Time Shadow®

Getting Started with Time Shadow

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Introduction

Time Shadow® is an innovative time tracking package developed with the help of accounting and other business professionals. Time entry is a cumbersome and annoying task that wastes valuable hours. These valuable hours could be turned into billable hours if there were a simpler way for you and your employees to track time.

Time Shadow® is based on the idea that time recording is more efficient and cost effective than time entry. It is more cost effective because it helps eliminate data entry mistakes and takes most of the guesswork out of creating your time logs. It is more efficient because it eliminates the need for employees to manually track and record time.

Time Shadow® is designed to record time in a unique manner. The user is presented with tasks organized by client and project tabs. Time is being recorded on a continuous basis. A user simply has to click the appropriate client tab and task each time they start or change what they are doing.

The difference between Time Shadow® and other time tracking packages is that Time Shadow® helps you keep track of every minute of your day not just the billable time for the day giving you a powerful time management tool.

Overview

Time Shadow is a time recording application (not a time entry) and therefore better suited to certain types of work. Time Shadow was designed for use throughout the workday to quickly record information about work being performed. People who use a computer for most of the day while working will benefit from using Time Shadow.

To help with explanations in this guide it is necessary to explain some of Time Shadow's general organizational information. The functionality of Time Shadow is divided into separate modules.

Module	**Description**
Administration	Used to setup your clients and projects. Create tasks for recording time. Provides consolidated reports for the multi-user version.
Desktop	Used to record your work. Time, expenses, and charges as they occur throughout the day. The reports can provide a look at how time was spent for an individual.
Billing	(Professional Edition Only) Used to create invoices and statements.
Diagnostics	Rarely used except as directed by Software Maniacs support staff. You probably will never run this module.

The sections in this guide refer to these module names.

First Things First

Time Tracking

In order to setup Time Shadow in the most effective way you will need to determine how you plan to track time. This is one of the first things you should decide before using Time Shadow. There are two general ways to track time with Time Shadow.

1. You can track time by client. This will give you the widest possible scope and is generally a good idea when you perform the same kind of work for all your clients and do not have a need to isolate work based on a project.
2. You can track time by project. This will give you a narrower scope and is generally a good idea when you perform different work for each client or you have to isolate work based on a project.

It is also possible to use both client and project tracking together, choosing to track some work at the client level and other at the project level. It is important to have a general understanding of this prior to setting up tasks for time tracking.

These questions may help to make your decision:

- Do you work on multiple projects (or jobs) for the same client?
- Does the type of work you perform vary from client to client?
- Do you need to create multiple invoices for one client based on what your working on?

  If you answer yes to any of these questions then you might want to consider tracking your time as projects.

- Do you have the same set of billable tasks for all clients?
- Do you produce invoices based on all work done for a client over a specific period?

  If you answered yes to either of these questions then you might want to consider tracking your time by client.

Demonstration Database

If you installed a demonstration database (only available in the single user versions), you will need to clear it before you begin setting up Time Shadow for "live" use. If you are seeing a message about this database every time you start the software then this message applies to you. To clear the demonstration database you will need to run the Administration module.

Be sure that all other Time Shadow programs are closed. (i.e. Desktop and Billing modules) And then follow these steps.

1. Run the Administration module by selecting it from the windows desktop or the start menu.
2. Choose "Clear Demo Database" located under the main menu item "File".
   (If the menu item isn't there, then the demo database has already been cleared)
3. Confirm the question to clear the database.

Setup

Once Time Shadow has been installed (*see Time Shadow Installation Guide*) and you have decided how you plan to use the software to track your time (*see section above "First Things First"*) your ready to begin setup. The Administration module has an interactive wizard to help with getting things setup. The first time you run Administration this wizard should automatically popup. However, if you need to start it manually you can start it by choosing "Setup Wizard…" from the main menu item "Help". Please run the setup wizard and follow the instructions for setting up the software. This section of the document does provide some supplemental information for use with the setup wizard.

NOTE: It is important to perform setup prior to creating clients or projects.

Company Profile

There are seven tabs of information to fill out in your company profile. The setup wizard explains in general the purpose of the information required on each tab. This section of the document provides additional information to help clarify the how the information will be used.

Company

The information on this tab is used by reports in Time Shadow. This is particularly important if you are using the "Professional Edition" of Time Shadow. You should supply at least your company name.

Logo

The upper right hand corner of most reports can show a company logo. Please provide a company logo for use with the reports. You can use JPEG or BMP formatted image file. The image will be scaled to fit. However, to help reduce the side effects of scaling an image you can provide an image that is 260 x 212 pixels.

