HourzPro User Manual

by Zoskware

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Installation and Setup

System Requirements

HourzPro and Reportz requirements:

- Any version of the Palm Operating System and hardware.
- If you plan to use HourzPro/Reportz with QuickBooks Pro, you must have QuickBooks Pro for Windows 5.0 or later.

HourzSync requirements:

- HotSync Manager version 1.1 or later.

HourzSync Setup program requirements:

- Windows 95 or Windows NT
- Pilot Desktop and the HotSync Manager installed and properly configured

*** Note: The HourzSync Setup program does not support Windows 3.1.** See the Zoskware website for the latest details (http://www.zoskware.com).

Compatibility with Hourz 1.x

HourzPro is NOT compatible with Hourz 1.x databases in any way. Users of Hourz 1.x should complete their billing cycle with Hourz 1.x and then switch to HourzPro/Reportz.

HourPro and Hourz 1.x can reside on the same Pilot with no conflicts. Their databases are completely separate.

HourzPro File List

HourzPro is distributed in a .zip archive that you must extract with an unzip utility. The files included with the registered version of HourzPro are:

HourzPro.prc	HourzPro PalmPilot application
Reportz.prc	Reportz PalmPilot application
HourzSetup.exe	Setup program for HourzSync
HrzSync.dll	HourzSync conduit to be installed in Pilot directory
HourzMan.pdf	This manual and software license agreement
ReadMe.txt	Release notes for this version

Installing HourzPro and Reportz

Use Palm’s Instapp.exe utility program to install the files HourzPro.prc and Reportz.prc.

1) Install Pilot Desktop if you have not already done so.
2) Start the HotSync Manager if not already running.
3) Use Palm’s Instapp.exe program to install the files HourzPro.prc and Reportz.prc.
4) HotSync your PalmPilot.

Upgrading from Hourz 1.x

If you purchased the HourzPro Upgrade Version, you must enter you Hourz 1.x registration key in the "Register…" dialog to enable all program features. HourzPro will use the registration key from Hourz if it already installed on your Pilot.

Installing HourzSync

HourzSync is a conduit that works with Palm's HotSync Manager to transfer HourzPro data and reports to your PC. It also imports QuickBooks lists into HourzPro and Reportz on your Pilot.

Follow these steps to install HourzSync on your PC:

1) Exit the HotSync Manager
2) Run the HourzSetup.exe program.
3) In the "Save Report To:" field, enter the folder where you would like HourzSync to save HourzPro reports during HotSync. If left blank, HourzSync stores reports in your HourzPro user directory (C:\Pilot\<user>\HourzPro-Reportz\). Click the browse button to choose a directory.
4) In the "Import 'QBLISTS.IIF' From:" field, enter the directory where you will store QuickBooks Pro Lists that are to be imported into HourzPro/Reportz during HotSync. If left blank, HourzSync searches your HourzPro user folder for QuickBooks List import files (C:\Pilot\<user>\HourzPro-Reportz\).\). Click the browse button to choose a directory.
5) Check the "Replace Lists with QuickBooks Data" checkbox if you want to use QuickBooks data exclusively. When HourzSync imports QuickBooks Lists into HourzPro/Reportz it will delete the existing HourzPro projects and tasks.

   Uncheck the "Replace HourzPro Lists with QuickBooks Pro Data" checkbox if you don't plan to use QuickBooks Pro or if you want to use custom projects and tasks.
6) Select the "Setup" button. HourzSetup copies the HourzSync conduit to your Pilot directory and configures the Windows Registry.
7) Exit and restart the HotSync Manager.

Reconfiguring HourzSync

You may change HourzSync preferences by running HourzSetup.exe at any time. Your new settings will take affect after you restart the HotSync Manager.

Uninstalling HourzSync

Uninstall simply removes HourzSync configuration information from the Windows Registry. It does not move or delete any files. Follow these steps to uninstall HourzSync:

1) Run the HourzSetup.exe program provided with this software.
2) Click the "Uninstall" button. A confirmation dialog notifies you of success or any problems.
3) Exit and restart the HotSync Manager.
4) HourzSync will no longer synchronize HourzPro or Reportz.

Time Reporting with HourzPro

HourzPro and Reportz are part of a four step time reporting process that allows you to capture the time and expenses you incur on your projects and transfer the information to your accounting system, invoices or timecards.

Step 1: Capture Your Time

You use HourzPro as your time and expense gathering tool. HourPro provides a flexible and powerful user interface that is easily customized to your unique situation. The easiest way to capture your time is to enter it into HourzPro as you work.

Step 2: Create a Report of Time Worked

When its time to transfer your accumulated time and expenses to your accounting system, you use Reportz to generate a report your HourzPro Time Entries. You select criteria, such as last month's work on ABC Project, and Reportz creates a text report in one of several formats. You select and customize the format that best matches your accounting system and billing needs.

Step 3: HotSync Reports with HourzSync

Once you have generated one or more reports, you simply HotSync your PalmPilot. HourzSync transfer the reports to your PC and stores them in a folder of your choosing.

Step 4: Import or View Your Data

The final step depends on your accounting system. You can simply open the file if your created a tab or comma delimited report. Also, you can import your data into a custom database like Microsoft Access or Claris' FileMaker Pro.

If you use QuickBooks Pro, you can import the time report into you QuickBooks Pro company file. Once your data is in QuickBooks Pro, you can easily assign the time and expenses to invoices, print time reports, and transfer the time to payroll. See *Working with QuickBooks Pro* for complete details.

2. HourzPro User Guide

Basic Concepts

Time Entries

HourzPro allows you to track time by creating Time Entries. A Time Entry contains all the information to describe a single period of work. The period of work can be several hours, a whole day including breaks, or the work for an entire week.

