

TIMESHEETS

TIME LOGGING SOFTWARE

by Dennis Birch

This product is offered as shareware. You may distribute it freely as long as it is accompanied by the documentation. If you decide to keep it and use it, please send the \$10.00 shareware fee to **Dennis Birch, 6645-190 Canyon Rim Row, San Diego, CA 92111.**

This document was written in Helvetica font. If it does not appear in Helvetica on your machine, select the "Define Styles..." command from Word's Format menu. Select Normal style from the list, select Helvetica from the Font menu and click "OK" or press the Return or Enter key on your keyboard.

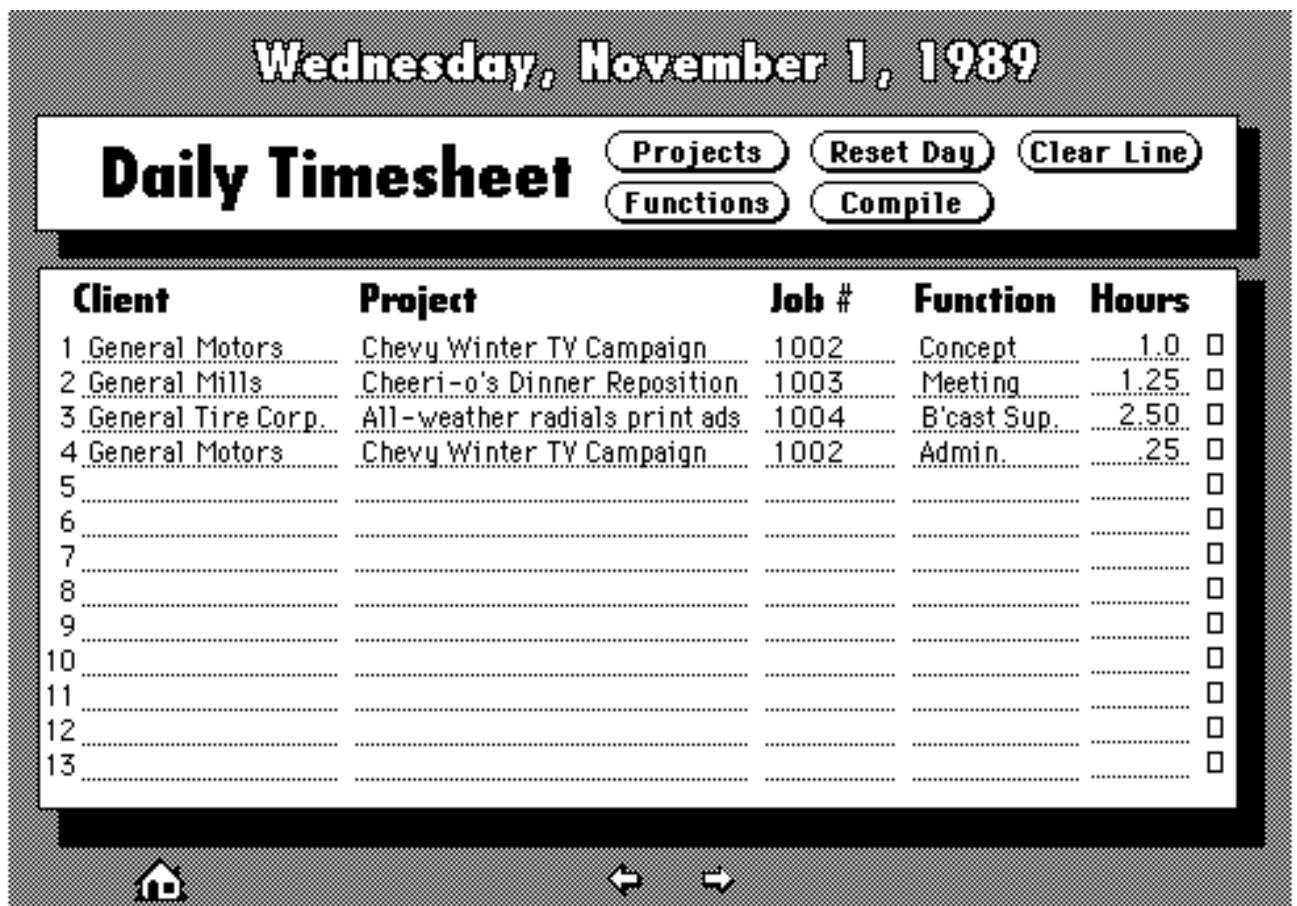
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The *Timesheets* HyperCard stack was designed to help people who charge for their time keep track of their accumulated hours for different projects. I developed this stack for my own freelance business. I have found it to be invaluable for estimating and billing jobs. I think it can help anybody who has to keep track of their time for a number of different clients or projects. As long as you have HyperCard version 1.2 or higher and a Mac Plus or later, you can enjoy the ease of timekeeping with *Timesheets*.

