Inmotion
Mobile Software Solutions

TimeCompanion 2003 Desktop Edition

User Guide

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Installing TimeCompanion

System requirements

TimeCompanion consists of two applications: a Windows® desktop application and a Palm OS® application.

The Windows®-application requires Microsoft Windows® 98 or higher and Internet Explorer® 5.0 or higher. The Palm OS® application requires Palm™ Desktop 3.0.1 and Palm OS® 3.0 or higher. The database format is Microsoft Access® 2000.

Upgrade

If you upgrade from an earlier version of TimeCompanion, we recommend that you synchronize your Palm OS® organizer and take a backup copy of the database file (c:\program files\timecompanion\timecompanion.mdb). Then uninstall the application from the personal computer and Palm OS® device before you install the new version. See the system documentation for your personal computer and Palm OS® device to see how to uninstall applications. Replace the timecompanion.mdb file with your backup copy when you have run the TimeCompanion installer on your computer.

Installation

- Insert the CD and select to install TimeCompanion Desktop Edition, or double-click on the Setup.exe file. Then follow the instructions on the screen.
- Start TimeCompanion from the Windows® Start menu, Programs, TimeCompanion 2003, TimeCompanion.
- Enter your name and a password. Confirm the password and click OK.
- You can now register the product, or choose to use the freeware. Enter your name, the name of the organization you represent, and the Product-ID you got when you purchased the product. When you click OK, you will be logged in to TimeCompanion. You can also choose to use the freeware for evaluation purposes.
- Synchronize your Palm OS device® two times in order to install the system and transfer data.

Login is automatic in TimeCompanion if there is only one user of the system. Note that each user of TimeCompanion needs a unique license (Product-ID) in order to use the system.

TimeCompanion Setup

Before starting to report time, we need to set up some basic data. We need to decide what time- and cost categories to use, and set up customers and projects.

- Use the **New** button to add Time Categories, Cost Categories, Customers, and Projects.

Note: it is easiest if you add the categories in the order suggested above.

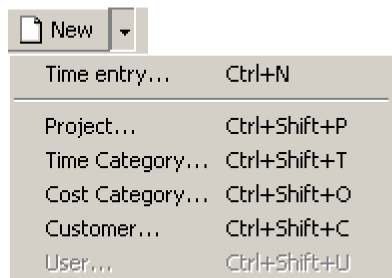

Figure 1. Use the New button to set up categories, customers and projects.

Category Manager

In the Category Manager, time categories, cost categories and customers are managed.

The **Time Categories** are the activities you want to be able to report time on. This may for example be meeting, correspondence, data analysis, programming, report writing, travel, sales, planning etc, depending on the type of work you do.

The names of your **Customers** are usually the names of the customer organizations you work for. You may want to add a customer called "Internal" for projects that are not customer-initiated.

The **Cost Categories** are used to specify a time rate, cost, or price for the time. This rate can for example be used in invoices. You can specify different rates for standard work, overtime, travel, administration etc. It may be good to have a cost category with a zero fee for work that will not be billed.

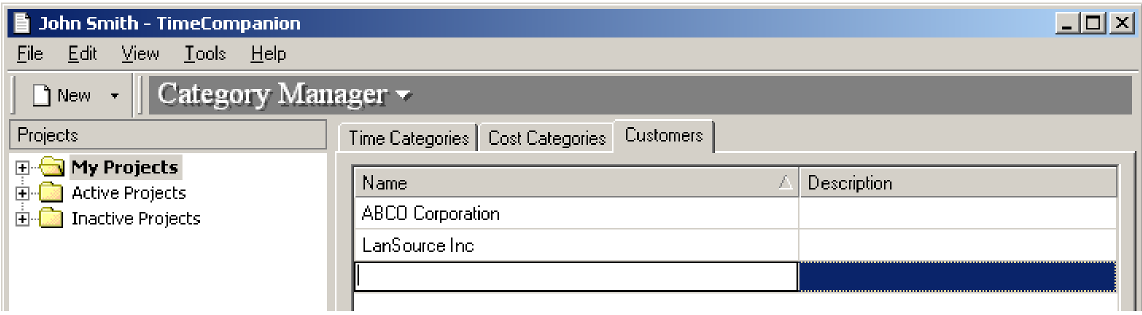

Figure 2. Category Manager.