Time Entries also allow you to track expenses and auto mileage.

Projects

Time Entries must be associated with a Project. You can create as many projects as you need limited only by available memory. The Project sets the initial billing rate for a Time Entry. The rate for a Time Entry can also be customized. Projects also capture the name of the client company, the work order number, and several other fields.

To simplify the user interface and data entry, HourzPro omits the concept of a separate “client” record. However, HourzPro Projects provide a field for the client name for billing purposes.

Tasks

Time Entries can optionally be associated with a Task. You can specify the task manually or choose from a list of existing Task Records. You can create as many tasks records as you like limited only be available memory.

If you have imported QuickBooks Pro data, the Tasks list contains the Service Items from your QuickBooks Pro company file. A Service Item associates a Time Period with a particular type of work in your QuickBooks Pro company file.

Time Worked

HourzPro provides several ways to specify the time that you work.

- Enter the start and end times. The gross hours are automatically updated to reflect the new time.
- Use the timer to accumulate more time. When a timer is stopped, the elapsed time is added to the gross hours.
- Manually enter your time in the gross hours field.
- You can also specify the total break time during your work period which HourzPro automatically subtracts from the gross hours to compute the total.

Reported Time Entries

Time Entries can be marked as “reported”. A reported Time Entry has been moved to the next stage of your time reporting process. This may mean that you included the time on a time card, included the time on an invoice, or created a report using Reportz – the HourzPro reporting application.

The reported status of a Time Entry is visible in the Time Entry Details dialog and can optionally be displayed in Project View as a checkbox in the left most column.

Working with List Views

HourzPro provides two customizable list views: Project View and Day View. Each view has unique features and options that are targeted for a particular usage scenario. You can quickly switch between Project and Day view by tapping the view selection buttons at the bottom of the screen. From either list view you can:

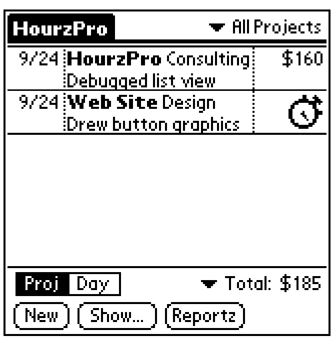
- Create a new Time Entry
- Change display options
- Go to Reportz – the HourzPro companion application
- Select the quantity to be displayed in the right column and the totals field (total dollars, net hours, expenses, or mileage).
- Filter the records displayed (by date or by project for Day/Project View respectively)

Project View

Project View displays all the Time Entries for a selected project or all projects. Its purpose is twofold:

- Provide a “big picture” view of your time worked
- Provide an easy way to enter time previously worked

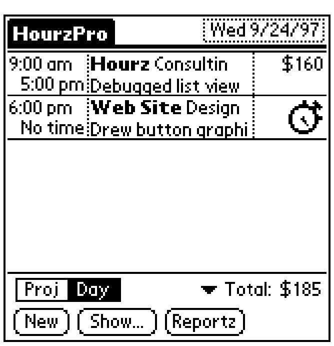
Project View can display Time Entries in either a compact format or an expanded format. See *Customizing Display Options* later in this manual. Both versions are illustrated below:



Compact Project View and Expanded Project View

In Project View, you can easily see your reported Time Entries.

Day View



Day View

Day View displays all the Time Entries on a single day. Day View is not filtered by project.

Day View is designed for entering your daily hours as you work them. For this reason, the start and stop times are displayed in the left most column so you can easily see the order and duration of your tasks that day.

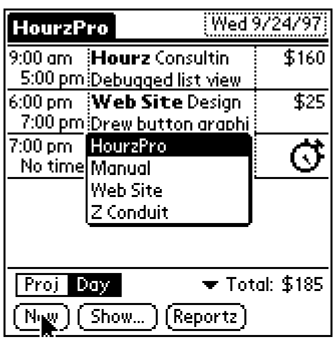
There are several convenient features in Day View that making entering time easy:

- Day View can automatically start a Timer for each new Time Entry. This can be enabled/disabled from the “Preferences” dialog.
- Easily switch tasks from Day View by starting a timer for an existing Time Entry. Simply tap the “total” column of the entry you are switching to.
- Easily view the total hours worked for today or any other day.
- Use Easy Entry to create new entries without having to enter all the details. See *Using Easy Entry* below.

Using Easy Entry

With Easy Entry, you can create Time Entries with two taps from the list view. Easy Entry is a special feature of Day View that allows you to create a new task without having to enter all the details. Use Easy Entry when you start a task at the beginning of the day when you don’t have all the work details.

When you tap the “New” button in Day View, a Popup menu is displayed above the entry so you can choose either a task or a project. A preference in the “List View Options” dialog determines which is displayed.



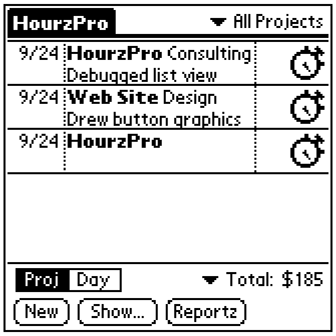
Using Easy Entry in Day View

Note: If you set the preference to popup the Task List, HourzPro may still decide to popup the Project List if it can’t determine what project to use for the new Time Entry. This happens when there are no Time Entries on that day. Normally, the project for the most recent Time Entry is used for the new Time Entry.

Using Timers in List Views

When an entry’s timer is running, HourzPro displays the Active Timer Control in the right most column for that entry. Entries without running timers are displayed normally based on the Totals Popup. You can start or stop the timer for entries in list view simply by tapping the rightmost column.

