TimeWriter Standard

Manual

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Table of contents

Introduction . . . 7
Multi-Platform . . . 8
Installation . . . 9
Local or Cloud database . . . 10
Migration . . . 11
Transferring data (existing TimeWriter users) . . . 12
Proxy settings . . . 13
Terminology . . . 14
Modules . . . 16
Input . . . 17
Week grid . . . 17
Time slot details . . . 22
Travel costs . . . 24
Expenses . . . 25
Recurring tasks . . . 26
Link calendars . . . 27
Week list . . . 30
Fixed hours list . . . 31
Tasks . . . 33
Manage task groups . . . 34
Manage/edit tasks . . . 36
Filter tasks . . . 41
Master data . . . 42
Employee . . . 43
Customer, Product and Activity . . . 47
Restore deleted-marking . . . 49
Tariff agreement . . . 50
Tariff agreement examples . . . 55
Leave . . . 57
Budgets . . . 59
Demo master data . . . 64
Import . . . 65
Maintenance and settings . . . 66
Settings . . . 66

Authorizations and combinations . . . 66
Backup reminder . . . 66
Blocking . . . 66
Company logo . . . 67
Hours checking . . . 67
Leave . . . 67
Password strength . . . 68
Login . . . 68
Reporting . . . 69
Special days . . . 69
TimeWriter API . . . 70
Update check . . . 70
Week grid . . . 70
Workplace . . . 72
Fields . . . 73
Aspect types . . . 73
User defined fields . . . 74
Maintenance tasks . . . 75
500 Cleanup . . . 75
530 Merge aspects . . . 75
540 Swap aspects . . . 75
550 Adjust multiple hour bookings . . . 76
Reporting . . . 77
Reports . . . 78
Exports . . . 80
Grid views . . . 82
Selection filters . . . 84
Report designer . . . 87
Auditing . . . 92
Leave survey . . . 92
Budget auditing . . . 93
Invoicing . . . 95
Settings . . . 95
Company data . . . 95
Customer data . . . 95
Invoicing . . . 96
Invoice layout . . . 97
E-mail . . . 98
E-mail layout . . . 99

Accounting . . . 100
No link to accounting . . . 101
Export journal entries SnelStart . . . 103
Export journal entries Exact . . . 105
Export journal entries Reeleezee . . . 107
Stip-T API . . . 109
SnelStart API . . . 111
Exact API sales invoices . . . 113
Exact API journal entries . . . 115
e-Boekhouden API . . . 118
KING Finance API . . . 120
Yuki API . . . 122
Visma eAccounting API . . . 123
Asperion API . . . 126
PerfectView API . . . 128
Moneybird API . . . 129
Generate orders . . . 132
Invoice . . . 133

Personal settings . . . 135
General . . . 136
View settings . . . 137
Week grid . . . 138
Fixed hours list . . . 139

TimeWriter Mobile . . . 140

Web client . . . 141
Week grid . . . 143
Reporting . . . 145
Settings . . . 146

Managing application and database (ControlPanelStd) . . . 147
Manage database . . . 148
Set up database . . . 148
Backup and restore database . . . 148
Transfer database . . . 148
Block database . . . 149
Fix database . . . 149

Archive database 149
Import from old / other TimeWriter database 150
Update check 153
Send files to XSO support 154

TimeWriter API 155

Index 156

Introduction

TimeWriter allows you to quickly and efficiently register hours worked and allocate them to customers or projects. The easy to use Week grid lets you schedule hourly bookings/appointments. Hourly bookings can include multiple details. These can be predetermined data, but can also be free work descriptions. The reporting function can be used to produce clear overviews of hours worked over random time periods.

Apart from this basic functionality TimeWriter also offers functions for monitoring budgets and for performing leave administration.

Unique TimeWriter Standard properties

Some of the unique properties of TimeWriter Standard include:

- Very simple to use; no training course required.
- Intended for use by 2 to (approx.) 25 concurrent users.
- Simply create hourly bookings in the Week grid or the Fixed hours list.
- Maximum of 3 booking contexts (e.g. Customer, Product, Activity).
- Enter data in user defined fields for master data and hourly bookings.
- Use of tariff agreements.
- Clear default reports and possibility to design own reports.
- Separable functionality for users and administrators.
- Terminology is matched to that commonly used within the organisation.
- Local or cloud database.
- Enter hourly bookings via internet browser from anywhere. **
- Desktop client for Windows and OS-X (Mac).
- Web client for all platforms and mobile devices.

*** Only available via the cloud database.*

Multi-Platform

TimeWriter can be used via various platforms (Operating Systems).

There are full desktop clients for **Windows** and **OS X** (Mac).
For mobile devices and all desktops (also for example **Linux**), the Web client can be used. **

A TimeWriter license includes its use on all platforms.

Overview

Platform	Client type	Functionality
All (also for example Linux)	Web Client (from a Web browser)	Complete; administration, registration, reporting **
Windows	Native Desktop Client	Complete; administration, registration, reporting
OS X (Mac)	Native Desktop Client	Complete; administration, registration, reporting
Mobile devices	Web Client	Depending on size: only registration or complete (administration, registration, reporting) **

*** Only in combination with a cloud database.*

Installation

You can install TimeWriter Standard on your computer or file server by using the installation wizard. Download the latest version from https://www.timewriter.com/download. The wizard will guide your installation process to ensure that the files go to the desired location.

It is preferable that you do not place the program in your C:\Program files\ folder. If you do, Windows will write the data onto an unpredictable location, which makes it difficult if the software should need to be transferred to another location at some other stage.

If you choose the default settings, all files will go to the C:\TimeWriterV5\ folder.

You will find the following programs in the installation folder:

Program	Aim
\client\twClientStd	This is the application for daily usage. Per employee you can setup whether it is TimeWriter administrator or not. **Every employee can:** • Register hours. • Generate reports. **Administrators can also:** • Managing master data. • Setting up system settings. • Create and edit reports.
\control\ControlPanelStd	• Setting up local database / cloud database. • Create / restore backup. • Conversion of old TimeWriter version. • Update check. • Send files to support service. Program operations are explained in the ControlPanelStd chapter.
\report\twReportStd	This program can be used if you only want to use the reporting function.

Files needed for listed programs are stored in the following folders:

Folder	Aim
\data\	• TimeWriter database. **
\data\xso_standard\default\backup\	• Backup files created with ControlPanelStd are stored in this folder. **
\lib\	• Various libraries required by the different programs.

*** If a cloud database is to be used, the database will be located at an internet location and this folder will not be used to store the new hour bookings*

Local or Cloud database

TimeWriter works with both a local or cloud database. An explanation of how this works follows below.

Local database

- The local database is located on your own computer or within the same network. This is a trusted internal location and is typically not accessible from outside of the local network.
- It is only possible to work with the desktop client.
- Optimal performance. Speed of reading and writing from the database does not depend on an internet connection.

Cloud database

- The cloud database is located on an internet server (http://std.cloud.timewriter.nl/).
- It is possible to work with the desktop client.
- It is possible to work with the web client via a web browser.
- Regular backups will be run on the server.
- Speed of reading and writing from the database is dependent on an internet connection.

If you want to use TimeWriter on **both** Windows and Mac OS X, the best option is to put the database in the cloud.

N.B.: For communication with the server in the cloud, a **TCP/IP** connection will be set up to **std.cloud.timewriter.nl** on port **9093**.

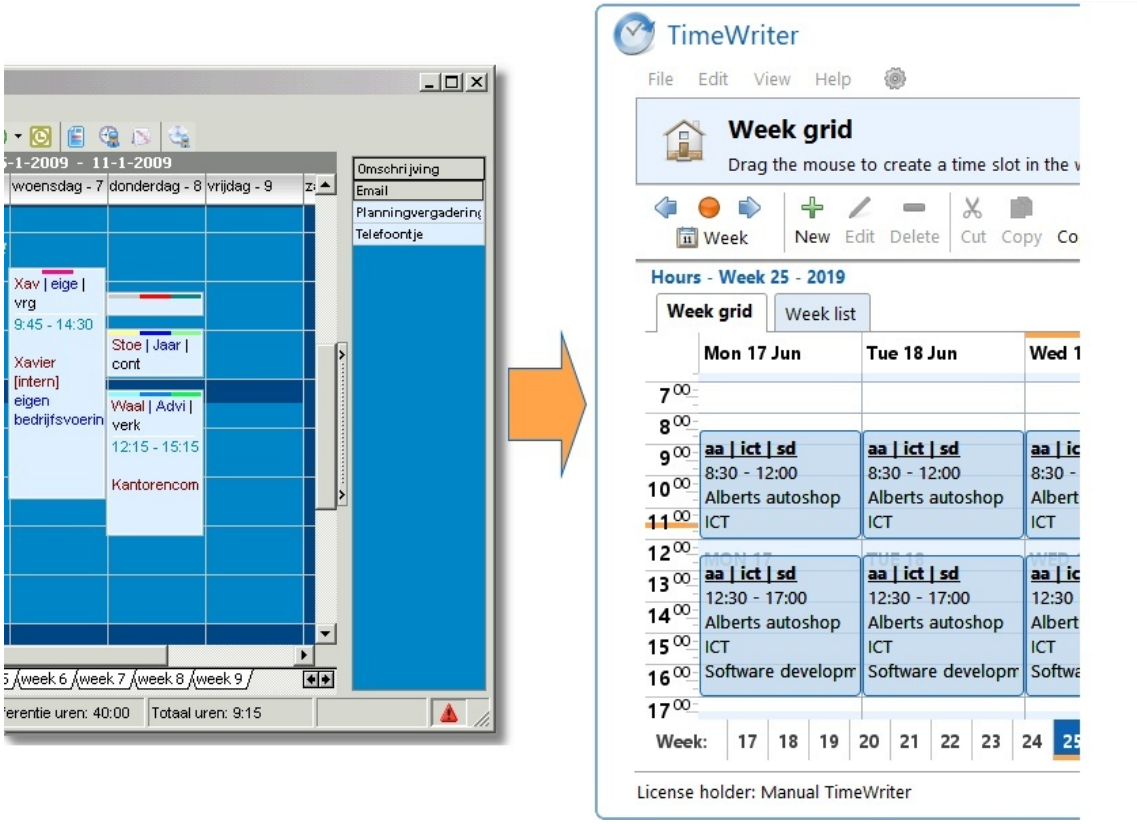
Migration

To migrate from a previous version of TimeWriter Standaard V4.x perform the following steps:

- Download the new software
- Install the new software
- Copy the license form the old environment to the new environment
  *(TimeWriterV4\twsAdmin**twriter.lic** -> TimeWriterV5\lib**twriter.lic**)*
- Select a database configuration
- Import data from old environment

Transferring data (existing TimeWriter users)

Do you want to transfer an older version of TimeWriter to this new TimeWriter version? You can do this via the Control Panel | Import from old/other TimeWriter database.



Proxy settings

The TimeWriter desktop application sometimes queries our web server to:

- Check for updates.
- Download an update.
- Request or renew a license.
- Send an error report.
- Send a database to XSO support (in case of a problem).

Sometimes this network traffic must be passed through a proxy server. During the installation of TimeWriter the use of a proxy server can be set up. These settings then will be used by TimeWriter afterward.

When you afterward need to change the proxy settings, you can do so by editing the file **/lib/timewriter.ini**.
The file contains the following proxy settings:

[HttpTimeWriterProxyServer]
#host = The IP-address or server name of the proxy server.
host =
#port = The port number of the proxy server.
port =
#username = If authentication is required you can setup the user name here.
username =
#password = The associated password can be setup here. You can write the password in plain, readable text. When TimeWriter uses this password, it will encrypt it.
password =

Terminology

This manual and the application will use terms/words that may require some explanation. You will find a list of some of these terms/words together with an explanation below.

Archive

An archive is a copy of a TimeWriter administration. An archive can be created via the **\control\ControlPanelStd program.** (see Archive database). An existing archive can be opened in TimeWriter by choosing menu option: **File | Open archive**. In the status bar you will see red text appear in the left bottom corner with the archive title that is currently open. The open archive can be edited in the same way as the main (Default) administration.

Aspect

An aspect is master data that can be used to create hour bookings. Aspects can be given a name so that it fits in with terminology used within your organisation, such as Customer, Product, Project, Activity and Phase.

Browser

see Web browser.

Cloud database

Is a database located on the internet. See Local database or Cloud database for more information.

Database

A file which stores all data, may also be called Administration.

File server

A computer within a network onto which files can be stored.

Local database

A database on your own computer or within a local network. See Local database or Cloud database for further information.

Modules

Modules are parts of the application and each module has its own functionality.

Time slot

A time slot is a period within a day between two set times.

Web browser

A program used to view pages on the internet, such as Internet Explorer, Google Chrome, Mozilla Firefox, and Safari.

URL

A URL is a structured name that refers to a piece of data, such as an internet address.

User defined fields

User-defined fields can be used to attach additional information to aspects and hour bookings. TimeWriter Standard includes a fixed number of available user fields. For these user-defined fields, names can be set up and whether or not a field is mandatory.

Modules

The program for daily use of TimeWriter is **\client\twClientStd**. twClientStd is subdivided into different modules. TimeWriter starts up in the **Module explorer**. A module will appear by clicking on its name/title.

The following module groups are only available for employees who are set up as TimeWriter administrators:

- Master data
- Maintenance and settings
- Invoicing

The Module explorer can be brought to the again by clicking on the **Home** button:

Input

See also www.timewriter.com/support/video for instruction video's how to create hourly bookings.

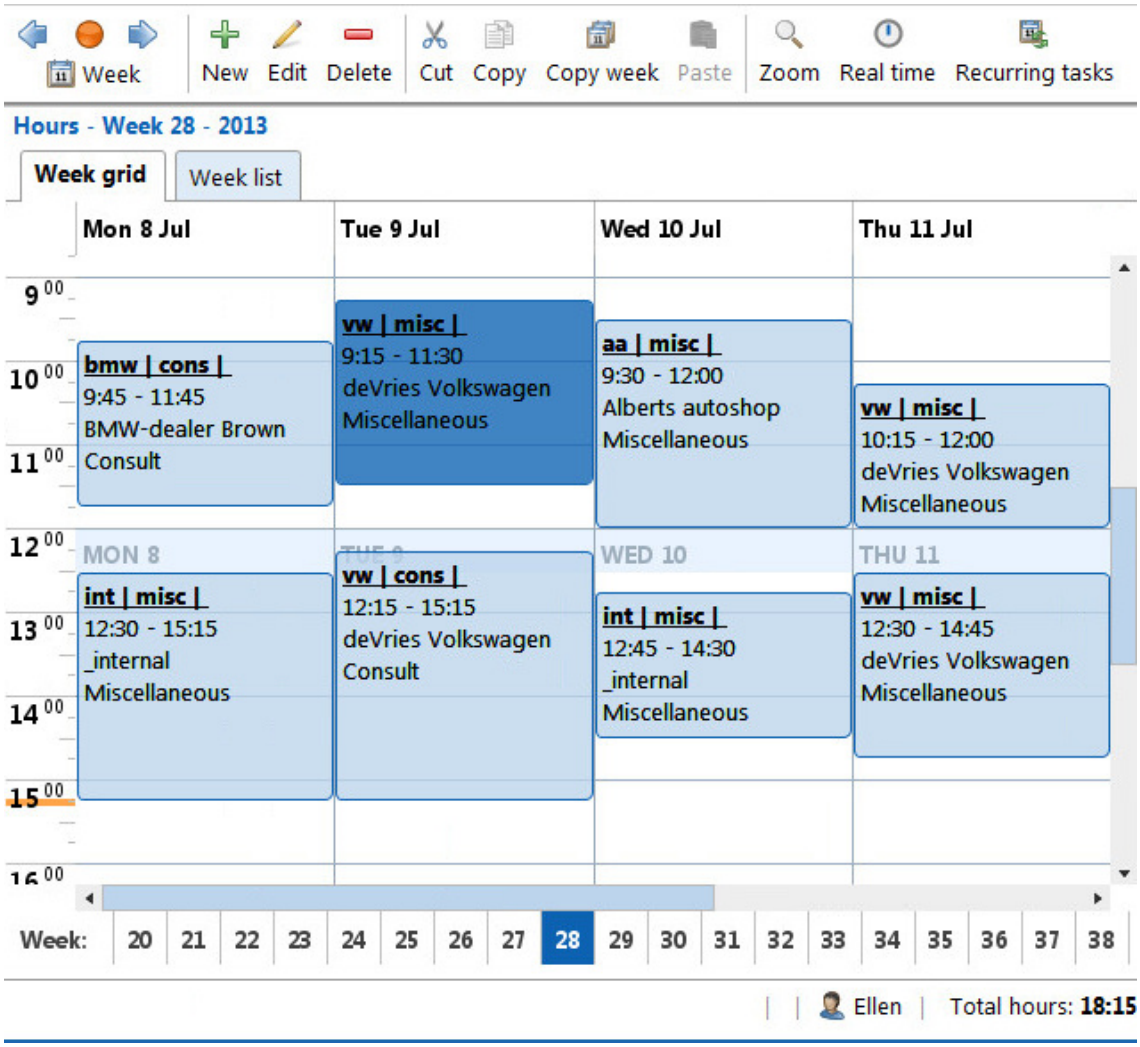
Hours can be entered in 3 different ways. All three ways are described in the next chapters:

- via the Week grid
- via the Week list
- via the Fixed hours list

Week grid

See also www.timewriter.com/support/video for instruction video's how to create hourly bookings.

The current week is shown by default on starting up the program. The left hand side shows the hours of the day, the days of the week are at the top, and at the bottom you will find the numbers of the week. The current time, day and week are highlighted in orange. The status bar at the bottom shows the total hours of the current week.



The buttons have the following functions:

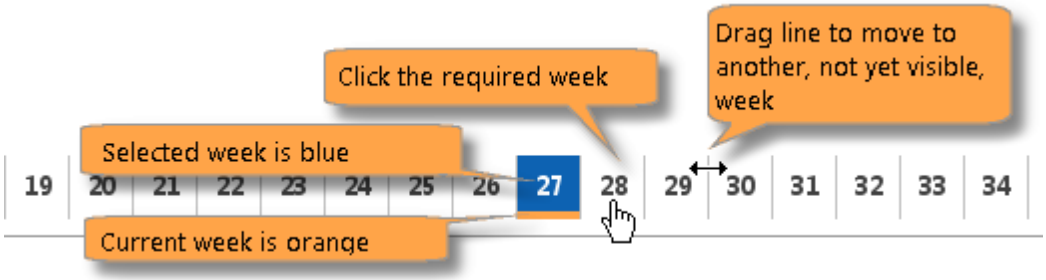
TimeWriter Standard

Button(s)	Keyboard	Function
		Navigate to previous week.
		Navigate to current week.
		Navigate to the next week.
Week		Navigate to a random week via a calendar (popup).
New	Insert	Make a new appointment/booking (for the current day, directly following any previously entered booking).
Edit	Ctrl + Enter	Edit the selected booking.
Delete	Delete	Delete the selected booking.
Cut	Ctrl + X	Cut the selected booking. Remove the booking and store it in memory so it can be pasted (into another week).
Copy	Ctrl + C	Copy the selected booking(s). Store the selected booking(s) in memory (see Copying a time slot).
Copy week	Ctrl + W	Copy all booking in current week to another week.
Paste	Ctrl + V	Paste the booking(s) from memory.
Zoom		Use this button to set the zoom level of the Week grid.
Real time		Use this button to start a stopwatch to record the time used for a task in progress. After stopping the stopwatch the recorded time will be registered.
Search	Ctrl + F	Search for bookings in the complete history.
Recurring tasks		Use this button to add and manage recurring tasks.
Mobile		Here the logged in user can scan a personal QR code with his/her phone to start the web client on that phone. Invalid TimeWriter mobile bookings from the old mobile apps can also be validated here. If there are bookings to validate, the button will show the number of bookings to validate.
Calendars		Set the properties of external calendars for linking with TimeWriter (see Link calendars)
Workplace		Indicate **where** someone worked on which day. The reporting module contains a number of separate workplace reports.

Select another week

You can navigate to another week in various ways:

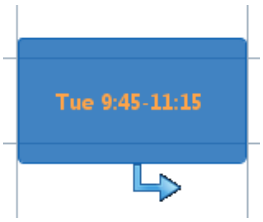
1. Via the toolbar buttons (see buttons and functions).
2. Via the week navigator below in the Week grid.



Creating a new time slot in the week grid

Create a new time slot as follows:

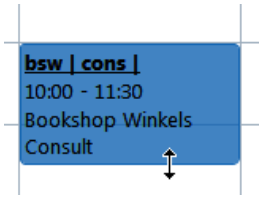
1. Select the week you need.
2. Click on the starting time (and day) in the Week grid. Keep the mouse clicked and drag to the end time you need.
3. By moving the mouse to the right, you can select more days in one go. A separate booking will be made for each day.
4. Release the mouse at the end time that you need.
5. A new window will appear. The date and times will be entered automatically.
6. Enter the rest of the relevant details (see Time slot details).
7. Click on Save.



Editing a time slot in the week grid

Time slots can simply be adjusted within selected weeks. They can be moved by hovering the mouse over them; when the cursor changes to the time slot can be moved. Click on the time slot and drag it to the required time. This can also be done to another day of the week.

Time slots can also be shortened or lengthened. By hovering over the top- or bottom line, the cursor will change to . Then click the mouse and drag it to the time you want.



Copying a time slot

Within the current week, 1 time slot can be copied by keeping the [Ctrl] key pressed and left clicking the mouse on a time slot. Then just drag this time slot to its new location.
When using [Ctrl] + right click instead [Ctrl] + left click, after dragging the time slot, you will be presented with a dialog asking if you want to Copy or Move the time slot.

Copying can also be done by using the **Copy** button:

1. Select / highlight the time slots to be copied and click on **Copy**.
2. Go to the week into which the time slot needs to be pasted.
3. Click on **Paste** to enter the time slots into a new location.
4. The pasted bookings will be created on the same time and day of the week as the original bookings and may overlap with existing bookings. (see Overlapping bookings).

