NCH Software
HourGuard Time Sheet

This user guide has been created for use with

HourGuard Time Sheet Version 1.xx

Technical Support

If you have difficulties using HourGuard Time Sheet please read the applicable topic before requesting support. If your problem is not covered in this user guide please view the up-to-date HourGuard Time Sheet Online Technical Support at
www.nchsoftware.com/timesheet/support.html
.

If that does not solve your problem, you can contact us using the technical support contacts listed on that page.

Software Suggestions

If you have any suggestions for improvements to HourGuard Time Sheet, or suggestions for other related software that you might need, please post it on our Suggestions page at
www.nch.com.au/suggestions/index.html
.

Many of our software projects have been undertaken after suggestions from users like you. You get a free upgrade if we follow your suggestion.

HourGuard Time Sheet

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Introduction

Thank you for installing HourGuard.

HourGuard is a time tracking program which provides for the tracking of time spent doing a particular task, and the preparation of working time reports. It allows accounting of worked time by overall duration, or by including start and finish times of working periods, or a mixture of both modes. Time tracking can be done automatically by using intelligent user activity detection.

This software also generates professional-looking reports which can be printed, emailed, or faxed directly from the report viewer.

Features

- Multilevel task hierarchy.
- Intelligent automatic time tracking.
- Report viewer.
- Ability to save reports in different formats (PDF, CSV).
- Ability to send reports by e-mail or by fax.
- Designed to be very easy to use for day-to-day operation.

System Requirements

- Windows 2000/XP/2003/Vista/7/8
- Internet Connection (for sending reports by email)
- Printer (for printing invoices)

Getting Started

HourGuard is used to track your or your employees working time. In order to start using HourGuard you need to create an account for a customer. Then you need to create tasks that you will be performing for that customer. Cut a big task down to different small tasks using the tasks tree structure of a Base Task and its Sub Tasks. You can mark a task Complete or Closed. You can then start and stop the tasks using the buttons etc, and then the times will be recorded and the amounts calculated. You can also use the Time Sheet list to record the periods of time spent working during a day. It shows working period entries (time sheet items) for the date that has been set in the Date field of the main window. You can enter working periods into the Time Sheet for a day either as period start and end times, or just as the working period's total duration. You can add a description of each working period in a "Notes" field. Current tracking status and task names are displayed in the lower section of HourGuard's window, under the Time Sheet list.

Starting/Stopping Time Tracking

Real-time tracking may be started automatically (see "Options"), by clicking the green button under the Time Sheet list ("Start current task") or by double clicking a task in the task tree (sets that task as the current task and starts time tracking). Clicking the black button ("Stop current task") stops time tracking. Time tracking may also be stopped automatically by using the computed idle time (see "Options").

While task working time is tracking current period start (shown next to "Active" indicator) and length (time indicator on the right side of the same panel). Currently active task full name is shown right under "Active/inactive" indicator.

Intelligent Automatic Time Tracking

HourGuard can be configured to automatically stop tracking time against the currently active task when it detects that there has been no user input for a certain time. It does this by monitoring the user's keystrokes and mouse clicks. HourGuard can also resume tracking time against the previously stopped current task once user activity is again detected.

See Options for details on how to configure and activate this feature.

Viewing Task Activity Reports

To view a task report click the Report button on the toolbar and then set the time period for the report.

To view a report for the currently selected day click the "Print or Send TimeSheet" option from the TimeSheet menu.

Report options are :

- Preview report before printing
- Print report
- Save to PDF or CSV formats
- Send report by Email (if connected to the internet)
- Send report by Fax (if fax is available at the receiving end)

Shortcut Keys References

- Ctrl+E - New time sheet entry
- Ctrl+T - Create a new base task
- Ctrl+D - Delete time sheet entry
- Ctrl+R - Open the Reports view
- Ctrl+O - Open program options
- F1 - Open Help documentation
- Alt+F4 - Minimize HourGuard to the system tray

Data Backup and Restore

It is essential to back up your HourGuard data often in the event that you lose data. HourGuard gives you several options for backing up your data, and makes it easy to restore your data when you need it.

To back up data, click the HourGuard menu and select Backup Data... Select a method for backup depending on how you would like to access the data later on.

