

(This is a text-only version of the Account Manager user manual.)

Account Manager

version 1.2

Winnovation
Innovation through Windows...

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Introduction

Account Manager is a tool designed for people who must keep track of how much time they spend on different projects or accounts. Examples of such uses are...

- * A person who charges their time to several different projects
- * Someone who bills to multiple clients
- * An entrepreneur who must keep records of business vs. personal use of a computer for tax purposes
- * And many more!

To use Account Manager, you "punch in" to each project or account as you begin working on it, and "punch out" when you are done. At the end of the week, or whenever you need a report of how your time was spent, Account Manager will generate a report, showing your time in varying levels of detail.

Account Manager also has a convenient feature to make it even easier to use. After your list of projects has been entered, you can click on the Account Manager icon with the right mouse button to get the Quick Access List. This list shows all of the projects in your list, and makes it very easy and convenient to punch in and out of them.

For even greater flexibility and convenience, Account Manager can automatically punch in or out of a project or

activate itself when certain user-specified applications are started. You may never have to punch in or out manually!

For those occasions when you must exit Windows for whatever reason, Account Manager includes a DOS command-line interface so you can punch in/out from DOS.

Note that Account Manager requires Windows 3.1.

Packing List

Your package should include the following:

- This manual
- Distribution disk
- License statement

The following files should be present in the distribution disk:

- ACCTMAN.EXE Account Manager starter
- \$AM.EXE Account Manager program
- ACCTDLL.DLL Account Mgr. support library
- ACCTMAN.HLP On-line help file
- DOSACCT.EXE DOS command-line interface
- ACCTMAN.TXT Documentation text file

If any files are missing, please contact Winnovation.

Installation

Important: You must make sure no other copies of Account Manager are running when you install this version.

First, make sure that no other copies of Account Manager are currently running. Then simply copy all of the files from the Account Manager distribution disk to a directory such as C:\ACCTMAN. To do this from a DOS prompt, type the following (assuming your floppy drive is A: and your hard disk is C:):

```
MKDIR C:\ACCTMAN
COPY A:\*.* C:\ACCTMAN
```

After the files are copied, add Account Manager to a Program Manager group. To do this, find ACCTMAN.EXE with the File Manager and drag it to the group you want in the Program Manager. To run Account Manager every time you start Windows, add Account Manager to the Startup group in Program Manager. See your Windows manual if you are unsure about how to do any of these steps.

Upgrading from an older version

If you are upgrading to Account Manager 1.2 from an older version, you should make a backup copy of your project list and database files. The file formats that this version uses are different from the previous versions, and the files will be converted immediately to the new format when Account Manager 1.2 starts.

Registration

When Account Manager is first started, you will see a registration reminder screen. Click the Register... button and you will see the following registration screen:

Enter your name EXACTLY as shown on your license statement, and enter your serial number and registration code (also found on the license statement).

Getting Started

This section is intended as a general overview to using Account Manager. For more detail, please refer to the reference section. Please note that the words "project" and "account" are used interchangeably within this manual.

When you start Account Manager, you will see a screen similar to the following:

The large space on the left side is the project list. You should enter each project or account that you work on in to this list. To do this, you should click on the top portion of the list (you will then see a flashing cursor there), type the name of the project, and click the Add button. When you do this, you will notice that the project has been added to the list. Repeat this step for each project that you want to enter.

For each project that you enter, you may select whether or not Account Manager should prompt for a comment when punching in to that project. A comment is simply additional information to help you track your time with more detail (see the Comments section in this manual for more information).

After all of the projects have been entered, you may punch

in to one. To punch in to a project, select the project in the list and click the In button. Alternatively, you may double-click on the project name in the list. If the Prompt for Comment box was checked, you will be prompted for a comment for this session. After you punch in, the status line at the bottom of the window will reflect which project you are punched in to.

To punch out of a project, simply click the Out button. You can also just punch in to another project -- this will automatically punch you out of the first one.

To make punching in and out more convenient, Account Manager provides a Quick Access List. To access this list, minimize Account Manager and click on the icon with the right mouse button. This will bring up a list of your projects for you to conveniently punch in to and out of.

If you wish to delete a project, select it in the list and press the Delete button. Note that this will not delete the data in the database for that project -- it will merely remove the project from the Project List.

To generate a report, select Create Reports... from the Reports menu. You will have the option of creating several different kinds of reports. For details about the different report types please refer to the reference section.

Reference

Project Lists and Databases -----

In Account Manager, the Project List and the Database are two different things. It is important to understand the difference.

A Project List is simply a list of your projects. It is displayed on the main window, and also in the Quick Access List for easy access. Project lists are usually saved with a .AMP extension.

A Database contains all of the punch in/punch out data. Every time you punch in to or out of a project, the database file is updated. Database files are usually stored with a .AMD extension.

Note that Project Lists and Database files are not connected in any way. A Project List exists only for your convenience. It is possible to punch in to a project which is not even in the Project List (to do this, type the name of the project and press In -- do not press the Add button,

which would add it to the Project List). Conversely, deleting a project from the Project List will NOT delete the associated data in the database.

