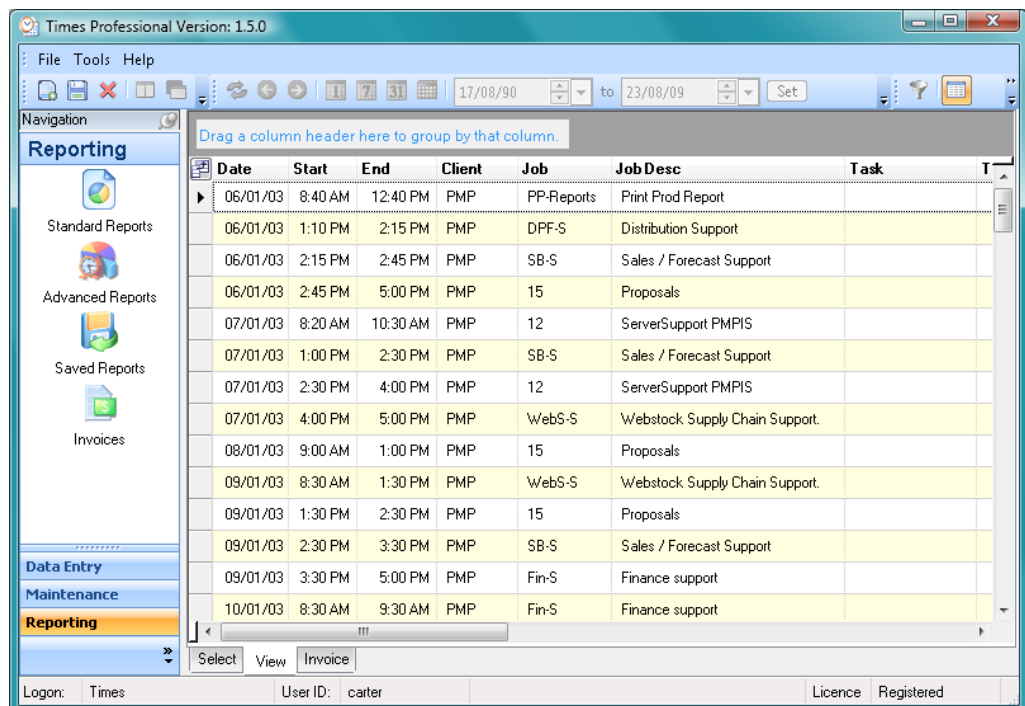
Review the time entries and if satisfied click the Invoice tab, otherwise click the Select tab to change your selection criteria.

The Invoice tab displays the details of the invoice to be created. Time entries are summarised by client and rate to create the invoice lines shown in the centre of the form. Any expenses not yet invoices are listed in the Select Expenses list at the bottom of the form. To complete the invoice follow these steps:

1. Enter a new invoice number or select an existing invoice to update.
    a. If updating an existing invoice you will be prompted to either append or replace the existing invoice when you click Save.
    b. If replacing an existing invoice all current records against that invoice will be un-invoiced before the new invoice is created
2. Select the Invoice Client. This will default to the invoice line client but can be changed if the invoice should go to a third party. I.e. to an agency instead of direct to the client direct. Note the Invoice Client will be used to obtain the contact and address details for the invoice report.
3. Select the invoice **Date** to record against this invoice.
4. Select the check box against any expense records to include on this invoice
    a. To add additional expenses first create the invoice and then refer to the Invoicing – Expenses section.
5. Click the Save toolbar button to save the invoice and mark all included entries as invoiced

