

# Timeslips Abbreviated Instructions

## LOGGING IN:

1. Double click on Timeslips icon; Database Login screen will appear
2. Highlight your name
3. Enter password if required

## ENTERING TIME

1. Click the navigator button that says New Slip
2. Choose Timekeeper in the slip
3. Choose the correct fields from the drop-down list. Tab between fields or use the mouse to select the following:

CLIENT

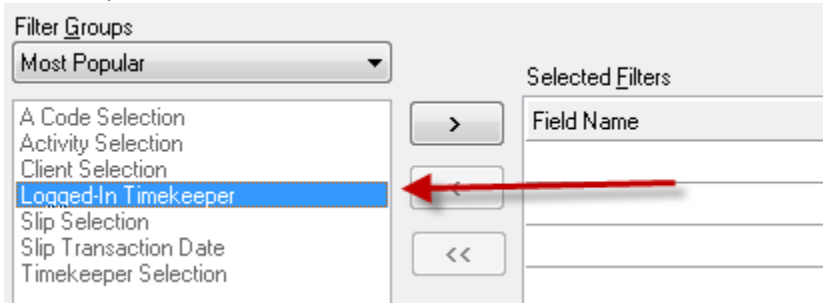
ACTIVITY

4. Tab or use your mouse to the "Time Spent" field; Enter the time spent in decimal format
5. Client the diskette icon (SAVE) on the right side of the navigator
6. Click the yellow + to add another slip
7. To view the slips you have entered, click the SLIP LIST icon shown above  
OR from the main navigator, click the "Show Slips" icon to show slips

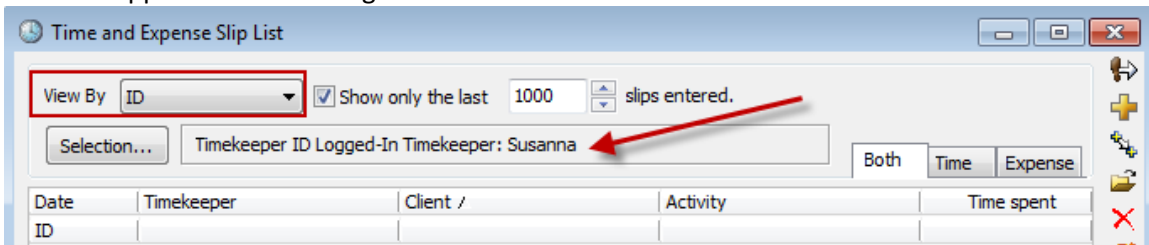
## SHOW / EDIT SLIPS

From the Show Slips screen, there are filters that can be set.

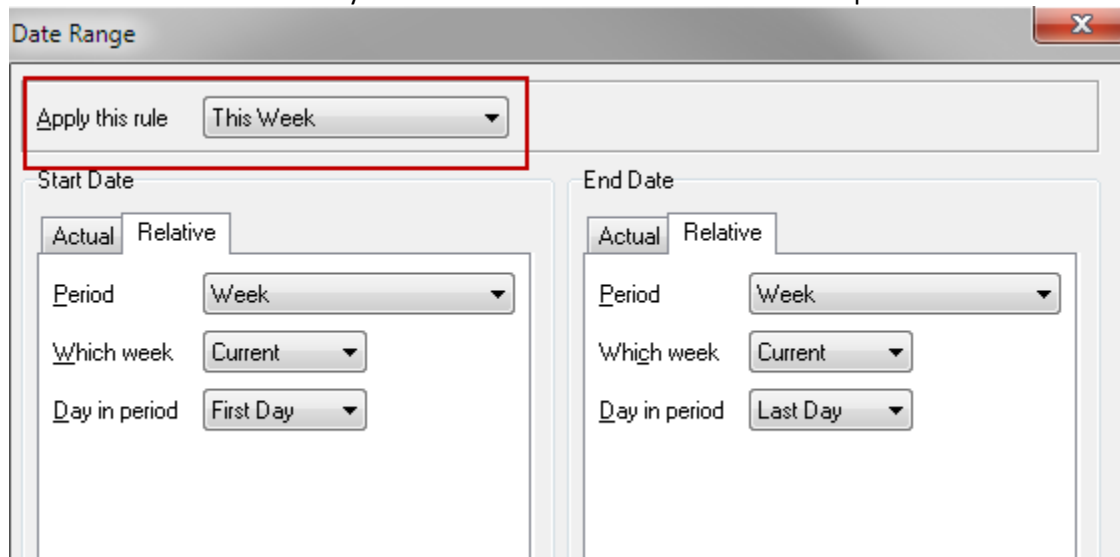
First, change the “Selection...” by clicking the box and double-clicking the words “Logged-In Timekeeper”



