TimeBox™ version 5.5

Usage Manual

General Information

About the TimeBox program

This program is designed for use by contractors, and other workers who need to track the time they spend working. The program presumes that there might be any number of jobs or clients (referred to by the program as *projects*) that the user will need to track. The program also allows projects to be cross-referenced with *tasks*, or types of work performed. The program also presumes that the user will be "off the clock"; that is, not performing trackable work 24/7.

Features

To help you track your time, the TimeBox application features a "punch-clock" approach. Simply punch a button and identify what project and task you are about to begin. The application also allows you to attach notes to your work. This way you can, for example, leave reminders of specifically what work you've performed on a given day.

Recognizing that you might not always be in front of the same computer when you start/stop/switch work activities, the TimeBox application also features a mini-web server. As long as your main computer (the one on which your instance of TimeBox is installed) has a dedicated Internet connection, you can punch in and out from another Internet-enabled computer or PDA. You can also perform other simple actions remotely, such as viewing weekly summaries of your recorded time. The Web server requires you to create a username and password for remote access; it uses basic authentication to ensure that no unwanted users can access your instance of the TimeBox application. And of course, you can control whether or not the server is running.

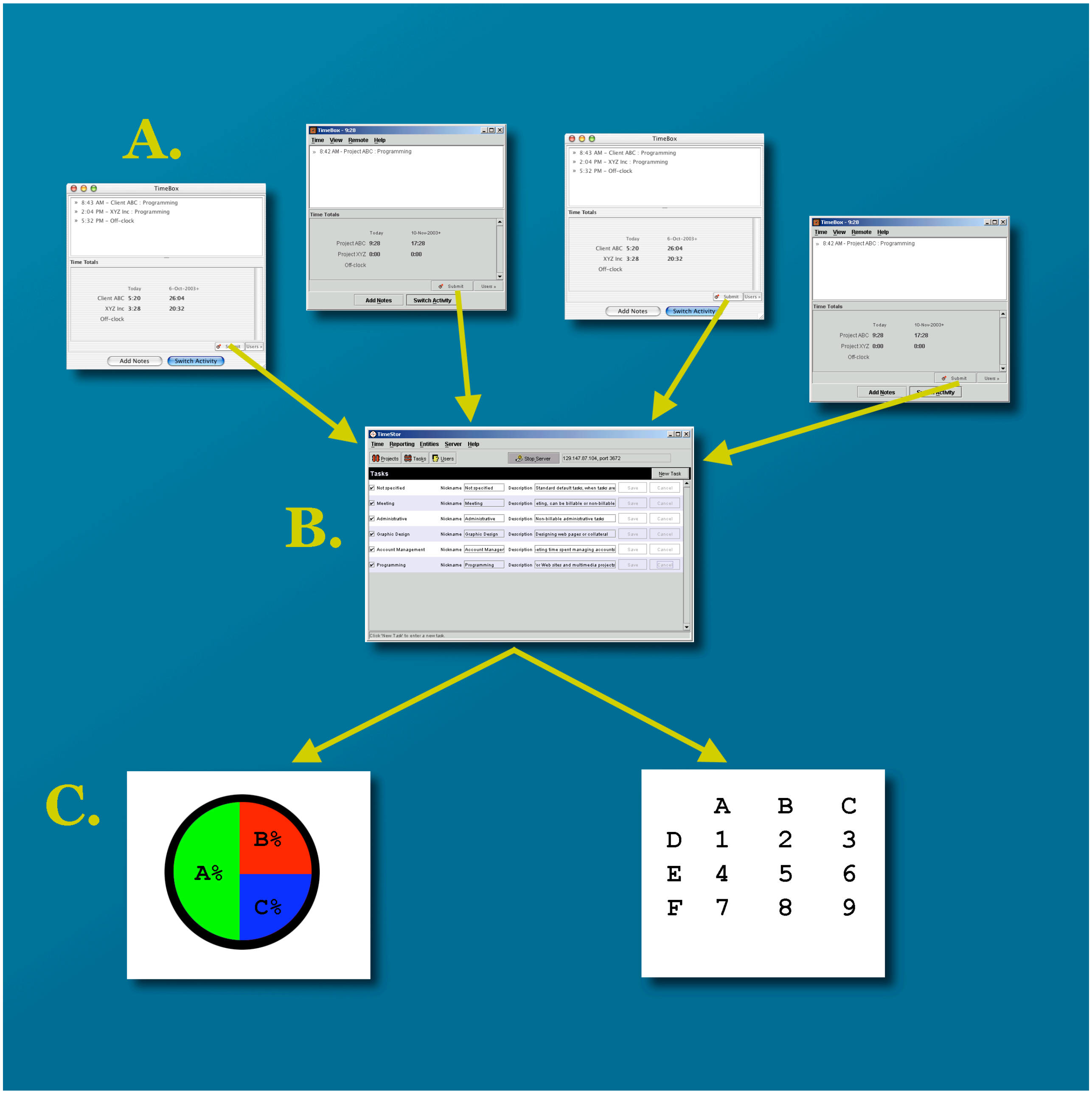
In addition to allowing you to view quick summaries, the TimeBox application allows you to generate reports of projects and tasks that you've tracked in the past. You can print, view, or save these reports to disk. You can also import your reports into a spreadsheet or database application for further number-crunching.

The application also allows you to edit time that you've already tracked, to easily add past days that you forgot or were unable to track. You can also create archives of your tracked time, as well as backups to protect your data. The application also allows you to search through previously recorded time across a variety of criteria.

TimeBox is also an integral part of the *TimeSuite* time management system. The other major component of this system is the *ClokBox*™ application. ClokBox is a server-based application designed to help entire workgroups track their collective time. TimeBox users can automatically submit their recorded time to a central ClokBox application. The ClokBox administrator can then track the time of all workers on a particular project or series of projects, generate reports based on all users’ time or the time tracked by select users, etc. ClokBox runs on multiple platforms, such as Mac OSX, Windows, and Linux, and is sold as a separate application. Information can be found at http://www.taubler.com/clokbox

The ability to track tasks was added in versions 5 of both TimeBox and ClokBox. For that reason, version 5 or higher of both TimeBox and ClokBox should be used together.

Of course, the TimeBox application can be used entirely on its own, if you plan to track only your own projects and tasks.



This diagram demonstrates the interaction between TimeBox and ClokBox. Various TimeBox instances (A) submit their time to a single ClokBox server (B). This ClokBox server can then run various reports (C) containing all users' data at any time.

Registration and Support

TimeBox is considered "shareware", which means that you are allowed to use the application for evaluation purposes. If you find that application to be useful, then you are expected to register to continue using it. Registration is handled on a per-user basis. That means that you can download and use one or more copies of TimeBox yourself. For example, you might want to use a Windows version on your PC and a separate OSX version on your Macintosh. As long as **you** are the user for both copies, one registration fee will cover both copies. However, if your home or organization has more than one TimeBox user who use their own TimeBox copies, a registration fee must be paid for each copy.

Registration entails paying a nominal fee to receive a registration code. Once you receive a registration code, simply access the *Help* > *Register...* menu. Enter your name in the first box, and the provided code in the second box, and click *OK*.

Unregistered versions of the TimeBox application will periodically nag users to register. In addition to removing these nags, registration will also entitle the user to email support. Registration information can be found at http://www.taubler.com/timebox

Instructions and FAQs can be found at http://www.taubler.com/timebox In addition, registered users can access email support there.

How to Use the TimeBox Application

General use

The TimeBox tool allows you to track time for multiple jobs or clients. This means that, for example, if you are doing part-time work for Company ABC, and part-time work for Company XYZ, you can use the TimeBox tool to separately track hours spent working for each company. The TimeBox tool refers to a client or job as a *project*. TimeBox creates your first project, called *Off-clock*, for you. This project has special meaning; it signifies that TimeBox should not be tracking time. You would use this project type to indicate, for example, that you are out for lunch or gone home for the day--essentially, that you are not currently working.

With the TimeBox application, you can also track time according to *tasks*. A task is a particular type of work that can be performed; examples might include *programming*, *design work*, *meetings*, or *administrative tasks*. Your projects, then, will typically share the same pool of tasks. While the concept of projects (formally called *activity types*) existed in previous versions of the TimeBox application, the concept of tasks is new starting with TimeBox version 5. For this reason--and because some users of TimeBox will find tracking tasks to be irrelevant, a "default" task, called *Not specified*, has been pre-created. If you decide to track only by projects, and not by tasks, simply use the *Not specified* task when tracking your time. You can also use this task if you happen to be performing work that does not have a relevant task. For example, anytime you indicate that you are "Off-clock", TimeBox automatically assigns the task of "Not specified" to that time period.

Projects, then, generally describe for *who* you are performing work, whereas tasks generally describe actually *what* you are doing. With TimeBox, you can cross-reference between both.

Let's take the hypothetical example of a firm that designs web sites. This firm would likely have a list of tasks that includes *administrative tasks* (such as scheduling, invoicing, etc.), *meetings* (which could even be further broken into *client meetings*, *project meetings*, and *administrative meetings*), *concepting*, *graphic design*, and *programming*. This firm might also have a number of projects at one time; for example *XYZ Corp Intranet*, *Bob's Bakery Website*, and *Toys 4 Pets Online Store*. A designer working for our hypothetical firm, then, might track part of her time as spent in a *meeting* (the task) for *Bob's Bakery Website* (the project).

The TimeBox user can now run reports to determine, for example, how much time she spent working on Bob's Bakery Website during a given time period. Or she can report on the amount time she spent performing graphic design. Perhaps most usefully, she can also report on the total time spent, during a specific period, performing graphic design work for Bob's Bakery Website.

Launching the application

The Windows installer should have created a shortcut or alias in your computer's main menu. Use this shortcut or alias to launch the *TimeBox* application. Alternatively, you can open up the folder that the installed created; in there, you will find an executable called *TimeBox* or *TimeBox.exe*. You can launch the application by double clicking on this icon. However, you are encouraged to create a shortcut or alias of this executable and move it to your desktop, or to some other location away from the *TimeBox* folder.

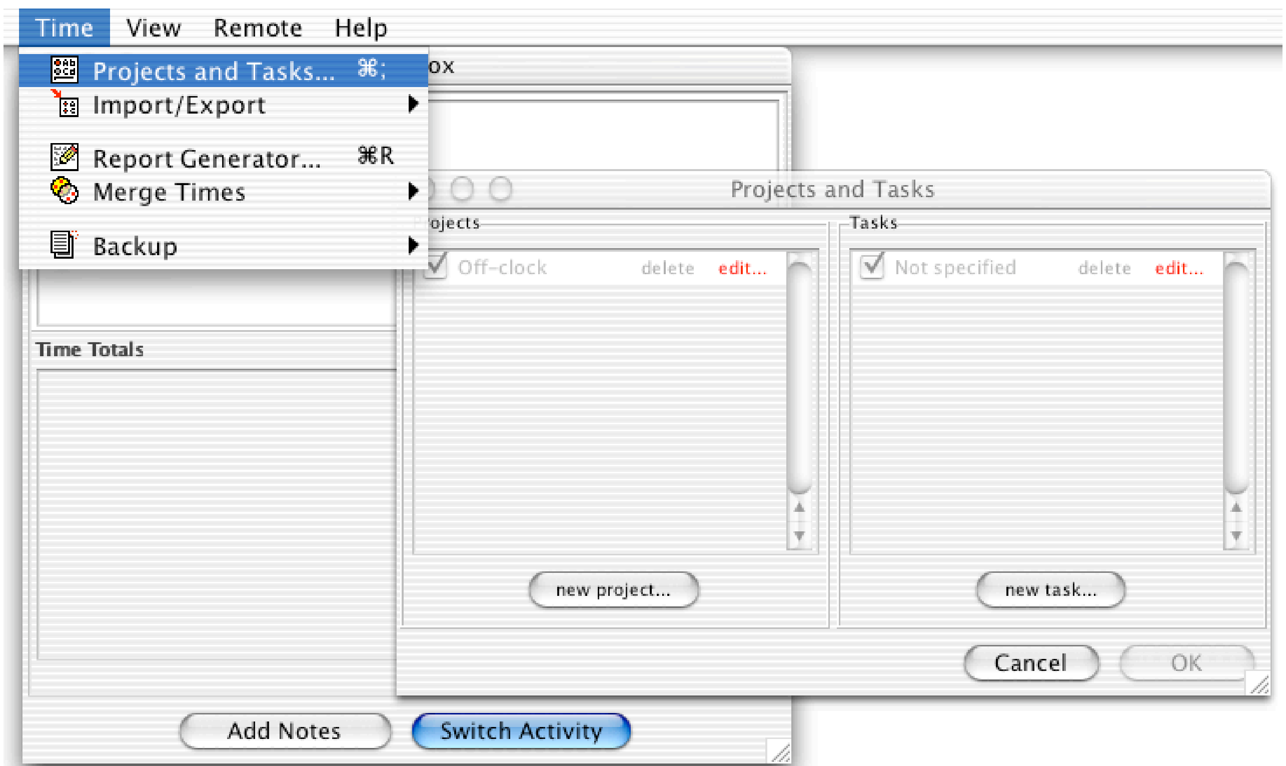
Macintosh users will find a *TimeBox* folder on their disk after downloading the application. The application is contained within this folder. Simply drag the application to the desired location, such as to your computer's *Applications* folder. Launch *TimeBox* by double clicking. You may also want to create a shortcut for the application; e.g. by dragging the application to your dock.

Users familiar with Java who want to create their own startup scripts can do so by including the JAR file (*tt.jar*) in the classpath and invoking *com.taubler.timebox.TimeTracker* A JRE version 1.2 or higher is required; 1.3 or higher is recommended.