In order to delete an entry in the Category Manager, you double-click on the line you want to delete, and press delete on the keyboard. You can double-click on a value to edit. Click in the white field to add a record.

Projects

When you add projects, you can add a project name, description and administrative information, such as for what customer the project work is carried out.

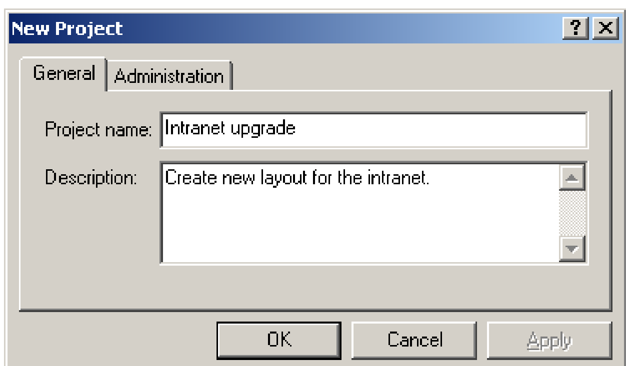

Figure 3. New project.

When you add a project, it is automatically added to the **My Projects** folder. This is the folder containing the projects you want to be able to report time on at the moment. You can see all active projects in the **Active Projects** folder, and the inactivated projects in the **Inactive Projects** folder.

In order to add or remove a project from My Projects, you **right-click** on the project, and select **Add to My Projects**, or **Remove from My Projects**.

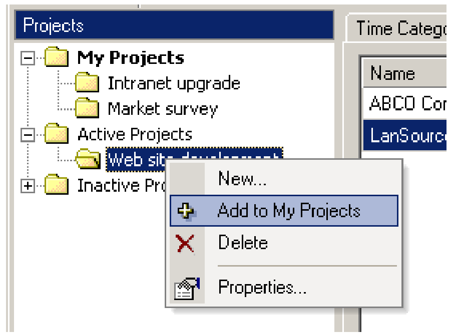

Figure 4. Add and remove projects from "My Projects".

You can change properties for a project by right clicking on it and selecting **Properties**. You can activate and inactivate projects by selecting the **Active** check box on the Administration tab.

Settings

Use the **Tools**, **Settings** menu to specify the length of the workday, the default event duration, default cost category and time formats. You can set the language for the desktop application on the **Language** tab.

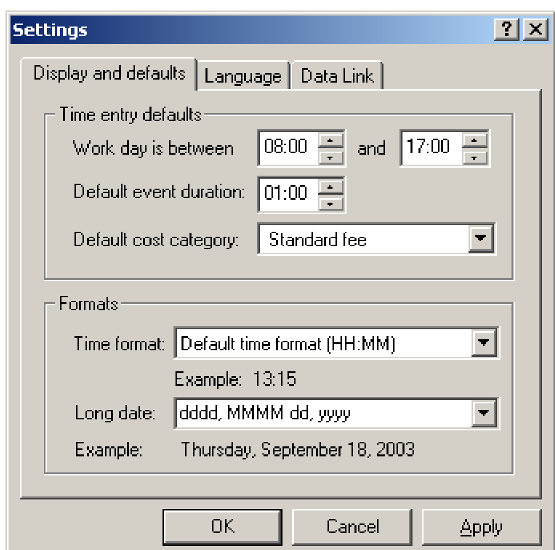

Figure 5. Tools, Settings.

On the **Data Link** tab, you can specify what TimeCompanion database you want to use. This is relevant if you want to connect to a TimeCompanion database on a local server. Click Change to open the Data Link Properties dialog.

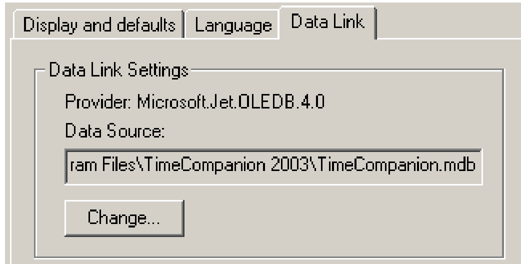

Figure 6. Use the Data Link setting to connect to TimeCompanion databases.

