Account Manager 1.1

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What Is Account Manager?

Account Manager is a tool which helps you keep track of how you spend your time.   It is primarily designed for professionals and others who work on multiple projects or accounts.

In a nutshell, you enter the projects that you work on into Account Manager, then you "punch in" or "punch out" of them as appropriate.   At the end of the week, or whenever you need a summary of how your time was spent, you select Account Manager's report option.   This will create a report for whatever dates you select, detailing (in varying levels) where your time was spent.

Getting Started

It is very easy to get started using Account Manager.   After running Account Manager:

1. Enter your first project name into the project list, and press the "Add" button (or press ALT-A).   Repeat this step for each project that you have.   Note that the project list is automatically saved after each change.
2. When all of your projects have been entered, you may punch into a project by selecting it in the list, and pressing "In" (ALT-I), or double-clicking on the project name in the list.   Note that the status line reflects that this project is active.
3. To punch out of the project, press "Out" (ALT-O).   Alternatively, you may punch into another project, which will automatically punch you out of the first one.

Account Manager also provides a convenient way to punch into and out of projects quickly. With Account Manager running as an icon, you may click on it once with the right mouse button.   This will bring up the Quick Access List, which is a list of your projects.   If you are currently punched into a project, it will be highlighted in the list.   From this list, you may punch in or out of any of your projects quickly and efficiently.

Project Lists

An Account Manager project list is a list of projects or accounts which you have entered. The default extension for project list files is *.AMP.   The project list is displayed in the project list box in the main Account Manager window, and also in the popup window displayed when the icon is right-clicked.

The project list exists for your convenience.   It is possible to punch into/out of a project which is not in the project list, by just typing the name and pressing "In".   Similarly, deleting a project from the project list will NOT erase data related to that project in the database.   It is important to realize that the project list and the database are not directly "tied together".

Database Files

An Account Manager database file is the file where all of the time data is stored.   Each time you punch into or out of a project, the current database file is updated.   The default extension for database files is *.AMD.

The database file can become quite large over time.   It is recommended that you delete old data periodically from it, via the <u>Edit Database</u> menu option, which will save disk space and speed up report generation.

Overview of the Main Window

The main Account Manager window looks like the following:
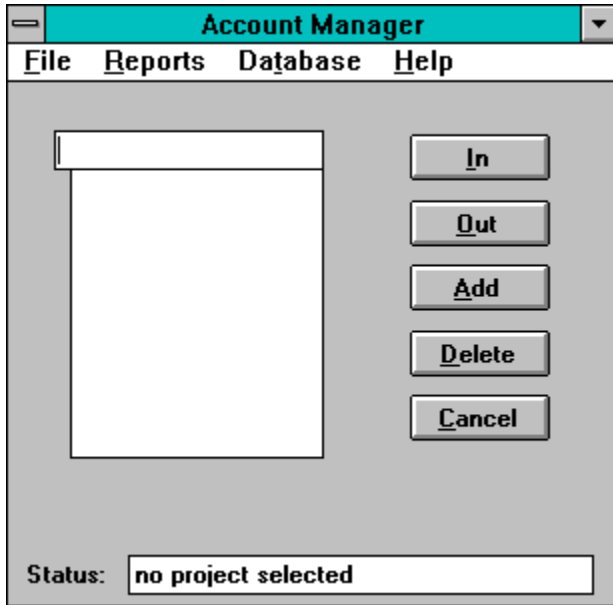
Project List

The large list area at the top left is the project list.

In

To punch into a project, select it in the project list (or type it at the top of the project list) and click the In button (or press ALT-I).

Out

To punch out of a project, click the Out button (or press ALT-O).

Add

To add a project to the project list, type it into the top section of the project list and click the Add button (or press ALT-A).   The project list will be automatically saved when you do this.

Delete

To delete a project from the project list, first select the project in the list and then click the Delete button (or press ALT-D).   The project list will be automatically saved when you do this.

Cancel

Pressing the Cancel button will iconize Account Manager.   Note that it is still possible to tell if you are punched in or not when Account Manager is iconized - see Account Manager Icon.

Status

The status area at the bottom of the window will tell you at a glance the current project status.

Account Manager Icon

The Account Manager icon changes to reflect whether or not you are currently punched into a project or not.

-- Punched In.   Note that when you are punched in, the icon title will reflect the current project.

-- Not Punched In

If you click on the icon with the right mouse button, you will see the Quick Access List.