Adding New Projects and Tasks

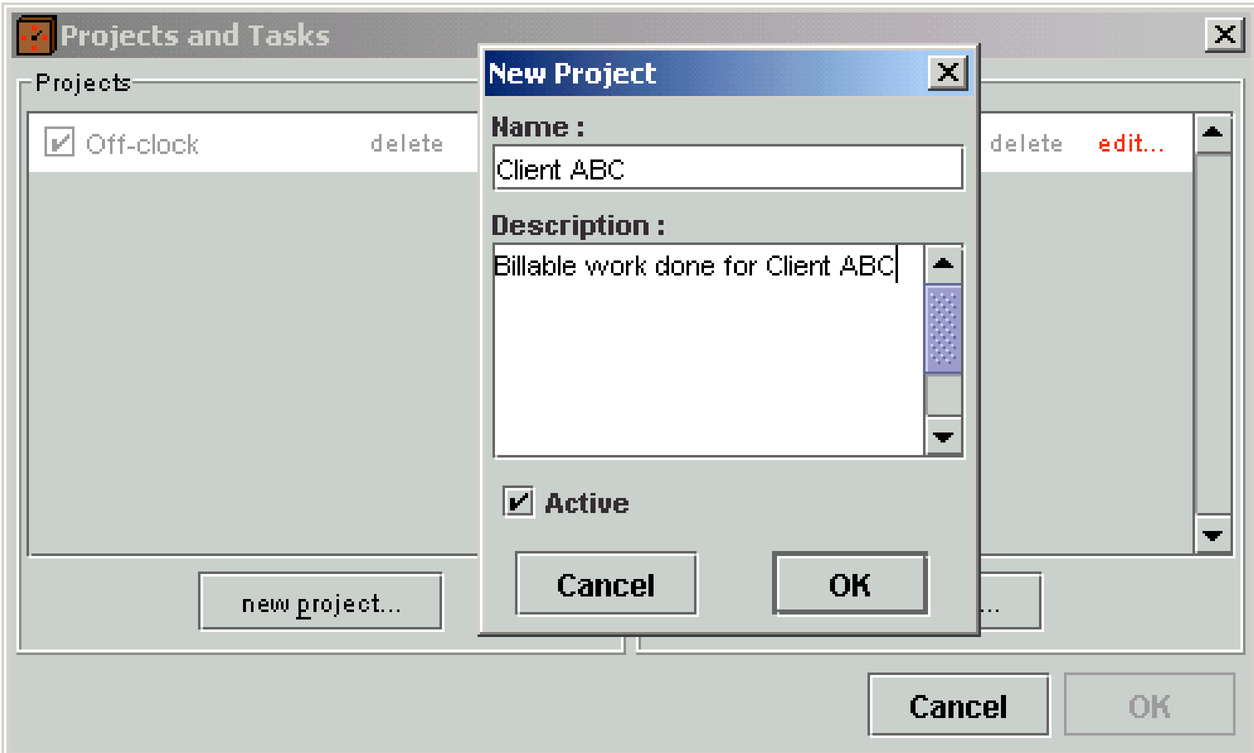
After launching the TimeBox program, your first job should be to enter your initial projects. You should also decide if you want to track time by tasks as well and, if so, enter your initial tasks in the same window. You will probably want to track by tasks if, for example, it is important for you to know not only how much time you spend working on certain projects, but how much time in each of those projects is spent in meetings, how much is spent doing research, how much is spent doing design or programming, etc.

Adding a new project and/or task can be done in the *Projects and Tasks* dialog. To access this dialog, go to the *Time* menu and select *Projects and Tasks*.... You will see a dialog that is split into two halves; the left half handles your projects, and the right half handles your tasks. If this is the first time you have accessed this dialog, you will notice the pre-created *Off-clock* project and *Not specified* task.



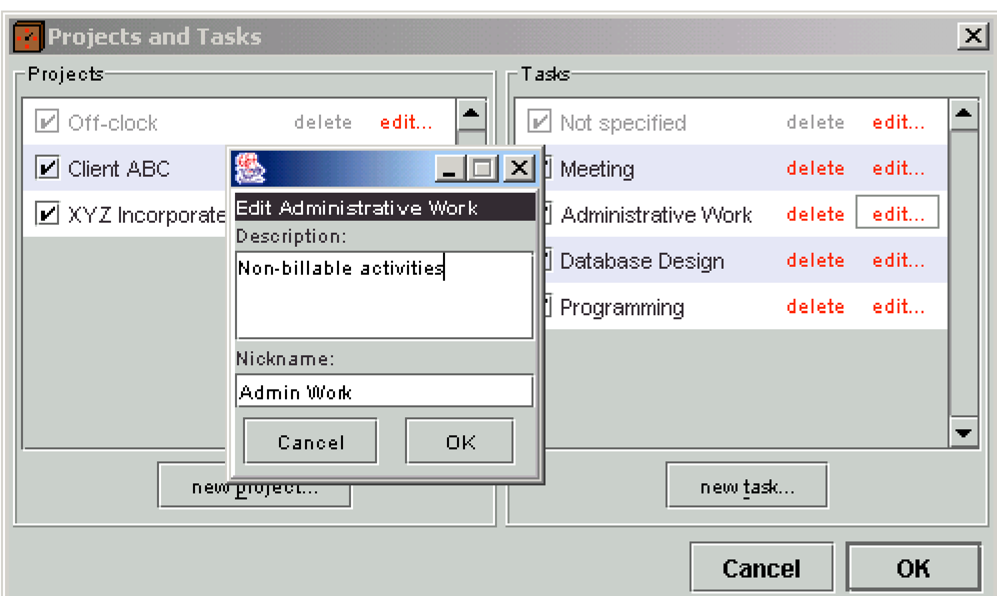
Select *Time -> Projects and Tasks…* to bring up the projects and tasks management screen. Then, you can click on the *new project…*button to add a new project, or *new task…* to add a new task.

To add a new project, just click the *new project* button. A dialog will appear, asking you for the name of the new project. Enter a name; this will be the name that the TimeBox application uses to refer to your new project. Optionally enter a description of the activity. Click *OK*. Adding a new task is done in the same manner except, of course, that you click the *new task* button.



After clicking the *new project* button, enter a name and, optionally, description of your new activity

You cannot change the name that you give to an activity. However, you can assign a nickname to the activity. In doing so, you are telling the TimeBox application to refer to the activity by the nickname. To do this, click the *edit…* link next to the activity to which you would like to apply a nickname. A small window appears. In the field provided, enter a nickname and, optionally, a description. To accept, click *OK*; to cancel, click *Cancel*.



Click the red "edit…" link next to project or task, and a small window will appear. This window will allow you to edit the description of the project or task, and give it a nickname

You may decide that you will temporarily not need to track a certain project or task. You un-activate a project or task in the *Projects and Tasks* window simply by un-checking the box next to the name of the project or task that you want to make inactive. De-activating a project or task will reduce unnecessary clutter in other windows throughout the TimeBox application, while allowing you to later re-activate the project/task (which is done by re-clicking the checkbox).

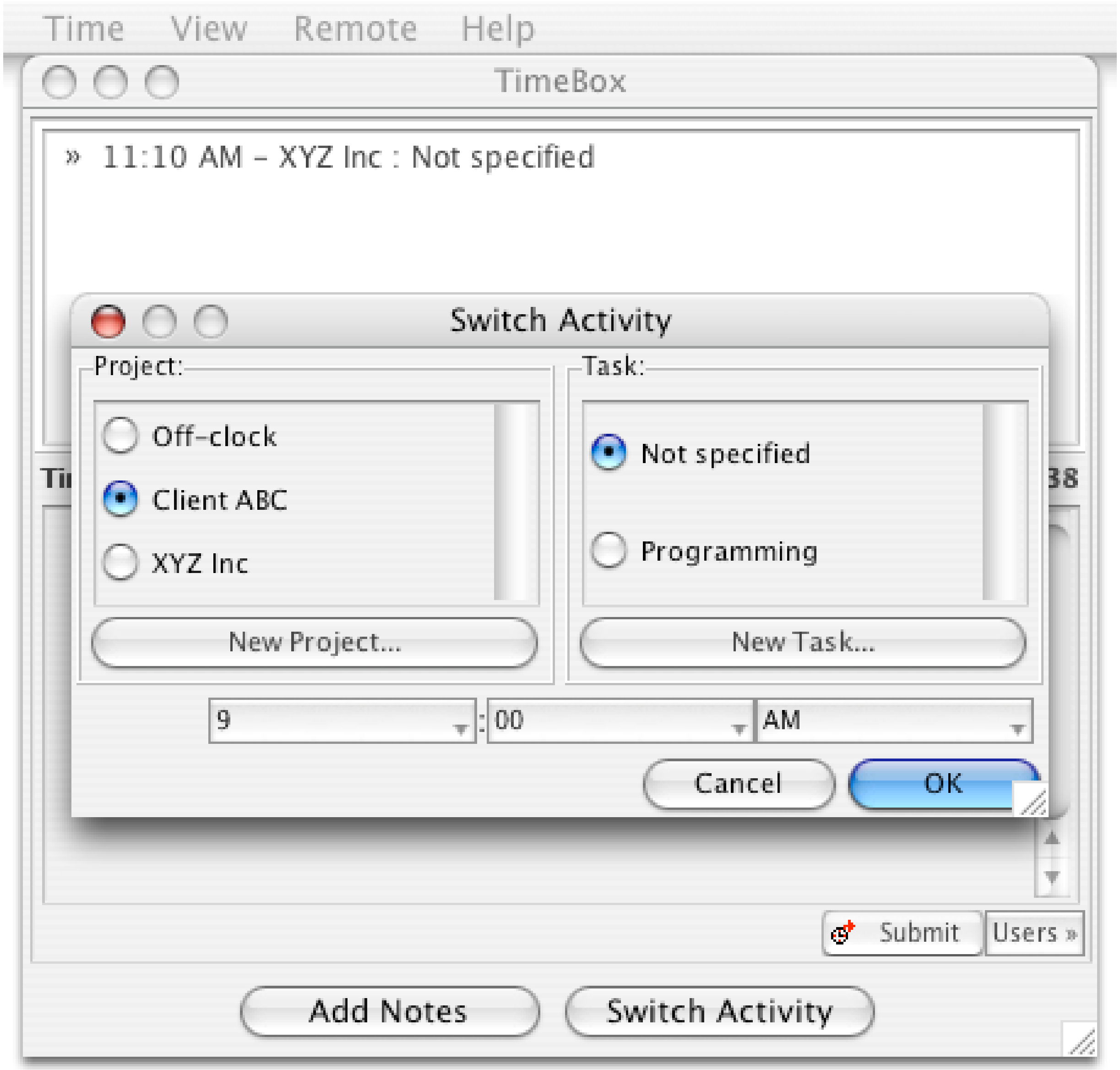
You are also allowed to permanently delete a project or task. Of course, you should be certain that you will never need to track such a project or task again before deleting. Once you delete a project, any past times tracked under that project will be reported by TimeBox as "Off-clock". Similarly, once you delete a task, any past times under that task will be reported by TimeBox as "Not specified". To delete a project or task, click the *delete* button located to the right of the project or task in the *Projects and Tasks* dialog, and then click *Yes* in the resulting popup.

Because the *Off-clock* project indicates to TimeBox that you are finished performing trackable work, you can never remove, nor inactivate, this activity. However, you can give this project a nickname, as described above. The same stands for the task *Not specified*, which is also provided by the application.

Tracking Time

Once you've set up the projects (and tasks, if relevant) that you will be performing, you can begin tracking your time. This is done through the main application window. This window is divided into three parts: a panel displaying today's activities, a panel displaying totals of the times tracked today, and two buttons. Simply click the *switch activity* button, and you will receive a window with one panel listing all of your projects, and another panel listing your tasks. Just click the radio button next to the name of the project that you are about to perform. If you wish to track a specific task, click the button next to that task name; otherwise, leave the button next to *Not specified* selected. You'll also notice pulldown menus that allow you to specify a specific time; they default to the current time, so you can typically leave them alone.

If later you need to work on another activity, and thus start tracking time for it, just do the same thing: click the *switch activity* button and select the new project (and task, if relevant). The application automatically stops tracking time for the first activity, and begins tracking for the second.



Click the *Switch Activity* button to display the *Switch Activity* window. Select a project and task (or leave the task at its default position, *Not Specified*) and click *OK*. In the above example, the TimeBox user is indicating that she is about do begin design work for Client ABC. Notice that the *Switch Activity* window provides you with both a *New Project…* and *New Task…* button as shortcuts to creating new projects and tasks. Notice also that you can select a specific time for your new activity to take place.

If you are tracking tasks, and you switch from one project to another but are performing the same task (for example, you are doing *design* work for Project ABC, but are about to begin doing *design* work for Project XYZ), you still need to re-select the task. When you are done working altogether, click the *switch activity* button and select *Off-clock* (or whatever nickname you might have assigned to off-clock). The task will automatically be set as *Not specified*.