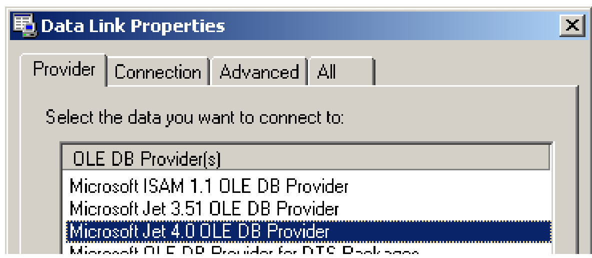

Figure 7. Data Link Properties.

The database driver should be Microsoft Jet 4.0 OLE DB. Change to the Connection tab and select the folder on the computer where TimeCompanion is installed (or a shared folder on a server). The database name is TimeCompanion.mdb. Use the Admin user name, and leave the password blank.

Note: If you cannot access the database correctly, it may be due to missing or outdated database drivers on the computer. The database driver and updates can be downloaded free from Microsoft. Use Microsoft Data Access Components (MDAC) 2.6 or higher, and Microsoft Jet 4.0 SP3 or higher. Also, make sure that you have Windows® permissions to access the database file and shared folder. See the Windows® documentation for information on how to share folders and set permissions on files and shared folders in your version of the operating system.

Report time

There are several views in TimeCompanion, which makes it easy to see both an overview, and details of the reported time. You select the time reporting view by clicking on the dark gray list header (week view, day view and details).

Figure 8. Switch between views with the view selector.

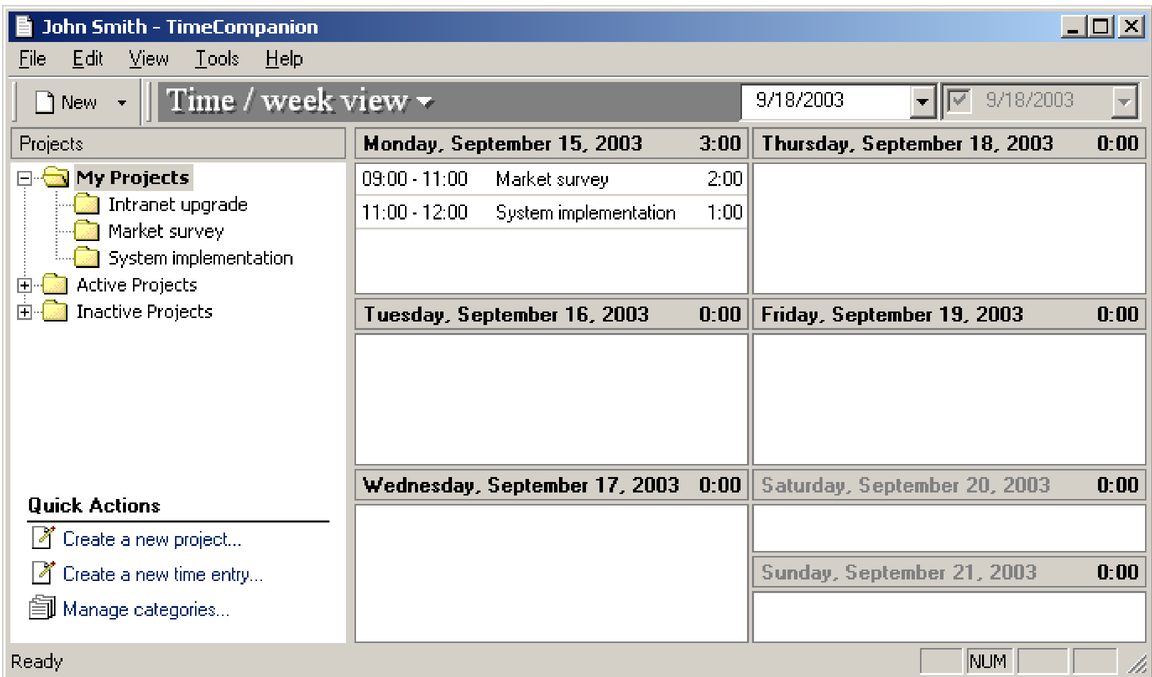

Figure 9. Week view for time reporting.