At the top, “View by” can be changed to “Date Range” to show the week or day view. A calendar appears when clicking on the date.



Choose “this week” or “today” or other desired time frame or choose specific dates



## EDIT SLIPS:

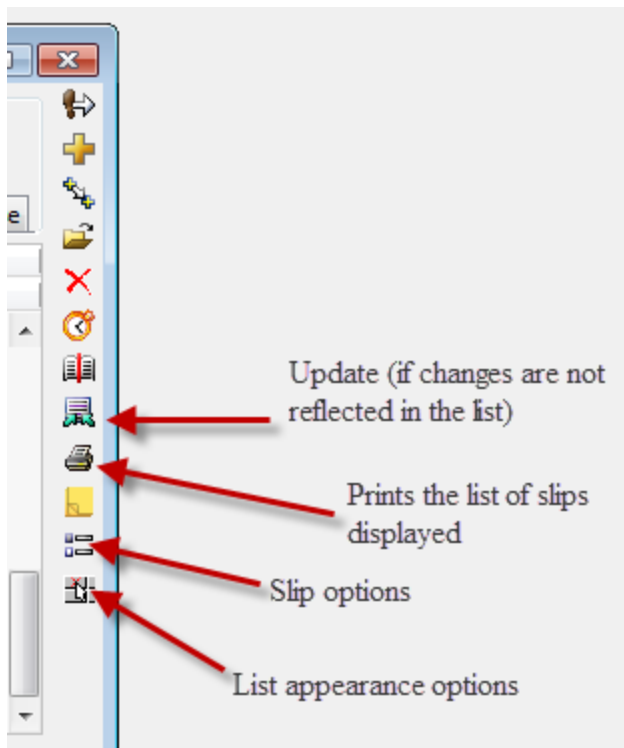
Locate the slip in the list that needs to be changed and double-click to open the entry. Make any changes and click the "SAVE" icon on the right.

## SHORTCUTS / PREFERENCES

### SLIP ENTRY SHORTCUTS:

- Date fields: Type "T" for today and use the up and down arrows to change the date
- SAVE slip: CONTROL + S to save the current slip
- NEW slip: CONTROL + N to create a new slip from the current slip
- USING TAB: The "TAB" key goes to the next field;  
"CONTROL" + TAB goes back to the prior field
- REVERT: The "Revert" icon (in the slip entry underneath the SAVE icon)  
Clears the slip to defaults (empties all fields)