To find out the current Project List and Database files, choose Get Status... from the File menu.

Note that database files can grow quite large over a long period of time -- it is recommended that you delete old records periodically via the Edit Database option. This will reduce the file size and also speed up report generation.

Note that the application setup information (see the Application Setup section for more details) is stored in the .AMP file with the Project List.

Comments

Comments are extra information you can enter when punching in to a project, to provide more detail about your activities. This allows you to keep a more detailed log of your time.

Each project can be individually configured to prompt or not prompt for a comment when punched in to.

When you are prompted for a comment, you will be shown a drop-down box which contains a list of your 10 most recently used comments for your convenience. You may either select one from this list, or type in a new comment. Then click the OK button to continue punching in. Pressing Cancel at this point will cancel the punch in action.

Database Options

The Database menu contains several options related to database management.

Punch In Earlier

This option allows you to punch in to a project at an earlier time. This is especially useful if you start working on a given project, but forget to punch in to it.

When you select this option, you will see the following screen:

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 in to 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 in to 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

If the project you punch in to is configured to prompt for a comment, then you will be prompted for the comment.

Note that you are not permitted to punch in to a project at an earlier time than the previous punch in/out time. If you need to do this, you must delete the last record in the database via the Edit Database option. You are also not permitted to enter a time which is later than the current time of day.

Punch Out Earlier

This option allows you to punch out of a project at an earlier time. This option is useful if you forget to punch out of a project, or if you are away from your computer when you stop working on a project.

When you select this option, you will see the following screen:

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 in to.

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

Note that you are not permitted to punch out of a project at an earlier time than the previous punch in time. If you need to do this, you must delete the last record in the database via the Edit Database option.

Punch Out on Exit

This option causes Account Manager to punch out of the currently active project when exiting. This is convenient in case you forget to punch out at the end of the day, etc.

If this option is not enabled, then you will remain punched in to the active project when Account Manager is closed.

Warn if Active on Startup

If this option is selected, you will be warned if you are already punched in when Account Manager starts. The warning will be similar to the following:

The top lines reflect the currently active project including the time it was punched in to. You have the following options:

Remain Punched In: Select this option if you want to remain punched in to 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 in to, 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

This option is convenient if you stay in Windows all of the time. If this is the case, then there is no reason that you should be already punched in when Account Manager starts (unless you forget to punch out), except for a system crash or other undesirable occurrences.

Enable Application Punch In/Out

This menu option enables the automatic application punch in/out feature of Account Manager. For more information, refer to the Application Setup section of this manual.

Application Setup

Account Manager has the capability of automatically punching in or out or prompting for a project when other applications are started or closed. To get to this setup screen, select Application Setup... from the Database Menu.

To enable automatic application punching in or out, set up the applications how you want them from the Application Setup screen and then select Enable Application Punch In/Out from the Database Menu.

The following is a typical Application Setup screen with a few applications set up:

The following is a description of the various fields on the Application Setup screen:

Event: This is either Start or Close, depending on whether you want to trigger on the application starting or closing.

Application Title: This is the title of the application you wish to trigger on. This is NOT the file name - it is the name of the program, as shown on the title bar of the window when it is first started. You only need to enter the first few characters of the name - for example, if you enter Calc, then Calculator will match. The more characters you enter, the more specific you can be as to which application will trigger the event. If you enter less characters, then multiple applications will match and trigger the event. For example, if you enter C, then Calculator and Clock will both match.

If an application matches more than one event, the event is chosen which matches the greatest number of characters; i.e., the most specific event that matches. For example, if you have two application events with titles of Cal and Calculator, then running Calculator will only trigger the second of the two.

If this field is left blank, then every application will match the name (except those that match another event more specifically).

Action: This is the action you want Account Manager to take when the application starts/closes. The options are:

Punch In: Punches into a project.

Punch Out: Punches out.

Activate: Activates Account Manager and prompts for input. Note that Account Manager will remain on top of all other windows until some action is taken by the user.

Project: If Punch In is selected as the Action, then this is the project to punch into.

Comment: There are three options for comments:

None: No comment.

Application Title: This enters a comment which is the title of the application that triggered the event. This is convenient if more than one application can trigger an event - this comment can tell you which application it was.

Select: Allows you to enter a comment, or select one from the history list.

To add a new application event:

Fill in the event you want using the field described above, and click the Add button.

To change an existing application event:

Click on the event in the list, make the modifications you want using the fields described above, and click the Change button.

To delete an existing application event:

Click on the event in the list, and click the Delete button.

Note that application setup information is stored with the Project List in the .AMP file.

Editing the Database

This function allows you to delete data from the current database. This can reduce the database size, resulting in faster report generation. Also, if you should accidentally punch in or out of a project, you can delete the most recent records (punch in/out actions) from the database one at a time.

When this function is selected, a screen similar to the following will be displayed:

Information Fields:

Database: This is the filename of the currently loaded DatabaseDATABASEFILES 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.

Note that selecting this function will cause you to be punched out of your current project.

Reports

The Reports menu contains options related to generating and viewing reports. See the following sections for details.

