AIM Timecard Quick Reference - Mac OS

Opening the Timecard Module

When the Timecard module opens it will open automatically to the Time/Entry tab on the current date.

You can make the Timecard open automatically to the Time/Shortcuts tab by setting the Always Open to Time Shortcuts preferences under the Prefs/Personal tab.

Troubleshooting Tips

On rare occasions (usually when previewing) AIM may appear to be stuck. When this happens press the **Enter** key 2 or 3 times.

On occasion some calculated fields may not update while editing. To save your changes and update the screen press **Command–S**.

When the Report Preview and other modal windows are front-most the window widgets (close, minimize, zoom) will not function. Click on a Continue, Cancel or OK button within the front-most window or press **Command–W**.

Productivity Tips

To change the magnification of the window while editing or previewing use **Command–= (plus)** or **Command–– (minus)**.

Use **Command–[** and **Command–]** to move quickly between tabs without moving your hands from the keyboard.

When editing fields that have drop-down menus you can toggle the drop-down menu on or off using the **Escape** key.

Creating Time Entries

To create a new time entry you must be on the Time/Entry tab. You can also make entries using Shortcuts. See the section on Using Shortcuts for more information.

To create a new entry click on the New button, select New Time Entry from the Timecard menu, or press **Command–N** on the keyboard.

You can also begin a new entry by entering data in any of the fields in the last blank line in the portal area.

Editing Time Entries

The fields on a time entry can be edited in any order. However, you will find it easiest to edit them in the tab order from left to right. You can tab from any field to the next by pressing the **Tab** key. You can move to the previous field by pressing **Shift-Tab**.

Editing Project Numbers

Enter a project number from the drop-down list in the Project No field. If you tab into the field the drop-down menu will list projects in alphabetical order. When you select a project number from the list your cursor will automatically be advanced to the Phase field.

Editing Phase Numbers

Enter a phase number from the drop-down list in the Phase field. Phases are always listed in numerical order. When you select a phase number from the list your cursor will automatically be advanced to the Task field.

Editing Task Numbers

Enter a Task number in the Task field. Tasks are always listed in numerical order. When you select a task number from the list your cursor will automatically be advanced to the Description field.

Editing Descriptions and Notes

Enter a description of the entry in the Description field. Entries can be of almost any length. The field will expand automatically. Descriptions are generally composed of properly formed sentences understandable by a lay person.

In the Notes field enter notes about the entry. Notes are generally for internal use only.

Editing Start and Stop Times

In the Start and Stop fields you can enter the time the activity started and stopped. These fields are optional. The current time will be automatically entered in the fields when you click on them. Only valid times are permitted. The time difference will be automatically calculated and appear in the Hours field in gray text.

Editing Hours

In the hours field enter the number of hours for the entry. If you entered start and stop times there is no need to enter a value. If you enter both start and stop times and make an entry in the Hours field a red indicator will appear if the Hours entered does not match the difference between the Start and Stop time fields.

Rounding Time Entries

You can round time entries to the nearest one tenth or one quarter hour using the Round Time Entries menu item in the Edit menu.

Marking an Entry Overtime

O If a time entry is overtime check the O checkbox. Otherwise, leave the checkbox unchecked.

Marking an Entry Billable

B In most instances the Billable checkbox will be set for you automatically when you enter a task number. The billable checkbox will be set separately on a task by task basis. You can change the checkbox if you know it should be set the other way.

Interpreting Entry Errors

E The E field lists errors for the entry. More than one error may be listed in the field. To view all the errors for an entry place your cursor in the field. The error codes appear on your timecard when printed.

Selecting and Marking Entries

To copy, duplicate, or delete entries they must first be selected or marked. Marking entries allows you to operate on more than one entry at a time.

1 To select an entry click on the entry number on the left side of the entry. The entry will become shaded.

To mark an entry check the box in the Mark column. More than one entry can be marked at a time.

Duplicating Entries

To duplicate a single entry select the entry and then click on the Duplicate button. To duplicate more than one entry mark the entries before clicking on the Duplicate button.

Copying Entries

To copy a single entry select the entry and then click on the Copy button or select Copy Time Entry from the Edit menu or press **Command-Option-C**. To copy more than one entry mark the entries before copying. Entries are placed on a clipboard for pasting elsewhere. Any entries previously on the clipboard are replaced.

