

# TimeClock 3.1 Users Guide

## Welcome to TimeClock Version 3.1 for Palm OS

### What's New

TimeClock Version 3 is a great way to keep track of your time, your business, your employees, your inventory, and more. This new version includes many new options and features, which you will learn about in this guide. Every effort has been made to keep TimeClock as simple to use and understand as previous versions. This new version is compatible with Palm OS versions 3.5 and higher, and is fully OS5 compatible, including support for hi-resolution devices, the Tungsten T3/T5 dynamic input area, and landscape/portrait modes, while still remaining compatible with older devices. TimeClock now has advanced security features to keep your data safe from prying eyes, and boasts a graphical navigation system optimized for ease of use with or without a stylus. Among the many new features are Overtime calculations, Inventory tracking, Printable Invoices, and many many more.

Users of previous versions of TimeClock may find all of these new features are more than they need, or just what they were waiting for. In either case, you may choose for yourself which features you want to use.

### Compatibility with older versions of TimeClock.

Unfortunately, due to the many changes required to add these new features, the data from older versions of TimeClock *cannot* be imported into this version (Version 3). You may still retain your old data from previous versions by leaving the previous version installed on you device. The new version will not overwrite the old version.

### Using this guide

This guide is intended for both new users and users of previous version of TimeClock. It is recommended that all users follow the steps below to gain a working knowledge of TimeClocks' methods and procedures. This guide covers all of the available functions, as well as some useful, real world tips that will certainly enhance the viability of TimeClock as part of an integrated time management system.

Let's begin by loading TimeClock onto your Handheld Device.

### Installing TimeClock

Unzip TimeClock3 to a temporary location on your computer. Remember where it is so you can find it. In the archive, you will see three (3) files. TimeClock3.prc is the application that will get installed on your handheld. TimeClock3Help.html is this help file. TimeClockVersions.txt is a simple text file describing the different versions of TimeClock.

You will need to use the HotSync Manager to load TimeClock. Double click TimeClock3.prc to start the Hot sync installer. Now HotSync your device. During the Hot sync operation, TimeClock will be loaded on the device.

Once the HotSync procedure is complete, you should see the TimeClock icon in either the 'All' or the 'Unfiled' category in the application launcher of your handheld.

### Running TimeClock for the first time

The first time TimeClock is run, it will automatically install all of the files it requires to operate properly. If, after TimeClock has been installed, you receive a 'Missing File' alert, it means that

## TimeClock 3.1 Users Guide

one of these files has not installed properly (or was accidentally deleted) and you must reinstall TimeClock.

After the initial setup operations are complete, you will see the TimeClock preferences screen. Although you do not absolutely have to, it's a good idea to inspect and adjust all of the options here, as they change the way TimeClock works and looks.

As TimeClock has many settings to adjust, there are more than one page of preferences. At the top of each page is a popup list where you can select which page you want to view/edit. Let's take a closer look at the options provided.

### **General Options**

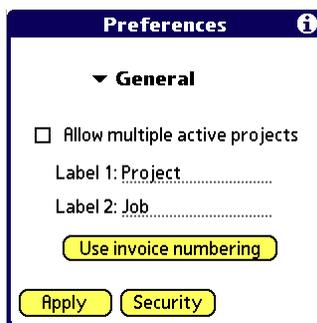
Allow multiple active projects: Normally, TimeClock will not allow you to be in more than one place at a time. In other words, you can't punch in to more than one project at a time. Check this option to allow multiple projects to be punched in at once.

Label 1: Speaking of projects, who says they have to be called 'Projects'? Nobody. You can call them whatever you want. Jobs, Duties, Tasks, anything you want. This only a label and does not affect the way TimeClock works.

Label 2: This is like Label 1, but with an extra option. You can use it as a simple label, or by tapping 'Use Invoice Numbering', you can convert this field to an 'Invoice Number' field. Once converted, TimeClock will automatically assign sequential numbers to your projects. Every time you create a new one, the number increases by 1. You don't have to start at number 1 though, you can enter whatever starting number you would like to use. TimeClock will take it from there.

You are free to switch between invoice numbers and a simple label as often as you would like. Projects created with one method will not be changed when you switch to the other.