To create a time entry, you click **New**, or double-click on the white space for the day you want to report time on.

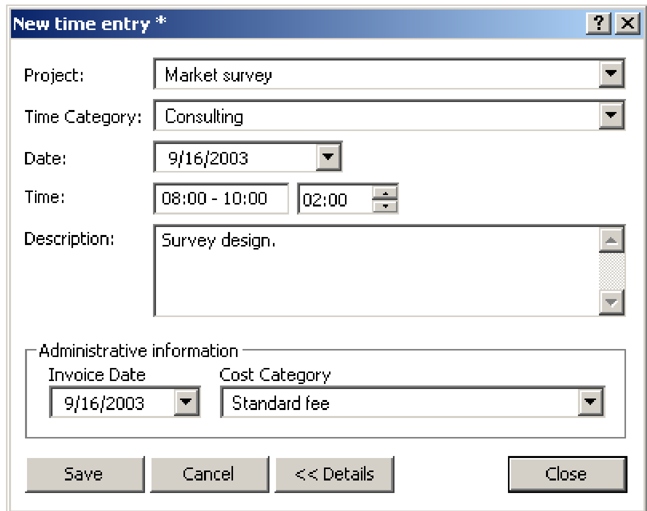

Figure 10. New time entry in detail view.

Select a project, time category, date, time and enter a description. The time is entered as hours and minutes. You can also click **Details** to extend the dialog and specify the cost category, and set an invoice date. Click **Save** to save the entry, and **Close** to go back to the main view.

To edit the time entry, you double click on it in the main view. To delete an entry, you select it in the main view, and press delete on the keyboard.

The invoice date is saved on each time row. The idea is that it can be helpful to know both when the work was carried out, and when the time row should be invoiced.

In the day view, it is easy to add time rows by selecting time, project and time category directly on the work area. This is a simple way to add time if you do not want to change the cost category or add a description.

Figure 11. Add time easily in the day view.

In the details view, you can make a selection of time rows in order to get an overview or copy the data to other applications.

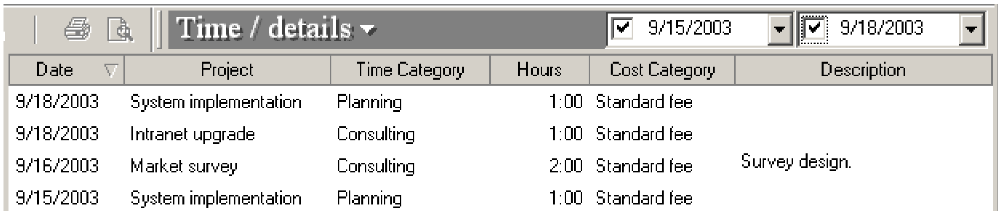

Figure 12. Time details view.

Right-click on the data to select if the time should be shown as hours and minutes, or in fractional form. Fractional display is often preferred when data is copied to other systems, such as spreadsheet applications.

Reports

To see time reports, you can switch to the Reports view using the view selector.