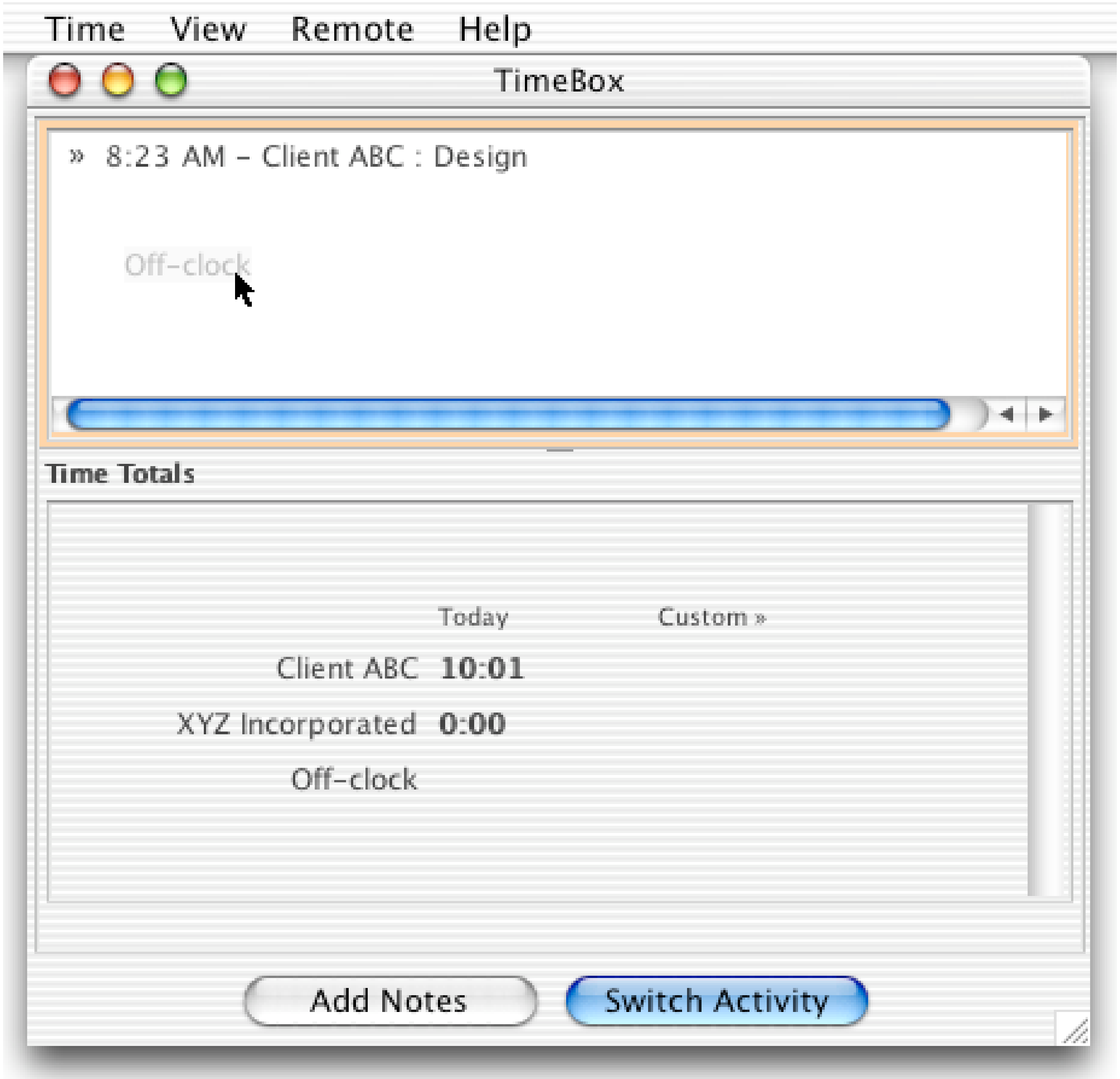
The activities will be captured in the top activity panel. If you need to edit any of them (for example, to change the time, project, or task), just click on the arrow symbol to the left of the activity and choose *edit* from the resulting popup. Edit the activity using the provided pulldown menus, then click the arrow again and choose *Save*.

The *Switch Activity* window also allows you to insert activities from earlier in the day. For example, say you got into work at 9:00 and began working on a project for Client ABC—but didn't begin tracking time. Then a few hours later, you began tracking time for a new project. If you later realize that you forgot to track your time spent on Client ABC, you can simply launch the *Switch Activity* window, select your project and task, then set the activity's time to 9:00 AM using the provided pulldown menus. Your activity will be added to the appropriate time slot.

You can also track—at a glance—the total time during the current day for that project, as well as all other projects, in the bottom *Total Times* panel. You can also choose a custom date from which to track times. Click the *Custom* label in the *Total Times* panel and enter the date. For example, if you want to watch the amount of time spent on each project during the past week, you can enter the date of the previous Sunday or Monday; the total times tracked for each project since that day will be displayed.

Note that the *switch activity* window also provides you with a shortcut to add a new project or task, if the one you have not already created the appropriate one. Just use the *new project…* or *new task…* button provided in the window.

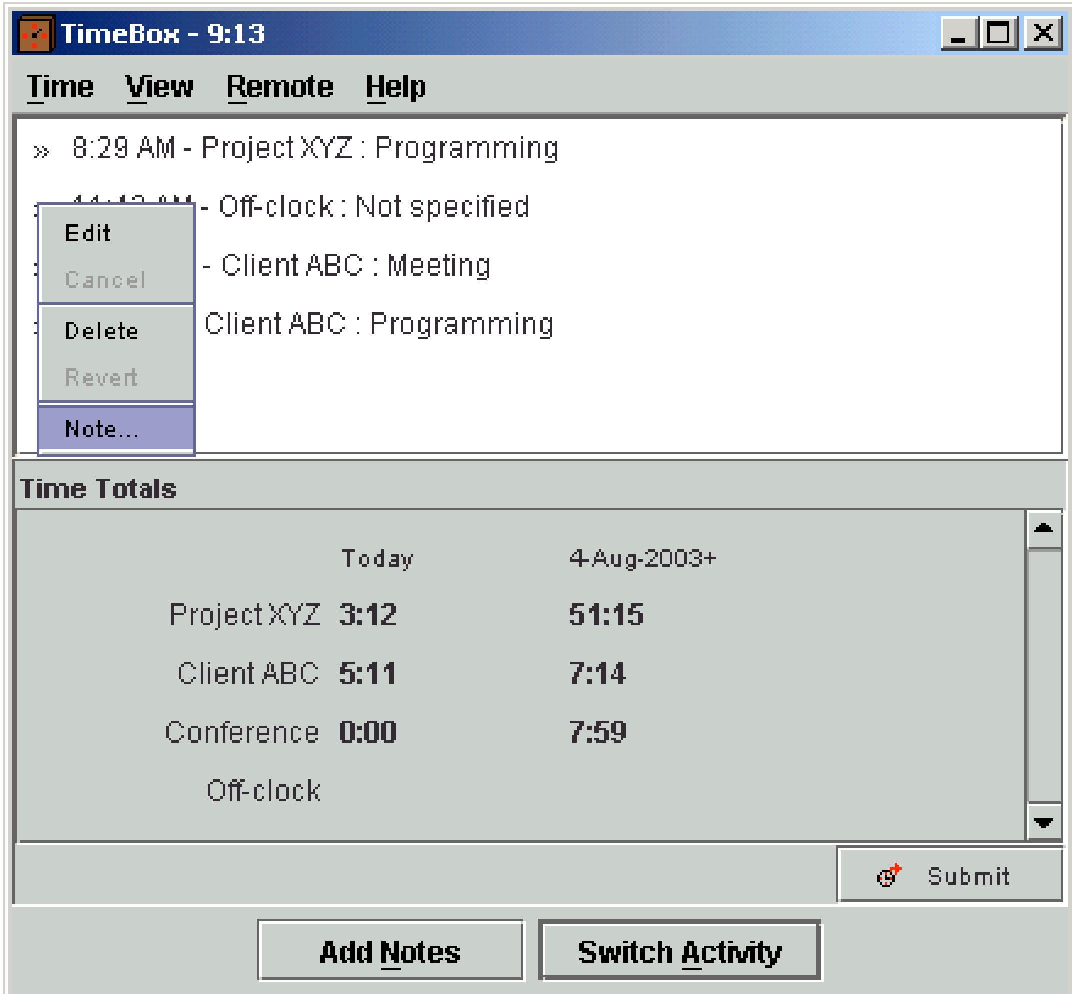
An alternative way to switch activities is to simply drag the label of the desired project from the bottom (Time Totals) panel to the top panel. You will notice that the task will default to *Not specified*. If you wish to indicate a specific task, simply click the arrow to the left of the activity you just recorded in the top panel, select *Edit*, and then use the provided pulldown menu to select the appropriate task. (You can also edit the time or the project here, if necessary.) Click the arrow again and select *Save* when you are done.



One way to switch activities is to drag a label from the bottom frame to the top frame. In the above example, the TimeBox user is indicating that she is going off-clock.

The program also lets you attach notes in two places: 1. You can attach *time-specific notes* to a particular activity describing, for example, precisely what work you performed at a specific time during the day; 2. You can attach general *daily notes* to an entire day describing, for example, what work you performed throughout the day.

To enter a time-specific note, click on the arrow symbol to the left of the appropriate activity in the top activities panel. In the resulting pulldown menu, select *Note…* You will be presented with a popup dialog in which you can add new notes for that specific activity, or edit any notes that you may have already entered for that activity. Click *OK* when done.



Click the arrow symbol to the left of an activity, and select *Note…* to attach a note to that activity.

To enter a daily note, simply click the *Add Notes* button. A dialog will appear, allowing you to enter or modify the notes for that day. Click *OK* when done.

For example, for a consultant who is employed by ABC consultancy, and is performing work for XYZ client, a typical day might look like this:

1. **Get into work.** Click *Switch Activity* and select the *XYZ* project and *Design* task.
2. **Go into an ABC staff meeting.** Click *switch activity* and select the *ABC* task button and the *Meeting* task button.
3. **Go back to working on the project.** Click *switch activity* and again select the *XYZ* and *Design* task.
4. **Go to lunch.** Click *switch activity* and select the *Off-clock* radio button. The task will default to *Not specified*.
5. **Come back from lunch and perform some administrative work for ABC.** Click *switch activity* and select the *ABC* project button and the *Administrative Work* task button.
6. **Go into a meeting hosted by XYZ.** Click *switch activity* and select the *XYZ* and *Meeting* task.
7. **Go home for the day.** Drag the *Off-clock* radio button to the activities panel. Click *add notes* and enter a brief description of the project worked on, and the meetings attended.

When the consultant needs to review time that has been previously worked, s/he can do so with the *View Summaries* window (see the "Viewing Daily and Weekly Summaries" section for more details.) Similarly, if the consultant needs to modify time that has already been tracked, or needs to add an entirely new day that s/he was unable to track in the manner described above, s/he can do so with the *Edit Days* window (see the "How to Edit Tracked Time" section for more details.)

Sharing projects and tasks

Some users might need to track time on different instances of TimeBox on different computers. For example, a user might typically track his or her time on a desktop computer, but occasionally work remotely on a laptop. In order to help ensure consistency between multiple instances, TimeBox has the ability to export and import projects and tasks.

To export the projects that you currently have entered in a TimeBox instance, simply go to the *Time -> Import/Export -> Export Projects* menu. In the resulting dialog box, navigate to the directory that you want to save the export file to, enter a filename, and click Save. To export tasks, do the same, except use the *Time -> Import/Export -> Export Tasks* menu. Once you've exported the projects or tasks from one instance of TimeBox, you should copy that file to the computer running another instance of TimeBox. From that instance of TimeBox, go the *Time -> Import/Export Types -> Import Projects* (or *Import Tasks*) menu. From the resulting dialog box, navigate to the copied file, and click Open. Note that TimeBox will attempt to detect if you are accidentally trying to import a tasks file into your projects list, or vice-versa. The application will warn you if it makes such a detection.

Automatically retrieving projects and tasks from ClokBox

If you are using your instance of TimeBox with a group, which is in turn collectively reporting time with the ClokBox application, then you can retrieve any projects and tasks that have been created by the ClokBox administrator. Instructions can be found in the *Submitting Times to the ClokBox Server* section. You can also automatically submit any project/task names that you've created within TimeBox to the ClokBox server; those instructions are also found in the *Submitting Times to the ClokBox Server* section.

Time Zones and Daylight Savings Time

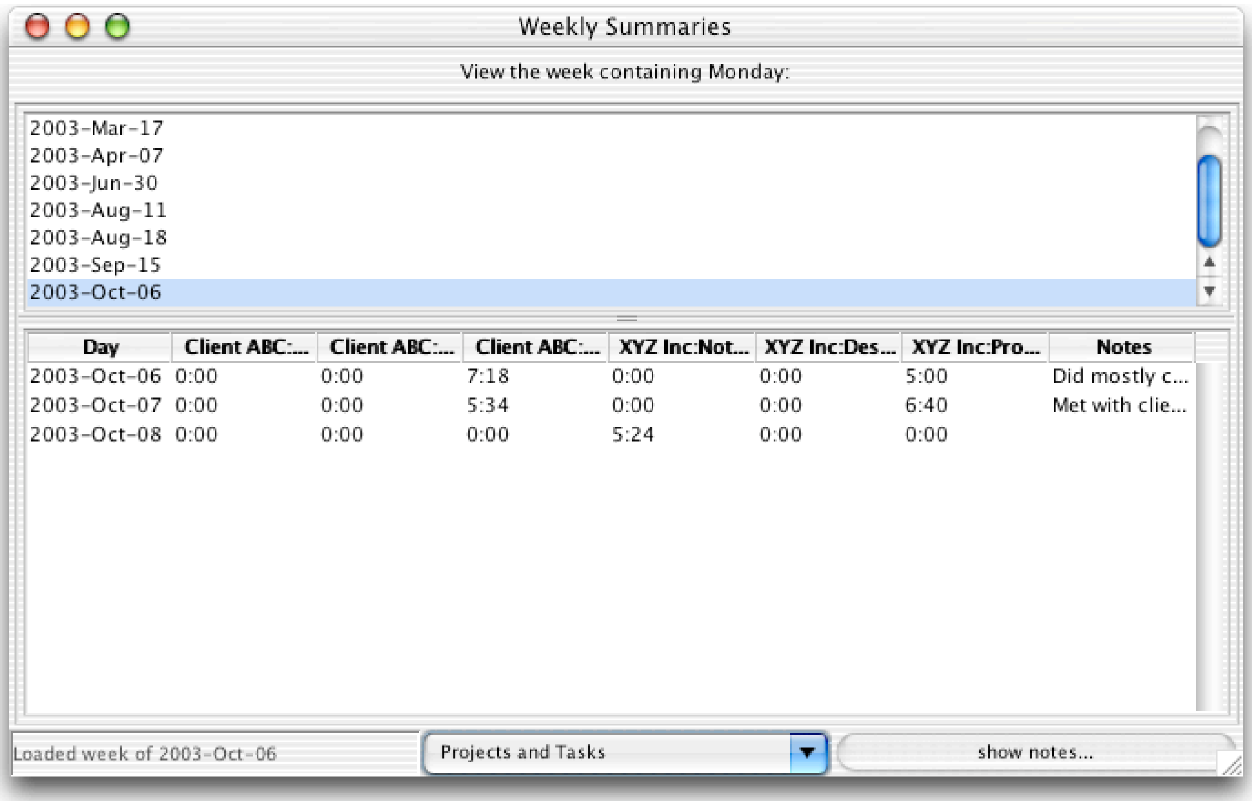
Different computers are set up to handle time zones and Daylight Savings Time in different ways. In most cases, TimeBox can interprete how the computer on which it is running handles these issues. In certain situations, however, TimeBox may report the wrong time; for example, your computer's clock indicates that the time is 10:00AM, but TimeBox logs time at that moment as 11:00AM. TimeBox might also tell you that times are out of order when you try to add or edit times, when in fact they are in proper order.