After creating an invoice the Invoices form will be displayed. Select the new invoice from the list and click the Print tab to view the Invoice report.
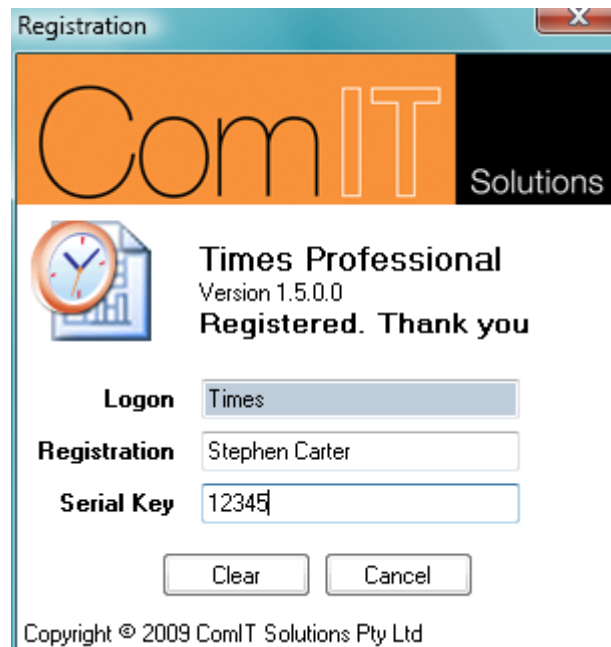
To cancel a new invoice click the Delete button on the toolbar or navigate to a different module.

REGISTRATION

Times Desktop is a licensed application which must be registered to continue to use it after the trial period. To purchase a licence please go to www.handango.com and type Times Professional in the search field. Once the licence fee has been paid you will receive an order confirmation email with your serial key enclosed. When registering you will be required to supply your registration name**. If also using the PDA application this MUST be the Owner name from your PDA exactly as displayed in the middle of the Registration form when you start the PDA application.** If you are not using the PDA application then use your name as the registration name. This will be used to create your serial key. If you do not supply this code then we cannot create your serial key. **Note: the registration name is case sensitive.**

TRIAL You may use the Times application for a trial period to assess its suitability. Whilst in trial mode the application is fully functional. Once the trial has expired you will not be allowed to log onto the application until you enter your registration details

Registration Form

After receiving your serial key open the Registration form using the Help/Registration menu item (or if your trial has already expired then this will open automatically when you try to logon). Enter your registration name and serial key exactly as shown on your order confirmation email and click Register.

If you wish to remove the registration from your Logon i.e. if you will be changing your Logon name, then open the Registration form and click Clear.

SUPPORT

Times Desktop has been tested on multiple PCs and software configurations. Although we have taken every step to ensure the application runs without issue, no software is bug free. If in the unlikely event you experience a problem please first ensure you have followed the installation and setup instructions and reviewed the FAQ section.

If the problem persists please email all bugs and support related enquires to

<div align="center">

support@comit.com.au

</div>

and include Times Desktop Support in the email header.

To assist us we will require the following information:
1. Registration No or serial key, purchase date and contact details
2. Windows OS version
3. Available memory on your PC
4. A detailed description of the problem. If it is bug related an example of the operations performed which caused the problem.

APPENDIX A – CREATING REPORTS

Warning: This section contains technical information and assumes a familiarity with report design, XML files and Visual Studio. There is a great deal of information available on the internet and from Microsoft regarding the use and creation of reports in Visual Studio. This section will outline how to use these tools to create additional reports for Times Desktop, it will not explain how to design reports or use Visual Studio.

To create additional reports you will require Visual Studio Express Web Developer edition or above (free from http://msdn.microsoft.com/vstudio/express) and the free MS Report Designer add-in. Visual Studio Standard edition and above already has the Report Designer included.

OVERVIEW   The standard reports in Times Desktop utilise MS SQL Report Viewer and Client side report definition files (*.rdlc). These are integrated into Times Desktop using an XML configuration file located in the application install directory called Reports.xml. By modifying the XML configuration you can add additional reports and report groups.

Starting with version 1.2 Times Desktop includes a Report Package importer. This is designed to read an XML file and import/update reports and their associated configuration. A sample Visual Studio 2005 project is available from www.comit.com.au/ppc/times/Reports.zip which contains two sample reports and an XML import configuration file. The following section assumes you have downloaded the sample project and can refer to the enclosed files.