Selecting an Editor

This menu option allows you to select an editor to use to view your report files. The default is notepad.exe, which is normally in your Windows directory. If you change this editor, the new editor must support a filename on the command line, i.e. notepad.exe report.txt.

Hint: If you use CSV-format files (Comma Separated Values), then a spreadsheet such as Microsoft Excel is a possible editor.

Selecting a Time Format

This option allows you to select the format used when printing time durations in the reports. You have the option of HH:MM:SS format (i.e. 03:20:00), or a decimal hours format (i.e. 3.33).

Note: Some spreadsheets do not correctly interpret a time

span in HH:MM:SS format which is greater than 24 hours. These time spans may import as a string field, rather than a time field. If you have this problem, you may wish to switch to the decimal format for time spans.

Creating a Report

This option allows you to create reports which show your time usage. There are three different report types, detailed in the following sections. Note that the examples in the following sections were not created from the same database.

There are two report formats: Formatted Text and CSV. Formatted Text will create a space-formatted file, suitable for viewing with an editor such as notepad. CSV will create a comma-delimited report file, suitable for importing into a spreadsheet.

The following example report files are examples of the Formatted Text report format.

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). The following is an example Overall Summary by Project report:

Project Summary Report
Starting 01/01/93, Ending 04/05/93

Project Name	Time (HH:MM:SS)
Presentations	1:14:02
Meetings	0:25:12
Project X	3:59:07

Total Time: 5:38:21

Daily 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). The following is an example Daily Summary by Project report:

Daily Project Summary Report
Starting 01/01/93, Ending 04/05/93

Date	Project Name	Time (HH:MM:SS)
03/21/93	John Smith	0:04:09
	Patty Roburn	0:03:52

Total Time: 0:08:01		
03/23/93	John Smith	1:00:07
	Ed Hayes	3:25:09
	Jane Doe	1:00:09

Total Time: 5:25:25		
04/05/93	Ed Hayes	0:25:02

Total Time: 0:25:02		

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. Note that a detailed report is the only report that shows the comments that were optionally entered. The following is an example Detailed Report:

Detailed Report

Starting 01/01/93, Ending 05/19/93

Project Name	In/Out	Date	Time	Total Time	Comment
Project 3	In	04/05/93	3:00:00p		
Project 3	Out	04/05/93	4:05:00p	1:05:00	
Project 2	In	04/05/93	4:20:00p		
Project 2	Out	04/05/93	6:18:30p	1:58:30	
Project 4	In	04/05/93	6:18:36p		
Project 4	Out	04/05/93	6:25:05p	0:06:29	
Project 3	In	05/19/93	9:08:31p		
Project 3	Out	05/19/93	9:08:35p	0:00:04	Sample comment
Project 5	In	05/19/93	9:08:35p		
Project 5	--	Still Punched In	--		

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, if any. The project name option will punch in to the named project.

The -in option can only be used if you are currently not punched in. It will punch you in to 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 in to "my proj".

Note that punching in via the command line, either with the project name option or with the -in option, will not prompt for a comment even if the project is configured to prompt for comments.

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 in to a project called 'my project'.

This powerful capability could be used with a program scheduler such as Clocker (also from Winnovation)OTHERPRODUCTS. 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 in to the project you were previously working on. This feature could also be used for regular meetings, etc.

DOS Interface

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

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, you must 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 in to a project. If the project name contains spaces, you must enclose it in quotes as in the fourth example above.

Note that it is not possible to enter a comment from the DOS command line interface.

Examples:

DOSACCT myproject

This will punch in to 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 in to the project called "myproject", using the database file TIME.AMD.

Miscellaneous Options/Features

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 in to or out of a project.

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

To punch in to a project:

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

project name. You may be prompted for a comment at this point, depending on how the project was configured.

To punch out of a project:

Click the "Out" button. Also, punching in to a different project will punch you out of the current project.

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

Click the "Cancel" button or press ESC.

Get Status

This option, available on the File menu, will display the file names of the current project list and the current database.

Icon Always On Top

This option is available on the Account Manager System menu. Enabling this option will cause the Account Manager icon to remain on top of all other windows on the desktop. This makes it especially convenient to use the Quick Access List.

Registration and Support Information

Single copy Account Manager registration is \$24.95, payable in US dollars. If used on a network, Account Manager requires one license for each machine it is running on. Site license rates are as follows:

5 users	\$ 109.95
10 users	\$ 199.95
20 users	\$ 349.95
50 users	\$ 699.95
100 users	\$ 999.95

For over 100 users, please contact Winnovation for pricing information.

To register additional copies, print out ORDERFRM.TXT and mail the completed form along with payment to:

Winnovation
PO Box 271071
Ft. Collins, CO 80527-1071

USA

After your registration is processed, you will receive a serial number/registration code combination, a manual, and a disk for each copy you ordered. Site licenses will receive only one code, manual, and disk, with additional manual copies available for a nominal fee. Registered users will be entitled to unlimited support and free upgrades to 1.x versions as they become available. Future updates will be available at a significant discount. Support will be via telephone, E-mail and US mail. Winnovation can be reached at:

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