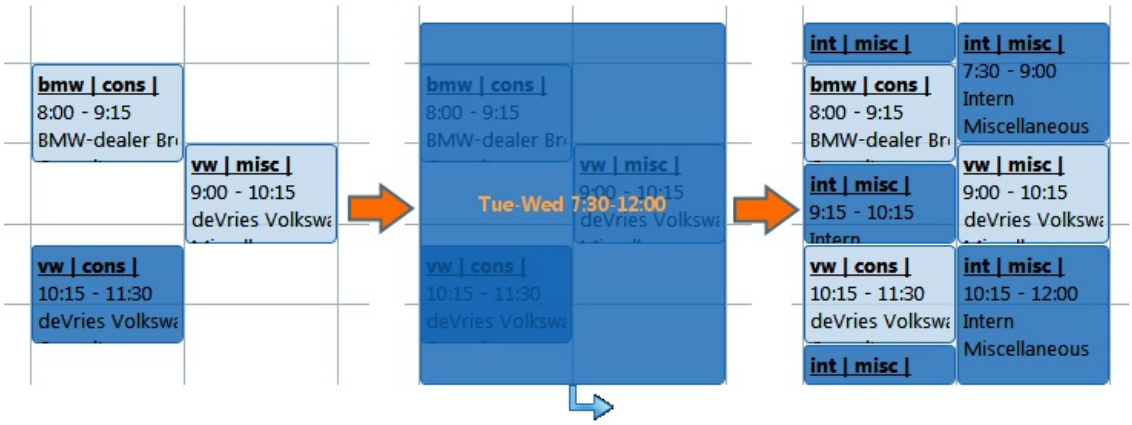
To use the keyboard for **Copying and Pasting**, use the [Ctrl]+[C] and [Ctrl]+[V] key combinations respectively.

Filling in gaps

By default, when a time slot is drawn, overlapping bookings are made over existing time slots.
To fill the time remaining between existing time slots instead, you must first turn on the setting "Fill in gaps" under **Maintenance and settings | Settings | Week grid**.

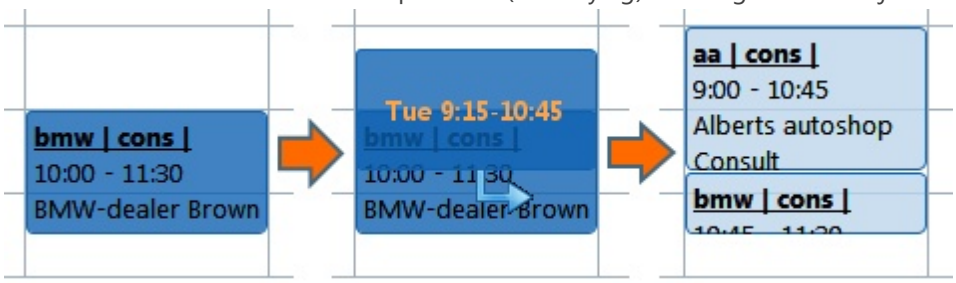
You can fill in gaps in the week quickly by:

1. Dragging a time slot across the existing ones.
2. Filling in the relevant details and clicking on Save.
3. TimeWriter will create bookings with your entered details for all empty time slot spaces.



Overwriting a time slot

It is possible to overwrite one or more existing time slots with a new one. Hold the [Shift] key and create a new time slot by using the mouse. When you release the mouse and you have filled in the data for the new time slot the previous (underlying) bookings will be adjusted or removed.



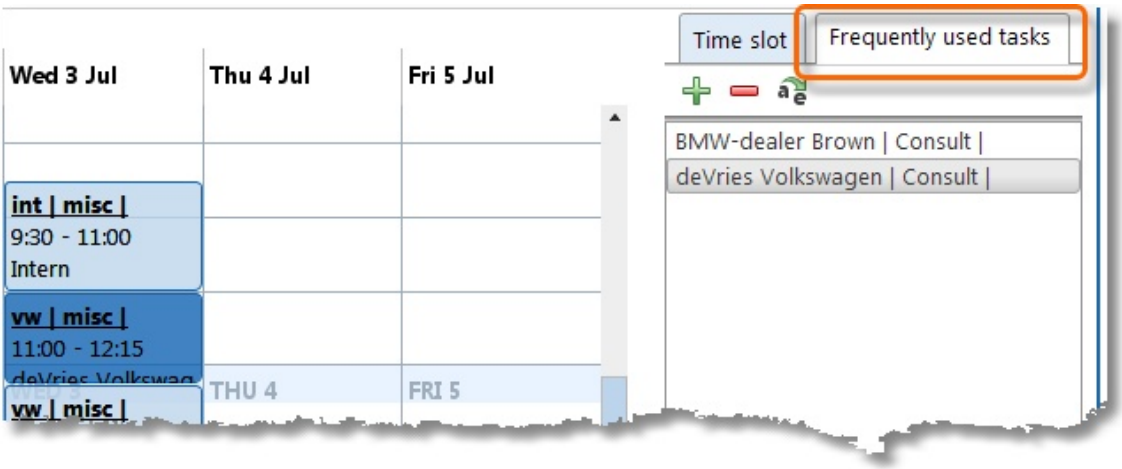
Overlapping bookings

Any overlapping bookings will be visible in the Week grid. These overlaps will be highlighted in red. These can be adjusted by simply changing one or both of them. See Editing a time slot in the Week grid for how to do this.

With button overlaps can be solved automatically (only available with overlapping bookings). For settings see: Personal settings | General

Frequently used tasks

It is possible to create frequently used tasks for time slots that are commonly expected to recur. To do this, open the **Frequently used tasks** tab, located to the right of the Week grid.



Creating a new frequently used task

1. Select a time slot in the Week grid and click on on the frequently used tasks tab.
   or: Select a time slot in the Week grid, keep the mouse clicked and drag the selected time slot to the frequently used tasks tab.
2. A window will appear for you to enter details about the frequently used task.

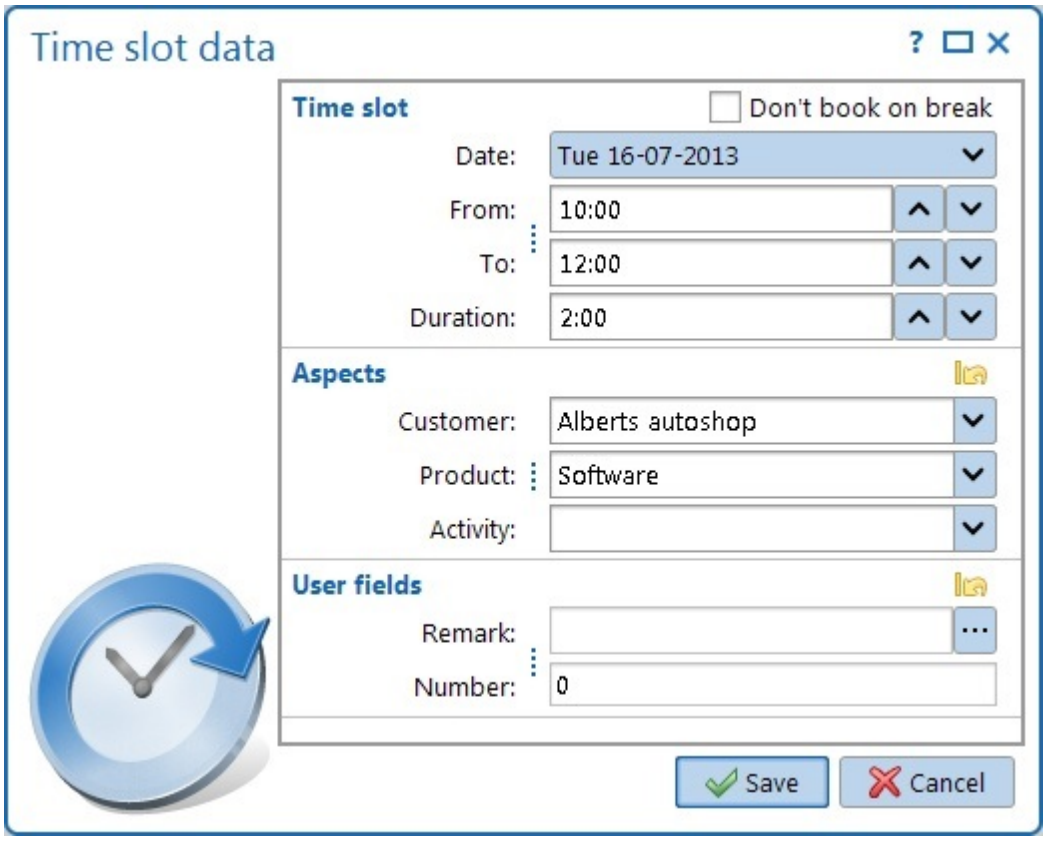
Placing frequently used task into the week grid

1. Select the frequently used task from the list.
2. Keeping the mouse clicked, drag the selected task to the required location in the Week grid.
3. If necessary, edit the required details in the opened time slot window and save them.

A frequently used task can be given a useful name by clicking on .
To delete frequently used tasks from the list, use the button.

Time slot details

Every hourly booking always falls within a time slot on one day and only includes a number of recognisable characteristics such as Date, From, To, Aspects (see Customer and Product in example below) and possibly also extra details under User fields, such as Remark and Number.



Date	Used to select a day of the week.
From / To	Used to change start- and end times of hourly bookings. The arrow keys can be used to increase or decrease the time slot by minimum time units. Times can also be entered by using the keyboard.
Duration	Duration equals the difference between the start- and end times. Duration is calculated automatically if start and / or end times change. It is also possible to alter start- and end times and in this case the new durations will also be calculated automatically. **TIP**: You can also use the Ctrl+ and Ctrl- keys to set the duration from anywhere in this window.
Aspects (e.g. Customer and Product in the example above)	Used to enter the previously entered aspects. Click on the arrow button to open the list and select the required aspect. **TIP**: It is possible to type in text here. The list will then be limited to those aspects that contain typed in text.
Remark	Use this to type in free text, such as the type of work done. Use the ... button to open an editor window for entering multiple lines.
Number	Use this to enter a number, such as the travelled distance.

Reset

The Aspects and User fields sections both contain a button . Click this button to respectively reset (delete) any of the previously entered aspect or user field data.

Excluding breaks

If a booking is saved and the time period includes a break, the program can ask whether the booking should be split. If the answer is affirmative, the time slot can be divided or shortened to reflect the preset break periods.

Note: This question is only asked if when 'Do not book on lunch break' is activated in **Maintenance and settings | Settings | Week grid** when making bookings and the time slot covers a break period.

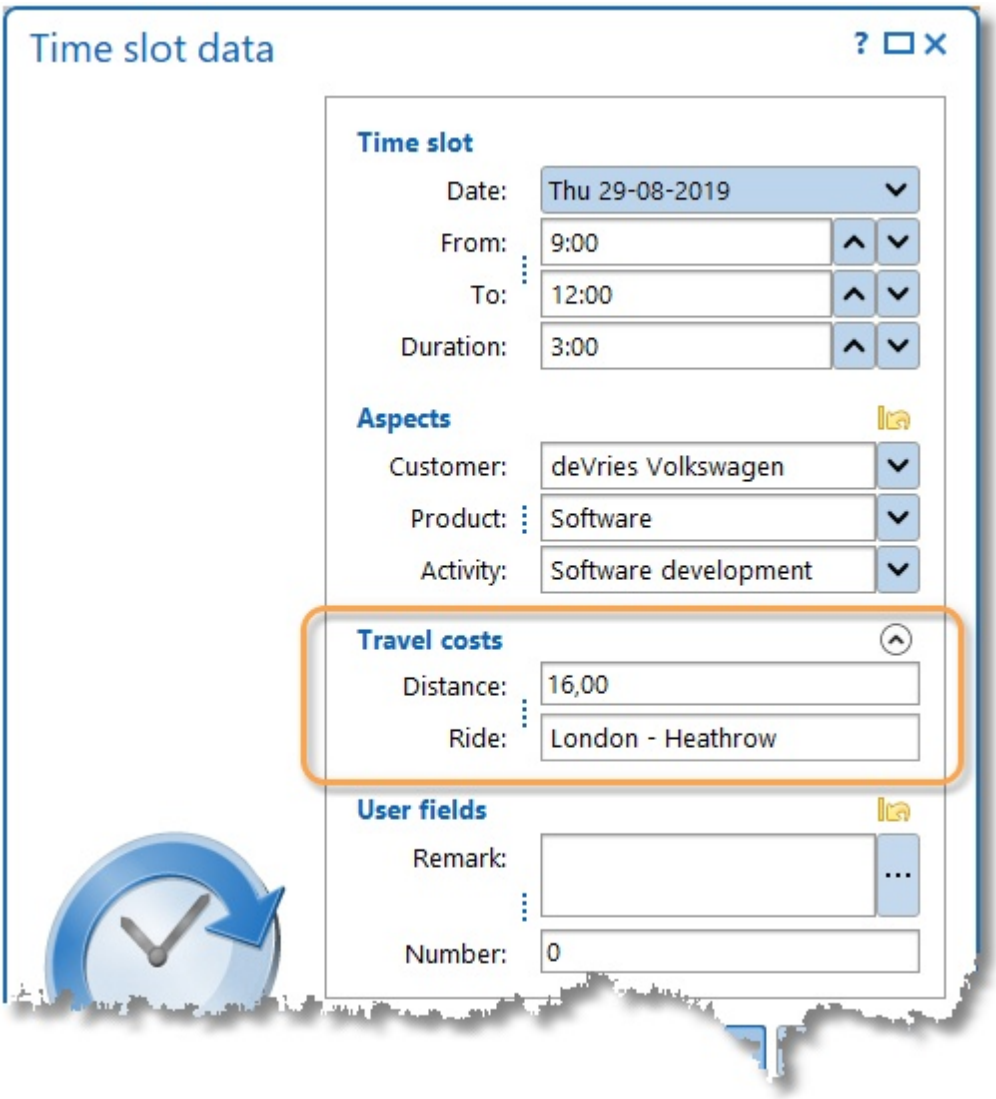
Information

Once a time slot has been saved all of its details can be checked from within the Week grid. Time slot details for selected hourly bookings will be shown on the right. Additional information that is shown here includes:

Overhead	If overhead is ticked for one of the aspects, the hourly booking will also become overhead.
Tariff	This shows the calculated tariff together with the name of the Tariff agreement that applies to the hourly booking.

Travel costs

Enter the distance and ride data at the time slot data.

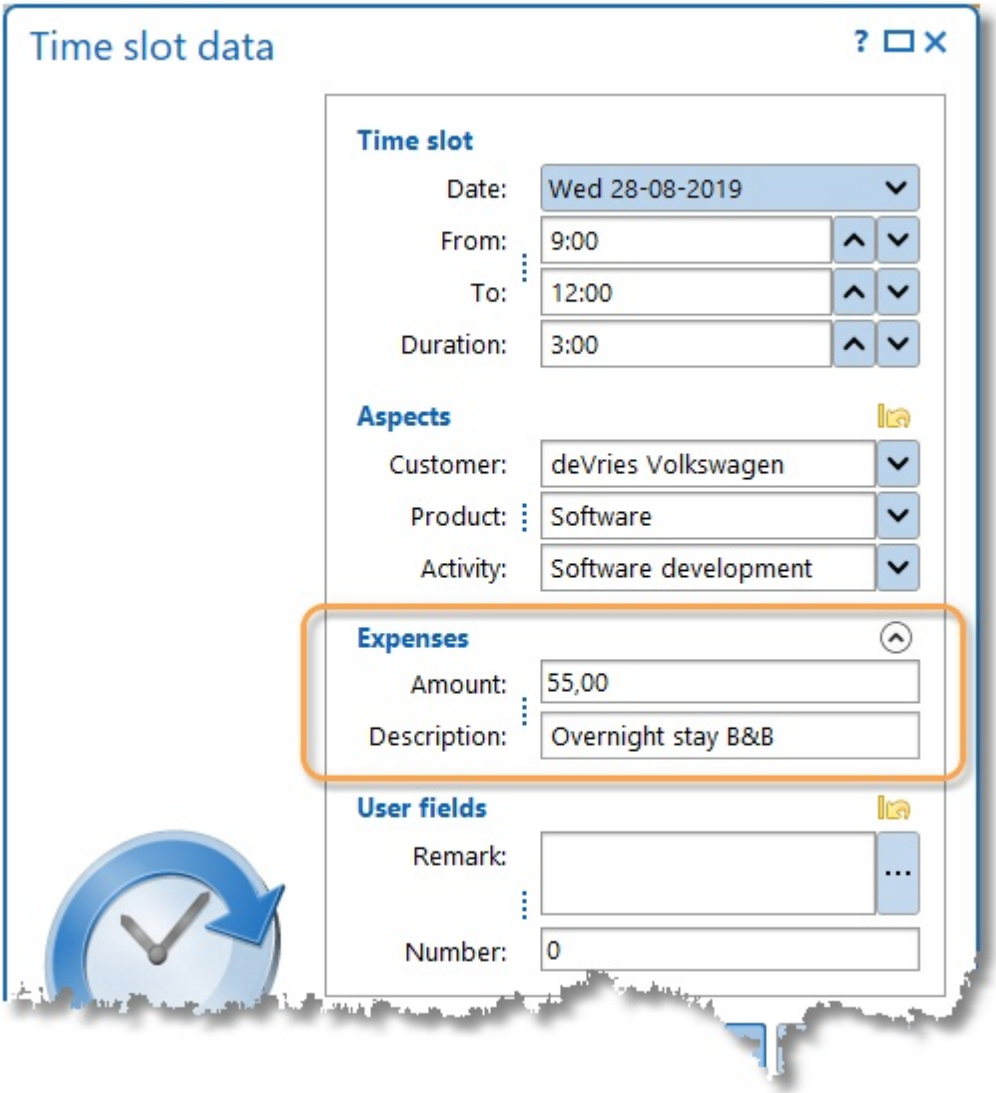


TIP: In the editor you can collapse the category Travel costs with the button to save some space. The collapsed or expanded state of the category will be saved. The information panel of the week grid and week list will follow these setting (except when there is data, then the category data is always shown).

Under **Maintenance and settings | Fields** can be set at the Hours aspect if travel costs are to be registered.
Under **Invoicing | Settings | Invoicing** can be set if travel costs should also be invoiced.
Travel costs tariffs can be entered under **Master data | Tariff agreements** on the **Travel costs tariffs** tab.

Expenses

Enter the expenses amount and description at the time slot data.



TIP: In the editor you can collapse the category Expenses with the button to save some space. The collapsed or expanded state of the category will be saved. The information panel of the week grid and week list will follow these setting (except when there is data, then the category data is always shown).

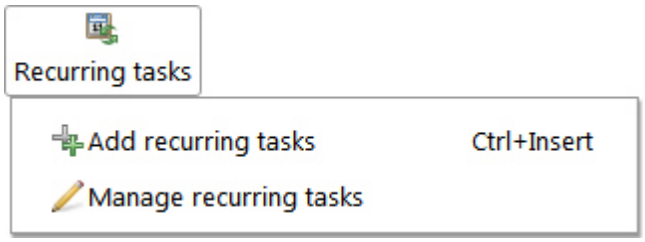
Under **Maintenance and settings | Fields** can be set at the Hours aspect if expenses are to be registered.
Under **Invoicing | Settings | Invoicing** can be set if expenses should also be invoiced.

Recurring tasks

In TimeWriter it is possible to create weekly recurring tasks. This recurring tasks option is only an aid to create hourly bookings in a every new week. The recurring tasks will not appear in the reports and will not be count in the week total, until they are added to the selected week. They are no real bookings yet.

Manage recurring tasks

Go to the weekgrid for creating and editing recurring tasks and click on the button **Manage recurring tasks**.



In a new window you can define the recurring tasks, as they must recur every week (just like in the weekgrid).

Add recurring tasks

If the current week does not have any booking yet, TimeWriter will suggest to add the recurring tasks. It is also possible to at the recurring tasks at any time by pressing the **Add recurring tasks** button.

Link calendars

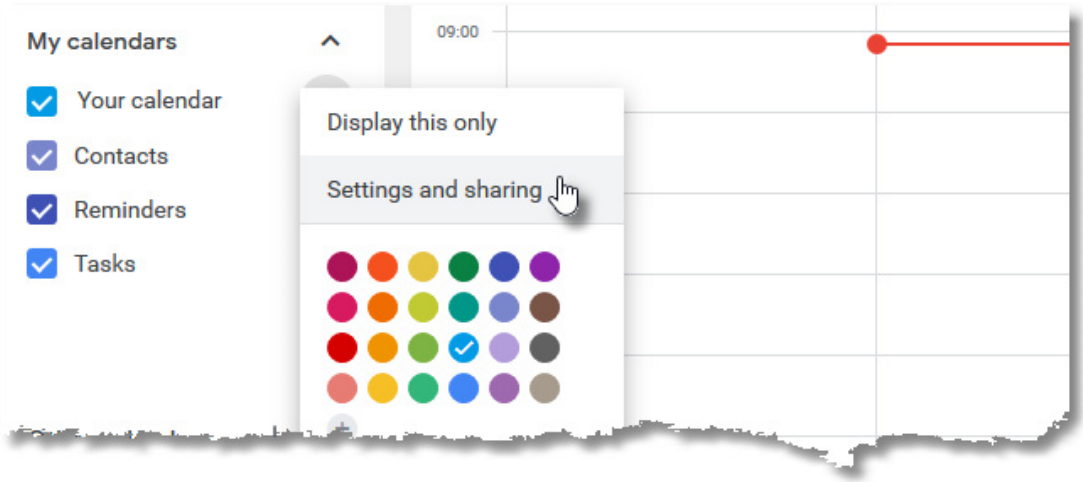
If you use an online calendar, like Google calendar or Outlook calendar, then you can link to it in TimeWriter. The appointments will be displayed in the week grid. An appointments can be created as an hour booking in TimeWriter with just one right mouse button click.

There are a lot of online calendars. Most will have an option to share the calendar using an internet address. In most cases, the address ends with `.ics`, `.ical`, `.ifb` or `.icalendar`, or it starts with `webcal://`.