XML DEFINITIONS   The Reports.xml file contains the definitions of all reports currently installed. Each report has a name and four elements as shown below. (This Reports.xml file is not included in the sample package but is shown here for information)

```xml
<report name="Times Detail">
    <group>Detail Reports</group>
    <filename>ReportTimesDetail</filename>
    <requiresprompts>true</requiresprompts>
    <procedurename>spr_Report_TimesDetail</procedurename>
</report>
```

- Name – The name displayed in the tree menu in Times Desktop. Must be unique.
- Group – The parent folder / group which the report belongs too when displayed in the report tree. New groups are added automatically.
- FileName – The file name of the rdlc report file (without the rdlc extension)
- RequiresPrompts – Specifies that this reports requires the standard filters. i.e. the stored procedure specified has the standard input parameters defined.
- ProcedureName – The stored procedure to execute for this report

The ReportPackage.xml file is identical to Reports.xml with the addition of a ProcedureSQL element. A sample report element is show below.

```xml
<report name="Sample Report">
    <group>Sample Reports</group>
    <filename>SampleReport</filename>
    <requiresprompts>true</requiresprompts>
    <procedurename>spr_Report_TimesDetail</procedurename>
    <proceduresql><![CDATA[--Put your SQL statements here.]]>
    </proceduresql>
</report>
```

- ProcedureSQL – The SQL commands inside the CDATA tag are executed when the report is imported. Use this to create or update procedures required by the report

When creating reports you must update the ReportPackage.xml file manually for each new report added. Refer to the ReportPackage.xml in the sample project for an example of two new report configurations.

STANDARD PROMPTS To create a report which uses the standard filters you must set the RequiresPrompts element to **true**. The application then assumes the stored procedure name supplied implements the standard parameters as defined below.

- `@UserID dtID – The User ID selected, otherwise null`
- `@Client dtClient – The Client selected, otherwise null`
- `@Job dtJob – The Job selected, otherwise null`
- `@StartDate datetime – The Start date specified`
- `@EndDate datetime – The End date specified`
- `@InvoicedStatus int – The invoice status selected`
    - `0 = All invoices`
    - `1 = Invoiced only`
    - `2 = Not Invoiced only`
    - `3 = Use Invoice No specified`
- `@Invoice_ID dtInvoice – The Invoice No specified.`
  `@InvoiceStatus also = 3`

See the ReportsPackage.xml in the sample for an example procedure which implements the parameters above

PROCEDURE DESIGN Each report must use a stored procedure to return the required data. Typically only a single result set is returned by the procedure, however you can return multiple result sets if necessary. When using multiple result sets you MUST return the result sets in the order they are defined in the reports' data sources. I.e. First define the procedure and then include the data from each result set in the report in the order you will return the result sets from the procedure. If you get the order wrong an error will be displayed when running the report, simply update your procedure to change the returned result set order (easier then changing the report data source order).

A procedure can be used by multiple reports and a report could use multiple procedures (by referencing the same rdlc file more than once in the Reports.xml configuration). Try to keep procedure result sets flexible to avoid unnecessary duplication and maintenance. If updating an existing procedure ensure you do not corrupt any existing dependant reports.

Remember to set the permissions on any new procedure. Ensure you include execute permissions for the `db_timeslocaluser` role for users with SQL Signons.

REPORT PARAMETERS Within the report you can referance a number of parameters which will be supplied by the application. These fall into three groups:

1. Standard filter parameters
2. Security roles
3. System Parameters

Standard Parameters The standard filter parameters are defined by the user when specifying the report filter. If you need to include a filter value in your report create one or more report parameters with the following names and data types:

- `Filter – String. Provides a summary of all filter values`
- `UserID – String`
- `Client – String`
- `Job – String`
- `StartDate – DateTime`
- `EndDate – DateTime`
- `InvoiceStatus – Integer`
  - `0 = All invoices`
  - `1 = Invoiced only`
  - `2 = Not Invoiced only`
  - `3 = Use Invoice ID specified`
- `InvoiceID – String`

Security Roles You can use security report parameters to control aspects of your report, i.e. to hide financial information to users not in the Finance Manger or Admin roles.

To determine if the user is a member of a security role create a report parameter starting with `IsInRole_` followed by the security role required (you must use underscores to replace spaces in the security role)

E.g. to determine if the user in is the Finance Manager role create a report parameter called **IsInRole_Finance_Manager** with data type **Boolean**. You can then use the **Visibility-Hidden** property of report objects to control the report layout. i.e. The Visibility-Hidden property of the Charge column in the sample Activity Summary report is set to:

> =Not(Parameters!IsInRole_Admin.Value Or Parameters!IsInRole_Finance_Manager.Value)

This hides the column to users not in the Admin or Finance Manager roles.