How you use it

You use *Timesheets* by entering information on what you did for which projects on a "Daily Timesheet" card for a particular day. After you've entered a day's work, you compile the information with a click of the mouse. The information from each line of the Daily Timesheet screen gets transferred to a "Job Sheet" card for that particular project, where it's accumulated with all the rest of your time for that job. This can later be exported to be used in a report on your time. Or you can refer to the information directly in *Timesheets*.

Below is a representation of the main *Timesheets* screen.



The Daily Timesheet Screen

At the top is the date for which you're entering time entries.

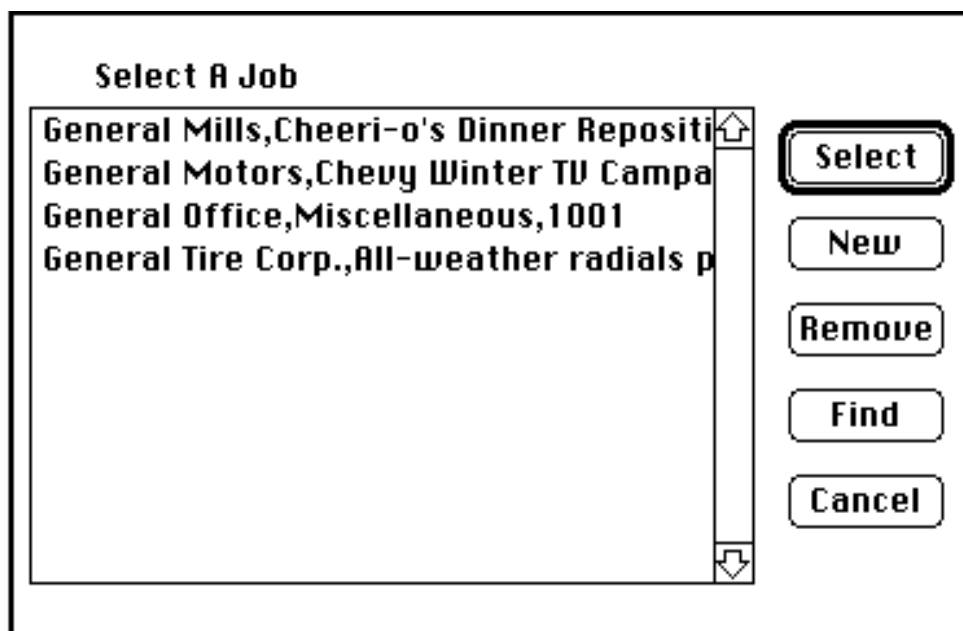
In the area below that are five buttons that control all your time entry functions.

In the lined area below that are the "fields" where the information for each entry goes. You can record up to 13 entries at a time. If you need to make more than 13 entries in a single day, you'll have to do them in separate batches.

Selecting A Project

To enter time data, start by selecting a project to enter time against. Click on the "Projects" button at the top of the main screen.

The "Projects" list dialog will appear. Listed in this dialog will be all the projects you have created. Each entry is on a line by itself, with the Client Name, Project Name and Job Number separated by commas. If you've used long names, you may not be able to see the entire line.