File Menu

The File menu contains options dealing with opening or creating Project Lists or Database Files.

New Project List

Open Project List

New Database File

Open Database File

Get Status

Exit

New Project List

This menu option creates a new <u>Project List</u> file.   You will be prompted for the filename to use; the default extension is *.AMP.   Warning: If you specify an existing filename, the old project list will be erased.

The new file will become the default project list which is loaded when Account Manager is started.

Open Project List

This menu option allows you to open an existing <u>Project List</u> file.   You will be prompted for the filename.

The file opened will become the default project list which is loaded when Account Manager is started.

New Database File

This menu option creates a new <u>Database</u> file.   You will be prompted for the filename to use; the default extension is *.AMD.   Warning: If you specify an existing filename, the old database will be erased.

The new file will become the default database which is loaded when Account Manager is started.

Open Database File

This menu option allows you to open an existing Database file.   You will be prompted for the filename.

The file opened will become the default database which is loaded when Account Manager is started.

Get Status

This menu option displays the current Database filename and the current Project List filename.

Exit

This menu option exits Account Manager.   You will be punched out of any currently active project when Account Manager closes.

Reports Menu

This menu contains options related to creating reports:

Report Options - this option contains a submenu of the following two options:
<u>Select Editor...</u>
<u>Time Format...</u>

<u>Create Reports</u>

Database Menu

This menu contains options related to database maintenance:

Punch In Earlier
Punch Out Earlier
Punch Out On Exit
Warn If Active On Startup
Edit Database

Help Menu

This menu has options to activate the Account Manager Help window (which you are now viewing) and the About Account Manager box.

Report Time Format

This menu option allows you to select the format used for time durations in reports.   You may select either HH:MM:SS format (for example, 2:20:00), or a decimal form of the total hours (for example, 2.33).

Selecting an Editor

This menu option (selected via the <u>Reports Menu</u>) allows you to select the text editor you wish to use to view the reports when they are generated.   The default is notepad.

Punch In Earlier

This option (selected via the <u>Database Menu</u>) allows you to punch in at some time before the current time.   This option is useful if you forget to punch into a project, or if you begin working on a project before you start Account Manager.

When this option is selected, a dialog will appear for you to enter the time when you want to punch in.   Note that you are not allowed to punch in before the previous project was punched out, nor can you punch in after the current time.

Information Fields:

Previous Project: this is the name of the last project that was active.   If this is a new database and there is no previous project on file, this field will say "(none)".

Punched In/Out At: this is the date and time that the previous project was punched into or out of (whatever the last punch in/out event was).   If this is a new database and there is no previous project on file, this field will say "(N/A)".

Selection Fields:

New Project Name: enter the project you wish to punch into here.   You can either type a project name, or select one from the drop-down list of projects.   If a project was selected in the project list on the main screen, then that project will be shown here as a default.

Time To Punch In: there are two fields in this section.

Date: Valid dates are in the format MM/DD/YY.

Time: Valid times are in the format HH:MM (24-hr), HH:MMa or HH:MMp.   For example, the following are valid times:

8:00, 14:35, 2:35p, 1:30a

Punch Out Earlier

This option (selected via the Database Menu) allows you to punch out at some time before the current time.   This option is useful if you forget to punch out from a project, or if you are away from your computer when you stop working on a project.

When this option is selected, a dialog will appear for you to enter the time when you want to punch out.   Note that you are not allowed to punch out before the current project was punched into, nor can you punch out after the current time.

Information Fields:

Current Project: this is the name of the currently active project.

Punched In At: this is the date and time that the current project was punched into.

Selection Fields:

Time To Punch Out: there are two fields in this section.

Date: Valid dates are in the format MM/DD/YY.

Time: Valid times are in the format HH:MM (24-hr), HH:MMa or HH:MMp.   For example, the following are valid times:

8:00, 14:35, 2:35p, 1:30a

Warn If Active On Startup

Selecting this menu option will toggle the Warn If Active On Startup feature.   If this feature is enabled, then Account Manager will warn you if it detects that you are already punched in when it starts.

If this feature is enabled and you get a warning message when you start Account Manager, it means that you were still punched in even though Account Manager was not running. The currently active project will be shown, along with the time it was punched into.   You will have the following options:

Remain Punched In: select this option if you want to remain punched into the currently active project displayed.

Punch Out Now: select this option if you want to punch out now from the currently active project displayed.