System Parameters All report parameters which do not correspond to either a Standard or Security parameter are considered System parameters. Such parameters are automatically populated with the corresponding values contained in the System Parameters table, see the [Parameter Section](#).

Using this technique you can add additional System Parameters via the application and then consume these within reports. E.g. To create a report which contains a company web site URL you would first create a System Parameter called **Company_Web_URL**. In the report create a parameter called **Company_Web_URL** of type String. When the report is selected the value in the System Parameter table for the **Company_Web_URL** parameter will be retrieved and used to set the report parameter.

It is recommended to keep report designs as generic as possible. Where feasible use System Parameters to provide custom details required in a report rather than hard coding them in to the report design.

REPORT DESIGN To create new reports follow these steps:

1. Determine the data required for the report. If you can use an existing procedure then do so in preference to creating a new procedure.
2. Create and test the stored procedure required for the report in SQL Management Studio, Visual Studio or a similar tool to make sure the data is returned correctly.

3. Open the sample Reports project in Visual Studio
4. Use Visual Studio to create a data connection to your stored procedure and import the result set schema into a new or existing dataset.
5. Remove any data adapters or additional code added by Visual Studio. You only need the data table definition.
6. Create a new report in Visual Studio. i.e. add a new Report object to the project.
7. Set the report Build Action to **None** and Copy To Output Directory to **Copy Always**. This ensures you get the rdlc file in the build folder.
8. Design the report using the standard Visual Studio report designer by dragging the required data elements from the dataset on the data sources list.
9. Add styles and formats to the report
10. Add any required Report Parameters
11. Repeat 1 – 10 for all new reports
12. Update the ReportsPackage.xml file and include a Report element section for each new report
13. Build the project. Each report rdlc file and the ReportsPackage.xml will be copied to the build folder.
14. The Build folder now contains all the files needed to distribute your new reports, i.e. one rdlc file for each new report and the ReportsPackage.xml file.
15. Copy the XML and rdlc files from the Build folder to a location for distribution.

TESTING To test reports import them into the Times Desktop application using the Tools/Import Reports menu function. This will display a file open dialog, navigate and select your ReportsPackage.xml file and click Open. The application will read the configuration details and import/update the Reports.xml file with the new reports.

Once the import is complete select the Standard Reports menu item to view the new reports. If Standard Reports is already displayed click any other menu and then select Standard Reports again.

Run the report and ensure the format and data is as expected. To update a report change the design and re import the ReportsPackage.xml.

REPORT DISTRIBUTION If you wish to share your report packages with other users please send them to support@comit.com.au We will verify that they are safe to run and post them to our website

FAQ

HOW TO BACKUP ALL TIMES DATA

You must be in the Admin role to create and restore backups. To backup the database used for Times data use the Tool/Backup Database menu option. By default the security database is also contained within the Times database and thus will be included in the backup. If you have specified a separate security database you must back this up manually.

The backup is stored in the default backup folder for the SQL server in a file called TimesDB_Backup.bak

APPLICATION EXCEPTION ON STARTUP OR LOGON

If you receive an error before or during the logon then most likely there is a problem connecting to the database. There are a number of possible causes for such error and reviewing the first few detail lines of the error will most likely point to the problem. Below are a number of things to check

1. Do you have a software firewall blocking the connection? You must allow the Times Application, SQL Browser and SQL Server network access. Try turning off you firewall temporarily to determine if that is the cause (disconnect from the internet first if you are not protected by any other firewall or router)

2. Is the SQL server running? See How to check if SQL is running

3. Did the connection timeout? If your PC is low on memory (<512MB) or has a slow processor then the connection to the SQL Server may not be made in the 30 second period allowed. Try starting the application again

HOW TO CREATE AN ACTIVITY OVERRIDE RATE FOR ALL JOBS

You do not need to create an override activity rate for all jobs for a particular client. Instead use the client override rates. Ensure to review and specify Override Job rate if necessary

USER NOT ASSOCIATED WITH A TRUSTED SQL SERVER CONNECTION ERROR MESSAGE WHEN YOU TRY TO CONNECT TO SQL SERVER

During the installation of SQLExpress the database server is configured to use both Windows and SQL signons. If you have installed the Times database on an existing server then the server may need to be updated to use SQL signons or Mixed Mode authentication. To do this, use the SQL Server management Studio to reconfigure the server properties or contact your DBA. If you do not have Server Management studio then use one of the options below:

Option 1.
This is complex in SQLExpress and you need to edit the registry.