### SLIP LIST PREFERENCES:

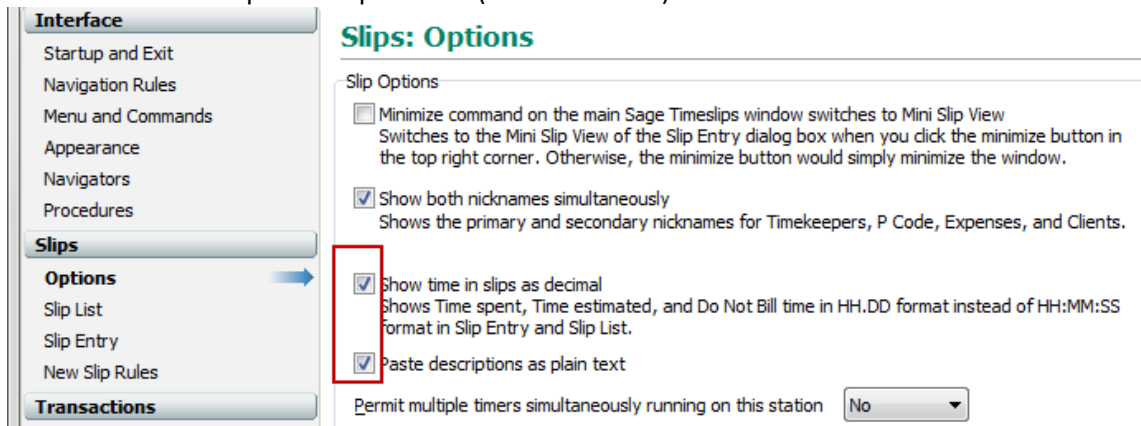


The above icons are shown in the slip list window. The next section explains some customization options that are available and will not affect any other computers.

## SLIP OPTIONS:

Click the "Slip Options" icon to display the following screen.

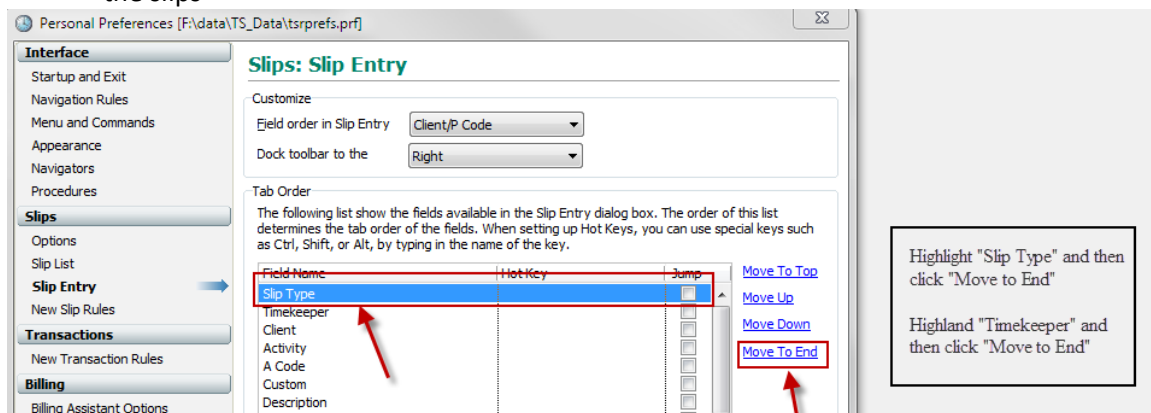
1. Change whether slips appear in decimal or hours:minutes (decimal is recommended)
2. Paste descriptions as plain text (recommended)



## SLIP TAB ORDER:

It is sometimes preferred to have the first field on the slip entry changed. For example, the first field defaults to "Timekeeper". Since the timekeeper doesn't change (it is always YOU), it might be preferable to start at CLIENT. Here is how to do that:

1. From the SLIP OPTIONS menu above, click the words on the left "Slip Entry"
2. In the list of fields, click the word "Slip Type" if it is first, and click "Move to End"
3. Next, click "Timekeeper" and click "Move to End"
4. Re-arrange the "tabbing order" if you are using the mouse to tab through the fields on the slips



**LIST APPEARANCE PREFERENCES: Change the way the slip list appears**

How to improve the Slip List view.