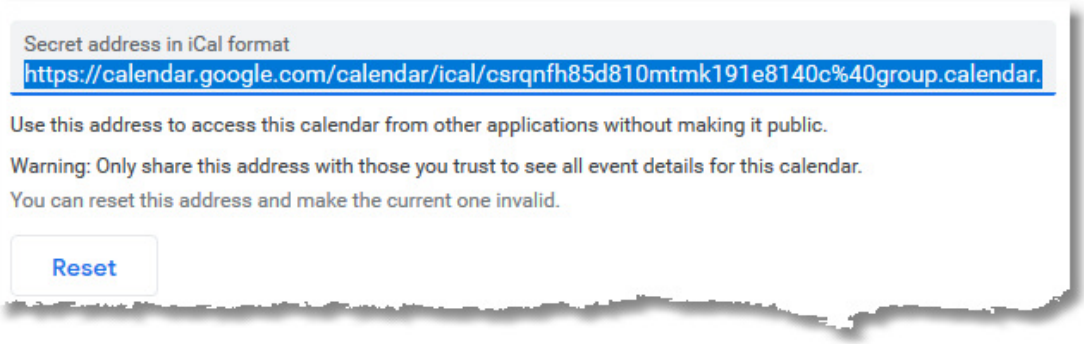
Google calendar example

This example shows how to link to a Google calendar in TimeWriter.

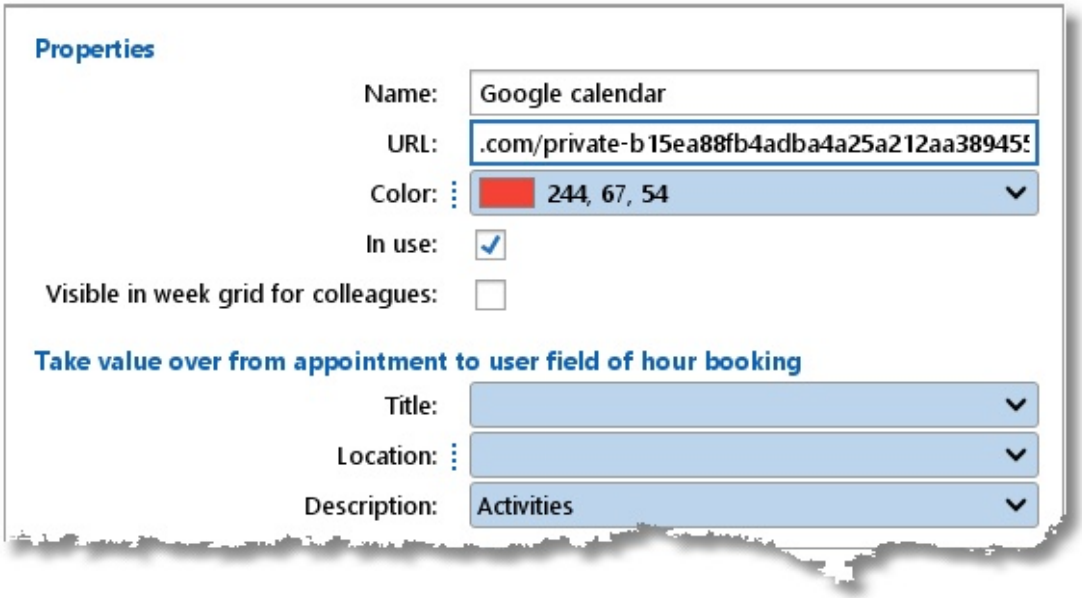
1. Go to https://calendar.google.com (Google calendar sharing can only be done via the web client, not by using the app)
2. Go to **My calendars** and click on the dots at the right side of the calendar which has to be linked.
3. Then click on **Settings and sharing**, like this:



4. Go to the section **Secret address in iCal format** (on the bottom of the page) and copy the internet address.



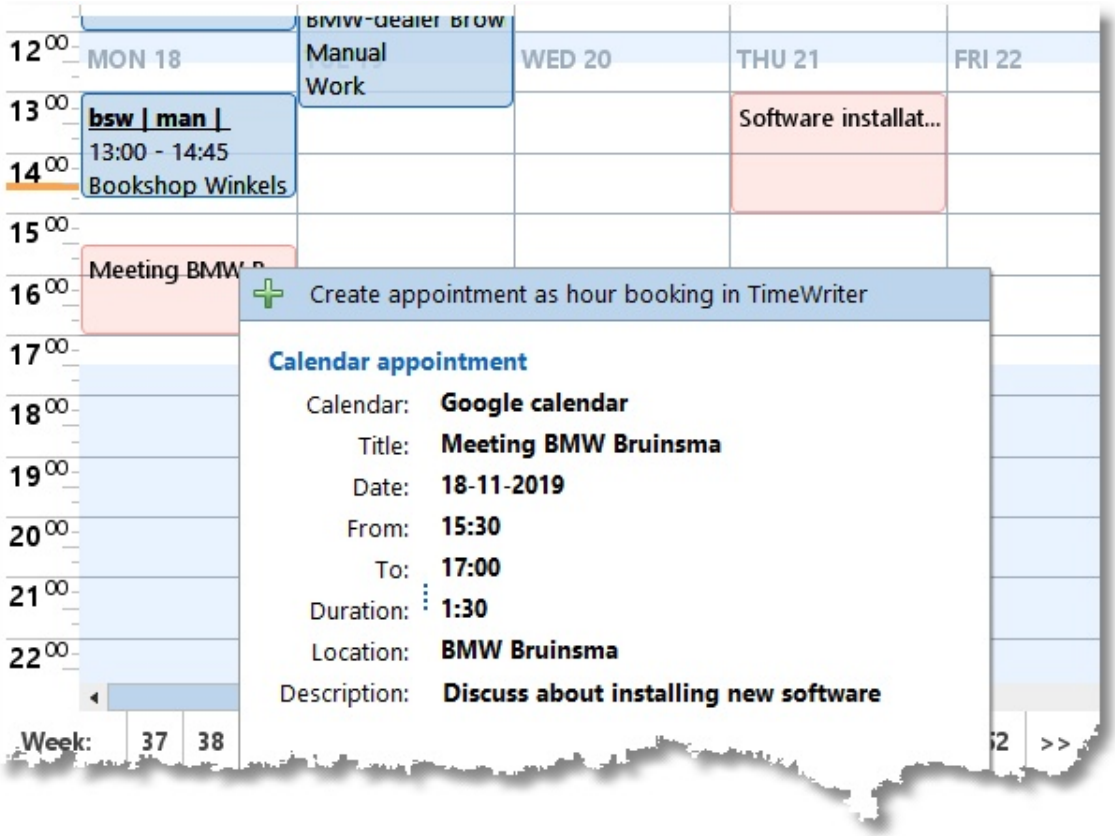
5. Go to the **week grid** in TimeWriter and click on Calendars.
6. Create a new calendar link. Paste the copied internet address in the **URL** field.
7. Indicate whether the calendar is in use and whether your calendar may be visible to other colleagues who have access to your week grid.



8. Data from the calendar appointment can transferred over to a user field of an hour booking. Here you can setup which field value should transferred.

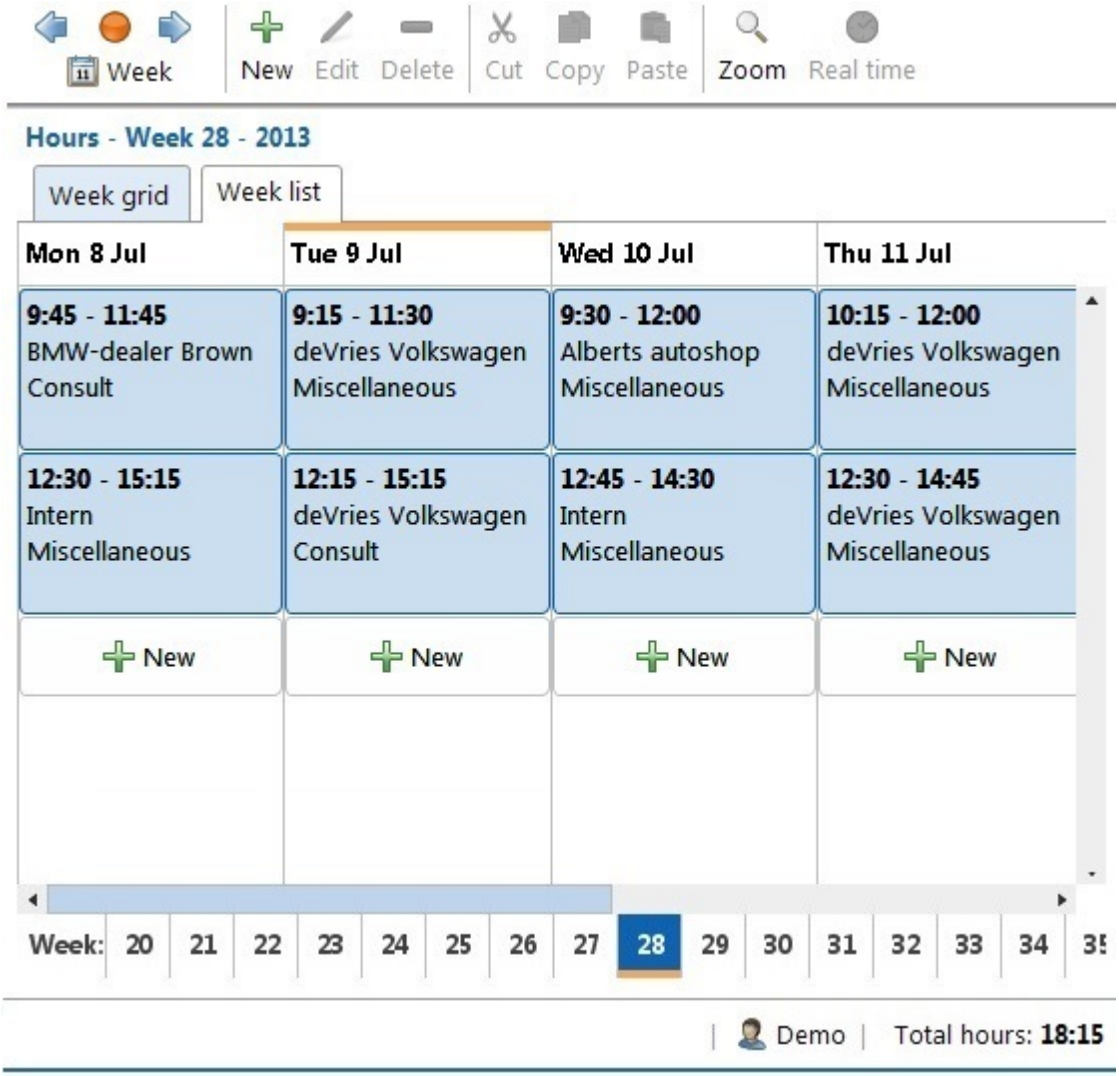
Calendar appointment to TimeWriter

A calendar appointment will be displayed in the week grid of TimeWriter. Click on the right mouse button to create the appointment as an hour booking in TimeWriter.


MON 18
WED 20
THU 21
FRI 22
Manual
Work
bsw | man |
13:00 - 14:45
Bookshop Winkels
Software installat...
Meeting BMW
Create appointment as hour booking in TimeWriter
Calendar appointment
Calendar: Google calendar
Title: Meeting BMW Bruinsma
Date: 18-11-2019
From: 15:30
To: 17:00
Duration: 1:30
Location: BMW Bruinsma
Description: Discuss about installing new software
Week: 37 38

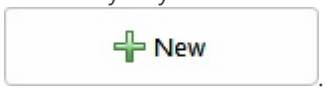
Week list

As an alternative for the week grid you can enter bookings by using the week list. The week list is particularly suitable when you have to enter a lot of short hour bookings. The size of the time slots in the week list are of fixed size and not dependent on the duration of the hour booking. As a result you will still have a good overview when there are lots of bookings visible.



Functionality of the buttons in the button bar is the same as in the week grid.

In the week list you can **not** create or edit bookings by creating, increasing or decreasing a time slot. Every day column contains, below any existing bookings, a button



. With this button you can create a new booking for the day concerned, directly following any bookings previously made. Editing of an hour booking can be done by using the Edit button or by double clicking the hour booking.

Moving or copying of hour bookings can be done in the same way as in the week grid. When doing so, pay attention to the time entries. The application will try to automatically edit the bookings in the best possible way, based on any previously made bookings and the available free time slots.

Fixed hours list

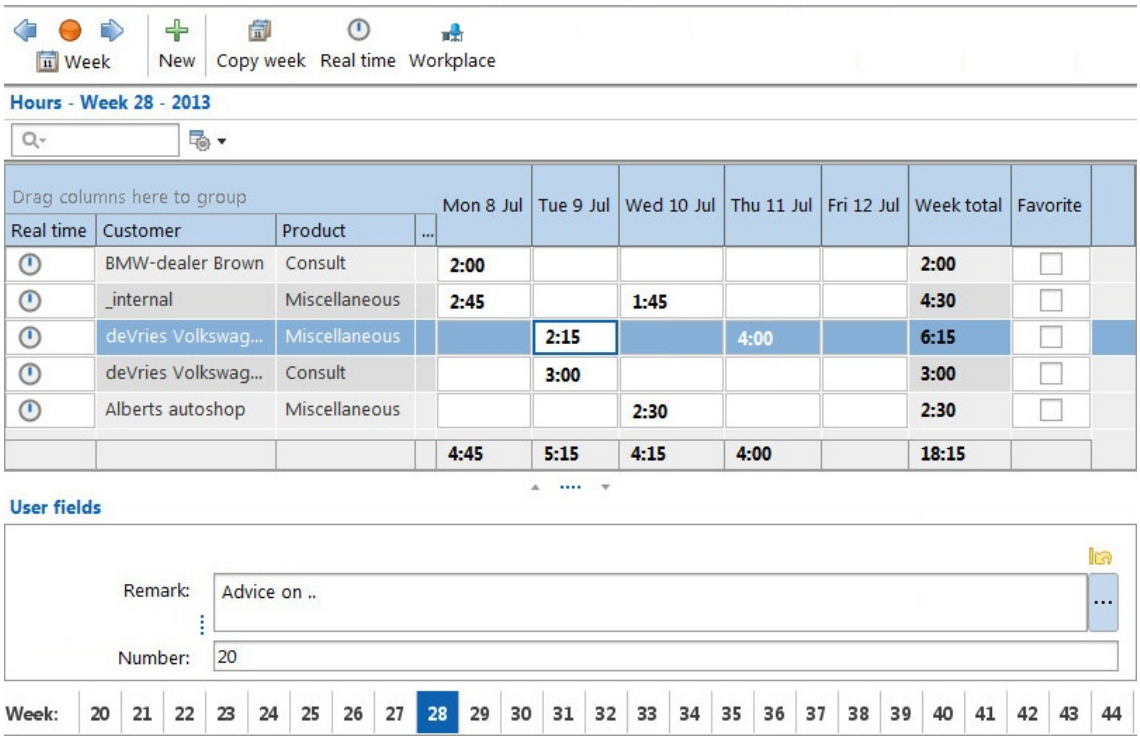
See also www.timewriter.com/support/video for instruction video's how to create hourly bookings.

The fixed hours list is an alternative option for filling in Week grid hours. This list only maintains completed hours and not start- and end times. Time slots are booked automatically from the start time of the working day. The fixed hours list shows unique aspect combinations based on bookings in previous weeks, expanded with favorites data. The standard for this function is to go back one week retrospectively. If you need a longer period, you can go to Personal settings. You can also use this setting to determine how you wish times to be shown; as time in hours and minutes, or as decimal hours.

The cross over point of the aspect combination and the day shows the number of hours booked for this aspect combination. The selected cell at this point is clearly displayed with a blue border. For this selected cell (hours booking) the user-defined fields are shown at the bottom of the screen.

Entering of certain cells can be disabled when, due to changed settings, combinations of aspects as shown in the fixed hour list have become invalid. Also if there are multiple underlying bookings for one cell, a cell can be disabled if one of those bookings contains a fixed price or if the user fields for the bookings contain different values.

Navigation to another week can be done in the same way as for the Week grid.



N.B.: Because the fixed hours list does not have start- and end times, multiple bookings with the same aspect combinations and those booked on the same day will be combined.

The buttons have the following functions:

Button(s)	Function
New	Make a new appointment/booking (for the current day, directly following any previously entered booking).
Copy week	Copy all booking in current week to another week.
Real time	Use this button to start a stopwatch to record the time used for a task in progress. After stopping the stopwatch the recorded time will be registered.
Workplace	Indicate **where** someone worked on which day. The reporting module contains a number of separate workplace reports.

Booking hours

There is a column for each day of the week and a row for every combination of aspects on which you can create bookings. At crossover points the completed hours can be entered.

Hour display

Depending on Personal settings times can be displayed as time in minutes or decimal hours. A combination of entry modes is possible. Imagine that the display is set up as 'Minutes' and you want to enter times as 'Decimal times'. It is possible to enter 1.5 or 1:30 and both will be shown as 90.

Marking aspect combination as favorite

By activating the 'tick' for the required aspect combination in the **Favorites** column, you will ensure that this combination will always appear in the fixed hours list, even if there are no bookings for this combination yet.

Searching

Typing text into the text box above the list, will limit the list to those aspect combinations that correspond to the typed in text.

Selecting columns

If you never enter hours for Saturdays and Sundays for instance, you can hide these columns via the column chooser. Click on next to the search text box and next, click on the Column chooser button in the opened menu. Remove the ticks next to the columns that you need to be hidden. Note that hours booked on the days being hidden **will** be added to the weekly total.

Tasks

In this module you can manage task groups and add or edit tasks.

Depending on their roles logged in employees can:

Every employee can:

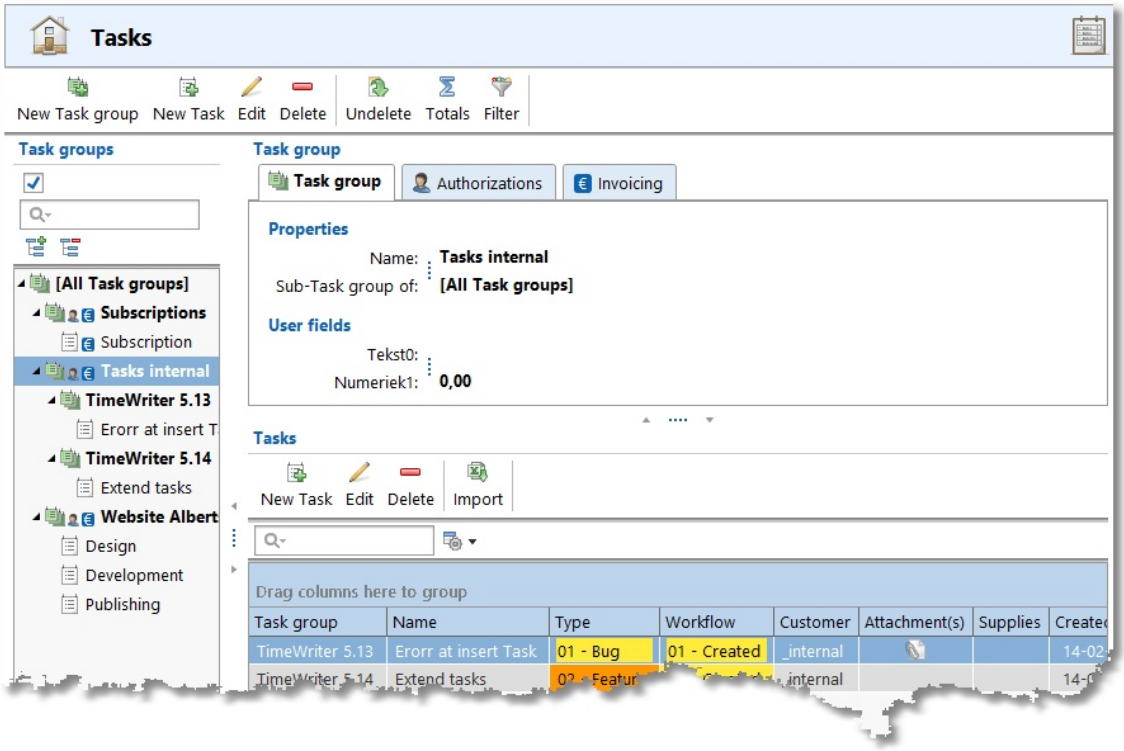
- See and edit tasks where he/she is authorized for.
- Close tasks.

An administrator can also:

- Create, edit and delete task groups and tasks.
- Authorize employees.
- Setup task groups and tasks for invoicing.

Task and **Task groups** are the default names. If preferred they can be given a more suitable new name, corresponding with the terminology used within your organisation. See **Maintenance and settings | Fields**. In this manual **Tasks** and **Task groups** will be used.

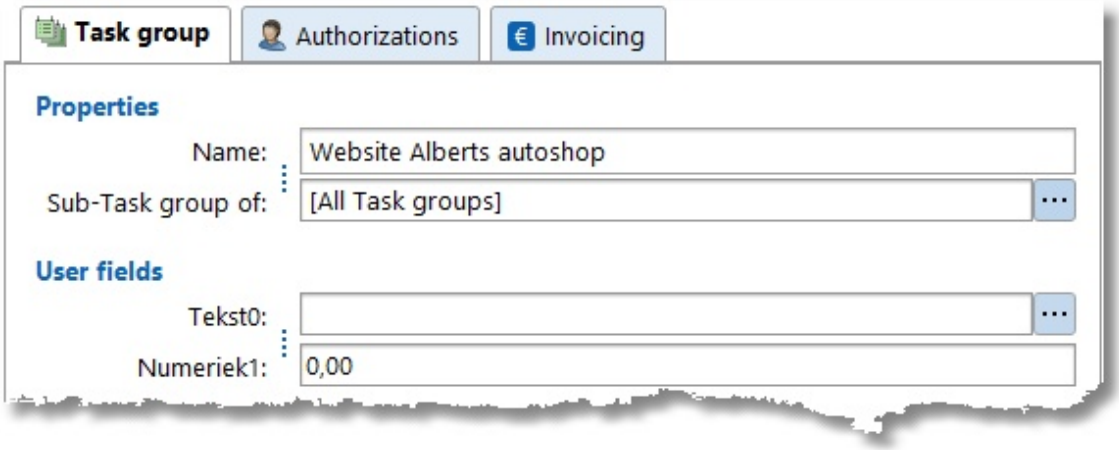
On the left side is a list of **Task groups** (bold) with the attached tasks (not bold and optional). On the right side are the properties of the selected task (group).