To restore data, click the HourGuard menu and select Restore Data... Confirm you want to restore, and browse to the location of your backup file.

See also:

- Backup in the Screen References section

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Main Window - Main Window Layout

The Main Window has 3 main areas:

1. Toolbar

    - Options
    - New Task
    - New Entry
    - Report

2. Tasks The Tasks list at the left hand side of the main window displays the list of tasks along with their sub-tasks that have been entered into HourGuard.

    The tasks can be easily added, removed and edited

    Check boxes at the bottom of the Tasks list can be used to filter already completed or closed tasks from view.

3. Time Sheet
    The time sheet at the right hand side of the main window displays the working times for the currently selected day.

    The buttons at the bottom of the window can be used to start and stop the currently active task's time tracking.

    - Green button to start time tracking.
    - Black button to stop time tracking.

Main Window - Manipulating Tasks

You may use the main menu option Task -> New Base Task / New Sub Task to create a new base task or a sub task for the currently selected task. Or you can click the New Task button on the toolbar. You can also right click any item in the Tasks list and make the same menu option choices from the tasks tree context menu. A Task Properties dialog is displayed. Enter a Task Name for the new task or sub task. The same Task Properties dialog opens by clicking the "Edit Task" item on the Task menu or the tasks tree context menu. Use it to edit any of currently selected task's properties. Other options available on the Task menu and the tasks tree context menu allow you to "Start this task", mark the task "Complete" or "Closed", or "Delete" the task. To make a task active and start time tracking just double click the required task.

Main Window - Manipulating Time Sheet Entries

The Time Sheet panel on the main window shows the time sheet for the selected day. The blue Left and Right arrow buttons change the current selected day to the previous day or the next day accordingly.

There is also a calendar available for selecting the date of the time sheet to display. Clicking the down arrow on the date display to the left of the two blue arrows will show a calendar for the month of the current selected day. Right and left arrows on this calendar allow you to scroll forward or backward a month at a time

Adding a new entry, and editing or deleting a selected entry are done by clicking on the "New Entry", "Edit Entry" or "Delete Entry" options accordingly from the TimeSheet menu. You can also right click any item in the Time Sheet list and make the same menu option choices from the periods list context menu. A new entry may also be added by clicking the New Entry button on the toolbar.

A new entry will be added to the time sheet automatically after "real-time" task tracking stops.

Note: When the "Delete" command is used, HourGuard deletes ALL currently selected time sheet entries.

Main Window - Creating an Invoice

To export tasks into Express Invoice, go to the HourGuard menu in the main window. Click Create Invoice then select an account and a date range. The data will be transferred into Express Invoice.

If Express Invoice is available, it will be launched automatically. Edit the rest of your invoice from there.

Screen References - Time Sheet Accounts

The Time Sheet Accounts window displays a list of account names and hourly rates stored in HourGaurd. In the Time Sheet Accounts window, accounts can be added, deleted, or edited.

Selecting an Account

To select an account, first select an existing account from the list of accounts on the Time Sheet Accounts window. Then either click on the Select button on the toolbar or double-click that account name.

Adding a New Account

To add a new account, select the Add button on the toolbar or select Add New Account under the Account menu.

Deleting an Account

To delete an account, first select an existing account from the list of accounts on the Time Sheet Accounts window. Then either select the Delete button on the toolbar or select Delete this Account from the Account menu.

Editing an Account

To edit an account, first select an existing account from the list of accounts on the Time Sheet Accounts window. Then either select the Edit button on the toolbar or select Edit this Account from the Account menu.

Screen References - Task Activity Report

The Task Activity Report window displays a list of active tasks from the account and time period selected. The account and time period for the report is selected on the dialog box before the Task Activity Report window is displayed. From the Task Activity Report window, the displayed report can be printed, saved, emailed, or faxed.

Printing a Report

To print a report, select the Print button on the toolbar or select the Print option under the Report menu. The Print option under the Report menu can also be accessed using the keyboard shortcut, Ctrl+P.

Previewing a Print of a Report

To preview a print of a report, select the Preview button on the toolbar or select the Print Preview option under the Report menu.