**Tip:** Note the 'i' in the upper right corner of the screen. Any time you see this icon, you can tap on it to view the built-in help screens. If there is no help icon shown, you may still view the available help by using the menu bar.



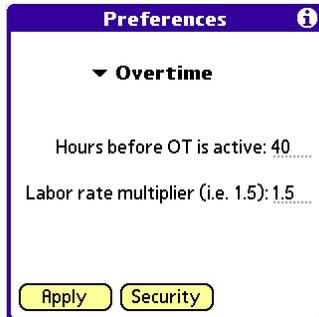
### **Overtime Options**

Due to the large number of possible overtime scenarios, TimeClock uses only a very simplistic version in order to keep TimeClock easy to use. There are only 2 options.

Hours Before OT is active: If the total time in any one (1) project exceeds this number (number of hours), TimeClock will consider the excess hours overtime. For Example, if this number is set to 40, and the total time for that project is 43 hours, the calculated overtime will be 3 hours.

## TimeClock 3.1 Users Guide

**Labor Rate Multiplier:** The number you enter here is multiplied by the labor rate and then multiplied by the calculated overtime (3 hours in the above example). To continue our example, if this is set to 1.5 and the Labor Rate (you'll learn about this option later) is set to \$20 per hour, and the calculated overtime hours equals 3, the total will calculate to \$90 ( $1.5 * 20 * 3$ ).



The screenshot shows the 'Preferences' dialog box with the 'Overtime' section expanded. It contains two input fields: 'Hours before OT is active: 40' and 'Labor rate multiplier (i.e. 1.5): 1.5'. At the bottom, there are two buttons: 'Apply' and 'Security'.

### Protecting your data

TimeClock now includes a security feature to protect your data from unauthorized users. This option only protects TimeClock data. Before we continue, it must be noted that if you lose your PIN number, it cannot be retrieved. You will have to completely remove and reinstall TimeClock to reset your PIN. **Any and all TimeClock data will be permanently lost.**

With the warnings of death, destruction, fire and brimstone out of the way, let's see how it works.

Tap the Security button to open the security dialog. As this is the first time using TimeClock, there is no Old Password, so you can move on to New Password. You can enter only numbers, dashes '-' and periods '.' into the password field. More correctly, this is a PIN number rather than a password. Enter a number into the New Password field.

There are 2 checkboxes here. The first one turns off the security feature. The second one masks, or 'hides' the characters you enter when you type in your password so someone standing close to you cannot read it.

Tap OK when you are finished. If you have set a password and uncheck the 'Don't ask' box, the next time you start TimeClock, it will ask you for your password.



The screenshot shows the 'Preferences' dialog box with the 'Change Password' section expanded. It contains two input fields: 'Old Pswd:' and 'New Pswd:'. Below the input fields are two checkboxes: 'Don't ask for a password' (checked) and 'Mask password' (unchecked). At the bottom, there are two buttons: 'OK' and 'Cancel'.

### Default Settings

Here we see the Default settings that will be used when you create a new project. These can be changed from within the project itself as well. The defaults here only apply to when the project is first created, saving you the time of entering the same values for every new project. The email address you enter here will be used as the 'Send To' address when exporting reports via E-mail.

## TimeClock 3.1 Users Guide

See Exporting Data for more information on this topic.

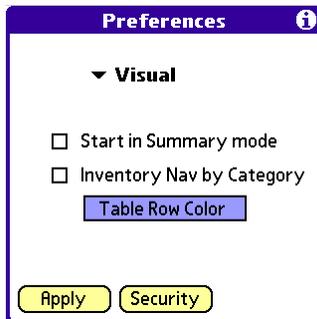


### Visual Options

These options determine what TimeClock will look like.

Start in Summary Mode: By default, when you start TimeClock, you will be shown a list of the projects that you have previously created. Checking this box will skip that screen and go directly to the last used project.

Table Row Color: TimeClock uses a few different tables (or lists) to display both the data that you have entered, and the data the TimeClock has created or calculated. Every other row in those tables can be set to this color, making it easier to follow rows across the screen. Tap this button and you will see a color chart with all of the available colors that your device can display. Simply choose the color you wish to use.



You're ready to start using TimeClock!