Manage task groups

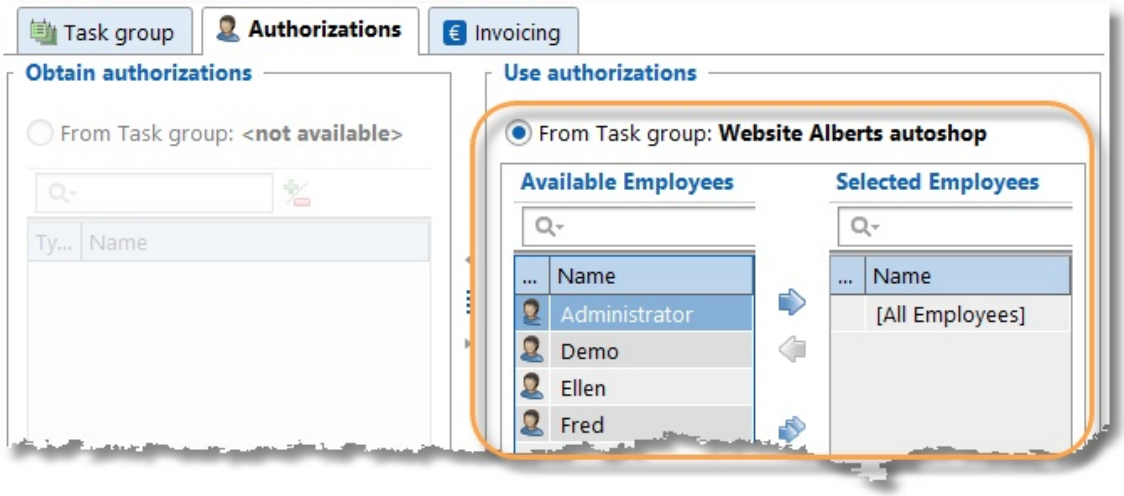
If an employee is set as administrator, the employee can manage task groups.

The name and parent task group can be set at the first tab page. A number of user fields can be set up at Maintenance and settings | Fields. These can be entered here per task group. Data entered in user fields can also be used in reports.



Authorizations

Authorizations can be set at the tab page authorizations. Only the employees set on this tab page can see the attached tasks and select the tasks when creating an hour booking.



Every task group can set its own authorizations or obtain them from its parent task group. Use the arrow buttons or drag items to selected employees.

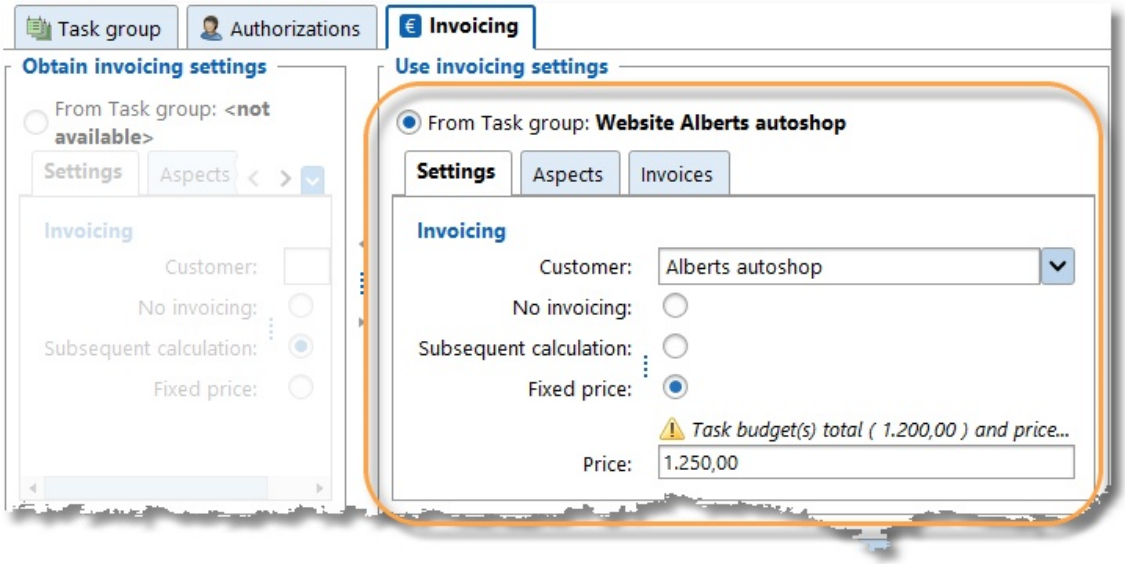
It you don't want to use authorizations at all, it can be disabled this at Maintenance and settings | Settings | Authorizations and Combinations.

Invoicing

At the tab page **Invoicing** you can set how the tasks have to be invoiced.

Settings

Every task group can set its own invoicing-settings or obtain them from its parent task group.



The following invoicing types are available:

Invoicing type	Explanation
No invoicing	Don't invoice the attached tasks.
Subsequent calculation	Invoice the hours booked on the attached tasks following the tariff agreement.
Fixed price	Invoice the attached tasks at a fixed price. A budget can be set per task. The sum of all the budgets attached to this task group must be the same as this price. **Note:** Only tasks with a **budget** and set to **invoiceable** will be invoiced.
Recurring (only at task level)	Tasks can be invoiced with a recurring pattern, task groups can not.

Aspects

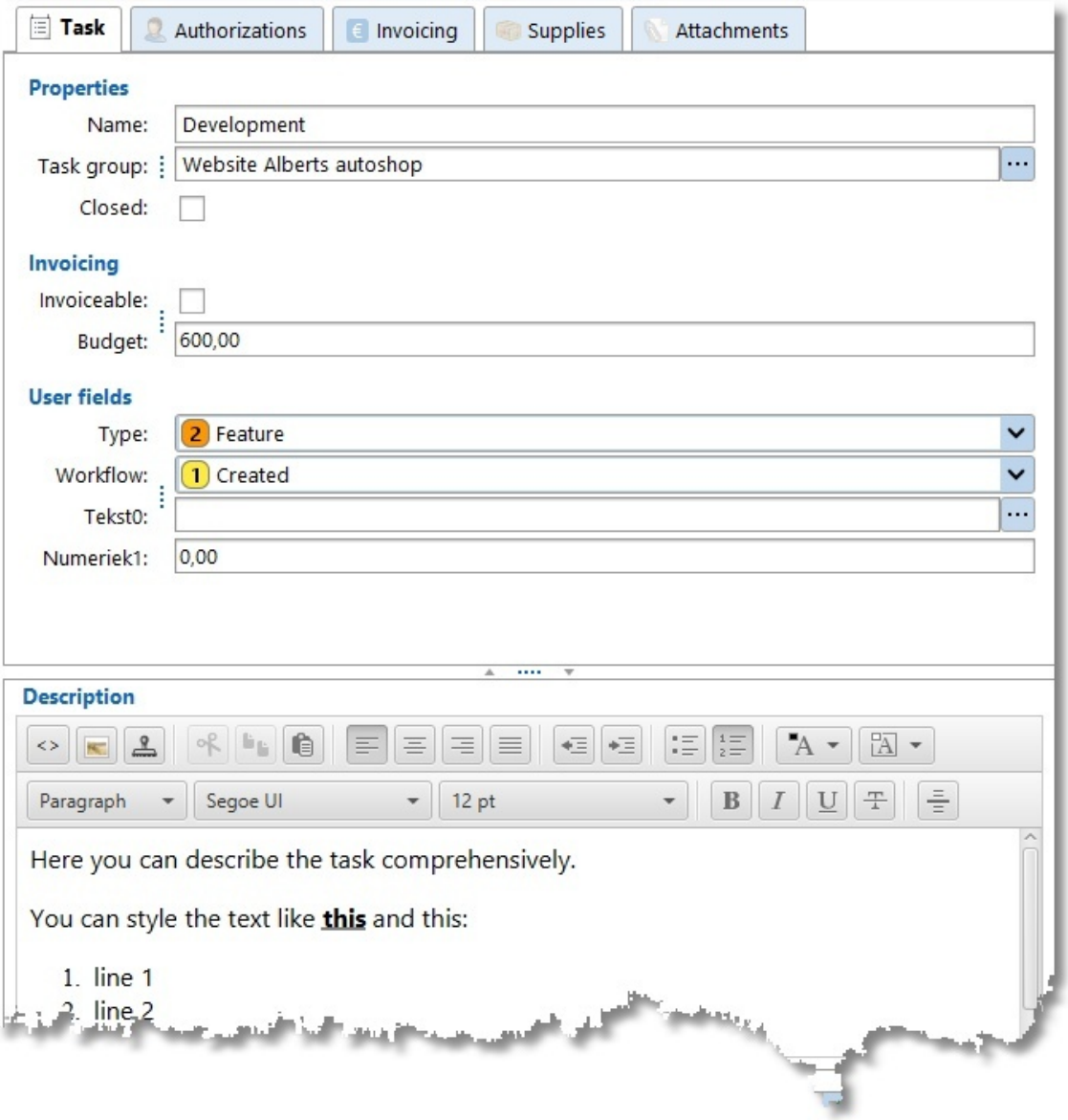
A customer is mandatory if the tasks must be invoiced. At the tab page **Aspects** also the other aspects can be set. These aspects will be automatically used when creating an hour booking.

Invoices

Invoices created for this task group are displayed at the tab page **Invoices**.

Manage/edit tasks

The tasks properties can be edited at the first tab page.

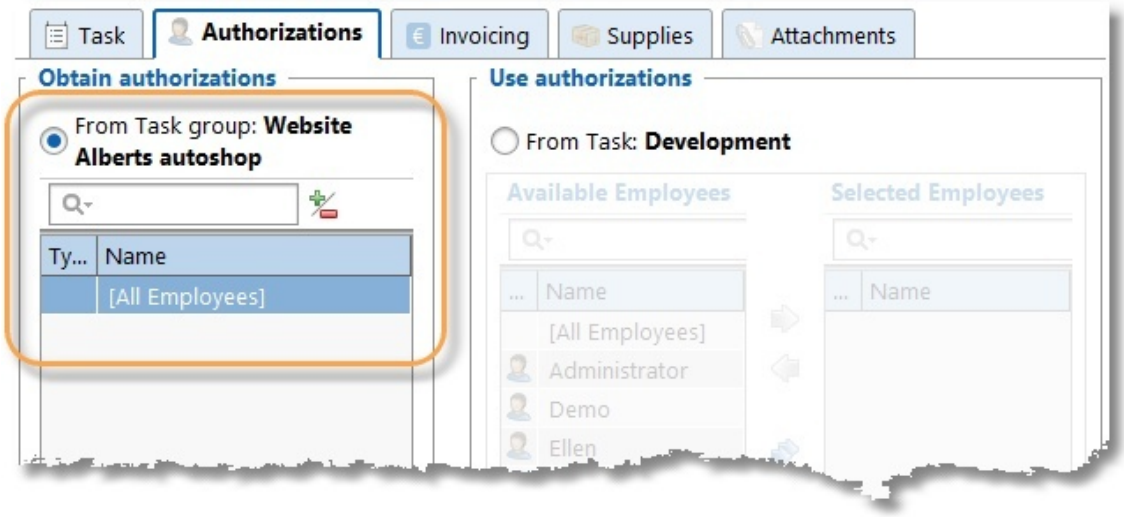


Name	Short description of the task.
Task group	The parent task group.
Closed	If a task is finished, it can be closed. A closed task will not be shown anymore when creating an hour booking.
Invoiceable	Tick this box when the task has to be invoiced (Only available when invoicing is set to fixed price).
Budget	**At fixed price:** The value of the task for invoicing. **Else:** Give it a value for comparing at the reports.
User fields	A number of user fields can be set up at Maintenance and settings | Fields. These can then be entered here per task. Data entered in user fields can also be used in reports.

	Type and Workflow are fixed user fields of Tasks. These fields can be used to classify tasks by choosing an item from a configurable list.
Description	At the bottom there is a big text field where the task can be described comprehensively.

Authorizations

The authorization tab page is only available If an employee is set as **administrator**.
Authorizations can be set at the tab page authorizations. Only the employees set on this tab page can see the attached tasks and select the tasks when creating an hour booking.

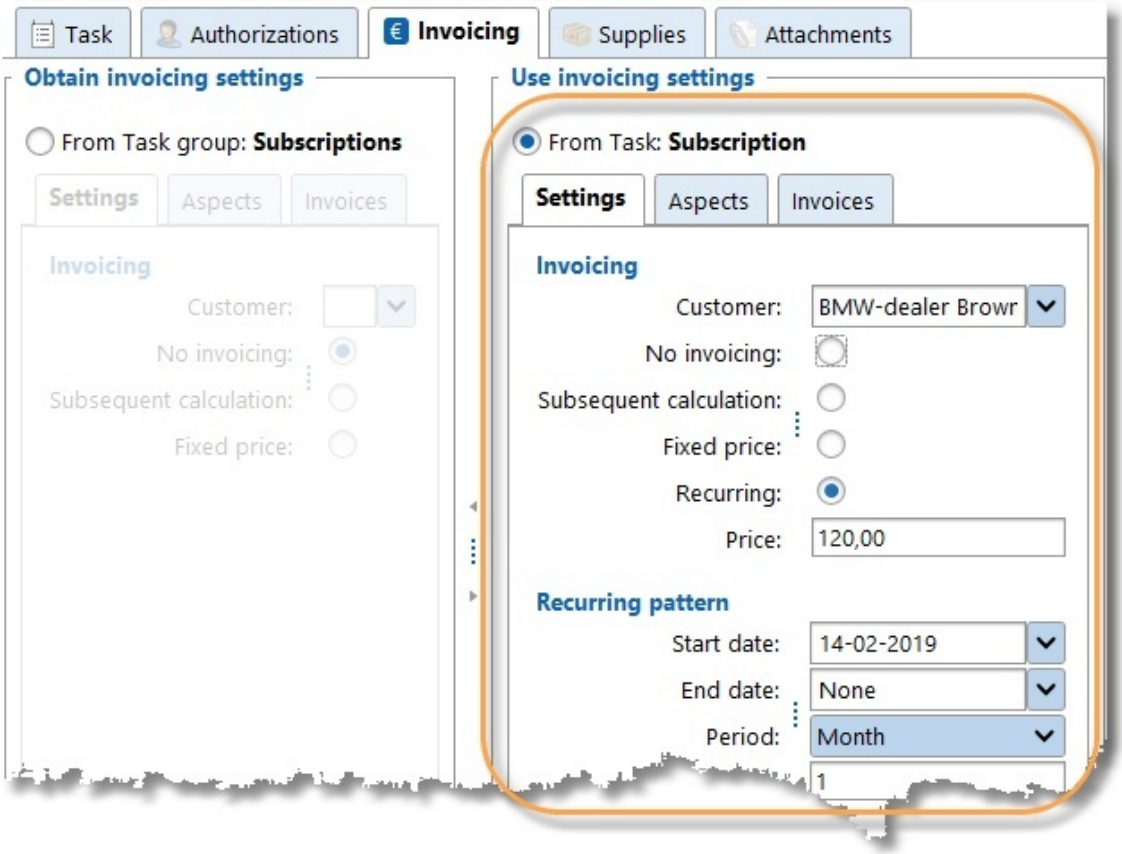


Every task can set its own authorizations or obtain them from its parent task group. Use the arrow buttons or drag items to selected employees. In the above picture the authorizations are obtained from the parent task.

It you don't want to use authorizations at all, it can be disabled at Maintenance and settings | Settings | Authorizations and Combinations.

Invoicing

At the tab page **Invoicing** you can set how the tasks have to be invoiced.



Settings

Every task can set its own invoicing-settings or obtain them from its parent task group.

The following invoicing types are available:

Invoicing type	Explanation
No invoicing	Don't invoice the task.
Subsequent calculation	Invoice the hours booked on the task following the tariff agreement.
Fixed price	Invoice the task at a fixed price. A budget can be set per task. The sum of all the budgets attached to this task group must be the same as this price. **Note:** Only tasks with a **budget** and set to **invoiceable** will be invoiced.

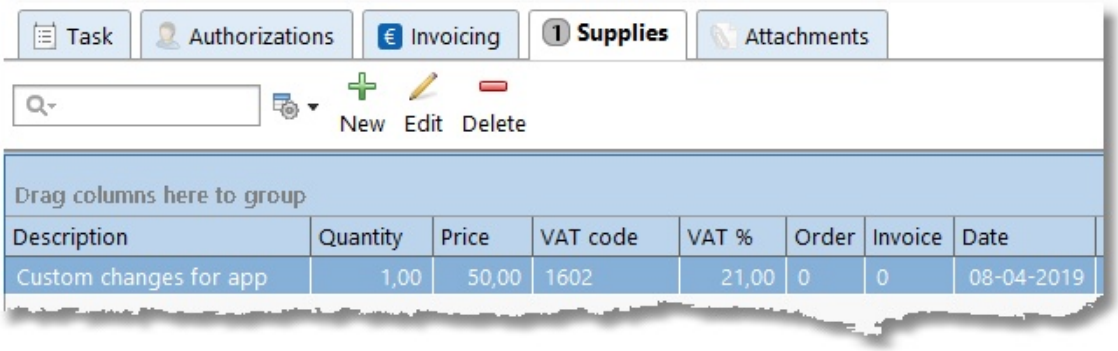
Aspects

A customer is mandatory if the tasks must be invoiced. At the tab page **Aspects** also the other aspects can be set. These aspects will be automatically used when creating an hour booking.

Supplies

Tab page **Supplies** is available depending on the selected accounting software TimeWriter is linked to (at Invoicing | Settings | Accounting).

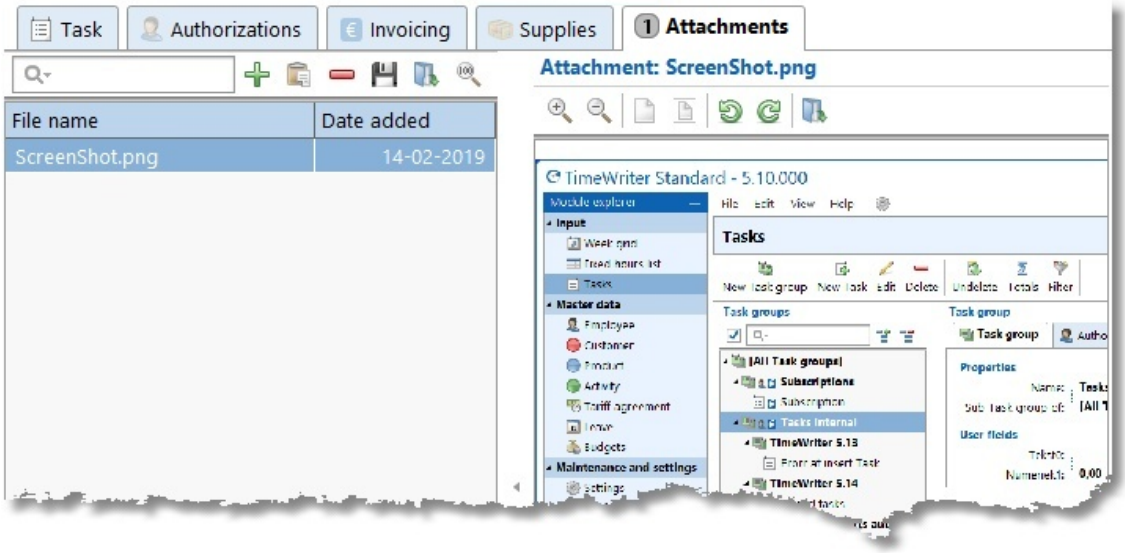
At this tab page supplies can be added to tasks. When generating orders/invoices, supplies to be invoiced will be automatically added to orders/invoices for tasks to be invoiced.



Supplies can also be added to tasks when booking hours by clicking the task aspect button **Select task** ⋯. A dialog for selecting a task will be shown. With this dialog a task can be edited if necessary and thus supplies can also be added to tasks.

Attachments

Documents can be archived at the tab page **Attachments**. At the left side is a list of archived attachments. At the right side a preview can be shown.

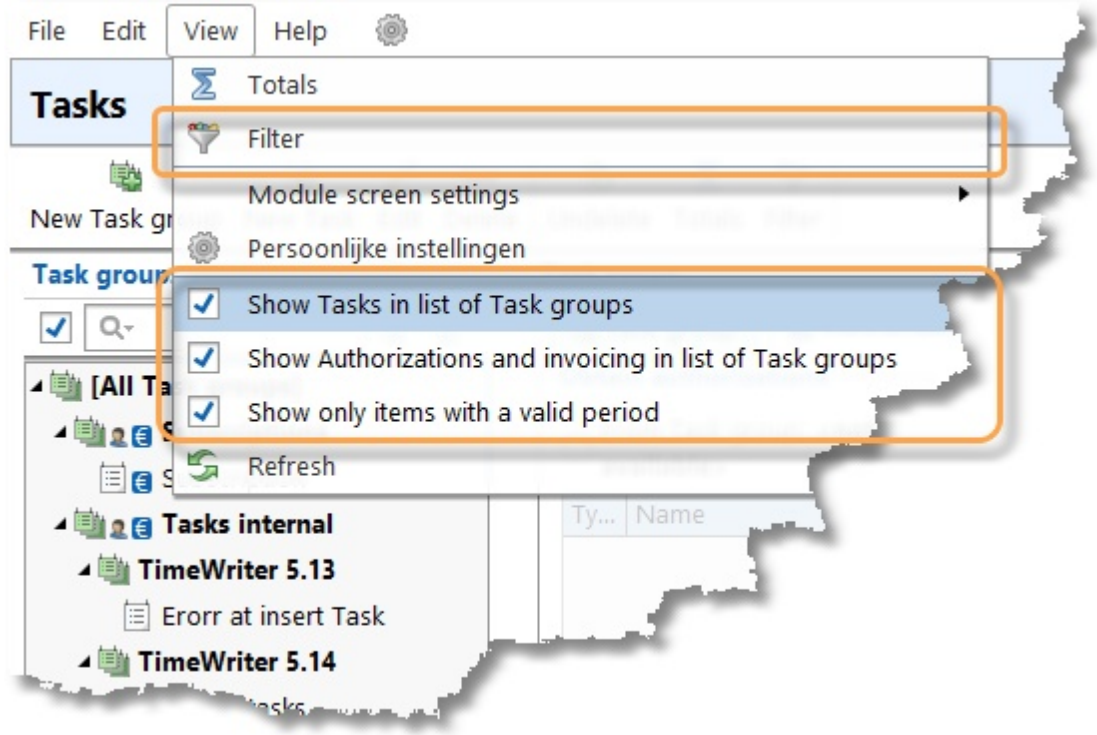


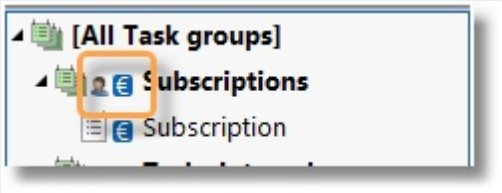
Manage attachments with the buttons on the toolbar:

Button	Action
	Add an attachment.
	Add an attachment from the clipboard (Print screen)
	Delete an attachment.
	Save a copy of the attachment.
	Open the attachment in an external application.
	View the attachment maximized.