Saving a Report

To save a report in PDF format, select the Save button on the toolbar or select the Save as PDF option under the Report menu. The Save as PDF option under the Report menu can also be accessed using the keyboard shortcut, Ctrl+S.

To save a report in CSV format, select the Save as CSV option under the Report menu.

Emailing a Report

To email a report, select the Email button on the toolbar or select the Send to Email option under the Report menu. The Send to Email option under the Report menu can also be accessed using the keyboard shortcut, Ctrl+E.

Faxing a report

To fax a report, select the Fax button on the toolbar or select the Send to Fax option under the Report menu.

Screen References - Invoice Period

Select an account and specify a period. Please click here for additional information on exporting to Express Invoice.

Generate Invoice for Account

Select Account:

Select the account for the invoice.

Select task:

Select the task to be reported under the selected Account Name. If All accounts are selected or if no tasks exist under the Account Name, the menu will be disabled.

Generate Invoice for Period

Select Period:

Select the period for the invoice. Fixed period choices available are this month, last month, this year or last year. Or you can choose Select and then enter any Start Date and End Date you like in the boxes below for the period of the report.

Start date:

Enter the date (inclusive) that the report period will start from. Clicking the down arrow will display a calendar from which the start date for the report can be selected.

End date:

Enter the date (inclusive) that the report period will end on. Clicking the down arrow will display a calendar from which the end date for the report can be selected.

Screen References - Back Up Data

It is essential that you backup your data regularly just in case something goes wrong. Please select one of the options below.

Backup Options

Back up to a Network Folder

This is a good option if you are working in an office. Ask your Network Administrator to create a safe folder on the shared server. Select this folder and click Backup. The entire application folder will be copied to that folder. If something goes wrong (like a hard drive crash) you just copy back the folder and everything will be restored.

Back up to a CD or DVD with Express Burn

Select this option to burn all the data to disc using Express Burn. See www.nch.com.au/burn to learn more about Express Burn.

Back up to a Removable Drive

As an alternative use this option to backup to an external USB hard drive or USB key flash drive. Please consider using MEO to encrypt the files if using removable media.

Screen References - Fax Settings

To send faxes you need an electronic gateway to send direct from your PC using email protocols. Click on the recommended gateways link for more information.

Gateway domain (after @):

To send faxes you must enter the gateway domain (that is the part after @). For example to send a fax to [FaxNumber]@yourfaxco.com enter yourfaxco.com as the domain.

Screen References - Fax Number

Please enter the telephone number for the fax to send to.

Remember this fax number

Tick 'Remember this fax number' to save the number for use in the future.

Screen References - Email Address

Please enter the email address you want to send to. This needs to be the full email address, e.g. tom.jones@example.net . To send to multiple email addresses, separate each address with a comma.For problems with sending an email, please refer to this page.

Remember this email address

If this option is available, tick 'Save this as email ...' to save the email address for use in the future.

Screen References - Print Preview

The Preview window displays each page of the document as it will be printed by the printer.

Print (if available)

You can print the document by clicking the Print button.

This will open the printer selection and settings dialog where you can select which pages of the document to print.

Previous and Next

Use the Previous and Next buttons to view each page of the document when there is more than one page to print.

Close

The Close button closes the window.

Screen References - Task Properties

The properties of the task affect the behavior of the task.

Task name:

Enter the name for this task. This name will be displayed as the task name in the report. Tasks may have their name changed at any time.

Account name:

Choose an account for this task.

Use account hourly rate

Check (tick) this option to use Account hourly rate. Account hourly rate:

This is the hourly rate for this task.

Use this hourly rate

Check (tick) this option to use the following hourly rate. Hourly rate:

This is hourly rate for this task.

Status

Use the task status to modify the current condition of the task.

Task is complete (new work cannot be assigned)

Check (tick) this option to mark the task as completed. A completed task cannot have any further work assigned to it.

Task is closed (do not display)

Check (tick) this option to mark the task as closed. A closed task is the next step on from being marked as completed.

Task Notes

The Task Notes field can be used to further describe the task.

Screen References - Account Properties

The properties of the account affect the behavior of the task.

Account Name:

Enter the name for this account. This name will be displayed as the account name in the report. Accounts may have their name changed at any time.