Tap the Apply button to finish. TimeClock will pause for a moment while it applies the settings you have just entered. When it is finished, you will see the List view screen. *Note: If you have entered the preferences screen from another part of TimeClock using the menu, you will be returned to where you left off.*

### Navigating TimeClock

At the bottom of the screen we see a few different icons. This is the Navigation Toolbar. You will find these toolbars throughout TimeClock. Each of the icons have a different function. To learn what each one does, tap and hold the icon. After a short delay, a description (called a ToolTip) will be displayed at the top of the screen. Slide the stylus off of the icon and release it to stay on the screen you are on, or release the icon to activate its' function.

# TimeClock 3.1 Users Guide



There are some TimeClock functions that are used less often than others. These lesser used functions do not have toolbar icons to activate them. To access these functions, you can use the Menu bar at the top of the screen. To activate the menu bar on newer devices, tap the screen title at the top of the screen. On older devices, use the Menu icon in the silkscreen area.



## Creating a New Project

If you aren't already viewing the List View Screen, go to it by tapping the 'Home' icon, or selecting 'Home' from the menu. This will display basic information about the projects you have created. This screen can be accessed from almost everywhere within TimeClock using the menu bar - Goto menu - Home. Let's begin by creating a new project.

Tap the 'New' button to start the creation process. TimeClock will initialize a new project file. Depending on the speed of your device, this may take a couple of seconds to complete. After the new project has been initialized, you will see the Project settings screen.



Notice the name at the top of the screen. This is your HotSync User ID. Your registration code is dependant on this name. When registering, you will need to send us this name, exactly as it appears here. This is also useful when more than one user is using TimeClock on different devices. Each project stores the name of the person who created it.

Let's move on the options you have available here.

## TimeClock 3.1 Users Guide

The blinking cursor means you should enter something into the field it's on. In this case, TimeClock is asking you to enter a project name (or whatever you named this field). The next field will either be another label like the first one, or an invoice number, depending on which option you chose in the preferences section. The invoice number, if used, can be changed here if needed, but has been automatically incremented by 1 already.

Category: The next setting is the project category. This will be used to filter the table on the List View screen. There is a popup like this one on that screen above the table. You may add, edit, or delete these categories by choosing 'Edit Categories' from the popup list.

**Tip:** *Create a project category and name it 'Archived' or 'Inactive'. When you are done with a project, change its' category, select the 'Lock this project' option and leave it on your device for later viewing.*

Lock This Project: This setting keeps you from accidentally punching in or out of this project. If the project is locked, an alert box will be displayed when you try to perform a protected function. You can bypass the lock with only a tap if needed. This is only meant to prevent unintended punches.

Enable Overtime: Checking this box will tell TimeClock to use the previously entered overtime options when calculating labor totals.

1-Tap Punching: As we will see later, you have the option to enter a comment when performing punch actions in a project. Select this option if you would like TimeClock to skip that step, making the punch process require only a single tap.

Always calculate totals: As you enter more and more information into TimeClock, the databases used to store the data will increase in size. This is not a problem; however you may notice an increasing amount of time required for TimeClock to calculate the hours worked (and the associated amounts). With this box checked, TimeClock will recalculate the hours every time you punch out. Unchecked, TimeClock will not automatically re-calculate the time. With either setting, you can manually calculate the time by tapping the 'Calc' button on the summary screen. By default, this option is turned on. You can turn it off here, or you can turn it off in the TimeClock preferences screen (located under the Defaults heading).

Labor Rate and Tax Rate: These should already be set to the default values we entered when we first set up TimeClock. Any changes you make here will only effect this one project.

**Tip:** *To disable the tax for a particular project, enter '0' in this field.*

Reset: When you are done with your project, you have a few different options. You can simply leave it on your device (they don't take up a lot of space) for referencing later. You can also Reset the project. This means that all of the calculated fields (total times, costs, etc...) are returned to zero, the Time Card entries are cleared, and the Parts List is cleared. All other information is retained. This is useful if you wish to reuse the same project from week to week.

Remove: If you want to completely remove all traces of a project, use this option. Everything related to the project is permanently removed.