Note: If the total is **not** set to “Hours” or “Total”, you will not be able to start/stop timers from list view, and the Active Timer Icon will not be displayed for entries with running timers.

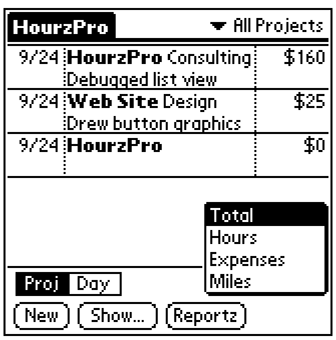


List View with Multiple Running Timers

Viewing Totals

Either list view allows you to select the quantity that is to be displayed in the totals field and in the right most column. Simply tap the totals popup at the bottom of the screen and select a new quantity.

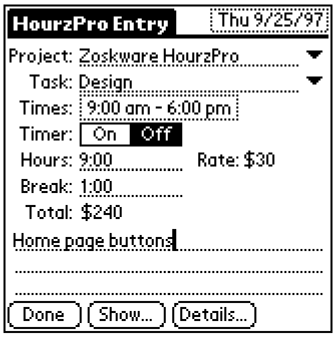
Note: If the total is **not** set to “Hours” or “Total”, you will not be able to start/stop timers from list view, and the Active Timer Icon will not be displayed for entries with running timers.



List View with Totals Popup Displayed

Editing Time Entries

Entry View allows you to specify the details of a Time Entry. HourzPro displays Entry View when you create a new Time Entry or when you tap on an existing entry in one of the list views.



HourzPro Entry View

In Entry View, you can:

- Change the date of the entry by tapping the date select trigger in the upper right of the screen.
- Change the project assigned to an entry. Time Entries must have a project.
- Optionally choose a Task from the Task List Popup, or manually enter a custom Task.
- Enter the start and/or stop times by tapping on the “Times:” selector.
- Start or stop the timer by tapping on the “On”/”Off” timer controls.
- Manually enter the gross hours in the “Hours:” field.
- Enter your break time in the “Break:” field.
- Enter a description of the work at the bottom of the screen.

When you change any field affecting the total money for the entry, HourzPro automatically updates the display.

Changing the Project

When an Time Entry is created, its project is set to either the current project (viewed in Project View) or to the first project in the list if viewing all projects.

You can change the entry’s project using the “Project” popup menu. When you change an entry’s project, the entry’s rate changes to that of the new project.

The rate for a Time Entry is optionally displayed next to the “Hours:” field.

If you have specified a custom rate (See *Editing Entry Details* later in this section), you can reapply the project rate by reselecting the entry’s project from the “Project” popup menu.

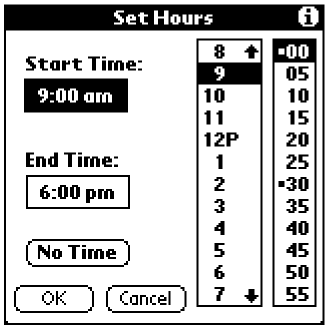
Selecting a Task

You can optionally choose a task to describe the work performed. Tasks can be manually entered or chosen from the Task List Popup Menu. You can customize the list of predefined tasks in the Task List Popup Menu.

If you are using QuickBooks Pro, the Task List contains your QuickBooks Service Items. Service Items are like billing codes. They are used to identify the type of work and the billing rate in QuickBooks Pro.

Entering Start and End Times

Tapping the "Times:" selector opens the Set Hours Dialog.



Set Hours Dialog

When you select start/end times, the gross hours displayed in the "Hours:" field are updated to reflect the new time.

Caution: If you have time accumulated in the "Hours:" field from Timers, this time will be replaced when you edit the start/end times.

HourzPro does not put any constraints on the start and stop times. You can choose a start time that is later than the end time.

Note: To simply the user interface, HourzPro does not provide an "end date". Because of this, the maximum time that can be specified from the Set Hours Dialog is 23 hours 55 minutes. However, you can manually enter up to 99 hours 59 minutes in the "Hours:" field.

If the entry's timer is running, you cannot modify the End Time because it is undefined. In this case,

You can clear the start and/or end time by tapping the "No Time" button. This sets the selected time to an undefined state. The gross hours are set zero in this case.

Entering Time Duration Values

You can enter duration values in both the "Hours:" and "Break:" fields. These fields support flexible data entry as follows:

- Clock Notation: "12:45"
- Decimal Notation: "12.75". When you click out of the field, decimal values are converted to clock notation.
- Support for commas or periods: "12,75" is the same as "12.75"
- Hours with no minutes: "12". When you click out of the field, the field is converted to

Using the Entry Timer

You can start or stop the timer for an entry by tapping the "On" or "Off" control buttons. The timer's current state is reflected by the highlighted button.

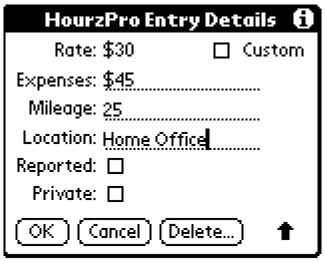
When a timer is started, the End Time is cleared because it is not known. By starting and stopping the timer you can easily track time over a work period where you take many breaks or frequently switch tasks. The End Time reflects last time you stopped work.

When a timer is stopped, the end time is set to the current time, and the accumulated time is added to the gross hours of the entry.

Note: HourzPro does not track multiple start and stop times for a single Time Entry. If you need this level of detail, you should created a new Time Entry for each work period.

Editing Entry Details

You can enter details for a Time Entry by tapping on the “Details…” button at the bottom of the Entry View.



HourzPro Entry Details Dialog

Other Details

You can track project expenses using the “Expenses:” field. Expenses can be viewed in the List View when you set the Totals popup to “Expenses”.