If you notice that the time reporting by TimeBox is different than the time shown on your computer's clock, you can quickly rectify this issue by going to the Preferences frame (*Time* -> *Preferences...*, or on Mac OSX, *TimeBox* -> *Preferences*.) In the Daylight Savings Time area, select the Tell TimeBox to adjust time by checkbox. Then, indicate with the pulldown menus whether TimeBox should add or subtract time, and by how much. If the time reported by TimeBox is later than that reported by your computer's clock, you should tell TimeBox to subtract time; if TimeBox's time is earlier than your computer's, tell TimeBox to add time. For example, if your computer's clock indicates that the time is 10:00AM, but TimeBox logs time at that moment as 11:00AM, select the checkbox, then choose Subtracting and 1 hour from the pulldown menus.

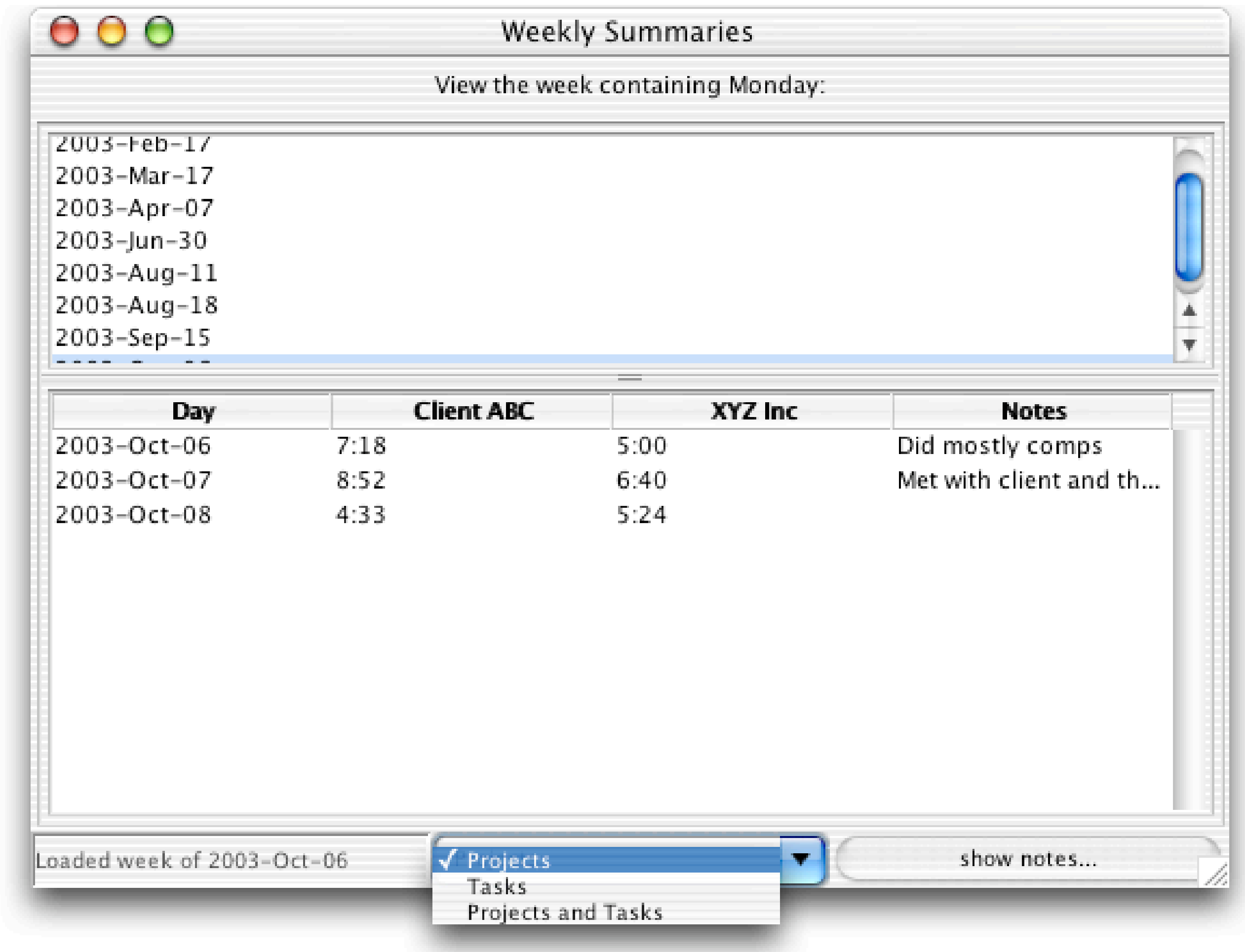
Viewing Daily and Weekly Summaries

You can view your past time tracked in two ways: 1. generate a custom report, as described later in this document, or 2. quickly view weekly and daily summaries, as described here.

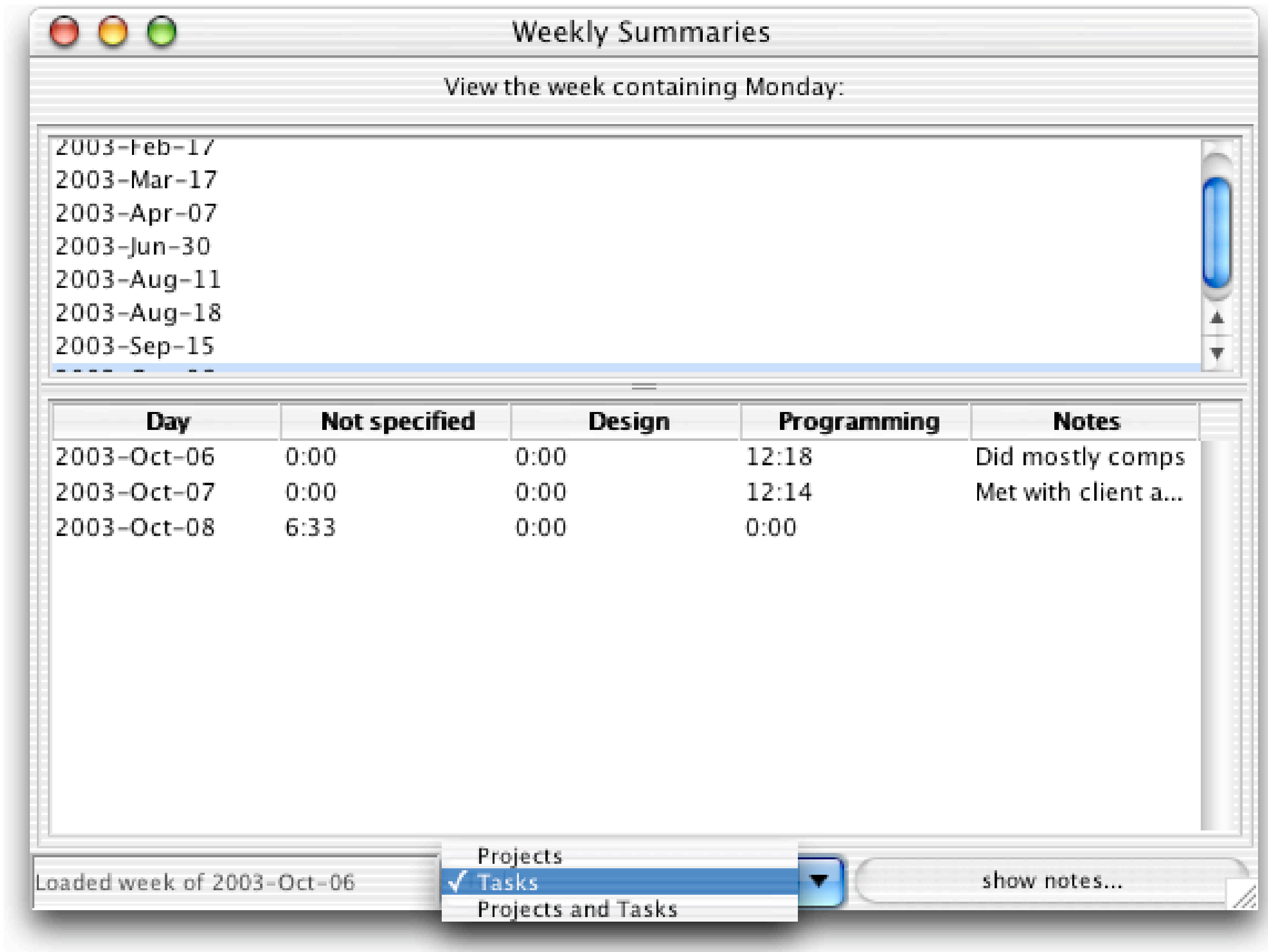
To quickly view weekly or daily summaries, select the *View* menu, then choose *Weekly Summaries…*. The window that appears will be split into two parts. The top part will list all of the weeks for which you have logged time. The weeks are identified by their Mondays.



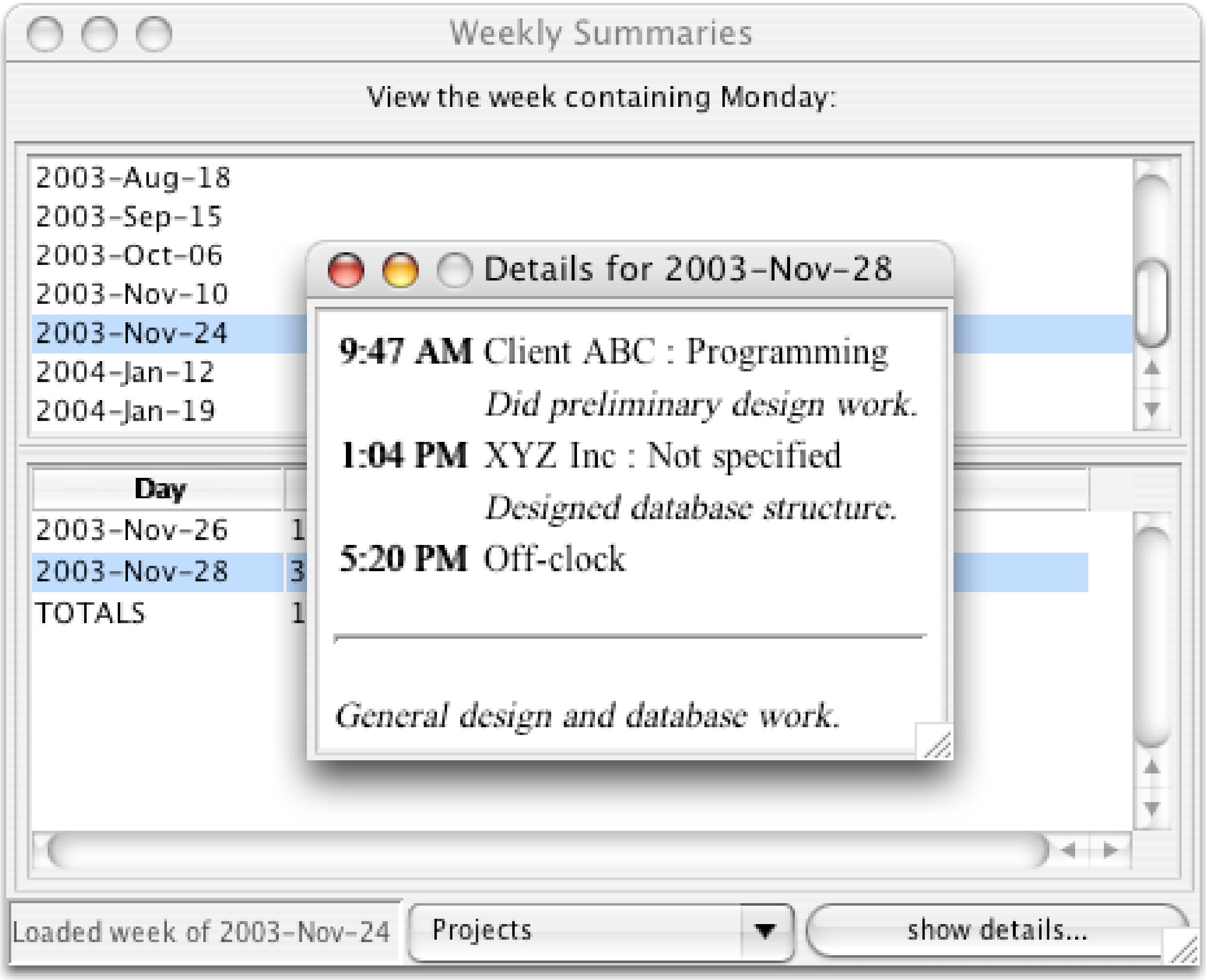
The top window lists the available weeks (indicated by the date of the Monday contained in that week; for example, the highlighted week above is labeled according to the fact that Monday, October 06, 2003 is part of that week,) The bottom lists the daily summaries for the selected week. By default, summaries for projects cross-referenced by tasks will be shown. If you need to view summaries only for projects or for tasks, use the pulldown menu at the bottom, as demonstrated in the screenshots below.



View only projects by selecting *Projects* from the pulldown menu.



View only tasks by selecting *Tasks* from the pulldown menu.



When a day is selected, clicking the button on the bottom-right will pop up a window that displays all of the notes recorded for that day; double-clicking the row will do the same. Summaries of times recorded, along with any time-specific notes and general notes, will be shown.