This is where you select a job to be entered in the next empty line of the Client, Project and Job # fields. Click on a project listed in this dialog, then click on the "OK" button or hit the "Return" or "Enter" key on your keyboard. You can also double-click on the line you wish to select.



If you click on the “Remove” button after highlighting a name in the list, a warning dialog similar to this will appear:

Clicking on “Cancel” (or typing #-.) allows you to back out of the Remove command. Clicking “OK” removes the job from your list of projects. You can have *Timesheets* put it back on the list as long as you haven’t deleted the Job Sheet card associated with it. More about that later.

The Projects list dialog offers one option not found in any others. By selecting a job listing and clicking on the “Find” button, you will be taken to the Job Sheet card.

If you wish to add a new job, click on the “New” button. You’ll be taken through a number of steps which are explained in more detail later.

When you option-click (click the mouse while holding down the Option key on your keyboard) on any line of the “Client,” “Project,” or “Job #” field, you’ll be prompted to replace the entries on the line you have clicked with data for another job. It can be one you have already entered in your project list, or you can create a new job entry at this time.

A Few Words About Lists

The “Projects” list is one of three that you will use to perform different functions in *Timesheets*. The rules for working with them are essentially the same in all cases.

1. You must keep at least one name in each list or *Timesheets* can bomb your entire system and screw up other important

files on your hard drive. *Timesheets* comes with an entry in each list. Before you can remove one, you must first enter another listing.

2. All buttons other than “New” and “Cancel” require that you highlight a selection from the list before clicking.

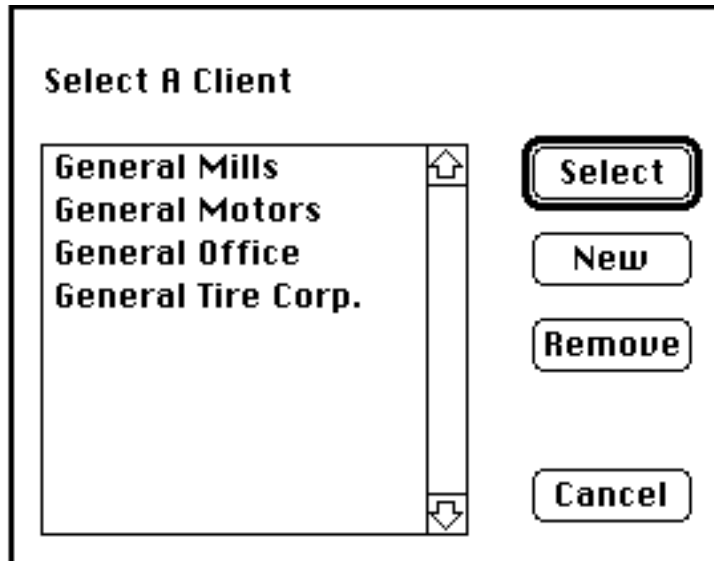
3. You can quickly highlight a line by typing the first letter of that line, and using the up and down arrow keys if needed.

4. As noted above, double-clicking on a selection from the list is the same as highlighting it and clicking the “OK” button. You can also

highlight a selection and press “Return” or “Enter” on your keyboard.

5. Almost every dialog in *Timesheets* can be cancelled by typing #-. (period).

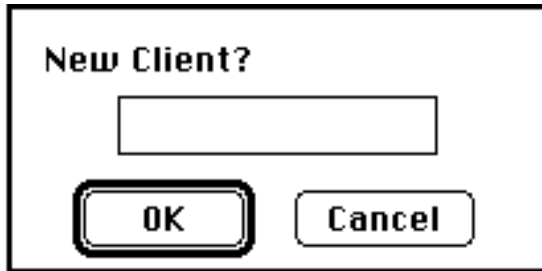
Creating A New Project Listing



After clicking the “New” button in the Project list dialog, you’re taken to the next step in creating a new project listing. The “Select A Client” dialog will appear. Like other list dialogs, it gives you the option of selecting a client, removing a client from the list, adding a new client to the list or cancelling. **If you want to remove a client from the list, you may find it quicker to go directly to this “Select A Client” dialog by option-clicking on the “Projects” button at the top of the main screen.**

Creating A New Client Listing

Clicking on the “New” button in the “Client” dialog results in another dialog asking you to enter the name of the new client for your list. Keep client names to a length that will fit in the text entry space of the dialog. If you’ve entered a name, clicking “OK” in this dialog takes you through the rest of the new project procedure. Clicking on the “Cancel” button ends it.