Filter tasks

Every employee can set several filters to show only the relevant tasks In the main menu **View**.



Menu action	Function
Filter	Here can be set which **Type** and/or **Workflow** has to be shown.
Show Tasks in list of Task groups.	Tick this box to show the tasks between the task groups or not.
Show authorizations and invoicing in the list of task groups.	Tick this box to show the icons for Authorizations and Invoicing to indicate where these are managed.  Note: only available for employees with option **Is Administrator**.
Show only items with a valid period	Tasks with the property **Closed** can be shown or hidden using this tick box.

It is also possible to type text in the search field above the task groups. The tasks underneath the selected task group will be shown at the right side. Here is also a search field. This field searches also on the task description.

Master data

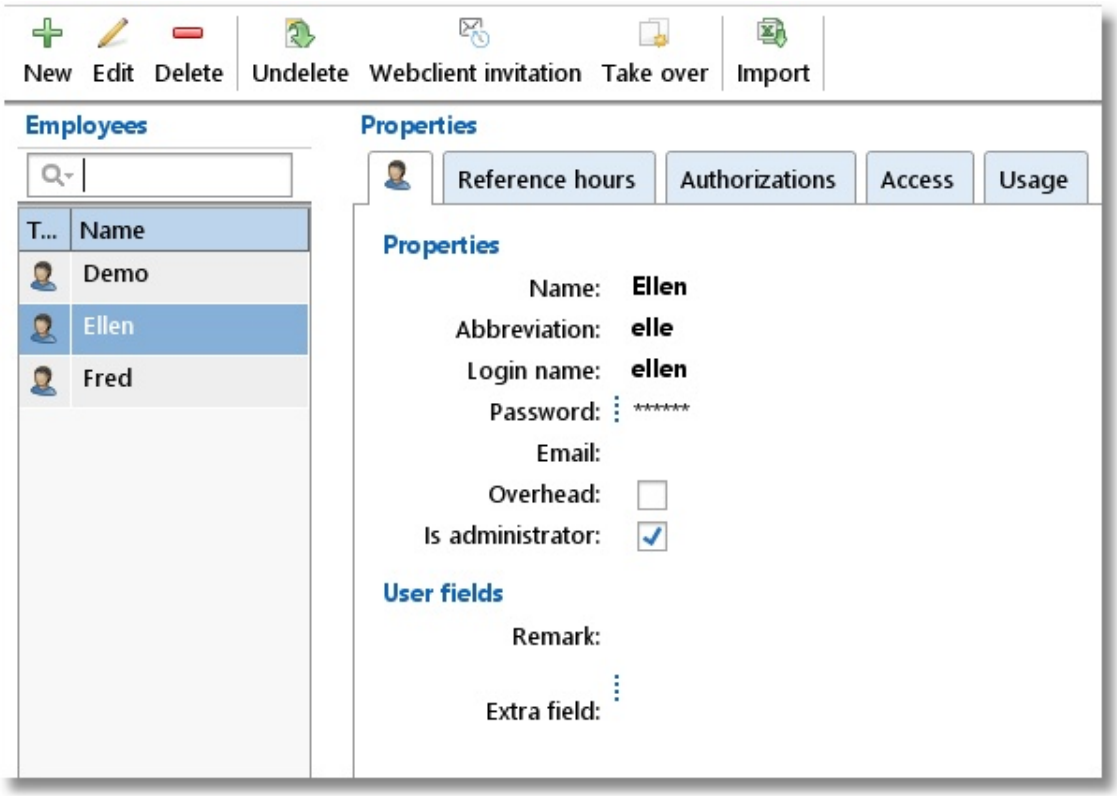
The following master data is included in TimeWriter Standard:

- Employee
- Customer
- Product
- Activity
- Tariff agreements
- Leave
- Budgets

Aspect is an abstract term used for master data that can be used for bookings. To prevent documentation from becoming abstract, it will consistently be referred to as Employee, Customer, Product and Activity. If preferred they can be given a more suitable new name, corresponding with the terminology used within your organisation. See **Maintenance and settings | Fields**.

Employee

Basic user details are entered here. Booking access and general access levels for users can also be entered here. Select **Master data | Employee** in the **Module explorer**.



On the first tab you can enter the following details for your users:

Name	Is shown in reports and when making hourly bookings.
Abbreviation	Can be used in reports.
Login name	Name used by user to login.
Password	Password to be used to be able to login.
Overhead	Overhead can be used to indicate if an hourly booking for this aspect is overhead or not. For Employee, Customer, Product and Activity the overhead field is available. If one or more aspects are ticked as overhead the related hours bookings will also be overhead. This can be used later for filtering / limiting a report.
Is Administrator	With this option you can setup whether the employee is a TimeWriter administrator or not. **Every employee can:** • Register hours. • Generate reports. **Administrators can also:** • Manage master data. • Change system settings. • Create and edit reports.

User fields	A number of user fields can be set up at Maintenance and settings | Fields. These can then be filled in here per employee. Data entered in user fields can also be used in reports.

On the second tab **Reference hours** you can enter how many hours an employee should cover.

The example above of tab **Reference hours** shows that Ellen should book 32 hours up to week 49 in 2014 and 24 hours after that.

Managing the data is done through the buttons on the toolbar:

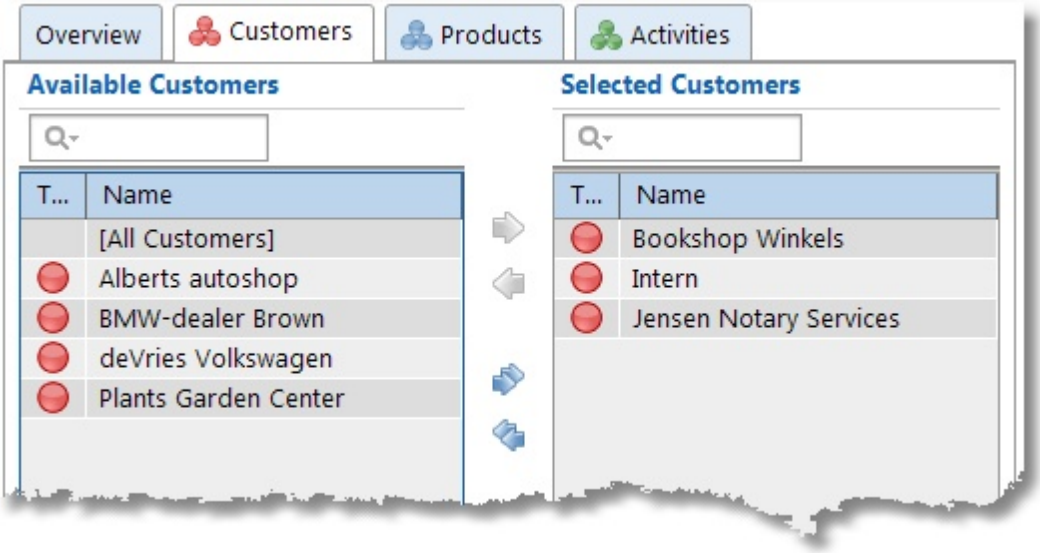
New	Set up a new employee.
Edit	Edit data for the selected employee (Ellen).
Delete	Remove the selected employee. To retain data, the employee is not actually deleted but gets a 'deleted' marking. The employee will then no longer be able to login but is still shown in historical bookings and will still appear in reports.
Undelete	See Restore deleted-marking.
Web client invitation	Invite the selected employee to use the TimeWriter web client via email with a personal link and QR code (only available when using the cloud database).
Take over	Take over all authorisations and access from another employee. Existing authorisations and access will be deleted.
Import	Import employee data from an Excel file. See import.

Authorising employees

An employee can be authorised to create hourly bookings for various aspects. Do this as follows:

1. Select the employee.
2. Click on **Edit**.
3. Go to the **Authorizations** tab.
4. The **Overview** tab will show all of the already linked aspects. Click on to link new aspects or to remove links.

Linking of aspects can also be done via the aspect tabs themselves. Below you can see the 'Customer' aspect tab. Use this tab to see which customers are already linked and all of the customers that are still available.



Customers can be moved from left to right by using the arrows. This can also be done by clicking and dragging. To link all customers in one go, select option **[All Customers]** and move it to the right. The advantage of selecting this option is that you don't have to adjust authorisations when new customers are entered. The text box above the list can be used to quickly look up details.

***TIP**: Authorisations can also be set up in Customer, Product and Activity. So if a new activity is being added for instance, you do not need to set up separate authorisations for every employee but several employees can be authorised in one go.*

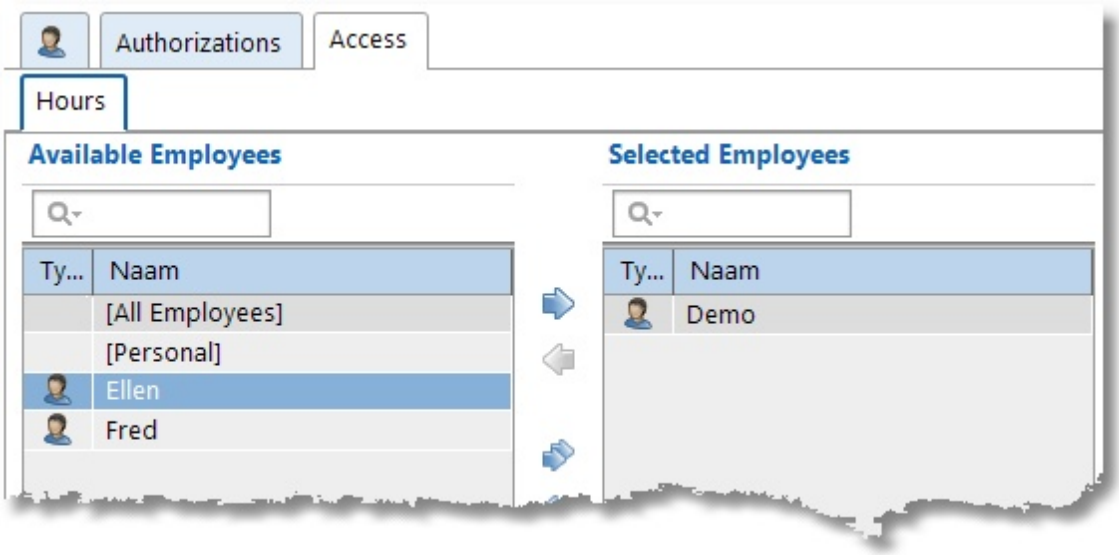
Setting up user access

Who has access to whose hours can be set up as follows:

1. Select the employee.
2. Click on **Edit**.
3. Go to the **Access** tab.

There are three options:

1. For employees who are to only see their own hours, select **[Personal]** from the list and move it to the right (Selected Employees) using the arrow keys.
2. For employees who are allowed to see all hourly bookings of all employees, select **[All Employees]** from the list and move it to the right (Selected Employees) using the arrow keys.
3. For employees who are allowed to see only certain hourly bookings of a limited number of employees, select the employee(s) concerned from the list and move the selection to the right (Selected Employees) using the arrow keys. The employee him-/herself should also be selected otherwise the employee will have no access to his/her own hours.

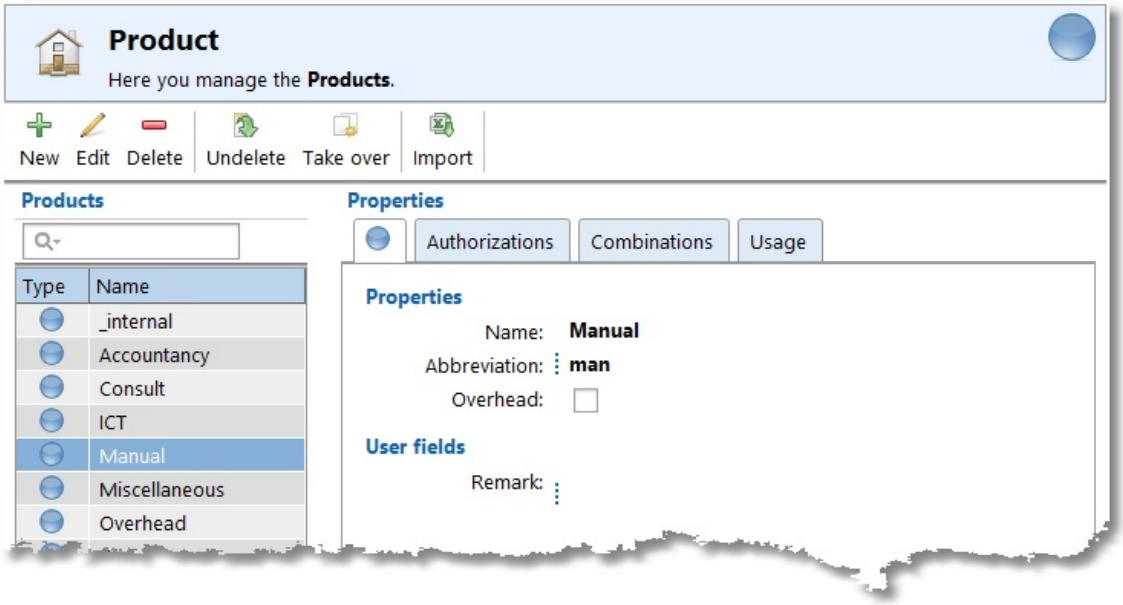


Customer, Product and Activity

TimeWriter Standard allows you to select 3 aspects per hourly booking (in the example below: Customer, Product and Activity). These can be managed in the **Master data** in the **Module explorer**.

This example relates to the Products screen, but for Customers and Activities the same applies.

The selected product is 'Manual'. Details are shown under properties on the right hand side.



Managing this data is done through the buttons on the toolbar:

New	Create a new product.
Edit	Edit the selected product.
Delete	Remove the selected product. To prevent this data from being lost, the product is not really deleted, but given a deleted marking. The product can now no longer be chosen when booking new hours, but is still at in the history of bookings and will be in the reports
Undelete	See Restore deleted-marking.
Take over	Take over all authorisations and combinations from another product or product group. Existing settings will be deleted.
Import	Import aspect data from an Excel file. See import.

All of the buttons on the toolbar are also available in the main menu and under the right-click menu of the product list. In the right-click menu you will also see what shortcut keys are available. To quickly find a product in the list (a part of) the product name can be entered into the search box above the list.

Properties

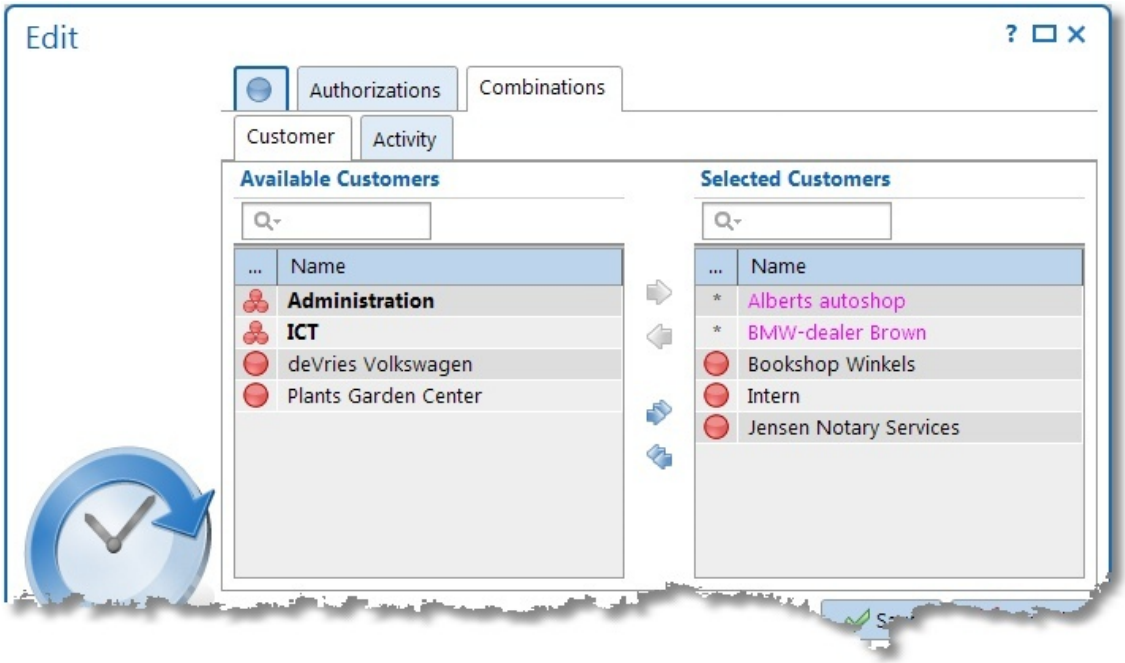
For every Customer, Product and Activity a number of properties can be entered:

Name	Name of the aspect.
Abbreviation	Abbreviations are used at the top of the time slots in the Week grid so that some information is also visible in small time slots.
Overhead	Overhead can be used to indicate if an hourly booking for this aspect is overhead or not. For Employee, Customer, Product and Activity the overhead field is available. If one or more aspects are ticked as overhead the related hours bookings will also be overhead. This can be used later for filtering / limiting a report.
User fields	A number of user fields can be set up at Maintenance and settings | Fields. These can then be filled in here per individual aspect. Data entered in user fields can also be used in reports.

Authorizations and Combinations

The **Authorizations** tab can be used for each Product to set up which employees are able to book this product.

The **Combinations** tab can be used for each Product to set up in combination with which Customers or Activities the product can be booked.



Customers can be moved from left to right by using the arrows. This action can also be done by clicking and dragging. The text box above the list can be used to quickly look up details.

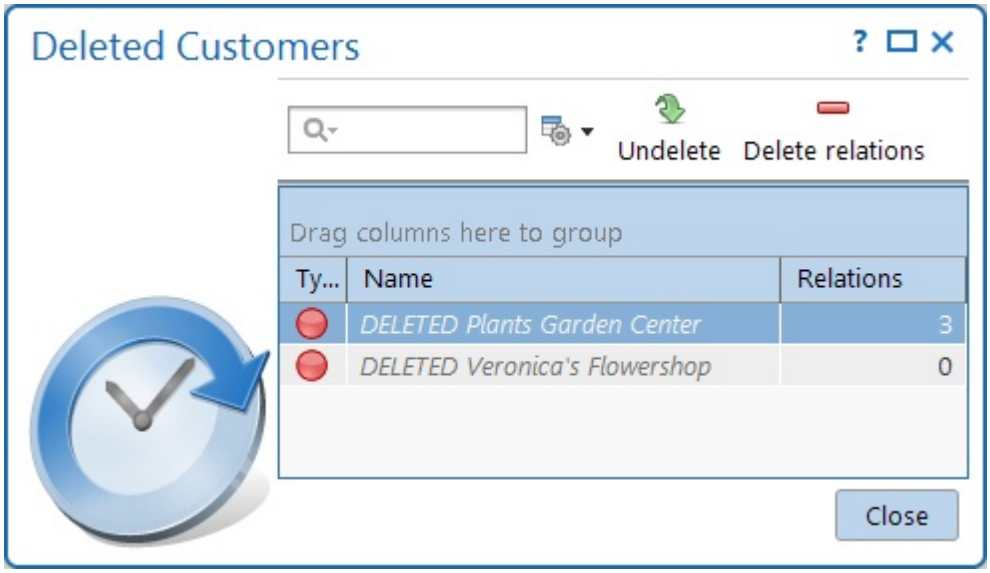
By managing it's master data, a previous aspect (above: Customer) can already be combined with all current aspects (above: Products). In the selected customers list these combinations are marked with an asterisk and shown in the color magenta. These type of combinations can only be edited by managing their own master data. In the example above product combinations for customers 'Alberts autoshop' and 'BMW-dealer Brown' can only be edited by managing **Master data | Customer**.

The same applies to authorisations. By managing the employee master data, an employee can be authorised for **[All products]**. These type of authorisation can only be edited by managing **Master data | Employee** and not by managing **Master data | Product**.

When combining with a next aspect, a choice **[All <aspect name>]** is present at the top of the list of available aspects. To combine all aspects you don't have to select all of them and then move them to the right, but just this one choice. In the example above Activity is the next aspect for Product. The choice **[All activities]** will be shown at the top of the list of available activities.

Restore deleted-marking

Aspects, tariff agreements and budgets are not actually deleted from the database, but get a deleted-marking.
All such deleted aspects, tariff agreements and budgets can be made visible by clicking on Undelete . A new window will appear with all deleted data (Customers in this case). The relations column shows the number of existing relations (authorisations and combinations) with other aspects.