OLD VIEW:

Date	Timekeeper	Activity	Time	Qty	Value
ID /	Client	Reference	Rate	Price	Billing status
3/18/2014 19967	Terry AAdmin	TSSW	1.000	499.99	499.99 Billable
3/18/2014 19968	Terry AAdmin	TSSW	4.000	274.99	1099.96 Billable
3/18/2014 19972	Terry AAdmin	TS	2.00	175.00	350.00 Billable
3/18/2014 19973	Terry AAdmin	TS	4.00	175.00	700.00 Billable
3/18/2014 19974	Terry AAdmin	TS	3.00	175.00	525.00 Billable
3/13/2014 19975	Terry AAdmin	TS	6.00	175.00	1050.00 Billable
3/13/2014 19976	Terry AAdmin	TS	2.00	175.00	350.00 Billable

NEW VIEW:

Date	Timekeeper	Client	Activity	Time spent
ID /	Client			
3/18/2014 19967	Terry AAdmin	AAdmin	TSSW	0.00
3/18/2014 19968	Terry AAdmin	AAdmin	TSSW	0.00
3/18/2014 19972	Terry AAdmin	AAdmin	TS	2.00
3/18/2014 19973	Terry AAdmin	AAdmin	TS	4.00
3/18/2014 19974	Terry AAdmin	AAdmin	TS	3.00
3/13/2014 19975	Terry AAdmin	AAdmin	TS	6.00
3/13/2014 19976	Terry AAdmin	AAdmin	TS	2.00

	Hours	Charges
Billable	20.00	5099.95
Unbillable	0.00	0.00
<b>Total</b>	<b>20.00</b>	<b>5099.95</b>

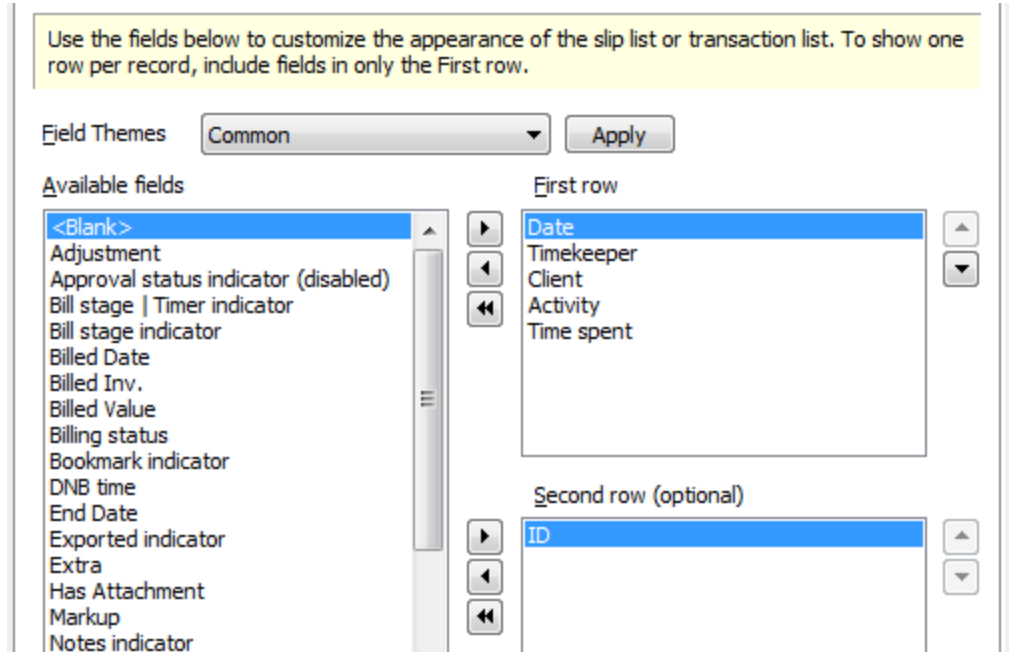
Number of slips: 8

**Field Selection tab:**

Change the way the slips appear. Here are the fields you need to view:

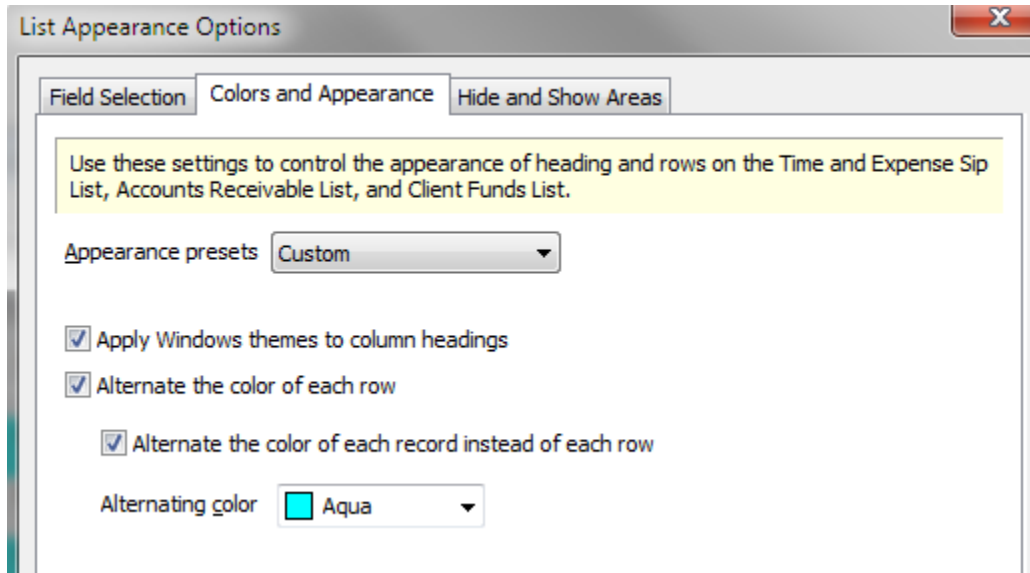
First row: Date, Timekeeper, Client, Activity, Time spent

Second row: ID



**Colors and Appearances tab:**

Check the box "Alternate the color of each record instead of each row"



## TIME CAPTURE:

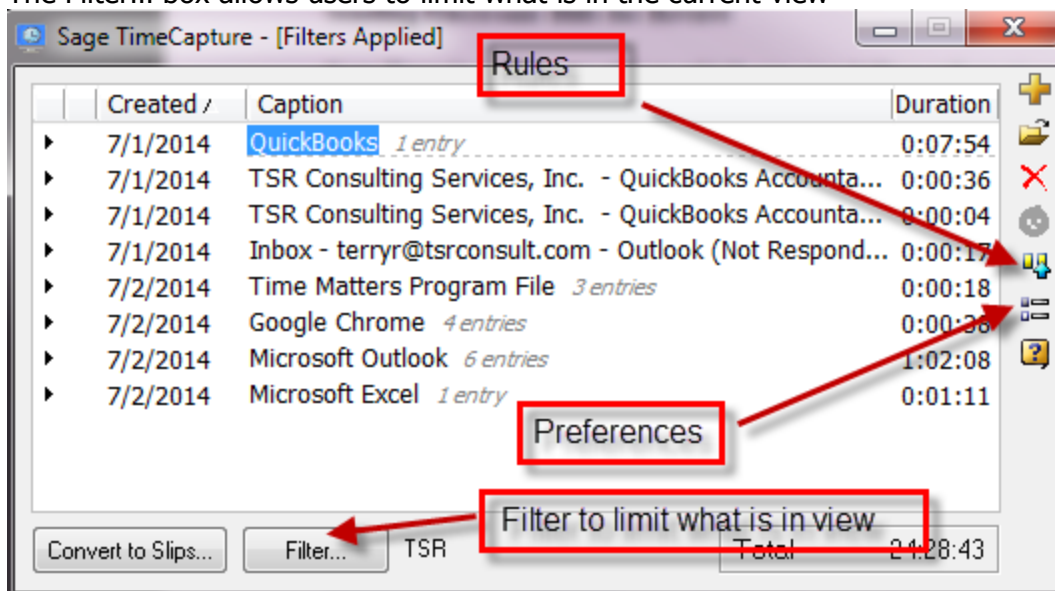
TimeCapture is a separate program that can run concurrently with Timeslips. To open the program, from the main menu click SPECIAL ... TIMECAPTURE. It is also a separate program in the Timeslips Program group under the start menu.