*Note: When removing or resetting projects that have items in the Materials list, TimeClock will ask you what it should do with the item quantities. If you are tracking inventory, select the option to Not return the items to inventory. This will insure that your item quantities remain accurate. Returning the items would be the equivalent of 'voiding' the transaction, and TimeClock will add the items back into the inventory.*

# TimeClock 3.1 Users Guide

## Invoice Summary Screen

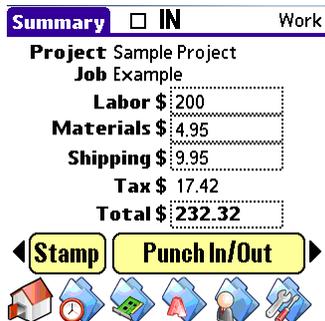
Up until now, we have been using 'project' to describe the records we are working with in TimeClock. You may have already changed the setting to call it something else as well. Here, we see the title of the screen called only 'Summary'. When we refer to the Project Summary, this is what we are talking about.

You should see the navigation toolbar again at the bottom of the screen. This is the same as the last toolbar with the exception of the Home icon. In this screen only, this icon will bring you back to the List View screen.

Also on this screen are 2 small arrows (right and left). One next to the Stamp button, and one next to the Punch button. These arrows let you navigate between projects without going back to the List View screen. The order they are navigated is the order that they are sorted in the list view screen.

*Tip: If your device has a 5-way navigator, you can use it to navigate the project screens also. Depending on which screen you are viewing, the Select button (the middle one) will perform a different function for each screen.*

This screen will show you the totals for labor (including overtime if enabled), miscellaneous charges, materials, and tax. Some of the fields have a dotted box around them. This means that when you tap on the field, a function is performed. Tapping on the Labor field will recalculate the labor time and amount. Tapping on the miscellaneous charges field will open a new screen allowing you to edit those charges. Tapping on the total field will refresh all of the calculations on the screen. If you have made any changes to materials, labor, charges, or the tax rate, tapping this will ensure all of the numbers displayed are correct.



## Punching in and out

Also on the Summary screen is one of TimeClock's most important functions; the Punch button. Tap it to proceed to the next step.

Unless you have enabled the '1-Tap Punching' option, you should now see the Punch Confirmation screen. This is where you can confirm the date and time that will be used for the time calculations. The punch date and time is automatically set to the current date and time, but tapping on either of them will allow you to change them.

**Warning:** It is possible to set dates and times that will result in negative accumulated times. For example, you can enter a punch out time that is before the punch in time. Furthermore, setting a time or date to some point in the future will automatically set an alarm on your device that will alert you at that time.

## TimeClock 3.1 Users Guide

You may also add a comment. 'Went to lunch' would be a good example.

You may cancel any punch action by tapping the Cancel button. You will be brought back to the screen where you tapped the punch button. **Note:** *This applies to using the menus also. You can punch in or out from any of the project screens, not just the Summary screen, using the menu bars at the top of the screen, or the command shortcut.*

After entering a comment and/or editing the punch time, tap the Punch button to finish the process.

TimeClock will take a few moments to perform the punch action. When it is finished, you will be brought back to the screen where you tapped the Punch button. Notice the indicator at the top of the screen. It will indicate that you are now 'Punched In'.

In order for TimeClock to calculate the time, you must punch out, but before we do that, let's spend some time in another important area of TimeClock.

### **Inventory**

If you aren't already at the Summary screen, tap the Home icon to return there. Tap the Home icon again to go to the List View screen. Alternately, you can use the Menu bar - Goto - Home to return to the List View screen.

You should now see the project we have just created in the list. If the project is not listed, tap the category field in the upper right corner of the screen and select either 'All' or the category that you chose when we created the project.

**Tip:** *Tap one of the labels at the top of the table to resort the data that is being shown. The first tap will sort the list A to Z, and the second tap will sort it Z to A. This feature can be used for most tables in TimeClock*

Locate the 'Inventory' button in the lower middle of the screen and tap it to navigate to the inventory section of TimeClock.

Here is where TimeClock will keep track of your inventory. Remember that the term 'Inventory' is generic, as this section can be used for any consumable item whether it be 'Parts', 'Materials', 'Items' or 'Widgets'.

We will start by adding some items to the inventory. Tap the Add button to create a new item.



Item	QOH	Price
Sample Item	1	4.95

### **Inventory Edit screen**

As we learned before, the blinking cursor indicates that you need to enter some data. In this case, you should enter a name for our new item.