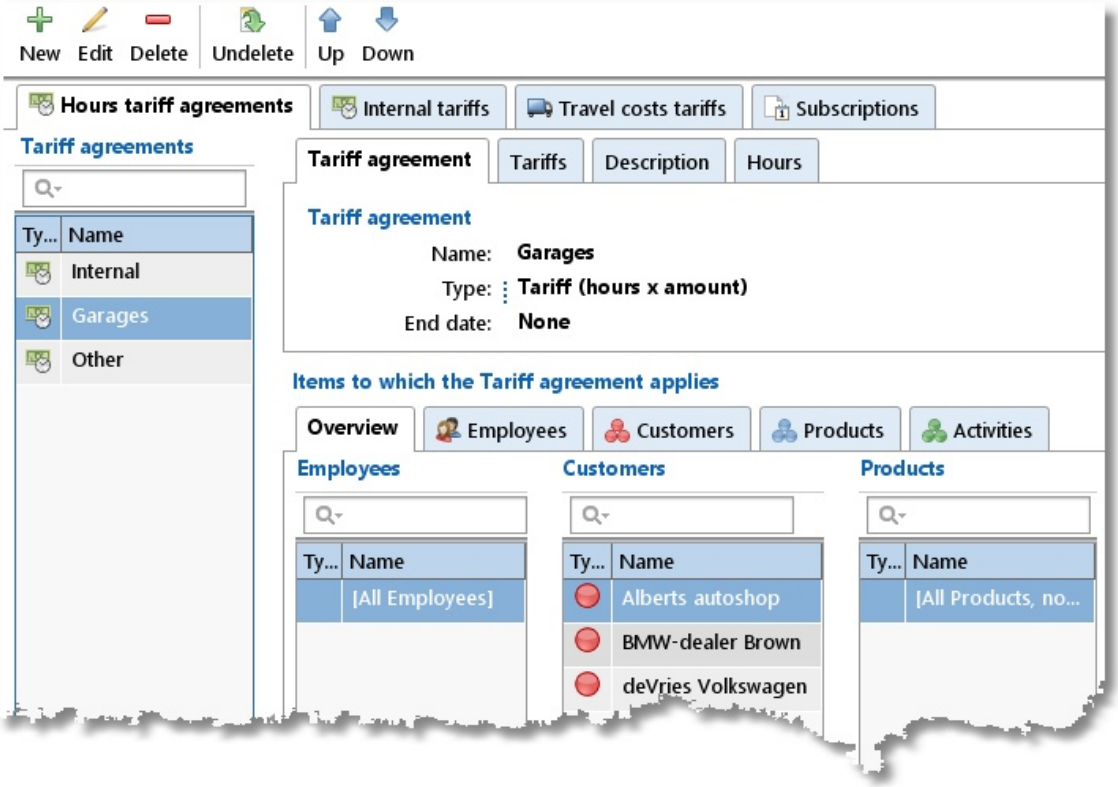
You can restore a deleted aspect as follows:

1. Select the aspect to be restored (in the example above: Plants Garden Center).
2. Click, if desired, on to delete the existing relations with other aspects (**Warning:** this process is irreversible).
3. Click on to remove the deleted-marking for that aspect. The edit screen will now be displayed to allow you to edit the aspect (f.e. to remove the word DELETED from the fields). After saving, the aspect is restored.

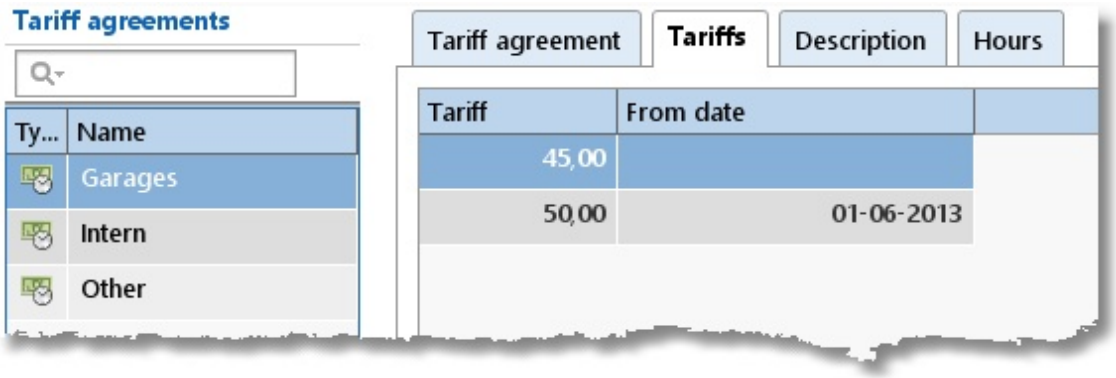
Tariff agreement

See also www.timewriter.com/support/video for instruction video's how to work with tariff agreements.

A tariff rate can be calculated from every hourly booking on the basis of the combination of the chosen aspects. Below you can see the tariff agreement for Garages. In this example, all customers who have a garage are linked to this rate.
Tariffs/rates can be entered on the **Tariffs** tab. A tariff may be applied over a set period of time. On the **Description** tab you can enter an extensive description for a tariff. On the **Hours** tab, the hourly bookings with this tariff are shown over the past 90 days.



In the example below on the **Tariffs** tab, hourly bookings to which the Garages tariff applies, before 01-06-2013 receive a tariff of 45 and thereafter 50. This amount is multiplied by the number of hours booked.



See also some detailed examples

Internal tariffs

Internal tariffs (internal costs) can be entered on the **Internal tariffs** tab. The operation and entering of internal tariffs is the same as with the Hours tariffs agreements. However, the tariff type can only be of the "Tariff (hours x amount)" type. The internal tariff is shown with the time slot information (Week grid, Week list and Fixed hours list) and is used in the efficiency reports.

Travel costs tariffs

Travel costs tariffs can be entered on the **Travel costs tariffs** tab. The operation and entering of travel costs tariffs is the same as with the Hours tariffs agreements. The entered amount is multiplied by the distance as entered under travel costs for an hourly booking. Under **Maintenance and settings | Fields** can be set at the Hours aspect if travel costs are to be registered.

Subscriptions

Periodically recurring services can be entered on the **Subscriptions** tab. For a subscription, in addition to the tariff, the customer to whom the subscription relates is also entered. A number of extra tabs are available with a subscription. On the **Invoice text** tab you can set which information should be shown on the invoice line of a subscription. On the **Recurring pattern** tab, start and end dates and the period and frequency for the subscription can be set. The **Invoices** tab shows the invoices generated for the selected subscription.

Creating a tariff agreement

To set up a new Tariff agreement perform the following steps:

1. Select **Master data | Tariff agreement** in the **Module explorer**.
2. Click on **New** to set up a new one.
3. Provide the tariff agreement with a relevant name. This name will be shown when making hourly bookings and can be used as a filter term for reporting.
4. Select the tariff type: Tariff (hours/distance x amount), Fixed price or Price per piece.
5. Select tab **Tariffs** and set the tariff start date and enter the tariff amount. The date field can also be left blank.
6. Link the required aspects to the tariff agreement. If no specific aspects are linked, then all aspects will apply.
7. If necessary, add an extensive tariff description on the **Description** tab.
8. Save the tariff agreement.
9. Arrange the tariff agreements in the correct order by using the **Up / Down** buttons. Keep the button clicked for faster scrolling up or down.

Tariff agreement sequence

The sequential order of the list is important to determine which tariff should be applied to an hourly booking. For every hourly booking this list will be checked from top to bottom to see if the booking fits within the time slot of the tariff and if it the aspects of the booking match a combination of aspects set for the tariff. The tariff of the first corresponding tariff agreement found will be used. Use the **Up / Down** buttons to arrange the tariff agreements in the correct order.

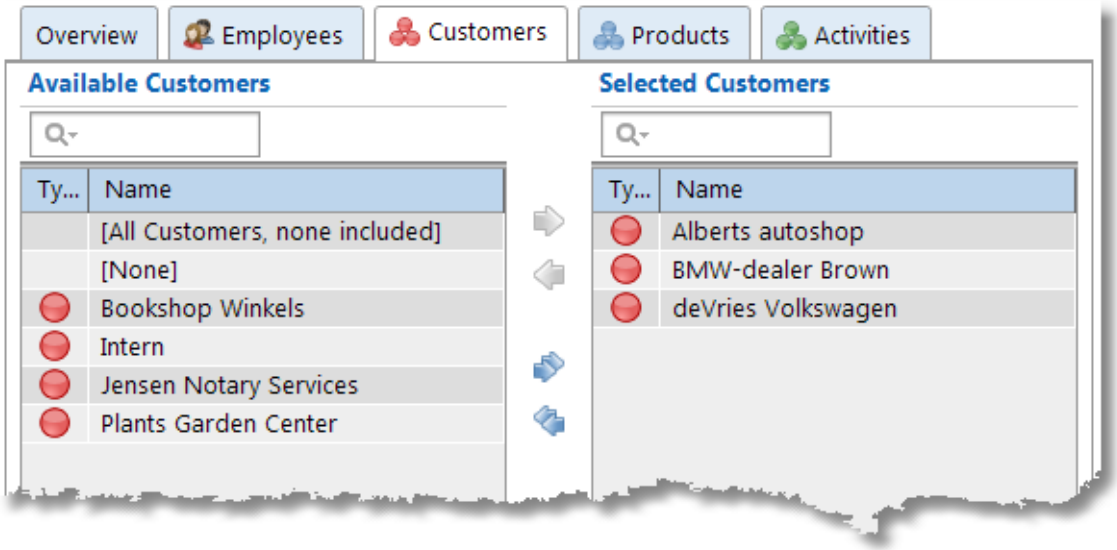
Linking aspects to tariff agreements

Aspects can be linked as follows:

1. Select the tariff agreement.
2. Click on **Edit**.
3. The **Overview** tab will allow you to see already linked aspects. Click on to link new aspects or to remove them.

Linking of aspects can also be done via the tabs of aspects themselves. Below you can see the Customer tab for the tariff agreement 'Garages'.

This view allows you to see which customers are already linked and those customers that are still available.

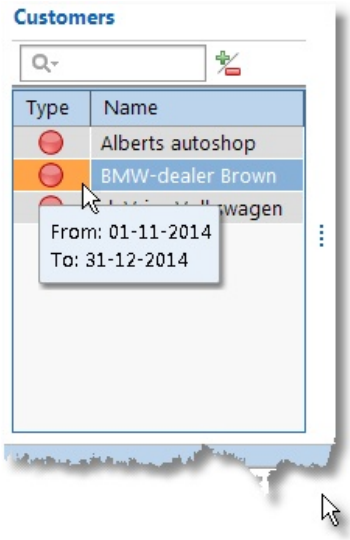


By using the arrows, customers can be moved from left to right. This can also be done by clicking and dragging.

There are 3 extra options:

Selection	Explanation
No items selected	the same as **[All Customers, none included]**
[All Customers, none included]	If this option is selected the tariff agreement is applicable to ALL customers, but is also applicable when no customer is selected when entering an hour booking.
[None]	If this option is selected the tariff agreement is applicable to any selected customer, but is also applicable when no customer is selected when entering an hour booking.

Setting a time period for linked Aspects



It is possible to set a limited time period for linked aspects by double clicking on the line.
First ensure that you have selected the **edit** mode.

If a period is set, the background will be orange and this time period can be viewed
by hovering over it with the mouse.

Ending or removing Tariff agreements

Tariff agreements can have an **End date** allocated to them. Setting the **End date** will ensure that the hourly rates that were set will no longer be applied to hourly bookings after the set end date. Rates will however still be applied to hourly bookings before the set end date.

You can also completely remove tariff agreements by clicking on **Delete**. This puts a deleted-marking on the selected tariff agreement. This tariff agreement will not be used after this. See the Restore deleted-marking chapter for how to restore a deleted tariff agreement.

When are tariffs calculated?

Hourly booking tariffs are continuously calculated. So, as soon as a tariff agreement is changed, the tariff / rate for the hourly bookings will also be changed. This applies to all hourly bookings ever made.

N.B.: Bookings set up in the previous TimeWriter version will retain their saved tariff.

See also some detailed examples

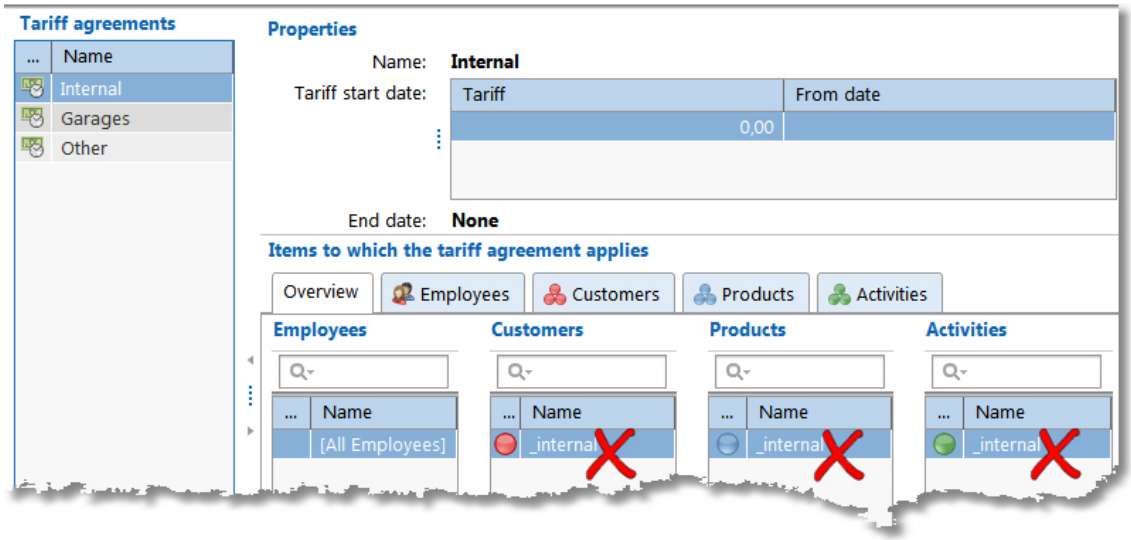
Tariff agreement examples

Not billable tariff agreement

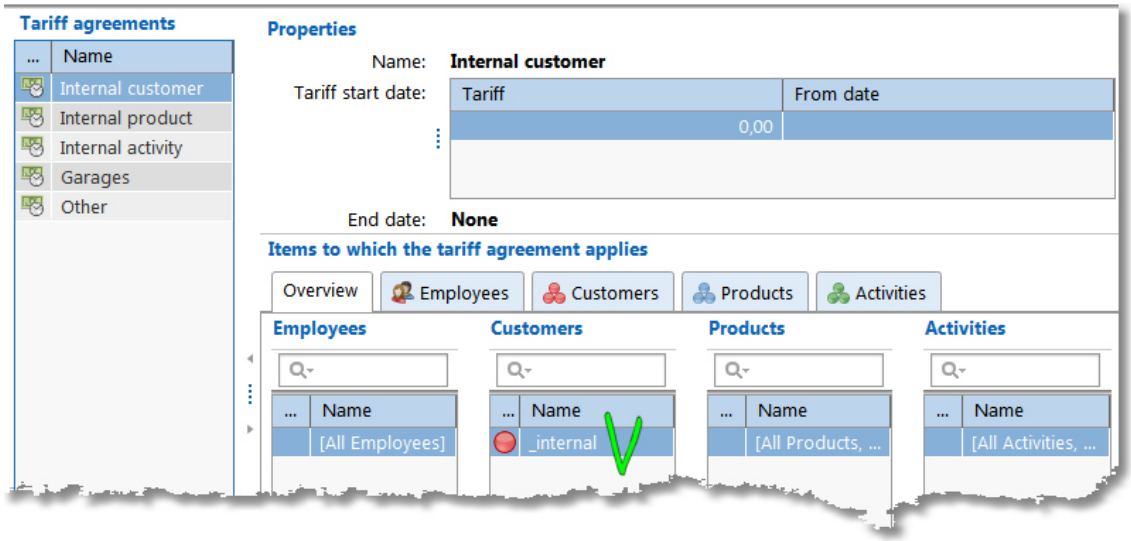
Suppose an organization has three possibilities to create not billable hourly bookings. They have a customer named '_internal', a product named '_internal' and an activity named '_internal'.

What they would like to achieve is that if one of these '_internal' aspects is choosen, the hourly booking becomes not billable.

The next image shows a situation that will **not** lead to the aimed result, because all three aspects are linked to one tariff agreement. The tariff agreement will only apply to bookings which are made on customer = '_internal' **and** product = '_internal' **and** activity = '_internal'.



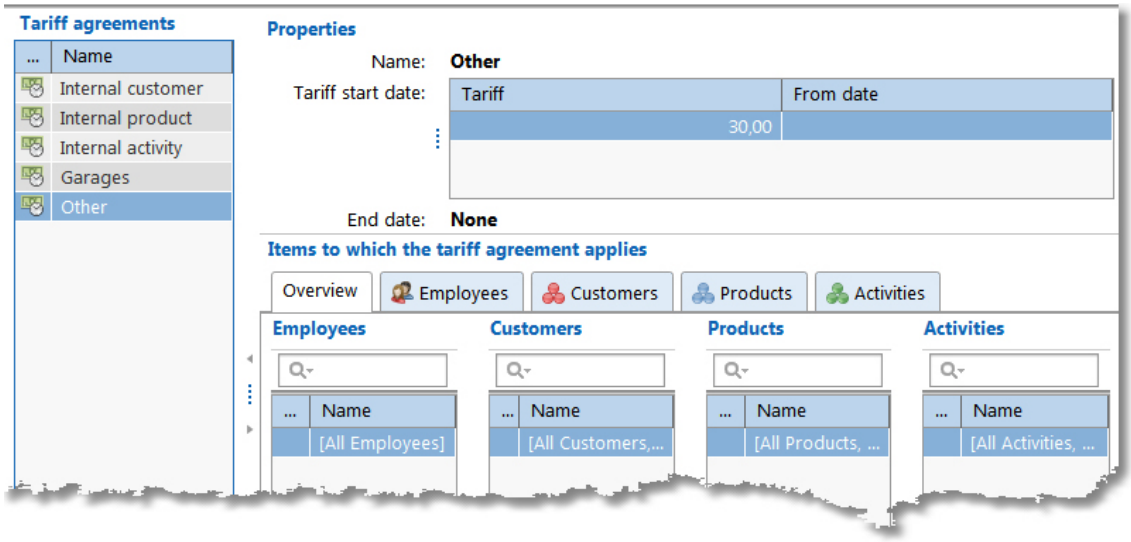
To achieve the aimed result, you need to create three separate tariff agreements, one for every aspect, like this:



By putting these tariff agreements to the top of the list they will be used (if applicable) before any of the other tariff agreements.

Default tariff agreement

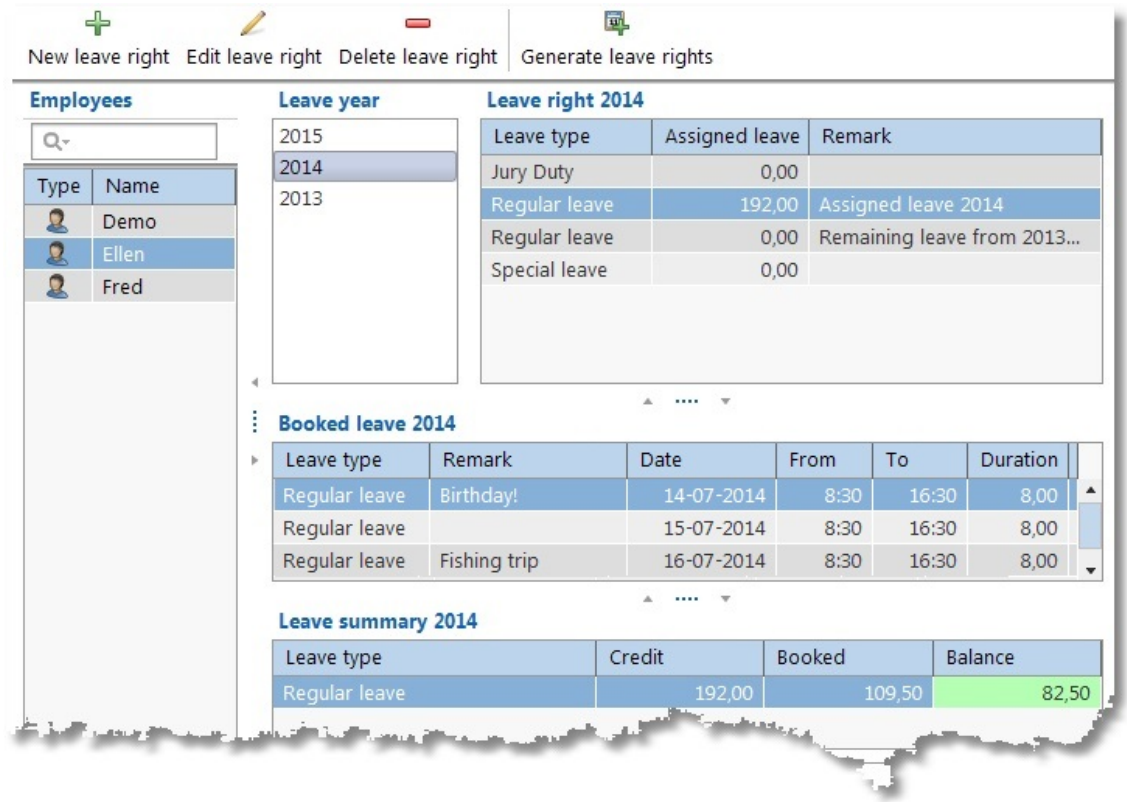
Suppose you want to have a safety net for hour bookings which do not match any tariff agreement. Than you need to create a tariff agreement linked to all employees, customers, products and activities, like the example below.



By putting this agreement to the bottom of the list, it will only be applied when no other agreements are applicable.

Leave

The Leave function allows leave rights to be assigned to different employees. Select **Master data | Leave** in the **Module explorer**.



Leave administration is done on an annual basis, this implies that leave rights that were not used are not automatically carried over to the next year. You need to manually enter this per employee or use the **Generate leave rights** button (see below). Approved leave rights will be shown together with leave requests in **Auditing | Leave survey.** To manage leave types see Maintenance and settings | Settings | Leave.

The leave administration screen will show an overview of leave taken for selected employee and year, booked leave (for selected leave type) and a leave summary. In the example above employee Ellen and the year 2014 are selected. In 'Leave rights 2014' her leave rights are shown and 'Regular leave' is selected here. Under 'Booked leave 2014' the details of the selected 'Regular leave' are shown. At the bottom of the screen, a leave balance will be shown under 'Leave summary 2014'.