1. Copy the following lines of text onto a Notepad and save it with extension .REG.

```
-------------COPY BELOW--------------------------------
Windows Registry Editor Version 5.00

[HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Microsoft SQL
Server\MSSQL.1\MSSQLServer]
"LoginMode"=dword:00000002
-------------COPY TILL THIS-----------------------------
```

2. Double Click on the .REG file to merge the registry setting. This changes the Authentication Mode to enable SQL Authentication.

3. Restart the SQL Server Express Service or reboot the machine for registry change to take effect.

Option 2.

1. Open a command prompt windows using Start/Run and typing cmd. Click OK
2. Change to the SQl Server Tool directory cd C:\Program Files\Microsoft SQL Server\90\Tools\Binn
3. Run the following command - replace (local)\SQLExpress with your server name and instance if necesary

SQLCMD -S (local)\SQLExpress -Q "EXEC xp_instance_regwrite N'HKEY_LOCAL_MACHINE',
N'Software\Microsoft\MSSQLServer\MSSQLServer', N'LoginMode',
REG_DWORD, 2"

4. Restart the SQL Service or PC
5. After the restart try the connection again

HOW TO DELETE THE TIMES PC DATABASE

If you wish to rebuild the Times database or uninstall SQL Server then you must first delete the existing Times database from the SQL Server. WARNING: Once deleted all data is lost and cannot be recovered unless you have a backup. Follow these steps to delete the Times PC database:

1. Close the Desktop application
2. Open a command prompt windows using Start/Run and typing cmd. Click OK
3. Change to the SQl Server Tool directory cd C:\Program Files\Microsoft SQL Server\90\Tools\Binn
4. Run the following command - replace (local)\SQLExpress with your server name and instance and replace Times with your database name if necessary

SQLCMD -S (local)\SQLExpress -Q "DROP DATABASE Times"

5. Review the command output for any errors

If you restart the Times Desktop application again the database will be recreated

CREATE DATABASE FAILED, FILE ALREADY EXISTS

If you have uninstalled and reinstall SQL server without first deleting the Times database you will receive this error when starting the Times Desktop application. To resolve the issue first determine if you want to keep the data within the old database files.

Option 1, Keep data and reattach the data files

1. Close the Desktop application
2. Open a command prompt windows using Start/Run and typing cmd. Click OK
3. Change to the SQl Server Tool directory cd C:\Program Files\Microsoft SQL Server\90\Tools\Binn
4. Run the following command - replace (local)\SQLExpress with your server name and instance and replace path to the Times data files with your database paths if necessary

SQLCMD -S (local)\SQLExpress -Q "CREATE DATABASE [Times] ON (FILENAME = N'C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\Times.mdf'),(FILENAME = N'C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data\Times_log.LDF') FOR ATTACH"

5. Review the command output for any errors

Option 2, Delete old data files

To remove the old data files delete the Times.mdf and
Times_log.ldf files located in the C:\Program Files\Microsoft
SQL Server\MSSQL.1\MSSQL\Data folder. Restart the Times Desktop
and a new database files will be created

*HOW TO CREATE A
NEW DATABASE LOGIN*

To access the SQL Database from a remote PC you will need to
create a new Login on the SQL Service. It is recommended that
you use Windows authentication rather than SQL Signon due to
the exposure of the password in the configuration file. If you
must use SQL Signon then you should only assign the minimum
permissions required to operate Times. To simplify this process
roles have been created on the TimesDB database.

Logins can be added using the SQL Management Studio if you have
it installed. Otherwise follow these steps on the PC/Server
running SQL Server.