Default Hourly Rate:

This is default hourly rate for this account.

Screen References - Time Sheet Entry

You can manually enter a time sheet entry if you were away from your desk or you forgot to record a new task. To open the Time Sheet Entry dialog, click the New Entry icon in the toolbar, or press Ctrl+N. The duration of this entry may be entered either as a set of start and end times (Specify time period), or as a duration of time (Specify duration).

Task

Click the down arrow and select the name of the task that this time sheet entry belongs to. A time sheet entry may be reassigned to a different task at any time.

Date:

Select the date for this time sheet entry. Clicking the down arrow will display a calendar from which the date for the time sheet entry can be selected.

A time sheet entry relates to a single day; if the period crosses over into a new day then a new time sheet entry must be added.

Specify time period

Use this to select the start and end times for the period. Start time:

Select the start time for this period.

End time:

Select the end time for this period. The end time must be after the start time for the period.

Specify duration (exact time unspecified)

Use this to enter the amount of time for this time sheet entry when the exact start and end times are unknown.

Notes

Use the Notes field to add a description for the work performed within this time period. These notes will be displayed with the time period on the time sheet display on the main window.

Screen References - Report Period

Generate Report for Account

Select account: Select the account for the report.

Select task: Select the task to be reported under the selected Account Name. If All accounts are selected or if no tasks exist under the Account Name, the menu will be disabled.

Generate Report for Period

Select period: Select the period for the report. Fixed period choices available are the current month, the previous month, the current calendar year or the previous calendar year. Or you can choose Select and then enter any Start Date and End Date you like in the boxes below for the period of the report.

Start date:

Enter the date (inclusive) that the report period will start from. Clicking the down arrow will display a calendar from which the start date for the report can be selected.

End date:

Enter the date (inclusive) that the report period will end on. Clicking the down arrow will display a calendar from which the end date for the report can be selected.

Screen References - Options ~ General

Run on Startup

HourGuard can be configured to run automatically whenever a user logs on to the computer.

Run this program automatically when you login

Tick this option if you want this program to run automatically when a user logs on to the computer. Specify for whom HourGuard will automatically startup by selecting one of the following options from the pull down list:

- Start when any user logs on : to start HourGuard whenever any person logs on to the computer.
- Start when this user logs on only : to start HourGuard only when the current user logs on to the computer.

If you have problems with these settings in Windows Vista, you should check that you run the program with Administrator privileges. For example, you can right click on the program on the desktop and choose Run as admin.

Resume previous task on startup

Check (tick) this option to resume at startup any previous task that was active when HourGuard was last shutdown.

Automatic Idle Start and Stop

The task can be automatically marked as being idle if there is no user activity detected on this computer.

Stop active task if idle

Check (tick) this option to automatically mark the task as being idle if there is no activity detected on this computer within a specified time (see next item).Idle time (mins):

Enter the maximum number of minutes of user inactivity before the task is marked as being idle. This value must be in the range of 10 to 120 minutes.

Resume previous task when computer becomes active again

Check (tick) this option to resume any task that has become idle due to the lack of user activity on the computer when the user becomes active again.

Default Options

Default hourly rate for new accounts:

This is the default hourly rate that will be used as the default for new accounts.

Default start time for first entry:

This start time will be used as default when the first entry for the day is entered.

Screen References - Options ~ Other

Regional Format Settings

Currency symbol:

This is the symbol used for money in your country - usually $.

Currency order:

Use this option to select if the currency symbol is before the number (e.g., $10.00) or after the number (e.g., 10.00$).

Currency digits:

Use this option to specify how many digits are used to represent the decimal fraction of a currency value (e.g., 2 -> $10.00).

Decimal symbol:

This is the symbol used for the decimal point - usually a dot everywhere but in Europe where a comma is used.

Thousands symbol:

This is the symbol used to separate thousands - usually a comma.

Paper size:

This is the paper size used for pdf generation and when the default printer is used.

Send Settings

Email Settings...

Please refer to Knowledge Base Articles - Problems when sending email using our software for more information.

Fax Settings...

Change fax settings.

Hotkeys

This is the Hotkey for easily starting and stopping the current task.