Details can be managed via the toolbar buttons:

New leave right	Create new leave right.
Edit leave right	Edit the selected leave right. This can only be done for leave types with leave balance administration.
Delete leave right	Delete the selected leave right. **Note**: The selected leave right will be deleted permanently and cannot be restored.
Generate leave rights	Automatic generation of leave rights for one or more employees.

Creating leave rights

Manual creation of leave rights is done as follows:

1. Select the employee for leave right.
2. Select the year for leave right.
3. Click on **New leave right**.
4. Select the relevant type of leave. Only those leave types that generate leave balance administration are available for selection.
5. Enter the number of assigned hours of leave for the selected leave type. These are automatically filled in with the default hours balance for the selected leave type.
6. Add comments as required.
7. Click on **Save**.

Generating leave rights

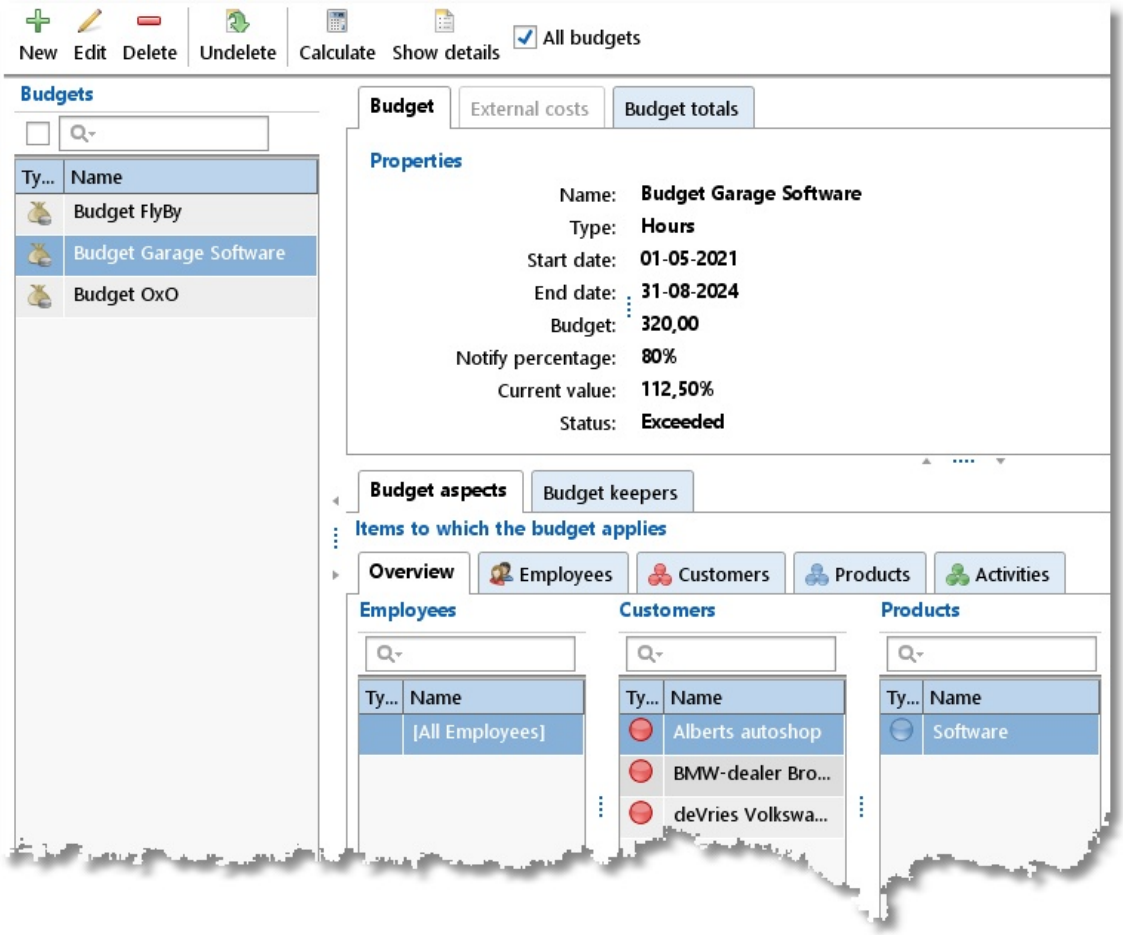
Multiple leave rights can be generated automatically for one or more employees in one go.

To generate leave rights perform the following steps:

1. From the list select **Leave year** for which rights are to be generated.
2. Click on **Generate leave rights**.
3. Select one or more employees for whom leave rights are to be generated.
4. If necessary adjust the following details for all leave types shown:
   - Generate; the 'ticked' leave type will have its rights calculated.
   - Assign; the hours to be assigned. This is filled in automatically with the default hours balance for the leave type.
   - Transfer remaining leave, if 'ticked' then any remaining leave balance for the selected leave type from the previous year will be transferred to the selected year.
   - Remarks for extra details if required.
5. Click on the **Generate** button.

Budgets

TimeWriter is able to process budgets. Select **Master data | Budgets** in the **Module explorer**.



For every budget, the aspects that are to be controlled are to be entered. Budgets can be defined in terms of hours or money. **Budget keepers** can be created per budget; they will be notified if / when budgets are exceeded. Employees who are also budget keepers can control their allocated budgets via **Auditing | Budget auditing**.

Details can be managed by the toolbar buttons:

New	Create a new budget.
Edit	Edit the selected budget. **Note**: when dates, budget or notify percentage are being edited, budget status will automatically become **Active** again.
Delete	Remove the selected budget. To prevent data from being lost the budget is not actually deleted but gets a deleted-marking.
Undelete	see Restore deleted-marking.
Calculate	Recalculate the actual values of shown budgets. How and when this happens is described later in this chapter.
Show details	Shows an overview of hourly bookings related to the selected budget.

On the **External costs** tab, external costs (e.g. work by third parties / third parties budget) can be entered for budgets of the **Tariff** type. These costs are deducted from the budget.

The **Budget totals** tab shows an overview of the progrss of the budget.

Creating a Budget

Budgets are created as follows:

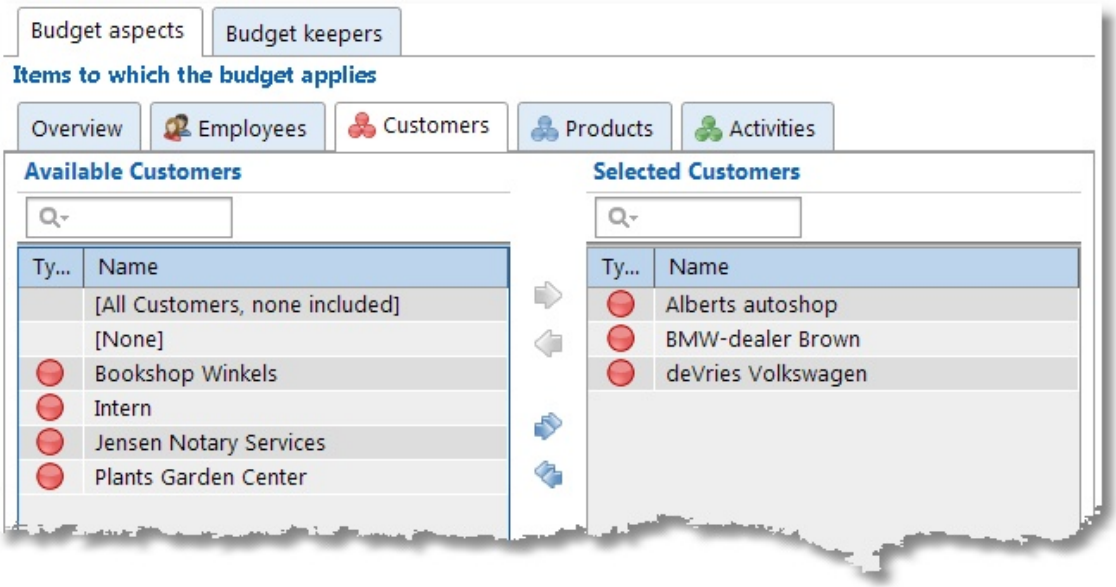
1. Click on **New** to start creating a budget.
2. Provide the budget with a relevant name. This name can be used as a filter term for reporting.
3. Indicate the type of budget you want; using hours or money (tariff or internal tariff) terms.
4. Set up a budget start- and end date (mandatory).
5. Enter the total available budget; in hours or money terms, depending on your selection. The budget always needs to be more than 0.
6. Enter the required notify percentage. Budget keepers will be sent a notification alert when this percentage of the budget has been used. The percentage must be between 0 and 100.
7. If applicable, enter external costs on the **External costs** tab.
8. Link the relevant aspects to the budget.
9. Link the relevant budget keepers to budget.
10. Enter the budget status; the default status is **Active** for new budgets.
11. Save the budget.

Linking aspects to budgets

Aspects and budgets can be linked as follows:

1. Select the required budget.
2. Click on **Edit**.
3. Select the **Budget aspects** tab.
4. The **Overview** tab shows already linked aspects. Click on to link new aspects or to remove links.

Aspects can also be linked via their own tabs. See below for a Customer to Budget link. This view shows the customers that are already linked and all of those that are still available.



Customers can be moved from left to right by using the arrows or by clicking and dragging.

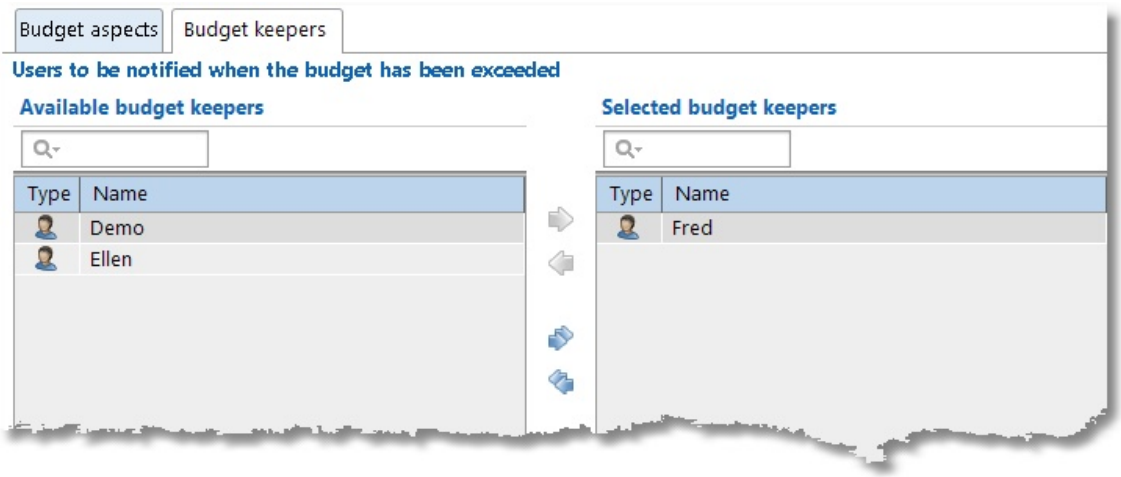
There are 3 extra options:

Selection	Explanation
No items selected	Same as **[All Customers, none included]**
[All Customers, none included]	If this option is selected the budget is applicable to ALL customers, but is also applicable when no customer is selected when entering an hour booking.
[None]	If this option is selected the budget is applicable to any selected customer, but is also applicable when no customer is selected when entering an hour booking.

Linking Budget keepers to budgets

The Budget keepers can be linked to budgets as follows:

1. Select the budget.
2. Click on **Edit**.
3. Select the **Budget keepers** tab.



Budget keepers can be moved from left to right by using the arrows or by clicking and dragging.

Ending or removing a Budget

Budgets can be removed by an Administrator by changing their budget status to **Inactive**. This is not an option for the Budget keepers. Inactivated budgets are no longer visible to Budget keepers in the **Auditing | Budget auditing** summary and will no longer be (re)calculated.

A budget can also be completely deleted by clicking on the **Delete** button. This gives the budget a deleted-marking and it will no longer be used. Refer to the Restore deleted-marking chapter to see how a removed budget can be restored again.

Copy a Budget

The grid right click menu has an option to **Copy** the selected budget to a new budget.

How and when budgets are (re)calculated

Booked hours are calculated within a budget when:

- All aspects related to the booking appear in the list of budget aspects OR when the aspects list is empty.
- It involves a booking of an employee who appears in the list of selected employees at the **Employee** tab of the **Budget aspects** tab. If this list is empty, all of the employees' hours will be counted.

The actual value of completed hours has to be continuously recalculated. Budgets that are linked to an employee who is also a Budget keeper are automatically re-calculated when this employee logs into Time Writer again. Calculations can also be done manually through the **Calculate** button. This button is also accessible to Budget keepers in **Auditing | Budget auditing** summary.

After a re-calculation the budget can be exceeded, because of a modified actual value. In this case the budget status will change automatically to budget status **Exceeded**. A budget is flagged as exceeded if its calculated current value is greater than the alert value (= notify percentage) of the budget.

Demo master data

As long as you are working with a TimeWriter **demo license** you can automatically generate demo master data by choosing menu option **File | Generate demo master data**. These details are intended to provide you with a general impression of program functions. This allows you to start making bookings straight away by using these generated details.

For the master data, 3 items are created for: Employee 1 to 3, Customer 1 to 3, Product 1 to 3 and Activity 1 to 3. Next, the authorisations and combinations are set up for the master data. If authorisations and/or combinations are to be used can be set up through: **Maintenance and settings | Authorizations and Combinations**. The standard setting is that all authorisations and combinations are to be used. An overview of automatically generated authorisations and combinations follows below.

Authorisations:

Employee	Authorised for
Employee 1 *	Customer 1, Product 1, Activity 1
Employee 2	Customer 1, Product 1, Activity 1, Customer 2, Product 2, Activity 2
Employee 3 **	Customer 1, Product 1, Activity 1, Customer 2, Product 2, Activity 2, Customer 3, Product 3, Activity 3
Logged in employee (you)	Customer 1, Product 1, Activity 1, Customer 2, Product 2, Activity 2, Customer 3, Product 3, Activity 3

** Employee 1 can only make hourly bookings for Customer 1, Product 1 and Activity 1.*

*** Employee 3 can make hourly bookings for all Customers, Products and Activities.*

The person generating master data (the logged in employee) is also authorised for all Customers, Products and Activities.

Combinations:

Master data	May be combined with
Customer 1 *	Product 1
Customer 2	Product 1, Product 2
Customer 3 **	Product 1, Product 2, Product 3
Product 1	Activity 1
Product 2	Activity 1, Activity 2
Product 3	Activity 1, Activity 2, Activity 3

** Customer 1 can only be booked in combination with Product 1.*

Product 1 can only be booked in combination with Activity 1.

As soon as Customer 1 is selected for a booking, Activity 1 and Product 1 are also automatically filled in because this is the only possible combination.

*** Customer 3 (can only be booked by you and Employee 3) can be booked in combination with all Products.*

Product 1 can only be booked in combination with Activity 1.

As soon as Customer 3 and Product 1 are selected for a booking, Activity 1 is also automatically filled in because this is the only possible combination.

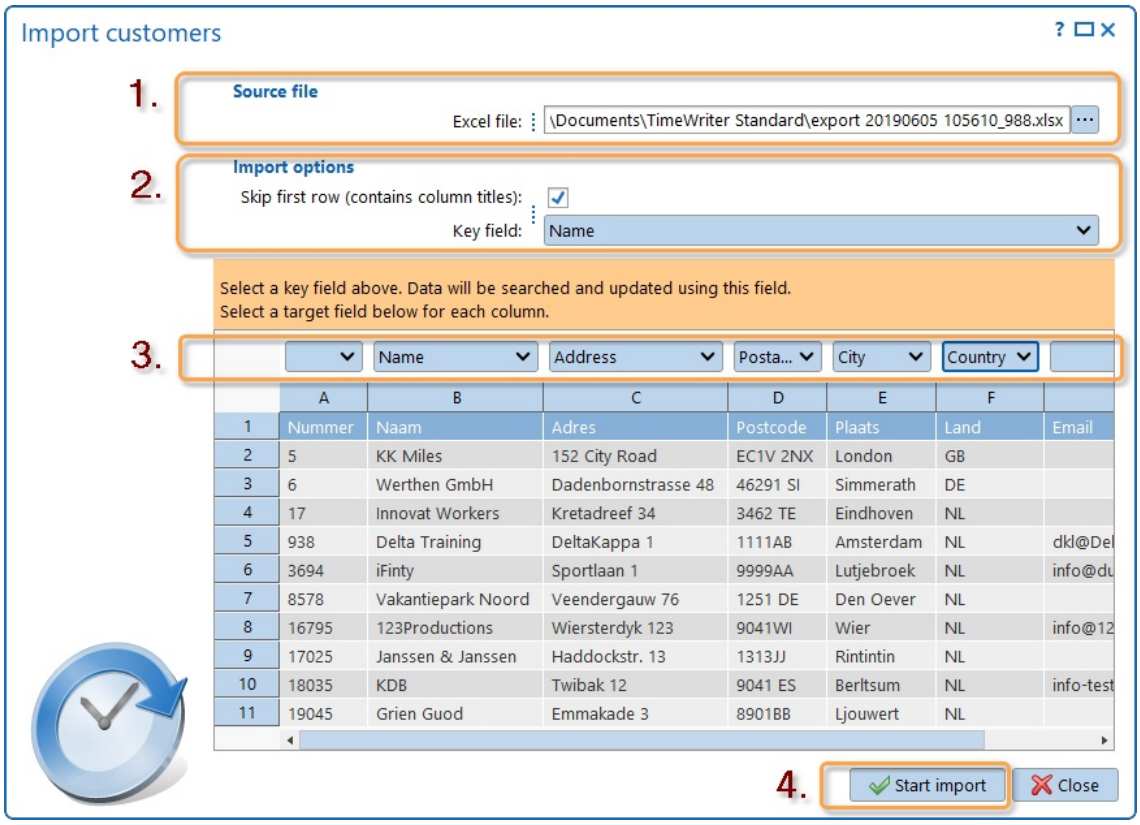
Product 2 – only booked in combination with Activity 1 or 2.

Product 3 - can be booked in combination with all Activities.

Import

Master data for employees and aspects can be imported from an Excel file. To do this, go to the relevant master data and press **[Import]**.

The following screen appears:



1. Select the Excel file to import.
2. Select a key field (mandatory). With the key field existing data can be updated in TimeWriter. The aspect (in this case the customer) will be searched for on the value from the key field column.
3. Select a target field from the Excel file for each column to be imported. Leave the target field empty for columns not to be imported.
4. Press **[Start import]**

Maintenance and settings

This chapter describes the general settings and explains the maintenance tasks.

Settings

Manage various settings and program behaviour.

Authorizations and combinations

Go to **Maintenance and settings | Settings | Authorizations and Combinations** to work on these settings.

Per aspect you can set up if employees are authorised to make bookings for this aspect. If no authorisations are required then all employees can automatically book all items for relevant aspects.

Every aspect can be set up to determine whether or not it should be combined with the next aspect. If no specific combinations need to be made, then all combinations are possible.

Backup reminder

Go to **Maintenance and settings | Settings | Backup reminder** to work on these settings. Here you can enable or disable a weekly backup reminder. The backup reminder will only be executed for administrators.

Note: This setting is only available when you are working with a local database. Backups for a cloud database will automatically performed.

Blocking

Go to **Maintenance and settings | Settings | Blocking** to work on this setting.

TimeWriter knows different kind of blocking. These settings are related to:
1. Blocking's due to period blocking.
2. Blocking's due to saved tariffs.
3. Blocking's due to invoicing.

To prevent completed hour registrations from being edited later, you can block entries made before a certain date or time period. This allows you to secure completed hours calculations after billing for instance.

The following settings can be changed here:

Enable period blocking	Indicate here if blocking is to be applied or not.
Block date	Here you can fill in the required blocking date. Everything *before* this date will be blocked. If necessary a period of a number of days can be entered here by using the letter D, minus the number of days, e.g. **D-45**. Everything *before* 45 days ago is then blocked.

In this screen you can also select the employees (for example: administrators) to whom the blocking does not apply, by moving them from left (available) to right (selected) in the selection lists using the arrow keys. The text box above the lists can be used to quickly look up details.

Company logo

Go to **Maintenance and settings | Settings | Company logo** to work on this setting. You can select an image to be shown on every report. A copy of the selected image will be saved in the database.

Hours checking

Go to **Maintenance and settings | Settings | Hours checking** to work on these settings.
When hours checking is being done TimeWriter compares the total hours completed by an employee to their total reference hours over the number of weeks to be checked. If the total number of actual hours worked is less than their total of reference hours a message is generated.

The following settings can be changed here:

Number of previous weeks to check	Enter how many weeks preceding the current week need to be checked.
Check hours on application start	When this option is ticked the hours checking will be run on start up of the program.
Check hours on application close	When this option is ticked the hours checking will be run when the program is being closed.
Prevent program from closing when too few hours	When this option is ticked the user can only close TimeWriter after remaining hours have been entered.

Hours checking can also be done by choosing menu option: **File | Check hours**.

Leave

Go to **Maintenance and settings | Settings | Leave** to work on these settings. This screen contains two tabs; **Leave settings** and **Leave types**.

Leave settings

On this tab the following can be set up:

Leave aspect	Select the leave aspect type (for which to add items on the **Leave types** tab).
User field for leave survey	Select an hours user field to be presented in the remark column of the leave survey or in leave reports.

Leave types

On this tab you can add the items that need to be entered as leave. Per leave type the following can be set up:

Leave type	Select the leave type (belonging to the aspect as entered on the **Leave settings** tab).

Count in balance	When ticked, a balance administration will be applied to the specified leave type.
Default hours balance	Enter the default number of hours that will be used when assigning leave rights to employees.
Remark	Enter a standard comment if necessary.

As a rule, employees are generally not to take more regular leave than those to which they are entitled. However there are also types of leave such as 'Special leave' for which there are no default hours needed.

Password strength

Go to **Maintenance and settings | Settings | Password strength** to work on these settings.