To view the daily summaries for a particular week, highlight the week in which you are interested. The table below will be populated with the individual days of that week. Each row consists of a single day. When you first launch the window, each column represents a project cross referenced by a task, plus two additional columns:

The first column will display the name of the day.
The last column will contain the notes for that day.

So if you are currently tracking two projects and have three tasks that you can perform, you will have eight columns: 2 projects x 3 tasks = 6, plus the name-of-day and notes-for-day columns equals 8. Recognizing that this might be too much detail, the TimeBox application allows you to view time breakdown by only project, or by only task. Use the pulldown menu at the bottom, which should read *Projects and Tasks*, to specify just *Projects* or *Tasks*.

You can also view the details for any of the days currently showing. To do this, highlight the table cell that contains the notes that you want to view, and click the *show details…* button. Or, simply double-click on the table cell that contains the desired notes. A small popup window will appear, displaying any recorded times for the day, along with any notes recorded.

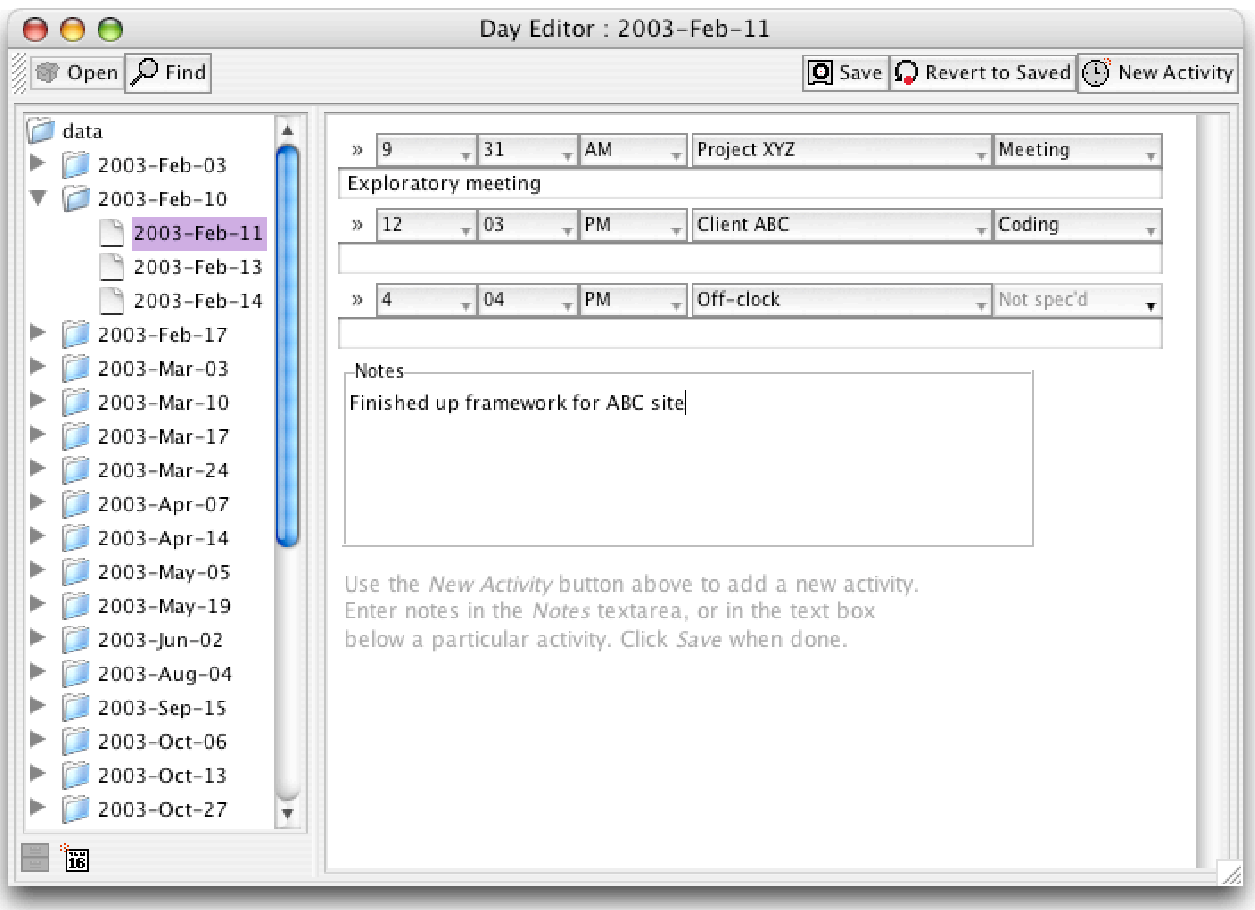
Note: no dates will appear in the top frame, and no data in the bottom frame, if you have not already logged time.

How to Edit Tracked Time

Editing an existing day

Select the *View* menu, then choose *Past Days*. You will be presented with a split-screen window that consists of a view of a filesystem on the left, and an editing screen on the right. If you do not see a split-screen, that means the window did not open on its own; simply drag the window-divider from the left-hand side of the window toward the middle of the window.

When the window first opens, the filesystem view will list the base location of your data files. Double-click it to expand it. It will open to reveal all of the weeks for which you have logged time. The weeks are identified by the date of the Mondays that they contain. Double-clicking on a week will in turn open that week to reveal all of the days in that week for which you have logged time.



The Day Editor window is divided into two panes; on the left is the “filesystem view”, which organizes recorded times into weekly folders that contain individual days. For example, in the left-hand window above, the week containing Monday, Feb 10, 2003, is expanded, showing three individual days from that week. On the right is a pane that—when an individual day is selected from the filesystem view—displays details recorded about that specific day. The image above shows the day that was selected (Feb 11, 2003) in the left-hand frame loaded into the right-hand frame.

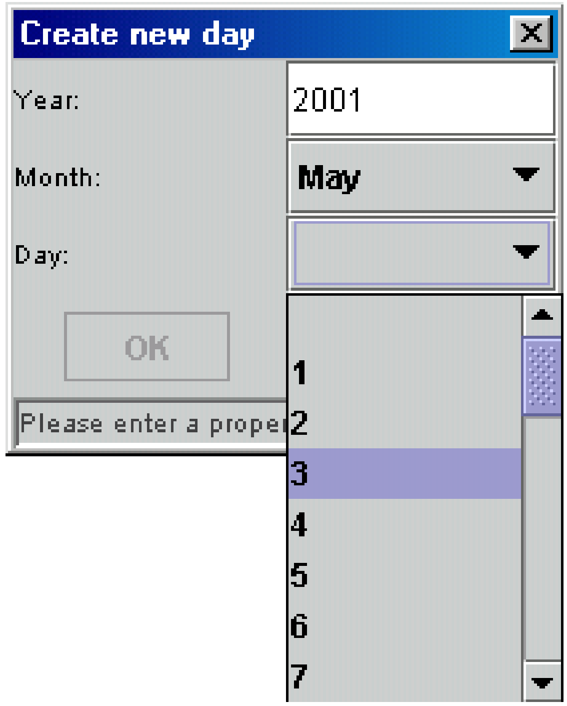
To edit a specific day, highlight that day and click the *OPEN* button above, or just double-click on that day. The data for that day will be loaded. To edit a time that was already recorded, just use the pull-down menus provided. Hour, minute, AM/PM and activity type can be edited. In addition, you can click on the arrow to the left of any activity to delete it, or revert to its saved state. Furthermore, you can move the activity back or forward, if it is not listed in the proper order. Activity-specific notes can be entered or edited in the textfield located below the activity's pulldown menus. Notes for the day can also be edited in the *Notes* frame. Once you are satisfied with the changes, save them by clicking the *Save* button. Note that all times must be in proper order before the changes can be saved.

What happens if you need to add a new activity? Simply click the *New Activity* button, and a new activity, ready for you to edit as described above, will appear. The activity will appear at the end of the list of activities. If that activity must appear earlier than any other existing activities, simply click the arrow at the left of the activity. A pulldown menu will appear, allowing you to select *Move Back*. This will move the activity above (before) the previous activity. Clicking *Move Forward* will move the activity below (after) the following activity.

Once you begin editing a day, you are not allowed to edit any other days until you are finished.

Adding a new day

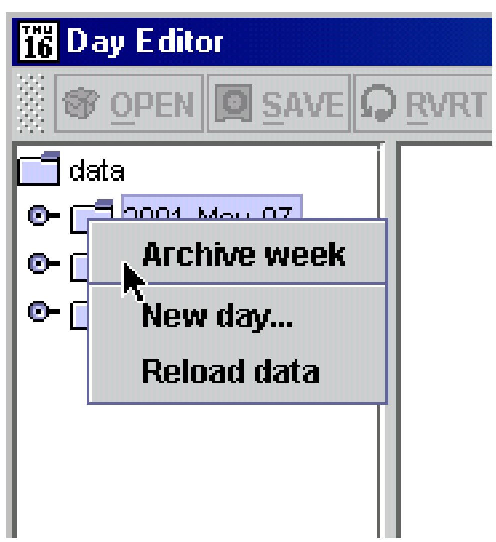
You might need to add data for a new day if, for example, you forgot or were unable to log your time for a certain day. To do this, right-click or (for Macintosh users) control-click in the filesystem view screen, and select *New day...* . Or click the New Day button, which looks like a page from a daily calendar, at the bottom left corner of the window. A dialog will appear, asking you to enter a date. Once you have entered a valid date, the program will create the day and you will be able to open, edit, and save it as described above.



Add a new day by right-clicking (or control-clicking on the Macintosh) in the left-hand pane, and selecting "*New day…*" A window like the one depicted above will appear. Create a new day by entering the year, then the month, then the day.

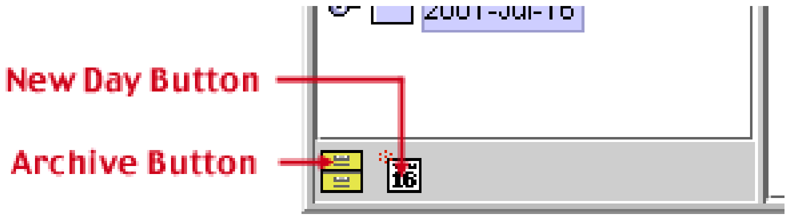
Archiving past weeks

Once you've been using TimeBox program for awhile, you may find it difficult to weed your way through all of the weeks that you've tracked in the past. That's why the TimeBox program allows you to archive weeks that you've tracked in the past, and that you don't think you'll need to view on a regular basis. You archive weeks in the *Day Editor* window. Simply select the week that you would like to archive, and right-click or (for Macintosh users) control-click and select *Archive week*. A dialog will appear asking for confirmation; be sure that the week shown is the week that you want to archive, and click *Yes*.

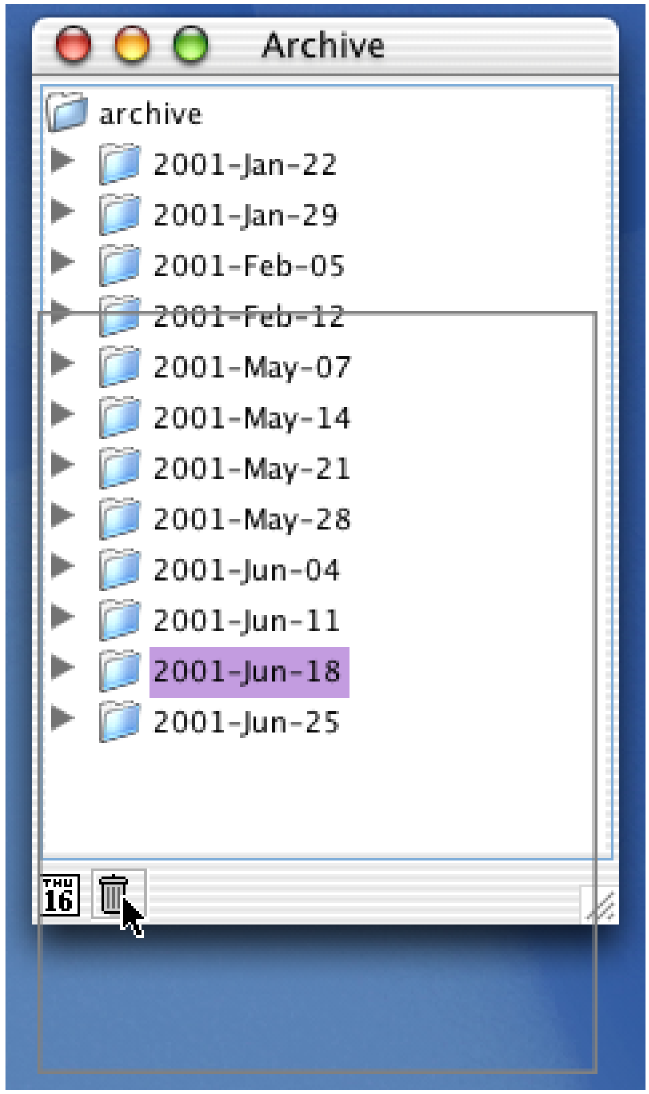


Select a week and right-click (or control-click on the Macintosh) and select “Archive week”. Click “Yes” on the resultant dialog box.

An alternative method is to simply select the desired week to be archived and click the archive button at the bottom of the screen, or just drag the desired week to the archive button.