Specify Earlier Time to Punch Out: select this option if you want to punch out from the currently active project at some time before now.   Note that you are not allowed to punch out before the current project was punched into, nor can you punch out after the current time.

Date: Valid dates are in the format MM/DD/YY.

Time: Valid times are in the format HH:MM (24-hr), HH:MMa or HH:MMp.   For example, the following are valid times:
                    8:00, 14:35, 2:35p, 1:30a

Punch Out On Exit

Selecting this menu option will toggle the Punch Out On Exit feature.   If Punch Out On Exit is enabled (there will be a check mark next to the menu item), then you will automatically be punched out when Account Manager exits.   If Punch Out On Exit is not enabled, then you will remain punched in when Account Manager exits.

Edit Database

This option (selected via the <u>Database Menu</u>) allows you to perform database maintenance. In particular, you can delete certain blocks of data from the database.   This will both reduce the database file size, and improve the speed with which reports are generated.

When this option is selected, a dialog will be activated which displays information about the currently loaded database and options for deleting data from it.   The following fields are in the dialog:

Information Fields:

Database: this is the filename of the currently loaded <u>Database</u> file.

Database contains information from {date} **to** {date}: these are the range of dates for which information is available in the database.

Selection Fields:

Delete data from {*start date*} **to** {*end date*}: selecting this option and pressing OK will delete data in the database ranging from *start date* to *end date,* inclusive.   A punch in/out pair will be deleted if the punch **in** time is within the date range specified, even if the punch out time is not.   Valid dates are in the format MM/DD/YY.

Delete data up to and including {*date*}: selecting this option and pressing OK will delete data in the database from the beginning up to *date,* inclusive.   A punch in/out pair will be deleted if the punch **in** time is within the date range specified, even if the punch out time is not.   Valid dates are in the format MM/DD/YY.

Delete last record in database: selecting this option and pressing OK will delete the last record in the database.   This record will include both a punch in and a punch out. The date and time shown are the time that the project was punched out of.   Note that since using the database editor automatically punches you out of the current project, there will always be a in/out pair at the end of the database when this option is selected.

Store deleted data: this option indicated that the data which is deleted from the database will be stored in this indicated file (which is the database filename, with a .BAK extension).   Note that if this .BAK file already exists, the new data will be appended to it. Note that this option is not available when using the Delete last record in database option.

Quick Access List

The Quick Access List is accessed by clicking on the Account Manager icon with the right mouse button.   This brings up a list of your projects/accounts, with the currently active one highlighted (if any).   From here, you can punch into or out of a project.

The Quick Access List is especially convenient when you are using the Icon Always On Top option, since the icon will then always be visible -- the Quick Access List is then never more than one mouse click away.

To punch into a project:

Select the project you wish to punch into, and click the "In" button.   Alternatively, you can double-click the project name.

To punch out of a project:

Click the "Out" button.

To Exit the Quick Access List without changing the active project:

Click the "Cancel" button or press ESC.

Create Reports

This option (Create Reports from the <u>Reports Menu</u>) allows you to create reports.   These reports will be saved to a file, and can be edited or printed later by another application (such as NOTEPAD).

Report Types:

Overall Summary by Project: This report shows the total time spent on each project in the database, from the starting date to the ending date (inclusive).

Daily Summary by Project: This report shows the total time spent on each project on each day, from the starting date to the ending date (inclusive).

Detailed Report: This report shows the time of each action (punch in/out) present in the database, from the starting date to the ending date (inclusive).   No summary is generated in this report.

Valid starting and ending dates are in the format MM/DD/YY.   The report filename is the file the report will be stored in.   Pressing the Browse button will allow you to select a file interactively.

View in Editor: if this box is checked, then the generated report will be loaded into the editor selected (select editor using the <u>Select Editor</u> option from the <u>Reports Menu</u>).   Note that it is still necessary to specify a report filename.

Account Manager Command Line

The command line options for Account Manager are:

```
ACCTMAN

ACCTMAN -out

ACCTMAN -in

ACCTMAN project name
```

The first option runs Account Manager normally.   The -out option will punch out of the currently active project.   The *project name* option will punch into the selected project.

The -in option can only be used if you are currently not punched in.   It will punch you into the last project which was active.   For example, if project "my proj" was active, then you punched out of it, and then ran "ACCTMAN -in", then Account Manager would punch you into "my proj".