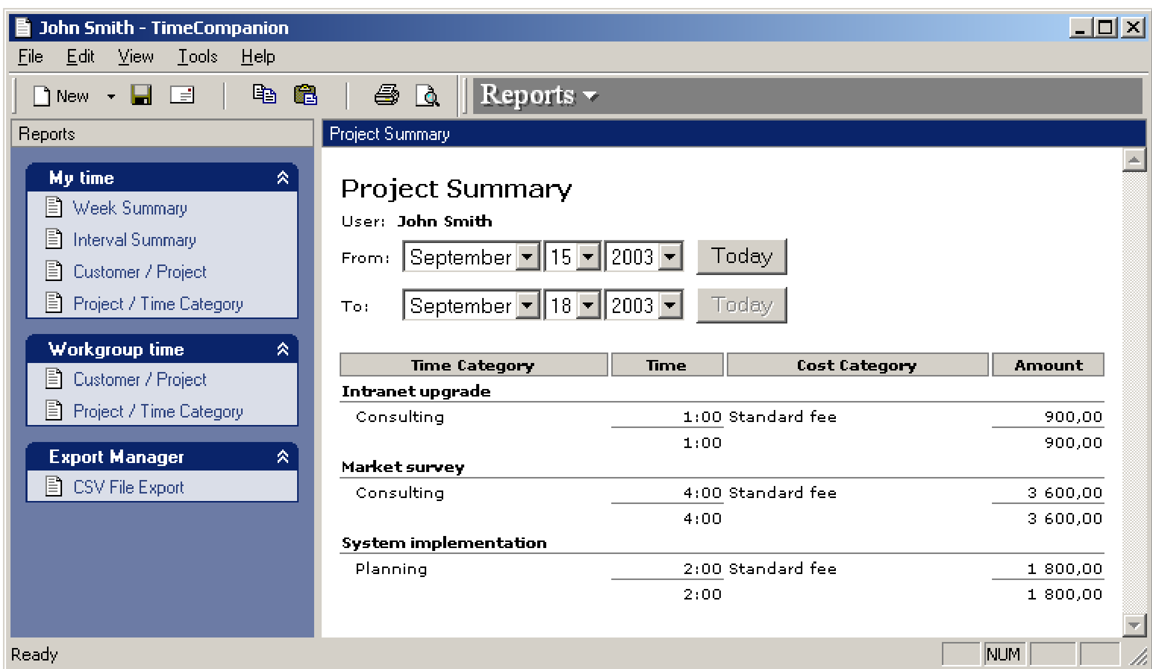

Figure 13. Reports.

Select the report you want to see in the left pane. Select the date interval at the top of the report form.

You can preview and print the report using the buttons on the toolbar. If you want to send the report as an e-mail enclosure with Microsoft Outlook®, click the envelope button.

The workgroup reports are used if you have several users of the system, and want to see summary reports for the workgroup.

With the export manager, you can save data to a file. This is suitable if you want to send the data for central aggregation or invoicing.

There is a special report tool available free for users who have Microsoft Access® installed. Please visit http://www.inmotion.se.

Palm OS® application

The TimeCompanion Palm OS® application can be used to report time, as well as to manage projects, time categories and cost categories.

The date selector at the top of the screen is used to scroll between dates. You can also click on the date and select a specific date.

Tap **New** to enter a new time row.

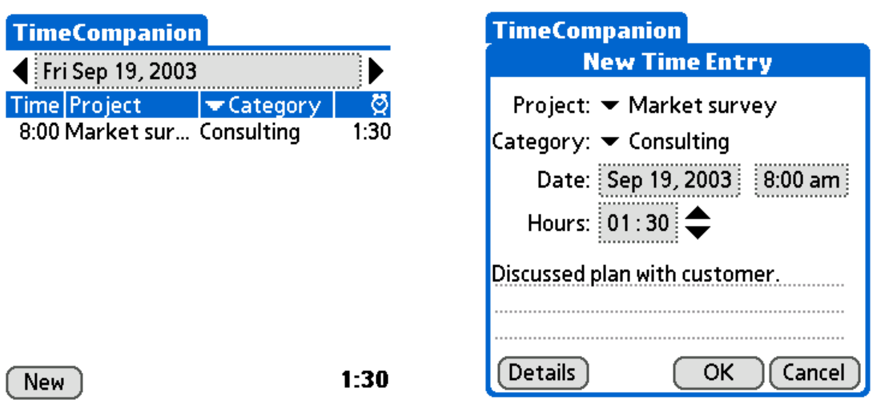

Figure 14. Palm OS® application.

You can change the cost category and invoice date by tapping the **Details** button.

When you have added a time entry, you can tap on the time value to start a timer. Tap the time value again in order to stop the timer for the entry.