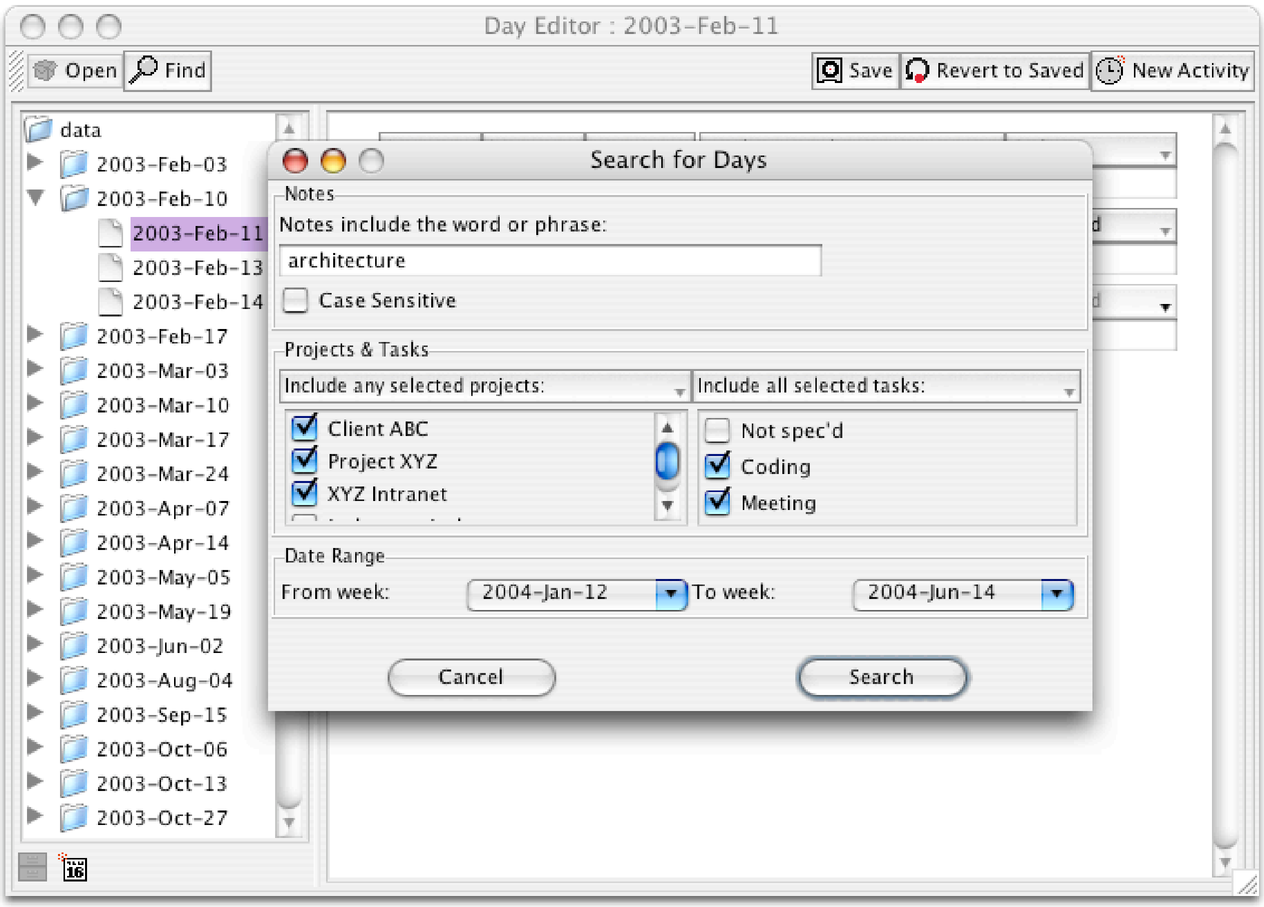
If you later decide that you need to unarchive, or re-activate a week that you had previously archived, you can do this via the Archives window. Select the *View* menu, then choose *Archives...* . A filesystem tree will appear. Expand the tree in the same manner as described above for the *Edit Days* window. Select the week that you want to unarchive, and right-click or (for Macintosh users) control-click and select *Unarchive week*. Or, you can select the week and click the unarchive button at the bottom of the frame, or just drag the week onto the unarchive button (which looks like a calendar square.) Weeks can be deleted permanently from this frame as well, by using the delete button (which looks like a trash can.)



Archived weeks wind up in the Archive window. To delete an archived week, either drag it to the trash, as shown above, or select it and then click the trashcan icon.

Searching through past days

You can use the Day Entity window to search through past days, and find days that match a particular criterion. To start, click on the *Search* button at the top right-hand corner. A search window appears, allowing you to set various criteria. First, enter any word or phrase the must match in the days' Notes section. Leave this field blank if you do not wish to search based on Notes content. In the *Activity Types* scroll panel, ensure that the names of the projects that must be included in the search results are selected. Finally, in the *Date Range* box, select dates between which the matched days must be. For example, in the frame depicted below, the user is searching for days whose notes contain the word “Test” (case-insensitive), contain the activity types *Contact*, *Freelance*, and/or *Testing* (or any other activity type), and were recorded for the weeks between Nov 15 2001 and Feb 18 2002 (inclusive).



Click the *Find* button in the Day Entity window to pull up the Seach window. Clicking the *Search* button above will find all days whose notes contain the word “architecture” (or “Architecture”, or “ARCHITECTURE”, or “ARCHitecture”…), contain at least *Client ABC*, *Project XYZ*, and/or *XYZ Intranet* as projects and contain both *Coding* and *Meeting* as tasks, and were recorded for the weeks between Jan 12 2004 and Jun 14 2004 (inclusive).

Search results will appear in a separate window. Any of the days that appear in the results window can be examined by clicking the row desired. Doing so will cause the selected day to be loaded in Day Entity window. Note that the selected day will **not** be loaded if there is already a day being edited.

Remote Access

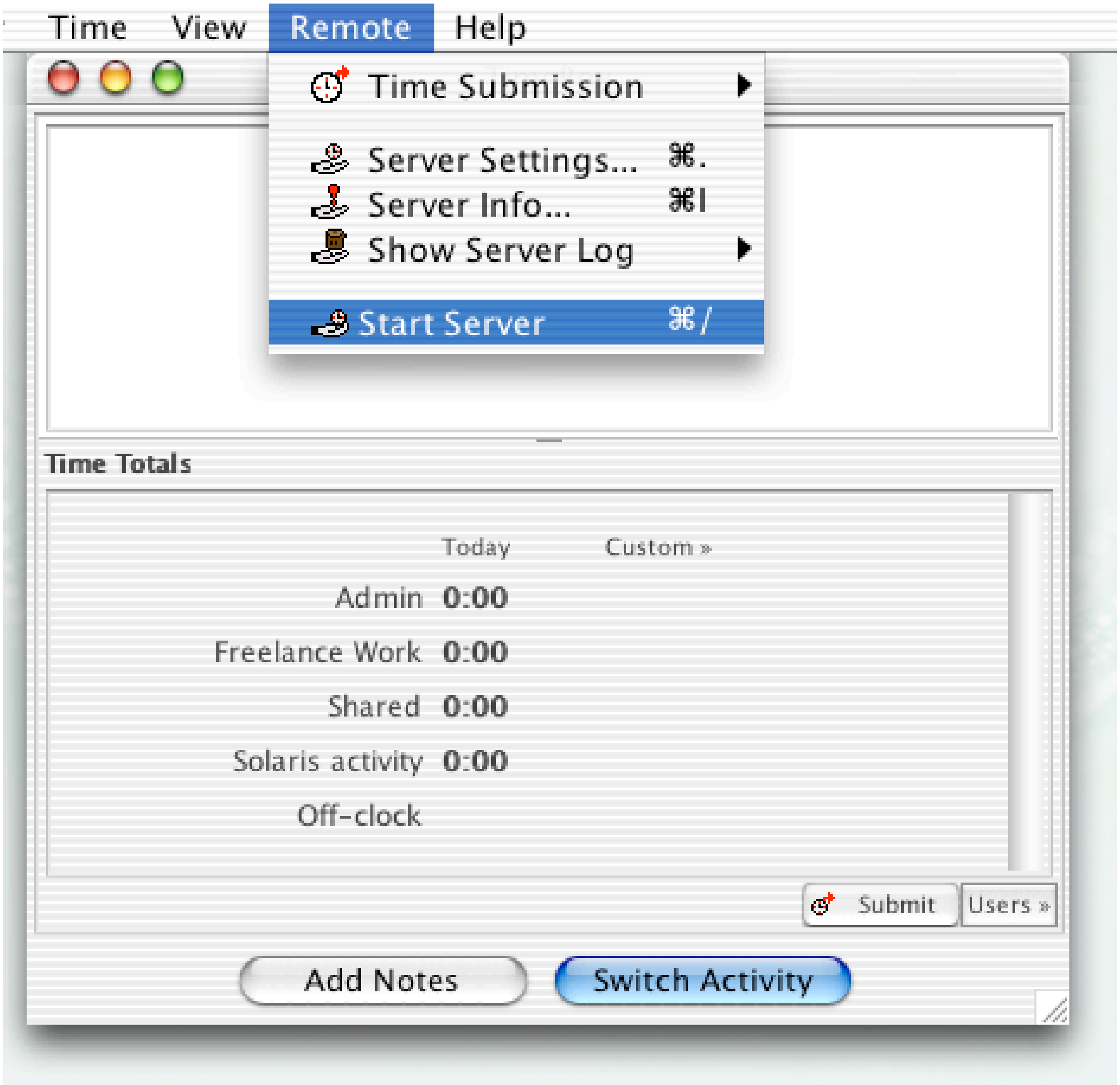
This program contains a Web server that allows you to track your time remotely. In order to use this service, however, the computer on which this program is installed must have a dedicated Internet connection. Having a static IP address (check with your Internet Service Provider (ISP) if you don't know what this means) is helpful but not absolutely required. Also, some equipment provided by ISPs contain firewalls which might block access (again, check with your ISP regarding this.)

Configuring the server

Provided your Internet access meets this criteria, you can configure your server using the *Remote > Server...* dialog. In this window, you should enter a username and password. For security reasons, you are required to create a username and password to use the remote access feature. You can also change the server's port number in this window. This feature will primarily be used by advanced users. Suffice it to say that if you don't know what a port number refers to, you can safely leave it as its default value. However, if you receive an error when you try to start the server, indicating that the port is already in use, you can change the port number to another arbitrary number (most computers require that you keep it above 1000.) (see Appendix A, *What is a port number?*, for more details.) Finally, in this window, you can use the provided checkbox to indicate whether the server should start automatically every time you launch the TimeBox application.

You must establish a name and password before you can start the server. You can specify a new port number for your server to run on, and by selecting the checkbox, you can ensure that the server will start any time the TimeBox application is launched.

To start or stop the server by hand, select *Remote > Server On*. The application must be running and the server on, for you to track your time remotely.



Select *Start Server* from the *Remote* menu to turn TimeBox's Web server on or off.

Log files

The server also provides three log files:

> *Messages*: shows informative messages about the state of the server.
> *Warnings*: warns the user about activities that might cause problems.
> *Errors*: informs the user about server errors that have occurred.

To view these files simply select *Remote > Server Log*, then select from the three server log options provided. A log window will appear. To the average user, these log windows may not display much of interest, but those familiar with Web server activity may find them helpful.

Accessing the application remotely

To remotely access this application, you will need the following at your remote location:

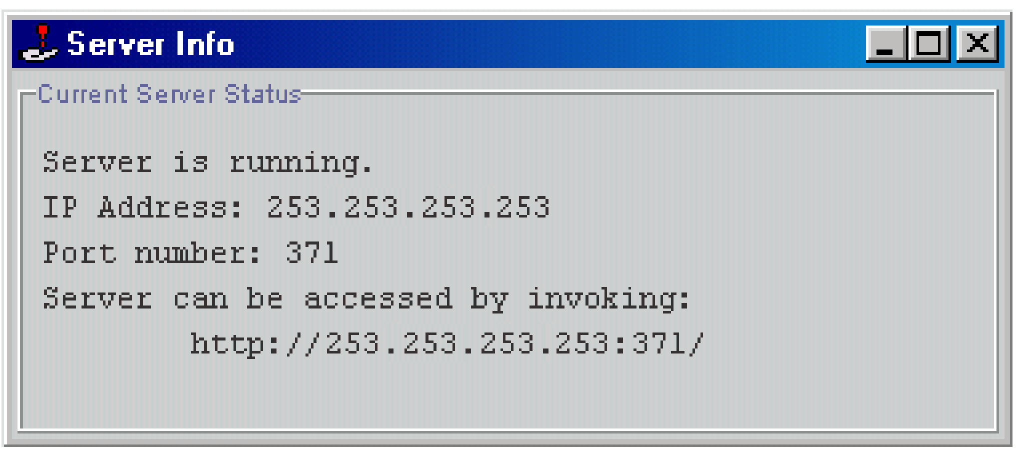
1. A computer or device with an Internet connection. This computer should have a Web browser on that device (currently, the application's server generates HTML content, which will display in standard Web browsers such as Mozilla, Netscape, Opera or Internet Explorer, as well as some browsers on Palm Pilots and other PDAs.) This browser should support basic authentication (basic password-protection).
2. Knowledge of the username and password that you set up for your server.
3. Knowledge of your computer's IP address (this is a numeric address that will identify your computer to all other computers on the Internet.)
4. Knowledge of the port number that the TimeBox application is using.