## TimeClock 3.1 Users Guide

**Note:** You can use part numbers or part names for this field. Remember though that only this field will be displayed in the Inventory list. If using numbers, it may be difficult to find the correct item in the list (unless you memorize all of them). Optionally, you may enter the part name in this field, and the part number in the description field.

Once you have chosen a name (or number), you can enter a description in the Description field. The description field is used only for reference, and does not impact any other functions. Much like projects, inventory items can be categorized. Use the same method to add, edit, or remove categories as we did before, by choosing the 'Edit Categories' option in the popup list.

There are three more fields to enter on this screen. The Price field will be used to calculate the materials cost in the Summary screen. The 'Qty on hand' will keep a running total of how many of a particular item you have 'in stock'. When adding items to a projects' materials list, this number will decrease by the number added to the project.

Lastly, you may enter an optional 'Minimum Quantity'. TimeClock will alert you of all of the items that are currently at or below the minimum quantity, as we will see shortly.

You've just created your first inventory item. Before we move on, let's try one more thing.

Tap the Duplicate toolbar button. You have just duplicated your first item. There are now 2 of them. In order to prevent confusion, TimeClock will show you an alert box asking for a name for the new part. Enter a unique name or number for this new part and tap OK.

You may change any or none of the other item information. When you are finished editing, tap the Done button to continue.

You should now see the inventory list with the 2 items we just added. Tap Done to return to the List View screen.

Now that we have some items in inventory, let's add some to our project. Tap the project in the list to re-open the project and view the Summary screen.



**Edit Inventory**

**Item** Sample Item

**Description**  
This is a sample inventory item

**Category** ▼ Parts

**Price** \$ 4.95

**Qty on hand** 1

**Min Qty** 1

### Adding parts to a project

Locate the icon (using the tool tips) that will bring you to the Materials List screen and tap it. You will see yet another table. This one will eventually show you any inventory items you have added to this project. Let's add one by tapping the Add Item button.

This is a list of the items in your inventory. You can use the Find feature to search for a part name or number, or select a category and pick the part from the list. Once you have located the

## TimeClock 3.1 Users Guide

part you would like to add, tap its' entry in the list. That items' name will display at the bottom of the screen, along with a flashing cursor prompting you to enter the quantity you would like to add. Enter a quantity and tap the Accept button. Alternately, if the item you are looking for is not in the inventory list, you may tap the New Item button to quickly jump to the Edit Inventory screen and create a new item.

After tapping Accept, we are brought back to the Materials list screen. You will see the items you have added, along with the total materials cost at the bottom of the screen.

*Tip: Tap an item in the Materials list to edit the quantity or remove the item from the list.*

### **Finishing a Project**

Navigate back to the Summary screen using either the toolbar or the menu bar. You will see the calculated total of the inventory items you have added. If the Total amount is blank, use the Update button to calculate the total.

Tap the Punch button to punch out of this project. Again, if enabled, you will see the punch confirmation screen where you may enter another comment, or adjust the time and date. After making any adjustments, tap the Punch button to complete the operation. Like before, TimeClock will take a few moments to perform the required calculations. Once completed, the Summary screen will display the total accumulated time, as calculated from the difference between the Punch In time and the Punch Out time. Use the Update button to recalculate the totals.

Congratulations!, you have completed your first project.

Now that you've learned the basics of creating and using projects with TimeClock, let's take a look at some more of TimeClocks' more advanced features.

### **Exporting Data**

Having a lot of information on your handheld device is very useful. Getting that information out of the handheld and onto your desktop is even more useful. TimeClock offers several ways to get your data out of the confines of your PDA.



### **Exporting to a Memo Pad entry**

Open a project that has some timecard entries and open the menu bar by either tapping the title at the top of the screen, or by tapping the menu icon in the silkscreen area. Under the Actions menu select Export.