You can enter the miles you drive in the “Mileage:” field.

The “Location:” field can contain the place where you work or anything else you like to store.

If the Time Entry has been included in a report generated by the Reportz companion application, the “Reported” checkbox will

be checked.

The “Private” checkbox will hide the record when you specify “Hide Private Records” from the security application.

Other Details

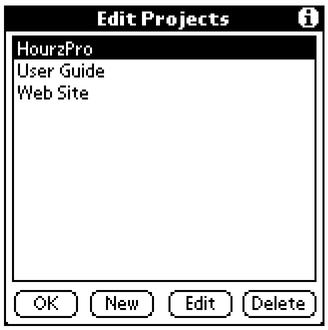
You can delete the Time Entry by tapping the “Delete…” button. A confirmation dialog will make sure you want to delete the record.

Editing Projects and Tasks

Editing the Project List

There are two ways to open the “Edit Projects” dialog:

- From any List View or Entry View, select the “Edit Projects…” menu item from the “Settings” menu.
- From Entry View, tap the “Projects” popup. Then select the “Edit Projects…” menu item in the displayed popup.

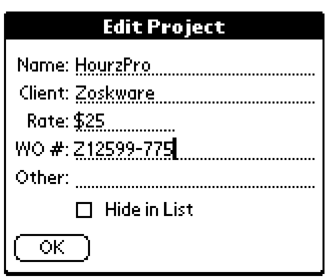


Edit Projects Dialog

The Edit Projects dialog displays the list of available projects without filtering hidden projects.

Creating a New Project

The Edit Project dialog is displayed when you select either the “New” or “Edit” buttons. A new project has a default rate of $0.



Edit Project Dialog

Enter the project name and client name. Enter the billing rate for the project.

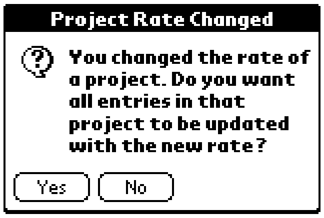
Check the “Hide in Lists” checkbox if you no longer actively use the project but want to retain billing information. HourzPro will hide the project in all popup lists.

The remaining fields are for your own use. You can use them to store additional project information.

Changing a Project’s Rate

When you select the “Edit” button from the Edit Projects Dialog, the selected project is displayed in the Edit Project dialog. You can modify any of the fields and click “OK” to save them.

If you change the “Rate:” field, the following choice dialog is presented:



Project Rate Changed Choice Dialog

If you select “Yes”, all Time Entries associated with the project will be assigned the new rate.

If you select “No”, the Time Entries associated with the project will not be updated and will appear to have a custom rate. See <u>*Customizing the Rate*</u> in the previous section.

Deleting a Project

To delete a project, tap the “Delete” button. HourzPro will not allow you to delete the last project in the list.

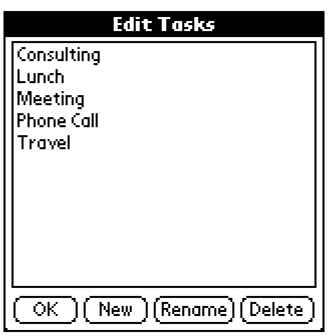
Caution: Deleting a project is not undoable. When you delete a project, all Time Entries associated with that project are moved to the first project in the database.

Editing the Tasks List

The HourzPro Tasks List is similar to the Categories List of other common PalmPilot application with the exception that HourzPro allows you define to as many tasks as you like limited only by available memory.

There are two ways to open the “Edit Tasks” dialog:

- From any List View or Entry View, select the “Edit Tasks…” menu item from the “Settings” menu.
- From Entry View, tap the “Projects” popup. Then select the “Edit Tasks…” menu item in the displayed popup.



Edit Tasks Dialog

From this dialog you can create a new task, delete tasks, and rename existing tasks.

Note: HourzPro will not allow you to delete the last task in the list.

Using Timers

Timer Basics

HourzPro supports a stopwatch work timer for each Time Entry. When an entry's timer is running ("On"), the end time is unknown and not editable, and time is accumulating. When you stop an entry's timer, the accumulated time is added to the gross hours and the end time is set the current time. You can restart/stop an entry's timer as often as you like.

Multiple or Single Timers

By default, HourzPro allows only one running timer at any given time. In this mode, when you start a new timer, the currently running timer is stopped and its entry is updated with the new time. This makes it very easy to switch from task to task with a single click.

To allow multiple simultaneous timers, check the "Allow Multiple Timers" checkbox in the *Customizing Preferences* for detailed information.

In multiple timer mode, HourzPro does not automatically stop the running timer when you start a new timer.

To stop all running timers, select the "Stop All Timers…" menu item from the "Options" menu. This is convenient at the end of the day.

Note: This is not normally necessary, since the default mode is one timer only.

Rounding Times

Timers capture time in whole minute increments rounded to the number of minutes specified as the "Round Times:" preference in the "Preferences" dialog. See *Customizing Preferences* for details on setting the rounding time.

For example, if you have selected a "Round Times:" setting of 5 minutes, HourzPro will round the accumulated time to the nearest 5 minutes. In this case, accumulated time of two minutes rounds to zero while and accumulated time of three minutes rounds to five minutes.

Starting/Stopping Timers from List Views

Timers can be easily toggled from any expanded List View. See *Using Timers in List Views* earlier in this document.

Starting/Stopping Timers from Entry View

Timers can be manually controlled from the Entry View. See *Using the Entry* Timer earlier in this document.

Timer Auto-Start from Day View

When you a create a new Time Entry in Day View, HourzPro automatically starts the timer for that entry. Day View is designed to start/edit tasks as you work during the day. Of course, other running timers will be stopped if you don't allow multiple timers.