After you have selected a client or created a new client to be entered in your list, you will be prompted for a project name, client purchase order (p.o.) number and client job number with dialogs similar to this:

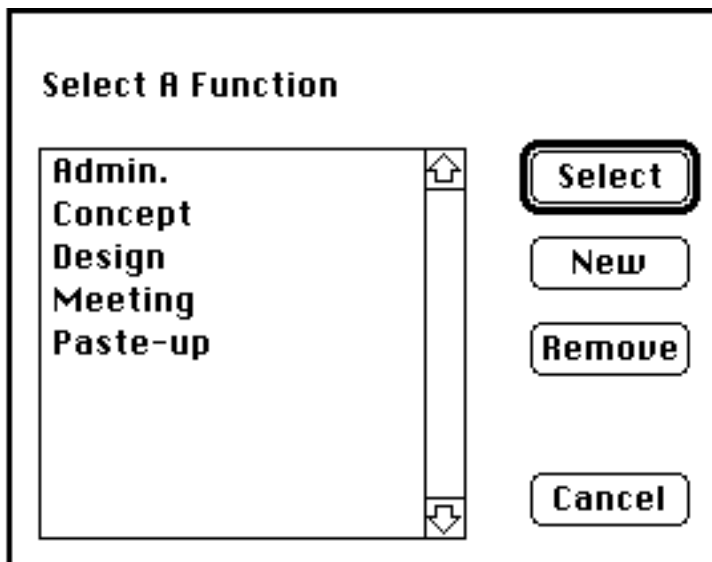


A dialog box titled "New Project?". It contains a single-line text input field. Below the input field are two buttons: "OK" and "Cancel".

You **must** enter a project name in this New Project dialog. Clicking "OK" when there is no project name entered is the same as clicking "Cancel."

The client p.o. and job number items are optional. They can be added to your Job Sheet for this project later if you wish, or not added at all. **The client job number is not the same as the sequential job number that *Timesheets* automatically assigns each of your projects.** The client job number designation is intended for a number assigned by your client for their tracking purposes, and is included in *Timesheets* to help with client communications and billing.

Selecting A Function



A dialog box titled "Select A Function". It features a list box on the left containing the following items: "Admin.", "Concept", "Design", "Meeting", and "Paste-up". To the right of the list box are four buttons: "Select", "New", "Remove", and "Cancel".

After you have selected a job or created a new job that you want to place on the next line of the job fields, the next step in logging time is to select a function. If, as an example, you are a graphic designer, your list of functions could include such items as design, layout, photo direction, paste-up and so on, as well as such typical business functions as Meetings and Administration. In a typical day, you may perform more than one function on a project, so for example, you could enter time on one line for a meeting on a project called "Big Ad Campaign," and also

time on another line for “Concept” on the same project. After you select a function from the list, it will appear on the next blank line in the “Function” field.

Creating A New Function

You create new functions by clicking on the “New” button in the Functions list dialog. A “New Function” dialog, similar to the “New Client” dialog, will appear. **Function names must be kept short.** Try to keep them to no more than 10 characters in length, or as much text as will fit in the “New Client” text entry space. So, as in the example above, you’ll need to abbreviate longer function names when you add them to your list. Functions are removed with the “Functions” list dialog just the same as with dialogs for projects and clients.

Clicking anywhere on the “Function” field is the same as clicking on the “Functions” button.

To replace an existing entry on any line of the "Function" field, option-click on the entry you want to replace.