When TimeCapture is running it tracks time spent in all areas of your computer.

The Rules icon is where users can create rules: Which applications to ignore, what defaults activities are assigned and how to group entries.

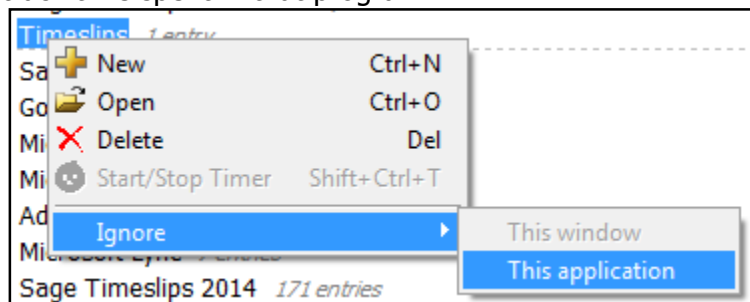
The Preferences icon allows users to set preferences for TimeCapture.

The Filter... box allows users to limit what is in the current view



## RULES:

From the list of applications, right click and choose "Ignore" ... "This application" to no longer track time spent in that program:



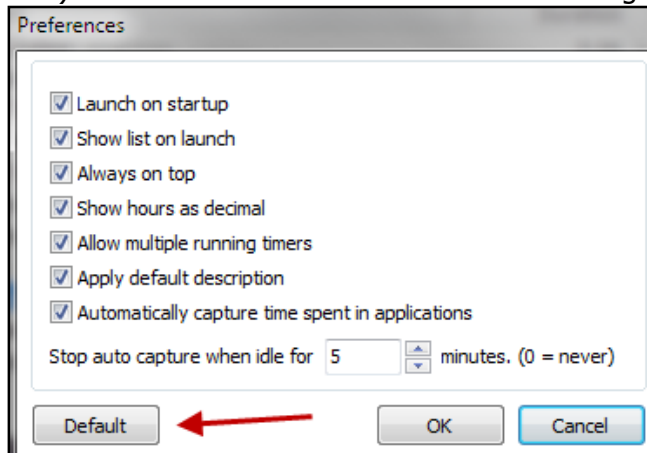
The ignore rules are created, names and modified when the rules icon on the right is clicked. The rules can be used to:

- Ignore applications
- Move entries into a specific group to make it easier to bill them
- Combine entries based on client name
- Assign names to time entries (Example: Any documents containing "Smith" are automatically assigned to the "Smith" matter); All entries created from a Word document are assigned the task "Preparation".
- If multiple workstations using TimeCapture will be using the same set of rules, it is now possible to export rules for those other workstations.

1-From the Rules list you can click **Export** to export all rules to file. Enter a file name, select a location, and click Save to save the rules file. Send the file to other timekeepers using a shared drive, a thumb drive, or email.

2-Click Import to import all rules from a file.