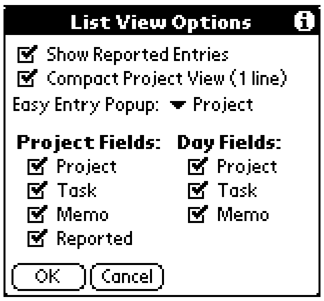
Customizing Display Options

HourzPro allows you to customize many aspects of the display to suit your individual work habits.

List View

To open the "List View Options" dialog either:

- Tap the "Show…" button in any List View
- Select the "List View Options…" menu item from the "Settings" menu.



List View Options Dialog

Show Reported Entries

When this checkbox is checked, reported entries are visible in list views. To hide reported entries, uncheck this checkbox. This allows you to view only the Time Entries that have not been billed.

Compact Project View

Project View can be drawn in a compact or expanded format. Compact format displays only one line per Time Entry. Expanded format allows two lines per Time Entry and the Active Timer Control can be viewed and controlled.

To select the compact viewing mode, check this checkbox.

Note: When viewed in compact form, you will not be able to see which entries have running timers unless you open them individually.

Easy Entry Popup

Easy Entry is a convenient way to create new Time Entries available from Day View. See *Using Easy Entry* for more details.

You choose the behavior of Easy Entry by selecting an item in the Easy Entry Popup Menu:

- Project causes Easy Entry to popup the list of projects
- Task causes Easy Entry to popup the list of tasks. The project is set the project of the latest entry on the current day. If Easy Entry cannot determine which project to use, it will popup the project list rather than the task list.
- None disables the Easy Entry feature.

Project Fields and Day Fields

To customize the display of the Project List View, you can check/uncheck the available checkboxes.

HourzPro will intelligently determine how to maximize the available display area for all the items you select.

If you uncheck all the items, HourzPro still displays the project name.

If you check the “Reported” checkbox, Project View displays the reported status of each entry as a checkbox in the left-most column of the Project List View.

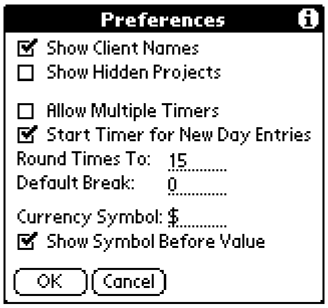
Entry View

The Entry View can be customized to your work habits by hiding the items you don’t use. When an item is hidden, the remaining controls in the view are condensed and the text description area is expanded to provide more memo viewing area.

For example, if you don’t use start/end times and you don’t want to see the total dollars displayed, simply uncheck the “Show Times” and “Show Total” checkboxes.

Customizing Preferences

HourzPro provides several settings to customize time tracking for your situation. You can change preferences by selecting the “Preferences…” menu item from the “Settings” menu.



HourzPro Preferences Dialog

Showing Client Names

When “Show Client Names” is checked, HourzPro prepends a project’s client name to the project name for display purposes. For example, if you setup a project with a client name of “Zoskware” and a project name of “HourzPro”, the displayed project name would appear as “Zoskware HourzPro”. With the “Show Client Names” checkbox unchecked, the project would appear simply

Show Hidden Projects

Projects that you no longer actively work on can be designated hidden. See *Editing Projects and Tasks* for details on marking a project hidden.

To show hidden projects in popup lists, check the “Show Hidden Projects” checkbox. If you want hidden projects to be filtered out, uncheck it.

Allow Multiple Timers

The “Allow Multiple Timers” checkbox sets the timer mode for HourzPro. See *Using Timers* for more information.

Start Timer for New Day Entries

When this checkbox is checked, the timer for new entries created from Day View will automatically be started.

Round Times

HourzPro rounds times to the nearest value you specify in minutes. Accumulated time is rounded and start/end times are rounded . See *Using Timers* for more information on timers.

Default Break

When an new entry is created, HourzPro can automatically insert a default break time into the entry. This is convenient if you always take the same lunch break everyday. Enter the break in minutes that you want automatically inserted. If you enter zero, no break will be inserted.

You can always customize the break by manually editing it.

Currency Display Preferences

Enter the symbol you use for currency. You can also specify whether the symbol should appear before or after the money value.

Common Usage Scenarios

One Project – Simple

If you work on a single project for a long period of time and don't need to track the tasks you work on, the following options may be useful:

- Uncheck the "Show Client Names" preference. This will provide more viewing area for your task and text notes.
- Uncheck the "Project" option in the List View Options dialog. This will provide more viewing area for your task and text notes.
- Set "Easy Entry" to "None" if you don't want to be bothered with the Easy Entry popup.
- Uncheck the "Show Task" option in the "Entry View Options" dialog.

If you work on a single project for a long period of time, the following options may be useful:

- Uncheck the "Show Client Names" preference. This will provide more viewing area for your task and text notes.
- Uncheck the "Project" option in the List View Options dialog. This will provide more viewing area for your task and text notes.
- Set "Easy Entry" to "Task". This will make it easy to track tasks for your single project.

Many Projects/Clients – Switch Once Per Day

If you work on several projects during the course of a week, but you typically only work on one of those projects on any given day, consider using the following preferences:

- Check the "Project" preference in the List View Options so you can easily see which project is associated with each work task.
- Optionally check the "Show Client Names" preference to provide better context for the display.
- Set "Easy Entry" to "Task". This will make it easy to switch tasks for a single client. At the beginning of each day, HourzPro will prompt you for the project the first time you create an entry. After this, HourzPro will display the "Tasks" popup so you can easily switch tasks.

Many Projects/Clients - Switch Projects Frequently

If you work on several projects during the course of a day, consider using the following preferences:

- Check the "Project" preference in the List View Options so you can easily see which project is associated with each work task.
- Optionally check the "Show Client Names" preference to provide more context for the display.
- Set "Easy Entry" to "Project". This will make it easy to switch projects.