Logging Your Hours

The next step in logging time against a job is to enter the number of hours worked in the "Hours" field. You can break your time down into as small a decimal portion as you wish. I personally use quarter-hour increments, i.e. .25, .5, .75, and whole hours.

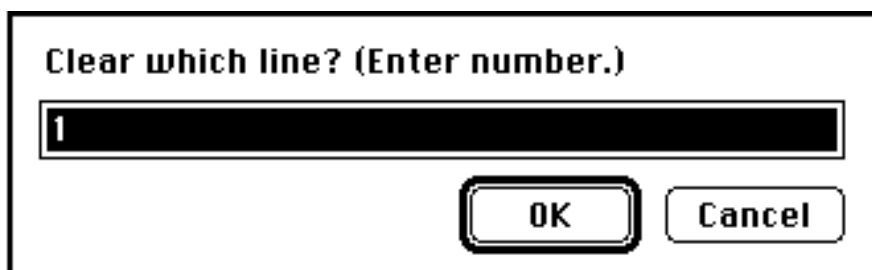
The "Hours" field is the only one that allows you to directly type in data. As you might expect, you must enter data in this field if you want Timesheets to transfer it to the Job Sheet for that project.

Attaching A Note

The final, *optional*, step for each entry line is to add a note. To do so, click on the small box at the right hand end of the line. A dialog asking what you want to put in the note will appear. If you have already entered a note for this line, it will be highlighted in the dialog's text entry area. To keep an existing note, click either "OK" or "Cancel." To enter a new note, type your entry and click "OK." Notes should be no longer than the length of the text entry line in the dialog box. If you don't enter a note, you'll see a notation of "--" in the Notes field on the Job Sheet for that entry.

Changing A Line

If you have made an error in entering data for a line, you have a couple of options for correcting it. To change the project for any line, option-click in the "Client," "Project" or "Job #" field. This will allow you to replace all three of the entries on that line with information for another project. You can select another job or create a new one to go on that line.



Clear which line? (Enter number.)

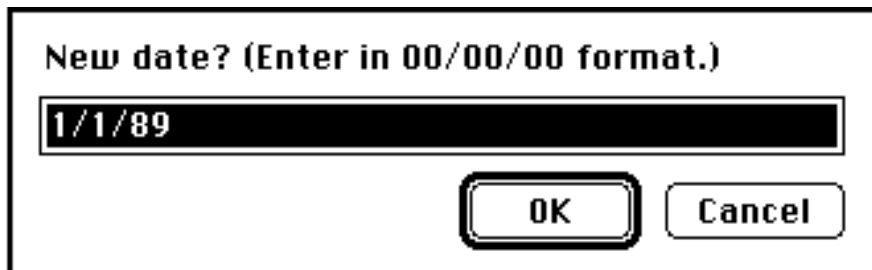
OK Cancel

Another way of correcting an error is to clear the line and then enter new information. To clear the line, click on the “Clear Line” button in the top portion of the main screen. You will be presented with a dialog asking you to enter the number of the line you wish to clear. Enter the number that appears to the left of the line you wish to delete. Clicking “OK” clears the line. Clicking “Cancel” leaves everything as it was before you clicked on the “Clear Line” button. After you have cleared the line, enter information for a new line.

Compiling Your Data

The end result of using *Timesheets* is tallying all the daily information for each job on one sheet. That’s what you do by clicking on the “Compile” button. Timesheets looks for every line that has hours entered and puts all the information (including the hidden notes) in the proper field of a single Job Sheet card for each project.

Setting Up For A New Date



The image shows a dialog box with a title bar that reads "New date? (Enter in 00/00/00 format.)". Below the title bar is a text input field containing the date "1/1/89". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

After you have finished compiling your data, you will be asked if you want to set up for a new date. If you want to keep your current data entries on screen, click on "Cancel." If you wish to clear your data and change the date, click on "OK." A dialog with the next day's date in the text area will appear. If that is the date you wish to set up for your next set of entries, click "OK." If you would like a different date, enter it in the text area and click "OK." **Be sure to use 00/00/00 date notation (e.g. 1/4/89 or 12/31/89).** The "New Date" dialog also appears, after a warning, when you click on the "Reset Date" button.