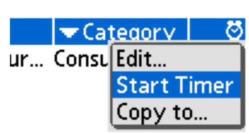

Figure 15. Start and stop the timer by clicking on the time.

Tap the **Menu** button in order to manage projects, time categories, cost categories and to set preferences.

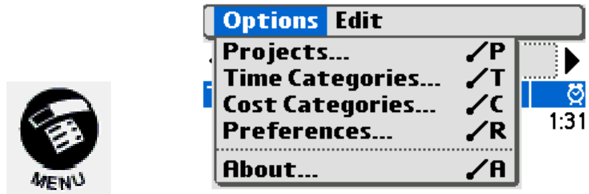

Figure 16. Projects and categories are managed through the menu.

Through the Preferences menu, it is possible to set the standard event duration, and the number of minutes to be incremented with each tap on the time selection arrows.

TimeCompanion uses two-way synchronization. In the case that a time entry has been changed both on the handheld device and using the desktop system, the value in the handheld device is written to the database.

You can set synchronization preferences using the Custom settings for TimeCompanion 2003 in HotSync®.

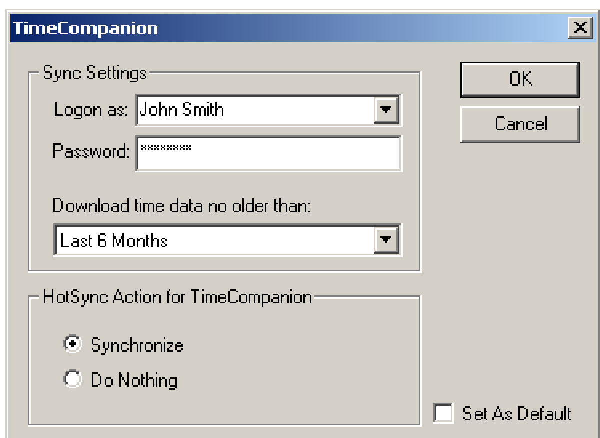

Figure 17. Synchronization settings for TimeCompanion in HotSync®.

Workgroup installation

TimeCompanion can be used in a workgroup. Install TimeCompanion on the server. Start TimeCompanion on the server and create user accounts in the database using the Tools, Users menu in TimeCompanion. The users can now log in to the server and report time.

In order to use the system from several computers, you can share the folder where the TimeCompanion.mdb database is placed, and connect each TimeCompanion installation to use the database in the shared folder.

Share the folder c:\program files\timecompanion 2003\ on the server (right click on the folder and select Sharing). Give all users permissions to access the file and folder share. It is now possible for other users to connect to the database and report time. See the Windows® documentation for information on how to share folders and set permissions in your version of the operating system.

Install the system on each computer you want to use TimeCompanion from. Use the Tools, Settings menu in TimeCompanion to set the Data Link to use the workgroup database on the shared folder. The data source should be Microsoft Jet 4.0 OLE DB Provider. The user name to connect should be Admin, and the password should be left blank.

Specify the user name and password on each computer in the HotSync® settings for TimeCompanion 2003 so that the handheld device uses the correct TimeCompanion user account to synchronize with the server. You make the setting by right clicking on the HotSync® icon, selecting the Palm device user and double clicking on TimeCompanion 2003 in the list of conduits.

Each user of TimeCompanion in the workgroup needs an individual Product-ID in order for the license to be valid.

Backup

Establish a backup routine for the TimeCompanion.mdb database file. The data is not backed up on the handheld device.

Upgrading from previous versions

The database format in TimeCompanion 2003 Desktop Edition is compatible with TimeCompanion 1.5 and 1.6.

Before you upgrade we recommend that you synchronize your handheld device and take a backup copy of the TimeCompanion.mdb database file. Then uninstall the old version from the personal computer and Palm OS® device.

Continue to install TimeCompanion 2003 Desktop Edition, and then replace the TimeCompanion.mdb database file supplied by the new installer with the database file from your old version.

Further information

You find further documentation and add-ons at http://www.inmotion.se.

Please contact our support at info@inmotion.se if you need help with the installation or use of the product, or simply want to provide feedback.