Track Hours Worked Only

If you don't need to track the start and end times for your clients, consider the following settings for Edit View Options:

- Uncheck the "Show Times" and "Show Break" checkboxes since you don't track time.
- Set the "Default Break" field in the "Preferences" dialog to zero.

3. Reportz User Guide

Reportz Basics

Reportz is a companion application to HourzPro that allows you to collect and report the time and expenses captured with HourzPro. See *Time Reporting with HourzPro* earlier in this document for an overview of time reporting concepts.

Report List View

Reportz maintains a list of the reports it has generated. The Report List View displays the date each report was created, the title of the report and the total money for the time entries in the report.

Reportz List View

You create a new report by tapping the "New" button. See *Creating Reports* for an extensive guide on creating reports.

You can change format options by tapping the "Format…" button. You also have an opportunity to change format options whenever you create a report.

You can quickly go back to HourzPro by tapping the "HourzPro" button.

Report Content View

Reportz does not permit editing of the report data once it is generated. However, you can view the report content by tapping a report in the Report List View. The Report Content View is much like the MemoPad except you cannot edit or copy the text.

Deleting Reports

Reports can be deleted individually from the Report Content View.

You can also delete all reports using the "Delete All Reports…" menu item from the "Options" menu.

Normally, you don't need to delete reports. HourzSync takes care of this automatically when it transfers you reports to your desktop computer. However, if you have changed the default preferences, HourzSync may not delete your reports during HotSync.

Reportz Preferences

Reportz has one preference for you to customize – “Delete Reports After HotSync”. To change this preference, select the “Preferences…” menu item from the “Options” menu.

Reportz Preferences Dialog

When the “Delete Reports After HotSync” checkbox is checked, HourzSync deletes all reports within Reportz after they are transferred to your desktop computer.

If this checkbox is not checked, HourzSync does not delete your reports. You may want to change this setting if you want to see a long-term list of the reports you created.

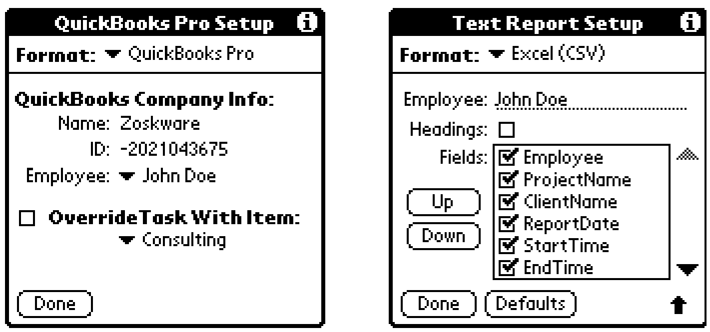
With either of these settings, HourzSync will not transfer a report twice.

Creating Reports

Step 1: Choose a Report Format

The first step in creating a report is selecting and customizing a report format.

The first time you create a report, Reportz displays the Report Format Dialog. This allows you to choose the format you need and customize its options. The Report Format Dialog is shown below for both QuickBooks Pro format and Comma Separated Value format.



Report Format Dialog (QuickBooks Pro and Comma Separated Values)

To select a different report format, use the “Format:” popup menu to make your selection. The available selections are described below.

QuickBooks Pro Format

HourzPro/Reportz can exchange information with QuickBooks Pro via Intuit Interchange Format (IIF) files. When you select the QuickBooks Pro format, Reportz generates time report data that complies with IIF and includes the information that QuickBooks Pro requires for importing Timer Activities.

See *Working With QuickBooks Pro* for complete details on how to setup HourzPro/Reportz to exchange data with QuickBooks Pro.

Excel (CSV) Format

When you select Excel (CSV), Reportz uses commas ‘,’ to separate export fields. This is a common format used by many spreadsheets and databases.

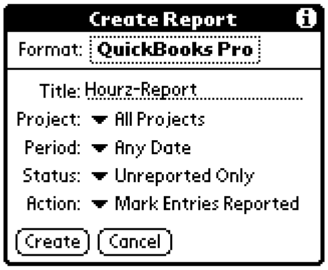
Excel (CSV) format allows you to customize the fields included in your report. See *Customizing Format Options* for more details.

Tab Separated Format

When you select Tab Separated format, Reportz uses tab characters to separate export fields. Like Excel (CSV) Format, this format allows you to customize the fields included in your report.

Step 2: Specify Report Criteria

After you choose a format, you need to specify the criteria used to gather HourzPro Time Entries. Below is the Create Report Dialog:



Create Report Dialog

The criteria provided are:

- **Title**: Enter a title for the report. HourzSync appends an appropriate suffix to your report file when its transferred to the PC (.iif, .csv, or .txt).
- **Project**: Select Time Entries from “All Projects” or from one specific project.
- **Period**: Select the date range of Time Entries to include. Several convenient options are provided or you can specify a custom period.
- **Status**: Choose whether to include Time Entries based on their reported status. Normally, you should select “Unreported Only”.
- **Action**: After the report is created, Reportz can optionally perform an action on all Time Entries include in the report. Reported Time Entries can be deleted or they can be marked reported. If you don’t want either of these options, select “None”. Marking entries reported is an easy way to track the Time Entries that have been transferred to your PC.

Step 3: Create the Report

To create the report, simply tap the “Create” button.

If your report does not include any Time Entries, Reportz will not create a report and will notify you with an alert dialog.

Report size is limited to 32K. If your report includes so many Time Entries that the maximum size is exceeded, Reportz will save the partial report and inform you that all entries could not be included. You can then create another report with the same criteria to capture the remaining Time Entries (assuming that you marked entries billed or deleted them).