If you have compiled a full screen's worth of entries and need to create another batch of entries for the same date, just enter that day's date when the "Reset Date" dialog comes up after compiling.

Another way of bringing up the "Reset Date" dialog is to click on the date itself.

The Job Sheet Screen

As mentioned earlier, the greatest value of *Timesheets* is having your time for different steps of each job, performed on different days, tallied together in one place. The Job Sheet is that place.

At the top are three buttons. "FM Report" creates a text file which you can import into a FileMaker II file for a report on your time. After the text file has been created, *Timesheets* asks if you want to open the FileMaker file. A template for the FileMaker report is distributed with this documentation and the *Timesheets* stack. The template holds up to 30 lines of entries.

Instructions are included in the FileMaker II template. One of the steps involved is navigating to the text file. I suggest putting the “Time Report” FileMaker II file in the same folder as the “Import Text” file that HyperCard creates.

By option-clicking on the “FM Report” button, you’ll change it to an “XL Report” button. This produces a text file that can be opened with Microsoft Excel or any other spreadsheet program (or for that matter, any word processor as well) to give you more flexibility in working with the data.

The “Rebuild Link” button lets you put a job deleted from your project list in the Daily Timesheets screen back in the list.

The “Delete Card” button lets you, after a warning, delete that Job Sheet card. It is not a good idea to do that, because there is no clean and easy way to get your accumulated data back.

Job Sheet			
		FM Report	Rebuild Link
		Delete Card	
Client:	General Motors		Job #: 1002
Project:	Chevy Winter TV Campaign		
11/1/89	Concept	--	1.0
11/1/89	Admin.	--	.25
11/2/89	B'cast Sup.	Shooting animatics	6.50
11/2/89	Meeting	With Bill & Joe on casting	3.50
		Client	
PO# --		Job# CHV-38756	Total: 11.25

The client, *Timesheets'* job number and project name are listed in the area below those buttons.

Below that are the data fields where the accumulated information is tallied. These fields are all editable. If they fill up beyond the area visible, you can scroll to see the additional entries by clicking on the arrows to the right of the Hour field. Because you're actually scrolling four fields at once, the scrolling action is very jerky.

Below the data fields are the lines where the Client purchase order and job numbers go. If you didn't enter them when you created the new job, you can enter them at any later point.

When you compile time for a job, *Timesheets* automatically totals the hours for that project. The total appears at bottom right, just below the Hours field.

At the bottom of each Job Sheet are three arrow buttons for getting around in the stack, and a button to take you to HyperCard's "Home" stack. The furthest left arrow (the one with the right angle pointing left) takes you back to the Daily Timesheet screen. You can also get there by typing `⌘-1`. The left and right pointing straight arrows take you to the previous and next Job Sheets respectively. Keyboard equivalents are `⌘-2` for previous and `⌘-3` for next. Clicking on the little house (or typing `⌘-H`) takes you Home.

If you have the ResCopy external command or ResEdit, you can install an icon for *Timesheets* in your Home stack, or any other stack. Look in *Timesheets'* resources for its icon and copy it to the stack you want it in.

As I mentioned at the beginning of this documentation, *Timesheets* is offered as shareware. I put many hours of work into creating it. If you find it valuable for your business, a mere \$10.00 is not much to share with me. And there is a bonus for your honesty. When you register, I will send instructions on how to get rid of the opening shareware reminder screen, so that your stack will automatically open to the Daily Timesheet screen.

I have also created a version of *Timesheets* for use in a multi-user environment, such as an advertising agency or architectural firm. It can track a virtually unlimited number of people's time for practically any number of different projects. The multi-user version of *Timesheets* is available on disk with documentation by sending me \$30.00. Be sure to include your name and address.

Thanks in advance for your support.

Dennis Birch
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