You can determine the last two pieces of information by viewing the server information. Just open the *Remote > Server Info* window. When the server is running, this window will display the IP address that your computer is using, and the port number that the application is using. These two pieces of information comprise the URL, or web address, that you will use to access this application remotely, as such:

http://IPADDRESS:PORT/

For instance, if your IP address is listed as 253.253.253.253 and your port number is set to 371, you would type the following address into the remote browser:

http://253.253.253.253:371/

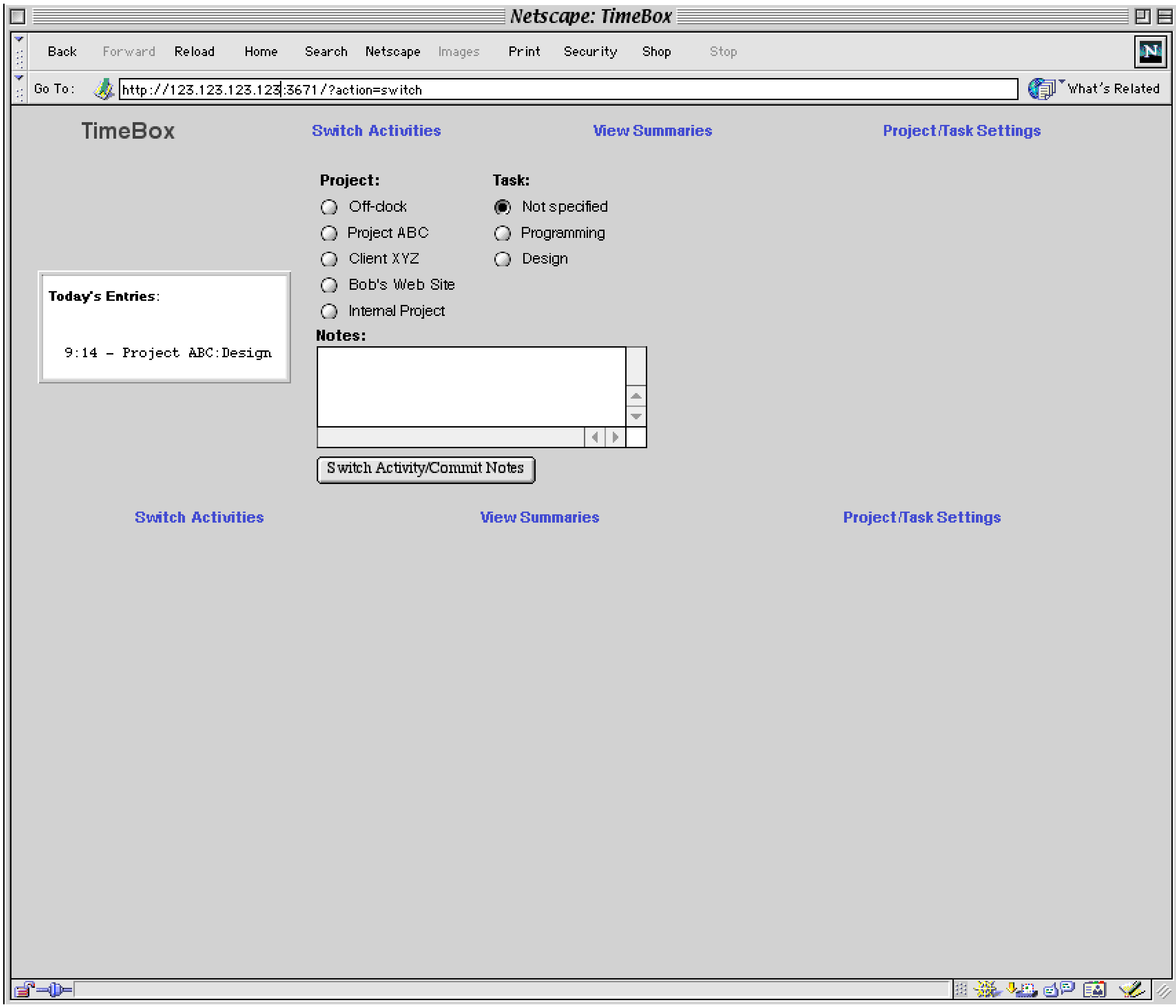


The Server Info window will provide the information you need to access your TimeBox server from a remote computer. In the above example, the user could point any standard Web browser to http://253.253.253.253:371/ to use the TimeBox instance remotely.

When you access the application through a browser in this manner, the browser will first prompt you for a username and password. Just enter the username and password that you established, typed exactly the same way. Once you do this, you are presented with a Web page that will allow you to perform these functions:

1. **Switch Activities:** Click on the *Switch Activities* link, select from the available projects and tasks, and/or enter notes, and click the *Switch Activity/Commit Notes* button.

2. **Enable/Disable Activities:** Click the *Adjust Settings* link, and select/deselect the activities that you want to activate/inactivate (the same way you would in the application's Settings window) and click commit activate/inactivate.
3. **View Weekly Summaries:** click on the *View Summaries* link. Select a week from the list provided, and click the view week button. After a brief pause, the Web page will display the summaries for that week.



You can access your TimeBox application remotely through a standard Web browser.

The Web page will always display the accumulated activities for the current day on the left-hand side of the window.

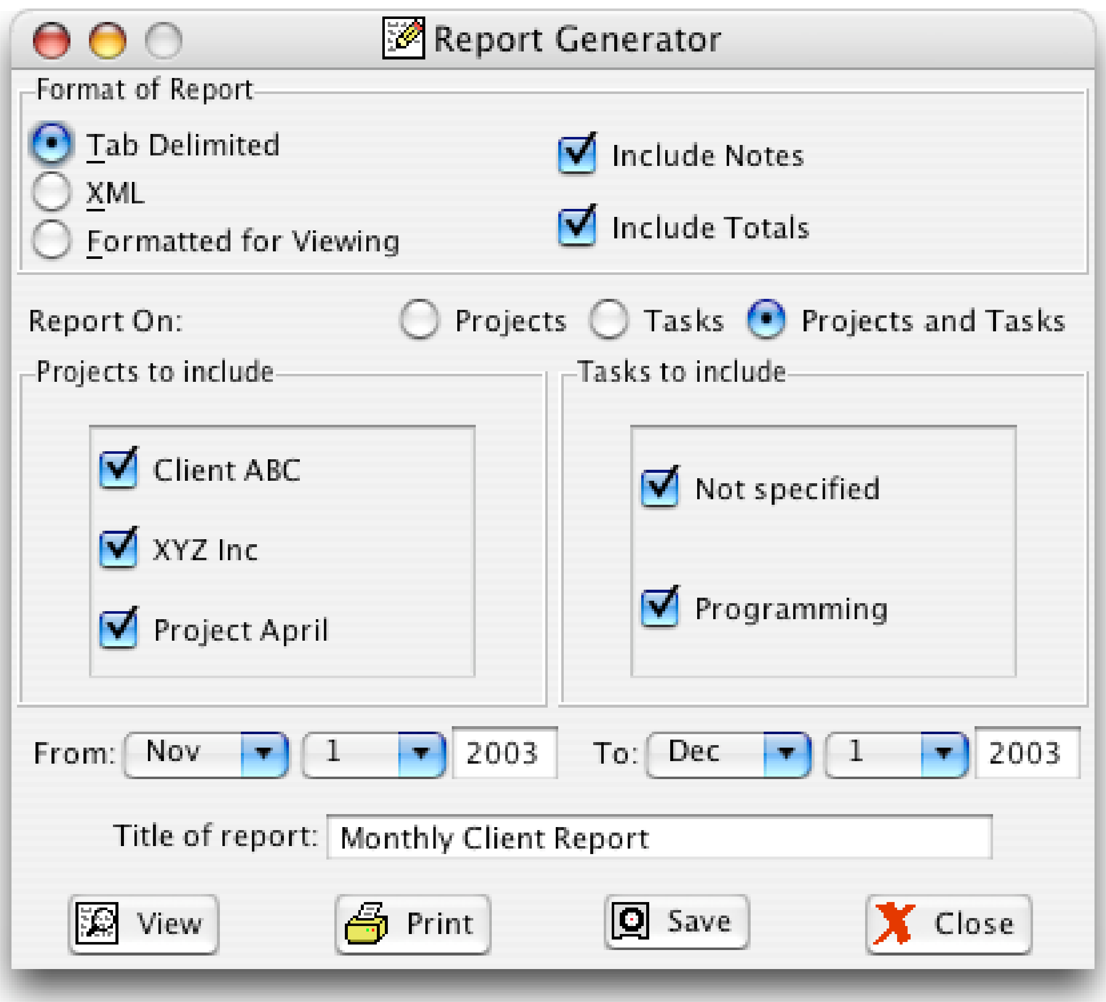
Generating Reports

The TimeBox application allows you create custom reports about your time tracked. You can view, save, or print these reports, as well as import them into third-party spreadsheet or database applications.

Creating a report

To create a report, select the *File* menu, then choose *Report Generator*.... The Report Generator window will appear. It is in this window that you set the parameters for how your report will be created.

You can create a report in one of three formats: *Tab Delimited*, *XML*, *or Formatted For Viewing*. Tab Delimited will format a report suitable for, say, importing into a spreadsheet program (most spreadsheet and database programs will accept data in tab-delimited format.) Formatting For Viewing is designed to allow you to quickly view and/or print a report without the use of external programs. XML might be useful for programmers who want to write a program to process the report; it might also become useful with later versions of the TimeBox application. You must choose one of these three formats for your report using the radio buttons provided.



The Report Generator window will allow you to customize your reports.

You can also decide whether to include notes in your report. You do this by using the Notes checkbox. Selecting this checkbox ensures that any notes you entered will be included in your report. Leaving the box unselected will result in a report that presents only time summaries.

In the row labeled *Report On:*, indicate whether you want to generate numbers for projects, or tasks, or whether you want to cross-reference between both.

In the panel labeled *Include these activities in report*, you are presented with a list of checkboxes that correspond to every activity that is currently active. Ensure that the checkboxes next to the activities that you want included in your report are selected, and that those next to the activities you want omitted from the report are deselected. Similarly, in the panel labeled *Tasks to include*, ensure that the checkboxes next to the tasks that you want included in your report are selected, and that those next to the tasks you want omitted from the report are deselected. Note that if you selected *Projects* or *Tasks* above, the opposing set of checkboxes will become inactive.

You may only want your report to cover a specific time period. You can set this parameter in the *Date Range* panel. This panel contains two pull-down menus; each contains all of the weeks (named by the Monday they contain) for which you have any time tracked. Use the first menu to select that "from" date; that is, the earliest week that you want included in the report. Use the second menu to select the "to" date, or that latest week that you want included in the report.

If you would like your report to have a title, enter that title in the text area provided.

Outputting the report

You can either view the report immediately, save the report, or print the report to a printer. Use the buttons at the bottom of the Report Generator window to indicate which you would like to do.

1. Selecting View Report will launch a mini-window that will present your report to you. That window gives you two control buttons at the top: a button that toggles word-wrap, and a button that allows you to set the relative size of the text for that window.
2. Selecting Print Report will bring up a standard print dialog box, and will allow you to print the report to any printer that you have connected to your computer.
3. Selecting Save Report will launch a dialog box in which you can name your new file, and determine where on your computer to save it to.
4. Selecting Close will close the Report Generator window.

Note: you can only create a report if you have already logged time. This may seem obvious, but you cannot generate a report based on no time tracked. The report output options described above will not be active unless you have time logged.

Backups

Purpose of backups

The TimeBox application allows you to create backups of your data. There are two primary reasons you might want to do this. The first, most obvious reason, is to protect your data against loss. Making regular backups of your data, and storing these backups in a location that is different than the disk from which you are running your TimeBox instance, will ensure that if some minor disaster happens (your disk becomes corrupted, an electrical storm fries your computer, etc) you can still restore your data later.

The second reason to create a backup is to move your data from one TimeBox instance to another. For example, if you start using TimeBox at home, but later decide that work is the best place to use it, you can create a backup of your data at home, transport it to your work computer via disk or the Internet, and import it to the instance of TimeBox running at work. Similarly, if you begin using TimeBox on a PC but then switch to a Macintosh, you can install the Macintosh version of TimeBox, backup your data from your PC, and import it into your Mac's instance of TimeBox.

Creating backups

To create a backup, simply go to the *File* > *Backup* > *Create Backup…* menu. In the dialog presented, click the *Select Directory:* button to choose the directory to store your backup file. In the text field below, enter the name you choose for your backup file. Note that the backup files are stored in ZIP compression format; if you choose to append a file extension to your filename, *.zip* is appropriate but certainly not required.

If you choose to include your archived data in the backup file, then be sure the *Include archive data in backup* checkbox is selected. Click *OK*, and your backup file will be created. If you did not specify that your backup file be created on a disk separate from the one on which your TimeBox application is stored, you might consider copying it to a floppy, ZIP, CD-ROM, or separate hard drive. This will ensure that you have a copy of your data in case your main hard drive is compromised.

Importing backups

If you somehow lose all of your existing data, or if you are moving data from one instance of TimeBox to another, then it is time to import your pre-existing backup. Open the *File* menu and select *Backup* > *Import Backup….* A file dialog will appear, asking you to select the backup file that should be imported. Navigate to the file and click *Select*.

Although TimeBox expects that you will not have any pre-existing data (since, in most cases, you will be restoring lost data or you will be populating a new instance of TimeBox with data), it will make every effort to not overwrite any existing data that it encounters. If there is a chance that existing data will be overwritten, TimeBox will asks you how to handle the situation. Two conditions can occur:

1. All of the data from the backup file conflicts with existing data. In this case, you can choose to either let the existing data remain intact (in effect, canceling the import) or to

cause the import to overwrite the existing data. In a dialog box, TimeBox will explain that the latter option (in which the existing data will be overwritten) is about to occur. Click *Yes* to allow that to occur, or *No* to cancel.

2. Some of the data from the backup file conflicts with existing data. In this case, you can choose one of three options: 1: cancel the entire operation; 2: restore only as much data from the backup as possible without overwriting any existing data; 3: restore the backup and overwrite any existing data that conflicts. Simply choose from the menu provided the options that matches your choice, and click *OK*.

Submitting Times to the ClokBox Server

Many TimeBox users will be tracking time only for their own projects, and are not concerned about jointly tracking time as a part of a group. These users will probably not find the features described in the following section very useful.

For those who are working as a part of a group, TimeBox allows the ability for users to submit their time to a central server. The server administrator can then run reports on the collective times submitted by all users. Note that your instance of TimeBox must be registered before you are able to submit time to a ClokBox server.