Note:

Only one copy of Account Manager will run at a time.   However, if Account Manager is running and you try to run it again, the command line options will be passed to the running copy.   So, if Account Manager is running, running "ACCTMAN -out" will punch you out of the current project.   Similarly, "ACCTMAN my project" will punch you into a project called 'my project'.

This powerful capability could be used with a program scheduler such as Clocker.   This would give you the capability to automatically punch out from 12:00 to 1:00pm for lunch, for example.   If at 12:00 you executed "ACCTMAN -out", and at 1:00 you executed "ACCTMAN -in", you would be punched out from 12:00 to 1:00, and then punched back into the project you were previously working on.   This feature could also be used for regular meetings, etc.

Icon Always On Top

This option is available from the System Menu of Account Manager.   Selecting it will cause the Account Manager icon to always remain on top of all other window.

This option is especially useful when used with the Quick Access List.

DOS Interface to Account Manager

Since many people have to exit Windows occasionally to run a program that will not run in a DOS box, etc., we have provided a DOS Interface to the Account Manager database.   This interface is limited, in that you can only punch in, punch out, or get the database status.

Note:

The DOS interface CANNOT be run from a Windows DOS box.   It is provided solely to be run completely outside of Windows.   If you are inside Windows, use the Windows Account Manager (ACCTMAN.EXE).

Command Line:

```
DOSACCT [-db database] -status
DOSACCT [-db database] -out
DOSACCT [-db database] projectname
DOSACCT [-db database] "project name"
```


The DOS interface will attempt to read your ACCTMAN.INI file to get the name of the active database.   If this ACCTMAN.INI file is not accessible (if you are on a network workstation other than your own, for example), then you can specify your database file with the -db option.   Use of this option is not recommended, except where it is absolutely necessary.

The -status option will tell you which (if any) project is currently active.   The -out option will punch you out of the currently active project.   The last two options are for punching into a project.   If the project name contains spaces, you must enclose it in quotes as in the fourth example.

Examples:

```
DOSACCT myproject
```

   This will punch into the project called "myproject", using the database file specified in the ACCTMAN.INI file.


```
DOSACCT -out
```

   This will punch out of the currently active project (if any), using the database file specified in the ACCTMAN.INI file.


```
DOSACCT -db time.amd myproject
```

   This will punch into the project called "myproject", using the database file `TIME.AMD`.

Support

Support will be available via telephone, E-mail or US Mail.   All inquiries from registered users will be acknowledged; non-registered user inquiries will be handled as time permits.

Telephone

(303) 484-7204

E-mail

CompuServe: 71774,605

Internet: 71774.605@compuserve.com

US Mail

Winnovation

P.O. Box 271071

Ft. Collins, CO   80527-1071

USA

Ordering Information

The registration fee for Account Manager 1.0 is $24.95, for a single-user license.   Site license rates are shown in ORDERFRM.TXT.

To order, fill out ORDERFRM.TXT and send it to:

Winnovation

P.O. Box 271071

Ft. Collins, CO   80527-1071

USA

Registered users will receive a printed manual, the latest version of Account Manager on disk, free support, and free upgrades to 1.x versions.

Other Winnovation Products

Be sure to check out the following other products from Winnovation!   They should be available on major Internet FTP sites, CompuServe, and major BBS's, or you may order directly from Winnovation!
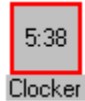
Clocker

A Personal and Network program scheduler for Windows 3.1!

Clocker is designed to schedule programs (or reminders) to be run at a scheduled time. Both a private schedule and a shared network schedule can be active at the same time, so you can...

* Backup your system periodically
* Manage network backups
* Run long processes during off hours
* Schedule reminders for entire network
* Download long data files during off-peak hours

System or Network administrators!   Clocker gives you the capability to execute processes on each machine on the network running Clocker.   This is done via a central schedule, which you alone control.   If you make a change to this schedule, all other machines will automatically update themselves from this file!

Other features:

* Clocker's icon functions as a system clock
* Group schedules fully password-protected

Clocker is available on CompuServe in the WINADV forum as CLOCKR.ZIP.   It can also be found on Internet FTP sites (ftp.cica.indiana.edu: /pub/pc/win3/util/clockr21.zip), and many BBS's, currently as CLOCKR21.ZIP.

Registration is $24.95 for a single copy, and site licenses are available at a discount.   Upon registration, you will receive a disk with the latest version of Clocker, a printed manual, and a license statement with your personal serial number and registration code combination. Registered users will receive free unlimited technical support and free upgrades to future versions of Clocker.