1. Copy one of the following scripts into a Notepad. To create
a Windows Login:

```
------------------------- COPY BELOW-------------------------
USE [Times]
CREATE LOGIN [DOMAIN\UserName] FROM WINDOWS WITH
DEFAULT_DATABASE=[Times], CHECK_EXPIRATION=ON, CHECK_POLICY=ON

CREATE USER [TimesLocal] FOR LOGIN [DOMAIN\UserName] EXEC
sp_addrolemember N'aspnet_Membership_BasicAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Membership_FullAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Membership_ReportingAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Profile_BasicAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Profile_FullAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Profile_ReportingAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Roles_BasicAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Roles_FullAccess', N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Roles_ReportingAccess',
N'TimesLocal'

EXEC sp_addrolemember N'db_timeslocaluser', N'TimesLocal'
----------------------- COPY TILL THIS-----------------------

Or to create a SQL Signon:
----------------------- COPY BELOW--------------------------
USE [Times]
CREATE LOGIN [TimesLocal] WITH PASSWORD=N'YourPassword',
DEFAULT_DATABASE=[Times], CHECK_EXPIRATION=ON, CHECK_POLICY=ON

CREATE USER [TimesLocal] FOR LOGIN [TimesLocal] EXEC

sp_addrolemember N'aspnet_Membership_BasicAccess',
N'TimesLocal'
EXEC sp_addrolemember N'aspnet_Membership_FullAccess',
N'TimesLocal'
```

```
EXEC sp_addrolemember N'aspnet_Membership_ReportingAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Profile_BasicAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Profile_FullAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Profile_ReportingAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Roles_BasicAccess',
N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Roles_FullAccess', N'TimesLocal'

EXEC sp_addrolemember N'aspnet_Roles_ReportingAccess',
N'TimesLocal'
EXEC sp_addrolemember N'db_timeslocaluser', N'TimesLocal'
```

---------------------- COPY TILL THIS----------------------
2. Replace the database references to Times to your database
name if necessary.
3. For Windows signon replace all references of DOMAIN\UserName
with your required domain and username. For SQL Signon replace
all references of TimesLocal with your required SQL Signon user
name and replace the password YourPassword with your new
password
4. Save the file as c:\SQLSCRIPT.sql
5. Close the Desktop application if necessary
6. Open a command prompt windows using Start/Run and typing
cmd. Click OK
7. Change to the SQl Server Tool directory cd C:\Program
Files\Microsoft SQL Server\90\Tools\Binn
8. Run the following command - replace (local)\SQLExpress with
your server name and instance

```
SQLCMD -S (local)\SQLExpress -i c:\SQLScript.sql
```

9. Review the command output for any errors

HOW TO REMOVE AN SQL LOGIN

To delete an SQL Signon follow these steps:

1. Close the Desktop application
2. Open a command prompt windows using Start/Run and typing
cmd. Click OK
3. Change to the SQl Server Tool directory cd C:\Program
Files\Microsoft SQL Server\90\Tools\Binn
4. Run the following command - replace (local)\SQLExpress with
your server name and instance and replace TimesLocal with the
user to delete

```
SQLCMD -S (local)\SQLExpress -Q "DROP LOGIN [TimesLocal]"
```

5. Review the command output for any errors

HOW TO CHECK IF SQL IS RUNNING

SQL server is a Service application which runs in the
background on a PC and should be started automatically when
your PC boots. To check the status of the service perform the
following

1. Open the Services control panel in the Administrative Tools
menu or click Start\Run and enter services.msc and click OK
2. Scroll down to SQL Server

3. Check the Status column to see the current state of the service. If running it should say Started

CREATE A RESTORE POINT
1. Click Start menu and select Help and Support.
2. Locate System Restore and click on this link.
3. Click on Create a restore point and click Next.
4. Enter a description.
5. Click Create.
6. Click Close to exit.

RESTORE A RESTORE POINT
1. Click Start menu and select Help and Support.
2. Locate System Restore and click on this link.
3. Click Next.
4. Select the restore point created before installation.
5. Click Next.
6. Click Next to begin restore. It will prompt you to restart the computer

HOW TO TURN USER ACCOUNT CONTROL OFF OR ON IN VISTA
1. Click Start menu and select Control Panel.
2. Double click on User Accounts.
3. Click on Turn User Account Control on or off
4. Tick or clear the check box.
5. Click OK to save the changes.

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