There are a quite a few options here. At the top is a popup selector labeled Destination. This is where the exported data will be sent. The remaining are the options to include or exclude particular data in the export. By default, the Memo Pad will be the destination. Also by default,

## TimeClock 3.1 Users Guide

all of the available data is selected. Without making any adjustments, tap the Export button. After a few moments, you will be notified that the export procedure has been completed. Depending on how much data is in the project, this can take several seconds. Open the Memo Pad application to view the exported data, and the format that it is presented in. *Note: If you have never used the Memo Pad application before, the export will fail, as the Memo Pad has not yet been initialized. To fix this, simply open the Memo Pad application and then return to TimeClock.*

### **Exporting to Doc Format**

The standard Memo Pad application has been around for a long time, and has its merits, but if you need to do anything more than jot down a quick note, the Doc format is the way to go. It offers the ability to do more advanced text editing and formatting, as well as offering a comprehensive desktop companion. DocsToGo is the primary application used to view and edit Doc files, and is included with most new Palm Powered PDA's. Back at the export screen, select Doc as the destination and tap the Export button again. The data will be available to any application that recognizes the Doc format.

### **Printing**

If you have an infrared or Bluetooth compatible printer, you can print the same data directly to your printer. Since Palm Powered PDA's do not come from the factory with any printing utilities, you will need to install a 3rd party printing utility. We recommend PalmPrint by Stevens Creek Software.

The data is printed in the same format as the Doc and Memo Pad data. Simply select the Printer checkbox as the destination and tap the Export button.

*Tip: If you do not have a infrared or Bluetooth printer, you can still print the data by exporting the data to either the Memo Pad or a Doc file and performing a HotSync operation. Once the data is on your desktop computer, you have many printing options using the desktop applications used to view the data.*

### **E-Mailing**

If your device is capable of sending e-mail, TimeClock can export the data directly to your e-mail application. The format is exactly the same as the other forms of export. When using this export method, you must supply an e-mail address to send it to in the Project Settings Screen. When the data is sent to the e-mail application, a confirmation dialog will prompt you about any particular email settings. This will be determined by your particular email client.

### **Managing Inventory**

TimeClock 3 is meant to be used on a daily basis, but not just for tracking time. The inventory section will let you store inventory information, create a shopping list of items that are below a preset quantity, and sort and organize the information you have entered.

Using the navigation toolbar, navigate to the inventory list screen. From here, as we learned previously, we can create new inventory items. There are other options here as well. Open the menu bar at the top of the screen. Here we see all of the available options.

### **Print**

If you have a infrared or Bluetooth capable printer, you can print directly from TimeClock. The print function is available in most sections of TimeClock. The data that is printed is dependant on the screen currently being viewed. In this case, an inventory list will be printed, including the

## TimeClock 3.1 Users Guide

items shown in the list. If the list is showing a particular inventory category, only the items within that category are printed.

### Export

Much like the Print function, the Export function will export the data shown to either the devices' Memopad, or a standard DOC format. With either method, the data can then be viewed or printed on a desktop computer after performing a HotSync operation.

### Report

Most inventory control software include some form of statistical reports. TimeClock does as well. The Reports screen will provide information such as the best selling and worst selling items, most and least expensive, highest and lowest cost, and the total inventory value.

### Navigating Inventory items

When viewing the Inventory List screen, tapping on an item in the list will bring you to the Edit Item screen where you can make changes, add, remove, or duplicate that item. You can also navigate through the inventory list using the Previous/Next buttons in the toolbar. This does not scroll blindly through all of the items in the inventory list though. It will only show you the items that match the category selected in the Inventory List screen. If 'All' is selected in the inventory list screen, then all items will be visible when scrolling through the items.

### Managing Contact Information

TimeClock offers the ability to store both a Bill To address and a Ship To address. To navigate to the Bill To address, use the toolbar from within any of the project screens. You may enter information 2 ways, either by manually entering the data in the fields provided, or by importing the data from the devices' built in address book. To import from the address book, tap the Import button and select the contact from the list. After you have selected an entry, tap Add. The information is automatically entered into the TimeClock fields. The same can be done for the Ship To address. You can navigate to the Ship To screen by tapping the toolbar icon again. Every time you tap the toolbar button, TimeClock will switch between the two screens. If the same information is to be entered on both screens, tap the Copy button to automatically copy the information from the other (non-visible) screen.

<b>Bill To</b>	<input type="checkbox"/>	<b>IN</b>	Work
<b>Project</b>	Sample Project		
<b>Job</b>	Example		
Name:	Ideal Universe Software Design		
Title:	Support		
Phone:	631-219-0383		
Addr:	.....		
City:	Riverhead		
State:	New York		
Zip:	11901		
	<b>Import</b>	<b>Copy</b>	