Pasting Entries

To paste entries on the clipboard click on the Paste button or select Paste Time Entryf rom the Edit menu or press **Command-Option-V**. All of the entries will be pasted at the end of the current list of entries. Only like entries can be pasted. You cannot paste time entries into expense entries or expense entries into time entries. You can paste entries from from day to another, from one staff member to another or to or from shortcuts.

Inserting Text

To insert text from another source and remove any formatting place your cursor where the text is to be inserted and click on the Insert button.

Viewing Entries in Form View

The Time/Entry tab generally shows entries in List view. To view entries in Form view click on the Form button in the upper left corner of the portal. The Form view shows an expanded view of of a single entry. Errors are also displayed for the entry. Use the scroll bar on the right move from one entry to another.

Going to Next/Previous Entries

You can go from one entry to the previous or next entry using the Go Prev or Go Next buttons. This is most useful when viewing entries in Form view.

Sorting Entries

You can sort entries by clicking on any of the column headings in black text at the top of the portal area. To sort entries by their original entry order click on the top of the Item Number column.

Viewing Different Dates

The timecard always opens to the current date, You can navigate to other dates in the past or future by several means. When the displayed date is not the current date the day name and date will be displayed in red near the top of the timecard window.

You can change the date to the previous day or next day using the Previous or Next buttons on either side of the Date field.

You can change the date to a specific date by editing the date in the date field. You can type in any date or select a date from the drop-down menu. Or, you can use the Calendar pop-up window to select a date.

Note that it may not be possible to navigate to some dates in the past if the Database Administrator has restricted navigation prior to a specified date.

Viewing Another Person's Timecard

To view the timecard entries for another staff person click on the Staff field and select their name from the drop-down menu. Staff member's names are listed in alphabetical order by first name. To view your entries again select your name from the drop-down menu.

Note: when a staff person other than the currently logged in user is specified the staff person's ID and name will appear in red in the upper right corner of the Timecard window.

Using Time Shortcuts

Time shortcuts are a convenient way to store frequently used time entries and enter them quickly and easily. Shortcuts reduce the tedium in making entries by allowing you to make one or more entries all at once without having to edit each field individually.

Time shortcuts are stored under the Time/Shortcuts tab. You can create and edit shortcuts just like you would normal time entries. You can also copy time entries and paste them into your shortcuts. Shortcuts do not need to be complete entries. You can leave any of the fields blank and fill them in after using the shortcut to create a time entry.

Shortcuts can be filtered by staff person and by project using the Filter By fields above the portal area. To view just your own shortcuts click on the Show My Shortcuts button. To view all shortcuts click on the Show All Shortcuts button.

To enter a single time shortcut go to the Time/Shortcuts tab. Click on the red paste button on the shortcut you would like to enter.

To enter multiple time shortcuts go to the Time/Shortcuts tab. Mark the entries you would like to enter. Click on the Enter √ Marked Shortcuts button near the bottom of the portal area.

Shortcuts are always entered into the timecard for the currently specified date and staff member. If you specified "One Click Shortcut Entry" under the Prefs/Personal tab you will taken to the Time/Entry tab automatically. Otherwise you will remain on the Time/Shortcuts tab.

Creating Expense Entries

Expense entries and expense shortcuts work exactly the same way as time entries and shortcuts. The only difference is that instead of phases you have expense categories and instead of tasks you have expense items.

Previewing & Printing Reports

To print a time card or expense report click on the Print button near the top of the window or select Print from the Timecard menu or press **Command-P** on your keyboard.

Setting Your Personal Preferences

Under the Prefs/Person tab are your personal preferences that effect the way the timecard system behaves. Temporary preferences are reset each time you open the Timecard module. They can be used to temporarily change the week end day and the period which effect reporting. The remaining temporary preferences effect the display. These can be turned off on very slow systems to speed up the display.

Personal preferences are persistent but will need to be reset each time the Timecard module is updated by the developer. The Autoenter Shortcuts option will automatically enter your personal marked shortcuts into the timecard for the current date and/or future dates. This saves time when the same entries are made each day.

The Enable One Click Shortcut Entry option will return you to the entry tab after using a shortcut to create a new entry. Holding down the Option key reverses this behavior.

The Always Open to Time Shortcuts option takes you to the Time/Shortcuts tab every time you navigate to the Timecard module. This speeds up the process of making a time entry for those who use time shortcuts heavily.

Notes