Preferences

Most of the information on this tab may be obvious. However, the options for "Logs" might require some explanation. The following table explains these check box options in more detail.

Allow gaps in time log	When this option is checked (the default) the system will require the user to account for every minute of time when verifying a time log. A time log will be required to be contiguous from the start of the first task to the end of the last task for a day. You should leave this checked if you plan on using Time Shadow to gather information to help with time management. If you simply interested in recording only time for billable work then you might consider not checking this option.
Require user to verify expense log	This option is used when you want users to be required to verify (double check) expenses entered the system.

Require user to verify charge log	This option is used when you want users to be required to verify (double check) charges entered the system.

Office Charges

Time Shadow can be used to record certain standard office charges. This is probably most important when you are using the Professional Edition of Time Shadow to produce your invoices, however, it might still be beneficial in the Standard Edition since certain reports will show these charges.

Administrative Tasks

The administrative tasks are used to track time that is not billable but needs to be recorded for other purposes. Time recorded under these tasks is shown separate on most reports. These are typically viewed as the "catch all" tasks, however, it is important to make sure that your administrative tasks accurately reflect items that you want to track. These tasks can help give you information to use towards improving time management.

Tax Rates

Tax rate information is only used by the Professional Edition when creating invoices. If you're using the Standard Edition, you can skip this setup. If you're using the Professional Edition you will want to include tax rates that you would typically use when creating invoices.

Terms

If you are using the Professional Edition of Time Shadow, you will want to setup billing terms that reflect how you invoice your clients. Standard Edition users can skip this setup.

User(s)

Almost all information recorded by Time Shadow is associated to a user record. As you might expect, Time Shadow operates differently in multi-user mode then it does as single user. The following items will help explain some of the differences.

NOTE: Remember your passwords! Software Maniacs does not have a good way to recover forgotten passwords.

Single User

When using Time Shadow as single user there is only one user record. Therefore the system can make numerous assumptions about what clients, projects, and tasks to assign to a user and therefore many of these operations are handled automatically. When a client or project is created in single user mode Time Shadow automatically assigns the user record to the client or project. This is not the case in the multi-user version of the software. If you are using the Professional Edition of Time Shadow, you will want to pay special attention to the "Billing Information" in the user record. This billing information is used for any task you create with the "Per Person" rate type. (See Clients or Projects later in this section)

Multi-user

Multi-user Time Shadow can have an almost unlimited number of user records defined. It is recommended that you leave the default user of "Admin" unchanged and assign a password to that user to secure access to the system. When adding additional users to the system you can specify the type of user. The following is a brief description of the users types.

Administrator	Can use all parts of Time Shadow. Administration, Desktop, Billing (Professional Edition) and Diagnostics
Standard User	Able to use the Desktop module only.
Billing User	**(For future use)** Able to use both the Desktop module and the Billing module.

Expense Types

The expense types are used when creating expense log entries. The expense log entries are then used to create expense reports. If you are going to use the expense reporting in Time Shadow you should review the expense types and make adjustments as necessary.

If you are using the Professional Edition of Time Shadow and you invoice your clients for billable expenses. Please pay special attention to the "Default Billable Expense" checkbox when setting up an expense type. When checked it specifies that the expense should be automatically associated to all "new" client records for billing purposes. If you plan to invoice your clients for billable expenses checking this box will make setting up clients a lot simpler.

Labor Templates

The operative word is "Templates". These are templates, similar to what you would use with any word processor, which can be used to create tasks for clients and projects. The tasks are then used to record time for a client and/or project. Careful consideration should be given when creating your list of labor templates. All tasks are created from labor templates.

NOTE: You might want to read the section "First Things First" if you haven't already done so.

Some things to consider before creating templates:

- You are going to use the client approach to time recording and you perform the same types of tasks for all your clients.

  If the statement above is true then:
  - *You should probably create one template for each task that you typically perform being specific with the information in the template.*
  - *You will most likely want to make sure that the checkbox "Default Assignment" is checked for each labor template you create.*

- You are going to use the client approach to time recording and your task lists will almost never be the same from client to client.

  If the statement above is true then:
  - *You should probably create one template for each task that you typically perform being specific with the information in the template.*
  - *You will most likely want to make sure that the checkbox "Default Assignment" is NOT checked for your labor templates unless the task described is likely to be used on every client.*

- You are going to use projects to record time and your task lists will almost never be the same from project to project.

  If the statement above is true then:
  - *You should concentrate on just creating a few basic templates that describe common tasks that you have on typical projects. You will probably want to use generic task names and descriptions.*
  - *You will most likely want to make sure that the checkbox "Default Assignment" is NOT checked for your labor templates.*

- You are going to use projects to record time and you perform the same types of tasks for all your projects.