TimeCapture Preferences are set using the second icon from the bottom (above the ? icon). Click the "Default" button for the following settings:



### Editing Time Entries:

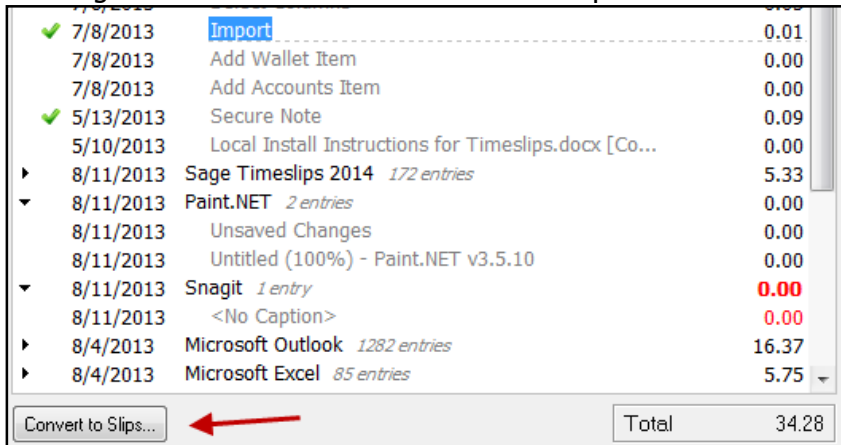
You can move multiple entries to another group. Click the entry and then hold Ctrl while clicking on additional entries. After selecting the entries to move, drag the entries and drop them onto the another group. It is also possible to rename the group.

It is possible to merge multiple entries to create a new entry. -- For example, suppose to merge all entries within the Microsoft Word group into a new entry: Right click on that group and choose Merge Entries. TimeCapture will open a new entry adding all the time from the original entries. Any notes from those entries will be merged into the new entry. Click OK to save the new entry and the original entries will be removed.

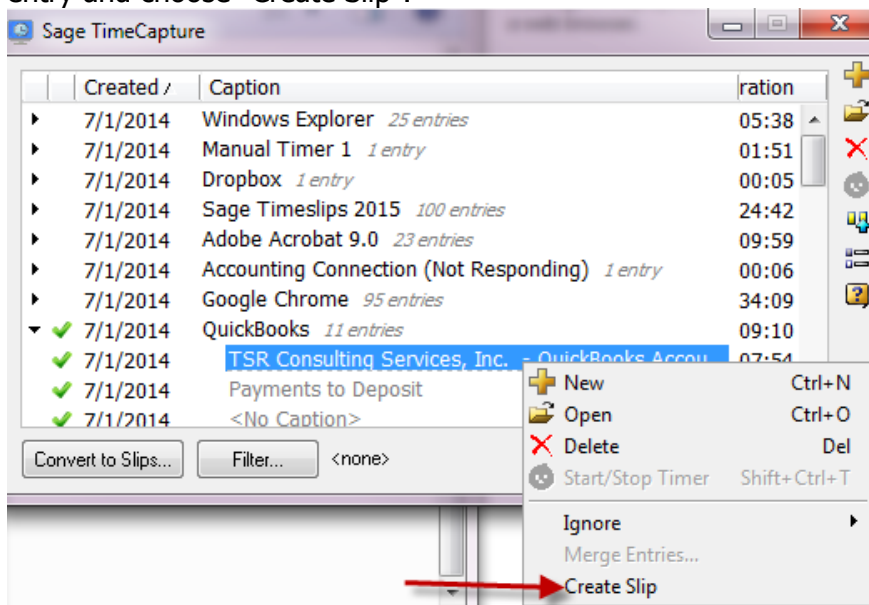


## Creating Slips from Time Entries

Double-click on any entry to assign the timekeeper, client, activity; Time spent and date are pulled from the entry in the list. Then, any entry with valid information will appear with a green checkmark. Click "Convert to slips" at the bottom of the list:



Entries with a green checkmark can be sent to Timeslips individually. Right-click on the entry and choose "Create Slip".



## The TimeCapture icon:



From the Windows taskbar, click the TimeCapture icon to access the program. Right-click to select preferences, show the TimeCapture list, keep on top, copy data file or exit. Since TimeCapture files are not backed up with Timeslips, users might choose to copy the data file if they rely on the list to later create time entries.