Step 4: HotSync Your Reports to Your PC

Once you have created one or more reports, you can transfer them to your PC using HourzSync. Simply HotSync your PalmPilot and the HourzSync conduit takes care of transferring your reports.

HourzSync stores each report in a separate text file in the HourzSync Reports Folder. The name of the report file is based on the title of the report. HourzSync appends an abbreviated date and a suffix depending on the report format:

.IIF	QuickBooks Pro Format
.CSV	Excel (CSV) Format
.TXT	Tab Separated Format

When you setup HourzSync, you were asked to specify the “Reports Folder”. This is where your reports are stored.

A QuickBooks Pro report might be transferred to a file named “Hourz-Report 9/27.iif”.

Step 5: Import or View Your Reports

Once your reports are on your PC, you can do several things with them depending on the report format.

QuickBooks Pro reports are ready to be imported into your QuickBooks company file. See *Working with QuickBooks Pro* for more information.

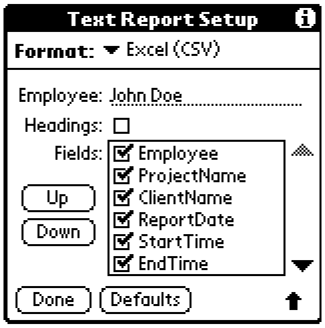
To open an Excel (CSV) report, simply double-click the file in Windows Explorer. Excel will be launched, and will display your report.

You can import Tab Separated or Excel (CSV) reports into many off-the-shelf database applications like Microsoft Access, FileMaker Pro, FoxPro etc.

Customizing Format Options

Text Reports

Both Excel (CSV) and Tab Separated report format are referred to as “Text Reports”. Reportz provides many customization options for Text Reports as illustrated below:



Text Report Setup

Since HourzPro does not track an employee name for each Time Entry, you can enter your employee name in the “Employee:” field.

You can optionally include headings in your report. When this option is selected, Reports creates a column heading in the first line of the report that includes the names of all fields included in your report. This makes it easy to identify the data in each column.

Reportz gives you the ability to choose which fields should be included in a report and in what order they are to be included. Use the “Fields:” list checkboxes to include or remove fields. Checked fields are included and unchecked fields are not.

To change field order:

- Select the field to be moved
- Tap the “Up” or “Down” buttons to move the field to the desired position. This list is scrolled as necessary.

To restore the default field order, tap the “Defaults” button at the bottom of the screen.

QuickBooks Pro Reports

QuickBooks Pro reports cannot be customized. However, you must enter required information before a valid report can be generated. See *Working With QuickBooks Pro* for more complete details.

Working with QuickBooks Pro

Overview

HourzPro/Reportz can serve as a time capture tool for QuickBooks Pro. HourzPro/Reportz function much like the Timer application shipped with QuickBooks Pro. The difference is that HourzPro/Reportz run on the PalmPilot and Timer runs on the PC. The following outline describes how to use QuickBooks Pro with HourzPro:

1) If you are using QuickBooks Pro, you must first import QuickBooks Pro Lists from your company file into HourzPro and Reportz. You should do this before you create Time Entries with HourzPro or generate reports with Reportz. See *Importing QuickBooks Pro Lists* for details.
2) Once QuickBooks data has been imported, you capture your time with HourzPro just as you normally would. See *Using Imported Data in HourzPro* for details.
3) When its time to transfer your Time Entries to QuickBooks, you use Reportz to generate a QuickBooks Pro report. See *Choosing QuickBooks Pro Report Settings* for details.
4) You then transfer your reports to your PC using HotSync and the HourzSync conduit. HourzSync stores reports in the Reports Folder you specified during HourzSync setup.
5) The final step is to import your time report into QuickBooks Pro. See *Importing Reports Into QuickBooks Pro*.

Importing QuickBooks Pro Lists

To use HourzPro with QuickBooks Pro, you must first import QuickBooks information into HourzPro and Reportz on your PalmPilot. These instructions assume that you have already created a QuickBooks Pro company file with lists of customers/jobs, employees, and service items. Refer to your QuickBooks Pro user guide for information on setting up your company file.

1) Open your QuickBooks Pro company file.
2) Select the “Export Lists for Timer…” menu item under the “Timer Activities” under the “File” menu.
3) QuickBooks Pro displays the Timer Export dialog.
4) Select the “OK” button.
5) QuickBooks Pro asks you to save the export file.
6) Select the “QBLists Folder” that you specified when you installed HourzSync. If you forgot the directory, you can run HourzSetup.exe to view or edit the “QBLists Folder”.
7) **Save the file as “QBLists.iif”.** You **MUST** name the timer export file **“QBLists.iif”**. If you don’t, HourzSync won’t import your QuickBooks Pro data to your PalmPilot.
8) HotSync your PalmPilot. HourzSync transfers your QuickBooks Pro Company data to your PalmPilot.

Verifying QuickBooks Pro Import

To verify that your QuickBook Pro data was transferred, follow these steps on your PalmPilot:

1) Launch the “Reportz” app by tapping its icon on your PalmPilot.
2) Tap the “Format…” button at the bottom of the screen.
3) Select the “QuickBooks Pro” from the “Format” popup menu at the top of the screen.

4) Reportz will inform you that you need to make some selections. This is normal.

5) If your company name is displayed and your company ID is not zero, your QuickBooks Pro data has been successfully imported to your PalmPilot.

6) You may now choose which employee you are from the “Employee:” popup lists.

Using Imported Data in HourzPro

What Data is Imported?