The server application is called *ClokBox*. Detailed information, as well as the application itself, can be obtained from `http://www.taubler.com/clokbox`

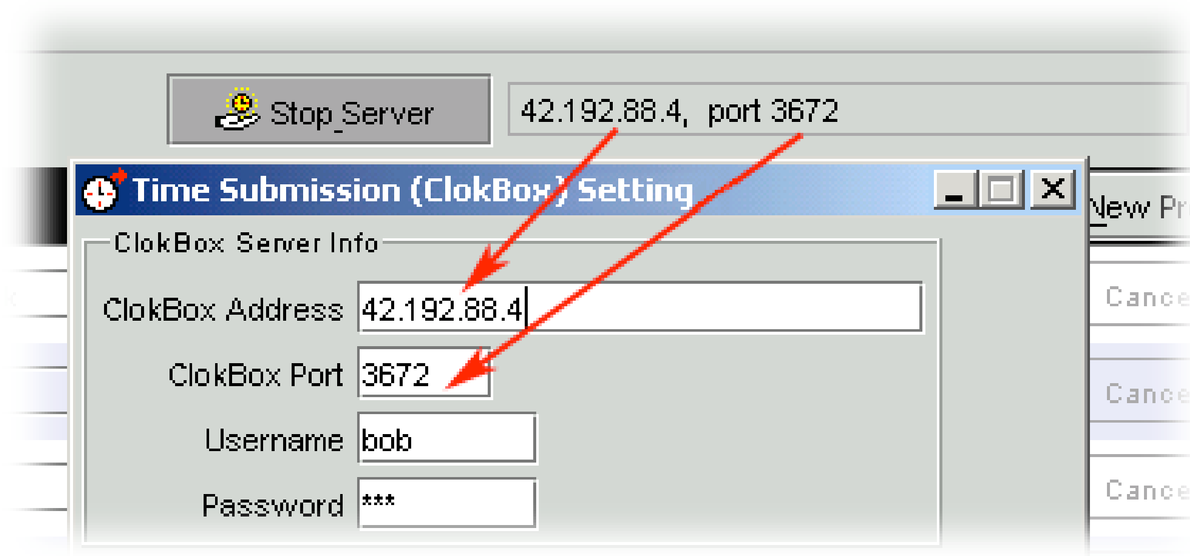
For ClokBox to be able to communicate with the ClokBox server, at least some of the activity types must match. There are three ways to ensure that this happens:

1. You can simply type in your activity types exactly as they appear in the ClokBox server application, including spellng and capitalization.
2. Your ClokBox administrator can export the ClokBox activity type settings and send them to you (details can be found in the ClokBox user guide and help window.) You can then import your settings into your instance of TimeBox. Simply save the export file anywhere on your hard drive. Then go to TimeBox's *Time* menu and select *Import Types…*. Navigate to the export file and click *Choose*.
3. If you've already been tracking activities and you discover that their names don't match the names entered in ClokBox, you can create a mapping. That way your activity type names will essentially be changed to match the types entered in ClokBox as they are submitted. Details on how to do this are later in this section.

Settings

Before setting up your ClokBox instance for time submission, you will need the following information from your ClokBox administrator:

- The URL or IP address of the ClokBox server
- The port number under which the ClokBox server is running
- Your username
- Your password



The “Address” and “Port” numbers from the ClokBox window should be entered into the respective fields in the TimeBox *Time Submission* window.

The first two can easily be ascertained by the ClokBox administrator; the last two will have been entered by the ClokBox administrator in ClokBox's *Users* panel.
Your time submission settings are all maintained within the *Time Submission Settings* window. You can access it via the *Remote* menu, selecting the *Time Submission* submenu, then the *Settings* menu item. The Time Submission Settings window will appear. You will notice a few different sections, detailed below:

ClokBox Server Info
At the top of the frame, enter in the spaces provided the four items you should have received from your ClokBox administrator: the ClokBox address and port number, and your username and password. The ClokBox address tells your instance of TimeBox what Web server to submit your time to; the port number provides further instructions to the Web server. Your username and password are required to ensure that only you are submitting time under your name.

Submit Time How?
The next section is the *Submit Time How?* section. You have three options as to how to submit your time to ClokBox.

1. *Automatically*
   The first option is to have TimeBox automatically submit your time for you on either a daily, weekly, or monthly basis. If you select this radio button, the pulldown menus to the right will become active. In the first pulldown menu, select whether you want TimeBox to submit your time on a daily, weekly, or monthly basis.
   - If you select *Daily*, you'll notice one set of pulldown menus appearing below. This set of pulldowns asks you to select what time of each day TimeBox should submit your time.
   - If you select *Weekly*, you'll notice two sets of pulldown menus appearing below. The first allows you to set what day of the week to submit time. The second set of

pulldowns asks you to select what time of the selected day TimeBox should submit your time.

- If you select *Monthly*, you'll notice two sets of pulldown menus appearing below. The first allows you to set what day of the month to submit time. For example, selecting "On day 12" will cause TimeBox to submit time to ClokBox on the 12th of every month. The second set of pulldowns asks you to select what time of the selected day TimeBox should submit your time.
  Note that for automatic time submission to work, TimeBox must be running during the selected time.

2. *Manually*
   The second option is to submit time yourself whenever you want to. To do this, select the *Manually* radio button. The *Submit Time Now* button to the right will become enabled (assuming you've already filled out the top section.) Click it to submit your time; TimeBox will submit your time to the address and port umber you'd entered above. Additionally, a small button will become active on the bottom-right side of the main TimeBox window. Clicking this button will similarly submit your time to ClokBox.
3. *Output to File*
   In case you do not have a reliable internet connection, or you find yourself plagued with firewall problems, you can still submit your time to ClokBox. In this case, select the *Output to File* radio to button. The *Output to File now...* button will become activated. When you click it, a file dialog will appear. Your times will be exported to the file you select in the dialog. You will then need to send this file to the ClokBox administrator, either via disk, email, or another electronic means. Note that, as described above in the *Manually* section, choosing the *Output to File* option will cause a small button to become active on the bottom-right side of the main TimeBox window. You can use this button to output your times to file as well.

Details

In the bottom section, you can enter your *Details* settings. The first checkbox, *Only submit times not yet sent*, determines whether TimeBox should only submit time that it has not already sent to ClokBox. The second checkbox, *Only send times between the following weeks*, determines whether ClokBox should only submit time that falls within a certain time period. Use the pulldown menus provided to then indicate the first week and last week in that time period.

The *Use project name mapping* option can be selected under special circumstances. If a TimeBox user has already begun tracking time, s/he may later discover that his/her project names do not exactly match the project names entered in ClokBox. In such a case, the ClokBox server will reject that data. To solve this problem, the TimeBox user can map his/her project names to diffferent project names, that match the names entered in ClokBox, as they are being submitted. Select the check box, and then click the *Show/edit mappings...* button. A *Data Mapping* window will appear, displaying each project entered in this ClokBox instance, and a corresponding text field. Enter the new, "correct" project name in the text field next to any incorrect name. Click *Save* when done. Note that doing this only affects names of projects submitted to the ClokBox server.

The *User task name mapping* option works the same way except, of course, it modifies the names of tasks that are submitted. Use this option in the same manner as described above for projects.

The *Specify activities to send* option can be selected to control what activity types are sent to the ClokBox server. With this checkbox selected, a Timebox user can click the *Show/edit activities* to view a popup window. That window will list all available activity types. If the checkbox next to an activity type is selected, all activity times of that type will be sent to the ClokBox server. If the checkbox is not selected, times of that type will not be sent. This setting will be useful, for example, if a Timebox user is tracking some times that s/he doesn't want sent or revealed to the ClokBox administrator.

Again, the *Specify tasks to send* option works in the same way, except it is used to limit the types of tasks sent.

Finally, ensure the *Announce self to server* checkbox is selected if you want to announce to your team when you are online. When this box is selected, TimeBox will tell the ClokBox server that you are online. As a result, all other TimeBox users who are using the same ClokBox server as you can know that you are online. In turn, you will be able to see who else is logged in as well. Once you have a valid ClokBox address/port/username/password combination entered, and *Announce self to server* is selected, a small button labeled *Users* will appear near the bottom right corner of the main ClokBox window. Activate that button to see the list of users currently online.

When you are finished entering your settings, click *OK* at the bottom of the frame.

Once you have entered valid username/password and address/port information in the submit settings window, you may see up to three new buttons appear in the TimeBox main screen, near the bottom right-hand corner. The first is a toggle button labeled *Users*. This button will appear if you had selected the *Announce self to server* option. If you enable the *Users* button, then a small window will appear to the right. This window will display all users—including you—who are currently logged into ClokBox. Through this window, you can also use ClokBox's *QwikMessage* feature. Clicking on any users name will pop up a small window into which you can enter a message. Enter a message to that user and click "OK". In a few moments, that user will receive a *QwikMessage* containing your message.

The second button that might appear would be labeled either *Submit* or *To File*. This button would appear if you selected *Manually* or *Output to File* in the *SubmitTime How?* category. If you had selected *Manually*, this button will be labeled *Manually*. Clicking it will cause your times to be submitted to the ClokBox server. If you has selected *Output to File*, the button will be labeled *To File*. Clicking it will invoke a file dialog, enabling you to choose a location to save your times to a file. This file should then be sent to your ClokBox administrator (i.e. via email.)

The third button that will appear from time to time will be labeled *Results*. The appearance of this button will indicate that your times have been sent over the Internet to the ClokBox server, and that the serve has returned the results of the submission. Clicking this button will open a results window, which will tell you what happened during the transmission. In this window you will find a table, with a number of columns. Depending on how often you've submitted times to the server, you will also find a number of rows of data. Each row represents a submission. The last row will always represent your last data submission to the server.

The rows will indicate the following:

1. *Time Sent* – The first column displays the date and time during which that data submission occurred.
2. *Status* – The second column indicates what errors, if any, occurred (or it will display "Successful" if no errors occurred.)
3. *Days Submitted* – The third column lists for which days times were submitted to the server. If the table cell is too small to display all of the dates, either double click the table cell, or highlight it and select the *Show Text* button at the bottom of the frame.
4. *Notes* – The last column displays any special notes about the transmission. For example, if you tried to submit data for activity types that the server did not recognize, that will reported in this column. If the table cell is too small to display this data, either double click the table cell, or highlight it and select the *Show Text* button at the bottom of the frame.

Below are the buttons that can appear in your main TimeBox window. These buttons can only appear if you've registered your instance of TimeBox, and you have a valid TimeStor Address/Port and Username/Password entered.
A. *Users*: This button will appear if you have selected *Announce Self to Server*. Clicking it will display a small window indicating all users that are currently online.
B. *Submit*: This button will appear if you've selected *Manually* in the "Submit Time How?" section. It will also appear if you've selected *Output to File*, but the label will change to *To File*...
C. *Results*: Once your time has been submitted , either manually or automatically, this button will appear to let you know the time submission has been completed. Clicking the button will bring up a window that displays the results of the time submission.

Automatically retrieving projects and tasks

You can ensure that the names of your projects and tasks are in synch with the names of the projects and tasks entered in your group's ClokBox application. To do this, first ensure that the correct ClokBox server information has been entered, as described above. Then simply use the *Remote* -> *Time Submission* -> *Find Projects/Tasks...* menu item. A small window will appear, prompting you to either retrieve projects only, tasks only, or projects and tasks. Ensure that the desired radio button is selected. Then click the Retrieve button. TimeBox will communicate with ClokBox, and will retrieve all of the projects and/or tasks contained within the ClokBox instance. Any projects and tasks that are retrieved--that are also not contained within your TimeBox instance--will be added to your TimeBox instance.

Automatically submitting projects and tasks

You can also submit the names of your projects and tasks to your group's ClokBox application. This also helps ensure that your project/task names are in synch with the ClokBox server's names. It also allows you to create new projects or tasks within ClokBox, rather than relying on a ClokBox administrator to do so (note that the ClokBox administrator must first grant you permission to do this. In addition, the administrator may grant you permission simply to suggest new projects/tasks, which would still require an administrator's approval.)

To do this, first ensure that the correct ClokBox server information has been entered, as described above. Then simply use the *Remote* -> *Time Submission* -> *Submit Projects/Tasks...* menu item. A small window will appear, prompting you to select the names of the projects and/or tasks that you would like to submit to the ClokBox server. Typically, you would select only the names of the new projects and/or tasks that you'd created (although the ClokBox server will disregard any duplicates that it receives). Ensure that the desired names are selected; then click the Submit button. TimeBox will communicate with ClokBox, and will send all of the projects and/or tasks that you selected to the ClokBox instance. Provided that you have been granted permissions, the projects/tasks that you submitted will either be added directly to the ClokBox server, or will be queued for approval by the ClokBox administrator.

APPENDICES

Appendix A – What is a Port Number?

Most home computer users are accustomed to browsing the Internet with their home computers. In this sense, the home computer is a client; it contacts a computer called a server (which contains information that the user wishes to access), requests the information, and receives it.

Nearly all Internet-capable home computers are also capable of acting as servers as well. For a computer to act as a server, it must first (of course) be connected to the Internet. It must also have a constant address that other clients can use to access it. Finally, it must have special server software running on it. This job of this software is to "listen" for clients that are contacting the server, and send back the requested information.

Many servers run multiple types of this sort of software at the same time. For example, a server might be running Web server software in order to serve out Web pages. It might also be running email server software, FTP server software, telnet server software, database server software, or software for any other type of server. For this reason, a simple Internet address is not enough. If I am trying to access the machine called www.somecompany.com, I need to further specify whether I am trying to access the machine's Web server, its FTP server, etc.

That's where the concepts of ports come in. Ports can be thought of as internal addresses that route requests from clients to the appropriate software. They are not physical connections, but rather numbers that correspond to server software running on the machine. For example, most Web servers run on port # 80. Web browsers such as Netscape Navigator know this, and therefore when you request a URL through Netscape, behind the scenes it adds the port number 80 to the request. Have you ever had to request a URL that looks like this: `http://www.somename.com:8080`? If so, you were requesting a Web server running on `www.somename.com` under port # `8080`.

The TimeBox software contains a mini-Web server designed exclusively for allowing remote access to the TimeBox instance running on your personal computer. When installed, the software's server defaults to a fairly uncommon port number, which is unlikely to interfere with any server software that might happen to be running on your computer. There is always a chance, however, of such interference, so the software allows you to change the port number that the software uses. The rest of this help file tells you how to use the port number to access the software remotely, but the basic idea is to use a Web browser and type in `http://your-computer's-web-address:port-number`.