## ADDITIONAL FEATURES

### Editing Descriptions from the Slip List

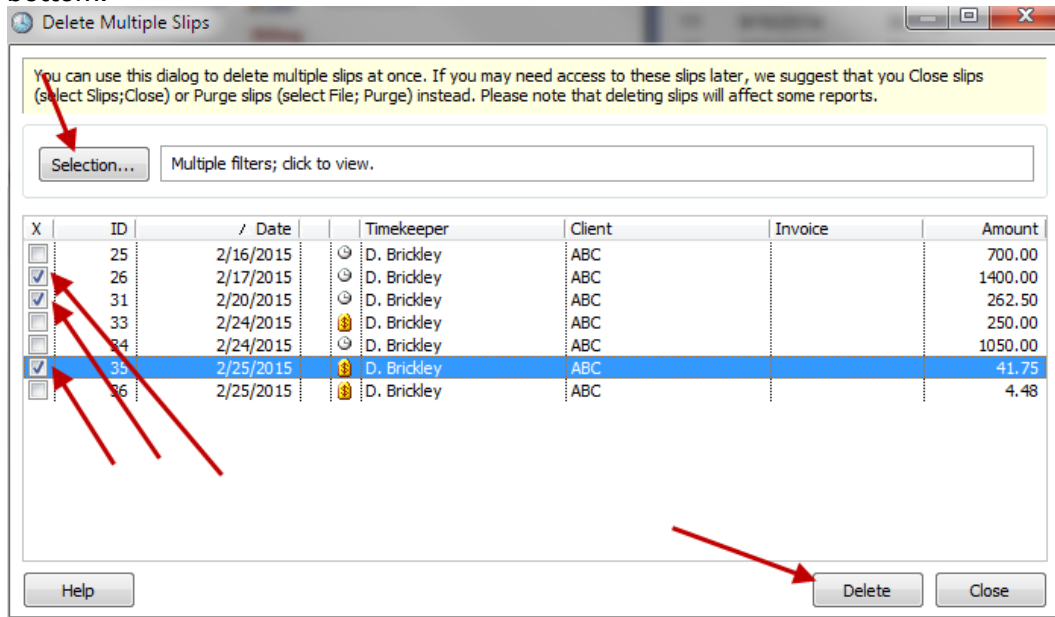
When viewing slips from the list, there is a box at the bottom of the screen with the slip's description. If the slip is unbilled, the slip can be edited and saved in that box ... *it is not necessary to open the slip to make changes.*

### Printing from Lists (Slips, Transactions, etc.)

When printing a list, the print choices now appear before the list prints

### Deleting Multiple Slips

It is possible to delete more than 1 slip at a time. From the top menu click SLIPS ... DELETE MULTIPLE SLIPS. Enter the criteria from which to select slips (example might be all slips for the current month for a specific client). Then check the box for each slip to be deleted and click the "DELETE" button at the bottom.



## Attachments to Slips

It is possible to add an attachment to a slip (for example: Including a copy of a receipt for a cost advanced).

At the bottom of the slip window is the "Attachment" dialog box and the check box to "include attachment on bill".

The screenshot shows a software interface with the following elements:

- Billing Status** section: A dropdown menu set to "Billable", and checkboxes for "Hold" and "Recurring".
- Markup and Adjustment** section: A dropdown menu.
- Attachments** section: A header with an upward arrow, a text input field, a "File Types" link, a checked checkbox labeled "Include attachment on bill", a "View attachment" link, and a "Scan" link.
- A three-dot menu icon is located to the right of the text input field.
- Two red arrows point to the "Attachments" section header and the three-dot menu icon.
- A red box highlights the "Include attachment on bill" checkbox.

Use the 3 dots to locate and attach the document. Documents ending in bmp, dib, jpg, tif, png, emf or wmf can be printed with a hard copy bill. All formats can be included in emailed bills.