  If the statement above is true then:
  - *You should probably create one template for each task that you typically perform being specific with the information in the template.*
  - *You will most likely want to make sure that the checkbox "Default Assignment" is NOT checked for your labor templates.*

Professional Edition users will want to make sure that each labor template has the rate and rate type set appropriately. This will make things easier when editing clients and projects and subsequently creating tasks from these templates.

Clients

In order to record time using Time Shadow you will need to create client records. All time recorded with the Desktop module is linked directly to client records or indirectly to client records through project records. Once you have setup the client record by entering the general and billing information. You will want to create tasks and assign users.

NOTE: If you plan on doing ONLY project time tracking as opposed to client time tracking you probably do not want to assign any tasks or users directly to a client record. If this is the case, you might want to skip ahead to the Projects heading.

Tasks Assignments

When creating a new client record, all labor templates that have been setup to be "Default Assignment" (and only those templates setup this way) will be used to create task assignments for the client. Once a task assignment is created you can make modifications to the task associated with the client record. The following things are true about tasks.

- Tasks are always created using labor templates.
- Modifications to a task do not affect the original labor templates used to create the task.
- Tasks are associated to a particular client record and potentially many user records.
- Tasks are required to record time for a client.

User Assignments

NOTE: This only applies to the multi-user version.

Once you have created some "Task Assignments" then you can assign users to the client record. Doing this will enable the assigned users (and only the assigned users) to record time for any task associated with this client. Until the client has both a task assignment and a user assignment, no time can be recorded directly for that client.

Projects

Projects are used to narrow the scope of work for a particular client and enable the tracking of time. There are two types of projects. Internal projects and client projects. Internal projects are associated to your own company profile that is treated like a client record. Client projects are project records that are associated with an actual client record. Once you've created a project record and associated it to your own company or a client record you will be able to create tasks and user assignments.

Tasks Assignments

Task assignments for project records are almost the same as task assignments for client records. However, no tasks are ever automatically created for new project records. Instead, they must be created manually using the labor templates created during setup. Once a task assignment is created you can make modifications to the task associated with the project record.

The following things are true about tasks.

- Tasks are always created using labor templates.
- Modifications to a task do not affect the original labor templates used to create the task.
- Tasks are associated to a particular project record and potentially many user records.
- Tasks are required to record time for a project.

User Assignments

NOTE: This only applies to the multi-user version.

Once you have created some "Task Assignments" then you can assign users to the project record. Doing this will enable the assigned users (and only the assigned users) to record time for any task associated with this project. Until the project has both a task assignment and a user assignment, no time can be recorded for the project.

Time Tracking

This is where Time Shadow excels. All time tracking is done through the Desktop module. When you first start the Time Shadow Desktop, a "Getting Started" wizard should automatically be presented. This wizard will guide you through some basic features of the Desktop to get you started tracking your time. If you need to manually start the wizard, you can do so by choosing "Getting Started Wizard…" from the main menu item "Help".

This section of the document is meant to supplement the "Getting Started Wizard". For the maximum benefit from both this document and the wizard, you should read the document while using the wizard.

Overview

The Time Shadow Desktop interface is designed to provide the most functionality with the fewest clicks. The best time tracking tools are those that are there when you need them and gone when you don't. Time Shadow uses a combination of tabs and radio buttons to provide a quick and easy way to designate what you are doing so you can actually get back to doing it.

There is one special tab used by Time Shadow. This tab is labeled "Administration" and the tasks that appear on this tab are those tasks that are setup in the "Company Profile" in the Administration module.

NOTE: In the multi-user version, you can eliminate certain administrative tasks from some users by overriding the task assignment in the user record. All other visible tabs are client tabs or project tabs.

View Client and Project Assignments

In order to record time for a client or project the tab for that client or project must be visible. To make a client tab visible, choose the "View Clients" located under the main menu item "Options" and then locate the client and check the box. To make a project tab visible, choose "View Projects" located under the main menu item "Options" and then locate the project and check the box.

Once you have any tabs showing you can begin recording time. All you do to start recording are locate the particular task you want to work on and click it. Time Shadow will do the rest keeping track of every click and using each click to stop a previous task and start the next one. At the end of your workday, you will have created a time log (down to the minute) with very little effort.

Preferences

Time Shadow Desktop has some preferences that can help you get up to speed with tracking your time effectively. You can change your preferences by choosing "Preferences" from the main menu item "Options".

When you are using Time Shadow, it is important to remember to let Time Shadow know what you are doing. You can use the reminder preferences to help you remember to click. The "Maximize every" option can be a very effective reminder.