HourzSync transfers QuickBooks Pro data as a follows:

- Your QuickBooks Pro company file name and id are stored in Reportz preferences. This information is needed later when you transfer reports into QuickBooks Pro.
- Your QuickBooks customer:job list is stored in the HourzPro project list. The customer name is stored in the Project’s “Client Name” field, the job name is stored in the Project’s “Name” field. If there is no job name, then the customer is stored in the Project’s “Name” field.
- Your QuickBooks Service Items are stored in the HourzPro Tasks List.
- Your QuickBooks Employee List is stored as Reportz preferences options (see below).

Note: If you chose to “Replace Lists with QuickBooks Data”, HourzSync deletes all your existing HourzPro projects and tasks.

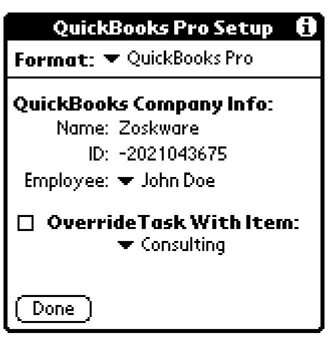
Assigning Service Items

QuickBooks Pro requires that you assign a Service Item to each Time Entry. You have two options for assigning Service Items to time entries:

- **Use HourzPro Tasks:** The list of QuickBooks Pro Service Items are added to your HourzPro Task List. You can assign unique Service Items to each Time Entry by selecting the desired item from the Task List.
- **Choose One Service Item:** If you only use one Service Item or you want to use HourzPro tasks for another purpose, you can choose to have Reportz use a single Service Item for all Time Entries. See *Choosing QuickBooks Pro Report Settings* for more details.

Choosing QuickBooks Pro Report Settings

Once you have successfully imported your QuickBooks Pro data, you must make the required selections in the QuickBooks Pro Format dialog before creating reports:



Reportz QuickBooks Pro Setup Dialog

Select an Employee

You must select an employee from the “Employee:” popup list. Reportz and QuickBooks require this information. The list contains the employees defined in your QuickBooks Pro company file.

Optionally Select a Service Item

QuickBooks Pro requires that you assign a Service Item to each Time Activity. Normally, Reportz uses the Task field from your HourzPro Time Entries as the QuickBooks Pro Service Item. However, if you use the HourzPro task field for something else, you can override this behavior by checking the “Override Task with Item” checkbox. You must then select an item from the list of QuickBooks Pro Service Items. In this case, Reportz uses your selection as the Service Item for all Time Entries in the report rather than the entry’s task.

Importing Reports into QuickBooks Pro

Once reports have been transferred to your PC, they are ready to be imported into QuickBooks Pro. Follow these steps to import a report into QuickBooks pro:

1) Open your QuickBooks Pro company file.
2) Select the “Import Activities from Timer…” menu item from the “Timer Activities” submenu
3) Select the “OK” button.
4) Use the Windows Open File Dialog, navigate to your reports folder and select the report you want to import.
5) If there are problems with the data, QuickBooks Pro asks you to correct them.
6) Once the data has been imported, QuickBooks Pro displays a confirmation dialog named “QBPro Timer Import Summary” from which you can view details of all the imported time records.

4. Troubleshooting Guide

Where Are My Reports?

HourzSync stores your reports in the folder you specified when you ran HourzSetup.exe. If you did not specify a folder, HourzSync stores the reports in the HotSync directory for your Pilot User Name: C:\Pilot\<User Name>\HourzPro-Reportz.

Why Didn't HourzSync Import My QuickBooks Pro Lists?

If you are having trouble importing QuickBooks Pro data, make sure you have done the following:

- You must install HourzSync using the HourzSetup.exe program. You **must restart** the HotSync Manager for the changes to take effect.
- You must already have setup your QuickBooks Pro company file. It must contain lists of employees, service items, and customers/jobs. See your QuickBooks Pro documentation for more details.
- When you export your QuickBooks Pro timer data, you must save it in a file named **"QBLists.IIF"**. Y must save this file in the folder that you chose when installing HourzSync.
- You must HotSync your Pilot after you have exported your data to QBLists.iif.

How Do I Restore HourzPro Data After a Hard Reset?

HotSync does not automatically restore your backed-up databases after your PalmPilot is hard reset. You must configure the HotSync Manager's System Conduit to do this using Pilot Desktop.

1) Make a backup copy of your "Backups" folder. Your backups folder is located in C:\pilot\<user name>\backups where <user name> is your HotSync name (or the Windows munged name version of your HotSync name).
2) Open Pilot Desktop (Pilot.exe)
3) Select your PalmPilot user name from the popup menu.
4) Select the "Custom…" menu item from the "HotSync" menu.
5) Select the "Sytem Conduit" and click the "Change…" button.
6) Select the "Desktop Overwrites Pilot" radio button and click the "OK" button.
7) HotSync your PalmPilot.

Your HourxPro and Reportz databases should be restored after you HotSync.

Is HourzPro Compatible with Hourz 1.x?

HourzPro and Hourz 1.x are completely independent programs. HourzPro stores its data in separate databases in a different format than Hourz 1.x.

If you are using Hourz 1.x, you should complete your billing cycle using Hourz 1.x and then switch to HourzPro. There is no data transfer utility.

Why are My Running Timers Not Displayed in List Views?

You probably have the totals column set to display "mileage" or "expenses". In either of these modes, the timer controls are not displayed.

How do I Track the My Break Start and Stop Times?

HourzPro Time Entries track a single start and stop time. If you need to track start and stop times for each segment of work time, you should create individual Time Entries for each time period.

Why Is the Rate of My QuickBooks Pro Projects Always $0?

QuickBooks Pro does not export the project rate information. You can manually enter the rate for a QuickBooks Pro project, but it will not affect any billing rates in your QuickBooks Pro company file.