The following settings can be changed here:

Enable checking password strength	When this option is ticked the password strength and password expiration will be checked.
Minimal length	Enter the minimal length of a password (0 = any length)
Expires in (days)	Enter the expiration period in days (0 = no expiration)
Must contain lowercase letter	Tick this option if the password must contain a lowercase letter
Must contain uppercase letter	Tick this option if the password must contain an uppercase letter
Must contain number	Tick this option if the password must contain a number
Must contain symbols from list: !@#$%^&*()_+-=\\\|<>,./?~	Tick this option if the password must contain a symbol from the list.

Login

In **Maintenance and settings | Settings | Login** you can change the settings for logging in.

The following settings can be changed here:

Determine user name	• **Manual**: user name must always be filled in manually. • **System user name**: the user name for computer login is filled in automatically. • **Use environment variable**: user name is obtained from reading the environment variable.
Environment variable	Fill in the environment variable here that is to be used to determine the user name (if 'use environment variable' has been selected).
Password checking	**Via application**: The password entered by the employee is checked against the password entered when logging in. **Via Windows domain**: the Windows domain is asked to verify if the password that was entered is correct.

Automatic login when possible	If this action is activated login will be automatic with the located user name. If this fails, a login screen will appear. **N.B.** Automatic login will not work when **Determine user name** is set to **Manual.**

Reporting

Go to **Maintenance and settings | Settings | Reporting** to work on this setting.
This is where you can set up the output location for report- and export files and the default font for reports.

The following settings for **the output location for report- and export files** can be changed here:

Default user documents folder	Select this option when file output is to be stored in the **Default user documents folder** (in Windows: My Documents or Documents).
Other folder	Select this option when file output is NOT to be stored in the **Default user documents folder**.
Other location for Windows clients	When **Other folder** is selected the complete Windows path can be entered here or be selected via an open-dialogue. **
Other location for Mac OS X clients	When **Other folder** is selected the complete Mac OS X path can be entered here or be selected via an open-dialogue. **

*** The %loginname% variable can be included in the path name. In reporting this variable will be replaced by the login name of the logged in user. If the entered path does not appear to exist during reporting, TimeWriter will attempt to create the path. If this is unsuccessful, this is reported and TimeWriter will use to the local folder for temporary files.*

The following settings for **the default font for reports** can be changed here:

Font	Select a font from the list available.
Font size	Select a font size form the list available.

Special days

Go to **Maintenance and settings | Settings | Special days** to work on these settings.
Special days, such as Christmas, can be marked with a different color in the Week grid and the Fixed hours list. Text from special days can also be used in reports (when there are hourly bookings on such days).

Dates need to be entered in the format of day-month-year. The year is optional. When a date does not include a year figure, it will count for every year. The letter E can be used to indicate Easter:

- E = Date of first day of Easter
- E+1 = Second day of Easter
- E+39 = All souls day
- E+49 = White Monday (Pentecost day 1)
- E+50 = Pentecost day 2

TimeWriter API

Using the TimeWriter API it is possible to import/export the following data:
- Aspects (employees, customers, projects, activities)
- Relations (combinations en authorizations)
- Hour bookings

To connect to the TimeWriter API you need a **API key** and a **User key**. Go to **Maintenance and settings | Settings | TimeWriter API**.
Click on edit to generate the user key and/or copy the keys. If there is no user key yet, click on to generate a new user key.

You can find the manual about using the TimeWriter API here:
https://timewriter.com/media/webhelpapi.

Note: You can only connect to the TimeWriter API if you are using our cloud server.

Update check

Go to **Maintenance and settings | Settings | Update check** to work on these settings.
Here you can enable or disable a weekly update check. The update check will only be executed for administrators

Note: This setting is only available when you are working with a local database. Update checks will always be executed when working in the cloud.

Week grid

In **Maintenance and settings | Settings | Week grid** you can change Week grid settings. This screen contains two tabs; **General** and **View**.

General

On this tab you can set the following:

Times:

Week starts on	Starting day of the week. Default setting is Monday. This can be changed to Sunday if necessary. This setting only affects the Week grid and the Fixed hours list. Reporting reflects the ISO standard that has Monday as its weekly starting date.
Work week starts on	The first day of the work week. **
Work week ends on	The last day of the work week. **
Working day starts at	Starting time of a working day. **
Working day ends at	End time of a working day. **
Lunch break starts at	Start time of lunch break.
Lunch break end at	End time of lunch break.

Minimal time unit	Minimal time unit is used to indicate the shortest possible time period to be entered. Default the unit is set at 15 minutes. Time slots are always rounded off using this unit setting.

*** The default setting for the Week grid is to show working weeks and working times. The Week grid saves and restores its zoom level. This means that changes to this setting are not always visible.*

The Week grid can be reset to working days and working hours by using the Zoom *button*

Program function:

Do not book on lunch break	When a booking is made across a break, you will be asked if the hourly booking should be split.
Warn at invalid bookings	When time slots overlap (or is invalid from mobile) you will be warned to fix this.
Confirm deleting of hour bookings	Prevents accidental deletion of a time slot.
Copy activities of last entry to new booking	Previously chosen aspects and filled in details for user fields will be stored in memory. When a new booking is made these will be filled in again.
Show special days in week grid	Show special days in the Week grid with title and selected colour.
Fill in gaps	When a time slot is drawn over existing bookings, overlapping bookings are made by default. If you enable this option, no overlapping bookings will be made, but the remaining time between bookings will be filled.
Hide information block	Hide information block in week grid and fixed hours list from users (not from administrators).

View

On this tab you can define the content and layout of the time slots as they are being displayed in the week grid. The layout and style of the text in these time slots can be customized by using html code. Any changes made are being displayed in a (live) preview.

Workplace

Here you can set up to 10 workplace locations yourself.

Fields

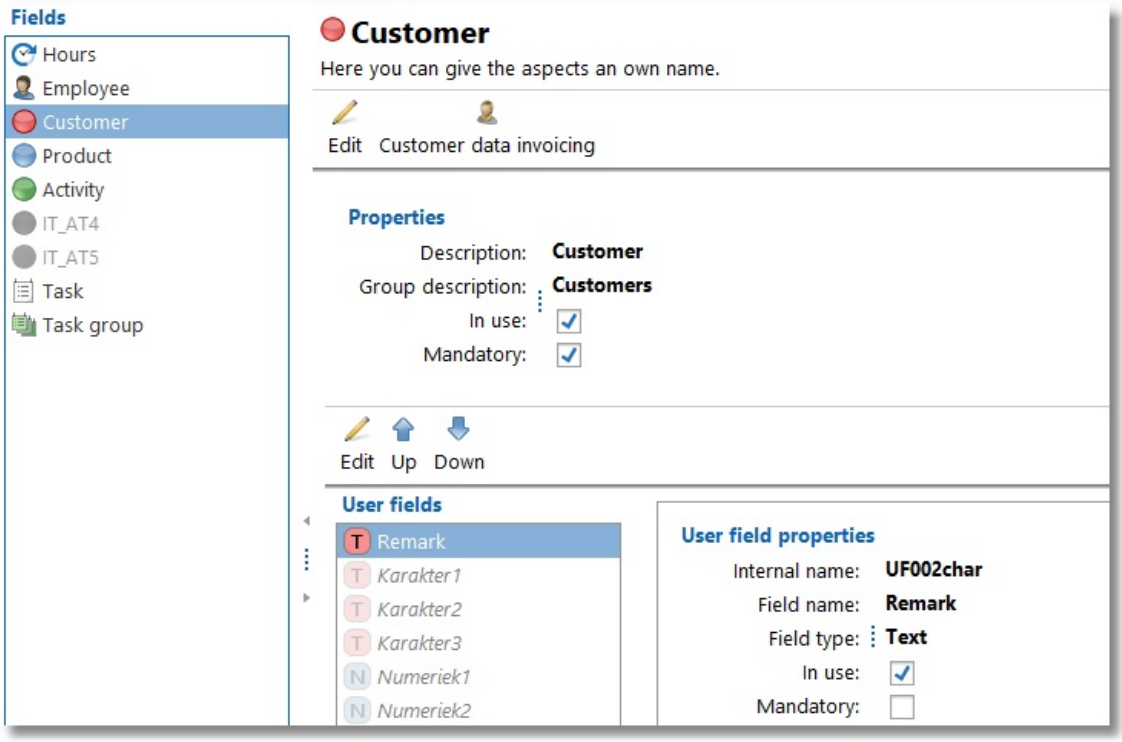
In the **Fields** module you can allocate names to aspects to reflect terminology used in the your organisation. Mandatory master- and hourly booking data entry requirements can also be set up here.

Aspect types

See also www.timewriter.com/support/video for instruction video's how customize aspect names (Terminology).

Go to **Maintenance and settings | Fields**. Here you can customize naming of aspects and set up user-defined fields.

The picture below show the default set up for the Customer aspect.



By clicking on Edit you can change the aspect types. You can set up the following properties for this:

Description	The name of the aspect as used in your organisation.
Group description	Plural of the description, will be placed at the top of the lists.
In use	Use this to indicate if this aspect is to be used or not.
Mandatory	When this is ticked the selection of this aspect will be enforced when making hourly bookings.

User defined fields

See also www.timewriter.com/support/video for instruction video's how work with user fields.

User-defined fields are extra details that can be saved with master data or hourly bookings.

In **Maintenance and settings | Fields** you can enter (per aspect) which user fields are to be used with which aspect and whether or not these fields are mandatory. The field names are adaptable to descriptions that are used within your organisation. In TimeWriter Standard there are 4 text fields and 3 numerical fields available for every aspect. For an hourly booking, task or task group there are 4 text fields, 3 numeric fields and 1 logical field available.

There are also 2 fixed user fields available for the Task aspect, namely Type and Workflow (names are freely adjustable). A selection list can be defined for these fields. A choice can be made from these selection lists when entering or changing a task, whether or not mandatory.

Maintenance tasks

In the **Maintenance tasks** module you can run several database maintenance tasks.

500 Cleanup

Use this task to delete hourly bookings and/or (deleted) aspects permanently. To delete hours you can select a period. All bookings within this period will be deleted.

If you have already **deleted** aspects in the database not related to any hourly bookings, then you can delete these aspects permanently with this task. Therefore you need to select the option **Remove deleted aspects**.
If you have aspects in the database not related to any hourly bookings, then you can delete these aspects with this task (deleted aspects included). Therefore you need to select the option **Remove aspects**.

1. Go to the module **Maintenance and settings | Tasks** en select task **500 Cleanup**.
2. Select the option **Delete hours** if you want to delete hours. The begin date will be set automatic to the date of the oldest hourly booking in the database. The end date will by set to December the 31th of 2 years ago. Adjust these dates to your needs.
3. Select the option **Remove deleted aspects** if you want to permanently remove **deleted** aspects which are **not** related to any hourly bookings.
4. Select the option **Remove aspects** if you want to remove all aspects which are **not** related to any hourly bookings (deleted aspects **included**).
5. Start running the task by pressing the button **Execute task.**

530 Merge aspects

The task merge aspects can merge two different aspects into one aspect. All previously entered hour bookings containing either one of the merged aspects will be adjusted as well.

1. Go to the module **Maintenance and settings | Tasks** en select task **530 Merge aspects**.
2. Select the aspect type (customer, product, activity)
3. Choose the aspect which should by merged at **Choose an aspect**. All bookings which are made on this aspect will be changed to the aspect selected in the next step. This aspect will be deleted after running this task.
4. Choose the aspect where the aspect should be merged into at the **Merge into** option. This aspect will remain. All booking made on the aspect selected in the previous step will be changed to this aspect.
5. Start running the task by pressing the button **Execute task.**

540 Swap aspects

Sometimes the need arises to set up the hour registration in a slightly different way, for example when an extra aspect level has to be applied.
(for example Project -> Task vs. Project -> Phase -> Task)

Task 540 makes it possible to change the aspects order with preservation of data (as far as possible[1]).

Go to **Task and settings | Tasks** and select task 540 Swap aspects. The screen will show all aspects in the current order. You can change the order of the aspects using the combo boxes. Every aspect can only be chosen once. Click on button Execute task to start the task. After the task has finished the order of the aspects will be changed as entered. This task can take some time, depending on the size of the administration.

1. Go to **Task and settings | Tasks** and select task **540 Swap aspects**. The screen will show all aspects in the current order.
2. You can change the order of the aspects using the combo boxes. Every aspect can only be chosen once. use the button and to shift all aspects 1 position.
3. Click on button **Execute task** to start the task.

After the task has finished the order of the aspects will be changed as entered. This task can take some time, depending on the size of the administration.

[1)] changing the order of aspects can lead to a situation where aspect are not consecutive anymore. As a result defined combinations will expire.

550 Adjust multiple hour bookings

With this task you can adjust aspects of all hour booking in one go.

1. Select the period range for filtering (optional).
2. Select one (or more) aspect(s) to adjust.
3. Select also to which aspect(s) they should by adjust.
4. Click on **Execute maintenance task** to view all the bookings and, if everything looks right, click on **Apply adjustments** to apply the adjustments.

Reporting

See also www.timewriter.com/support/video for instruction video's how work with reports.

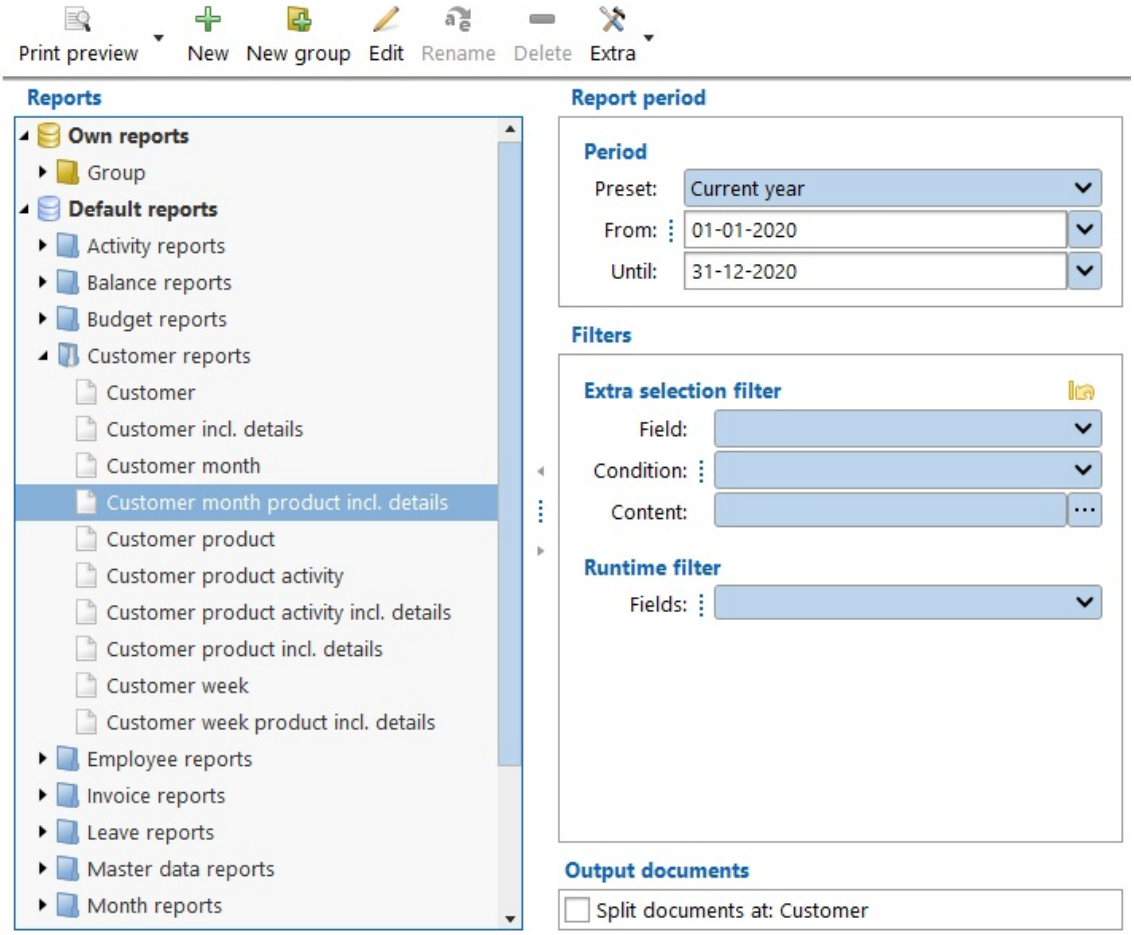
TimeWriter Standard offers the following reporting functions:

- Formatted text reports as on screen previews, printable copies or saved as Word, Excel, HTML or PDF file.
- Export files to export data from TimeWriter to other programs for further action and analysis.
- Grid views with charts and pivot table, to quickly and interactively view and analyze data.

Reports

In TimeWriter Standard various default reports are available, arranged in various groupings. Select **Reporting | Reports** in the **Module explorer**.

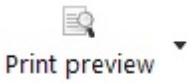
TimeWriter is supplied with a series of **Default reports**. These are located in a separate table and cannot be customised. You can generate reports on booked hours, master data, leave and budgets. You can use the default reports but you can also create your own reports as long as you are authorised to do so.



Generating a report

1. Select the correct report group from the list.
2. Select a report from the group.
3. Enter the required period at the right hand side (see also Selection filters).
4. Enter the required Extra and/or Runtime filters at the right hand side (see also Selection filters).
5. Double click on the report or click on the **Print preview** button to generate the report. The report preview will appear on the screen.

Report printing options

There are various options for printing reports. Click on the arrow of the 

button.

Various options are:

Button(s)	Function
Print preview	Print report as preview on the screen.
Print	Print report to the default printer.
Print (with printer settings dialog)	Print to another printer (not default printer) or using different page settings.
Print to DOCX	Print report as docx file. ** *Word in Microsoft Office 2007 and more recent.*
Print to HTML	Print report as html file *.* *Webpage.*
Print to ODT	Print report as odt file. ** *OpenOffice.*
Print to ODS	Print report as ods file. ** *Open Document Spreadsheet.*
Print to PDF	Print report as pdf file. ** *For example Acrobat.*
Print to XLS	Print report as xls file. ** *Excel.*
Print to XLSX	Print report as xlsx file. ** *Excel in Microsoft Office 2007 and more recent.*

*** After printing, the report will be opened with the default program for this type of file. The files will be saved in the output folder as set up in* Maintenance and settings | Settings | Reporting*. Default for this is the Default user documents folder (in Windows: My Documents or Documents).*

Designing/changing reports

See Report designer.

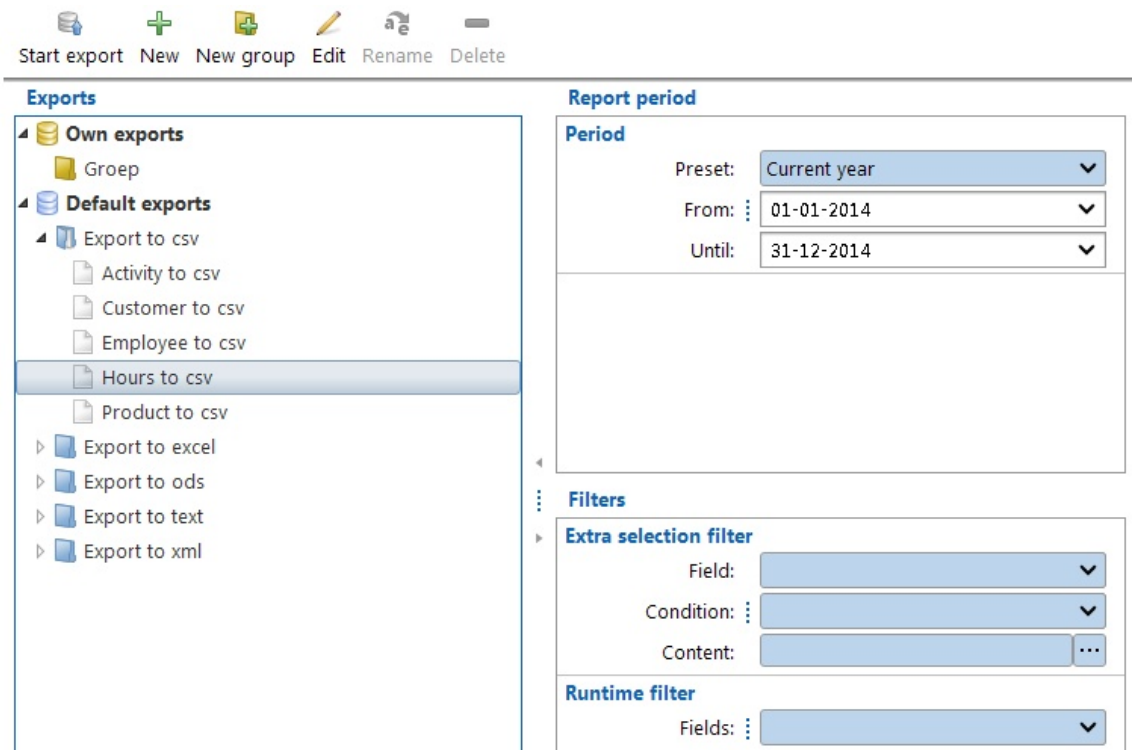
Exports

TimeWriter Standard offers various export options, arranged in various groups. Select **Reporting | Exports** in the **Module explorer**.

TimeWriter is supplied with a series of **Default exports**. These are located in a separate table and cannot be customised. You can generate exports on booked hours, master data, leave and budgets. You can use the default exports but you can also create your own exports as long as you are authorised to do so.

TimeWriter includes the following export formats:

Extension	Description
.csv	Comma separated text file
.xls	Excel '97 - 2003 file
.xlsx	Excel 2007 and newer file
.ods	Open document Spreadsheet
.txt	Tab-separated text file
.xml	XML file



Creating an export

1. Select the correct export group from the list.
2. Select an export from the group.
3. Set up the required period at the right hand side (see also Selection filters).
4. Also set up any required Extra and / or Runtime filters at the right hand side (see also Selection filters).
5. Double click on the export or click on the **Start export** button to generate the export.

6. Files are saved in the folder set up in Maintenance and settings | Settings | Reporting. Default for this is the Default user documents folder (in Windows: My Documents of Documents).

Designing/changing exports

See Report designer.

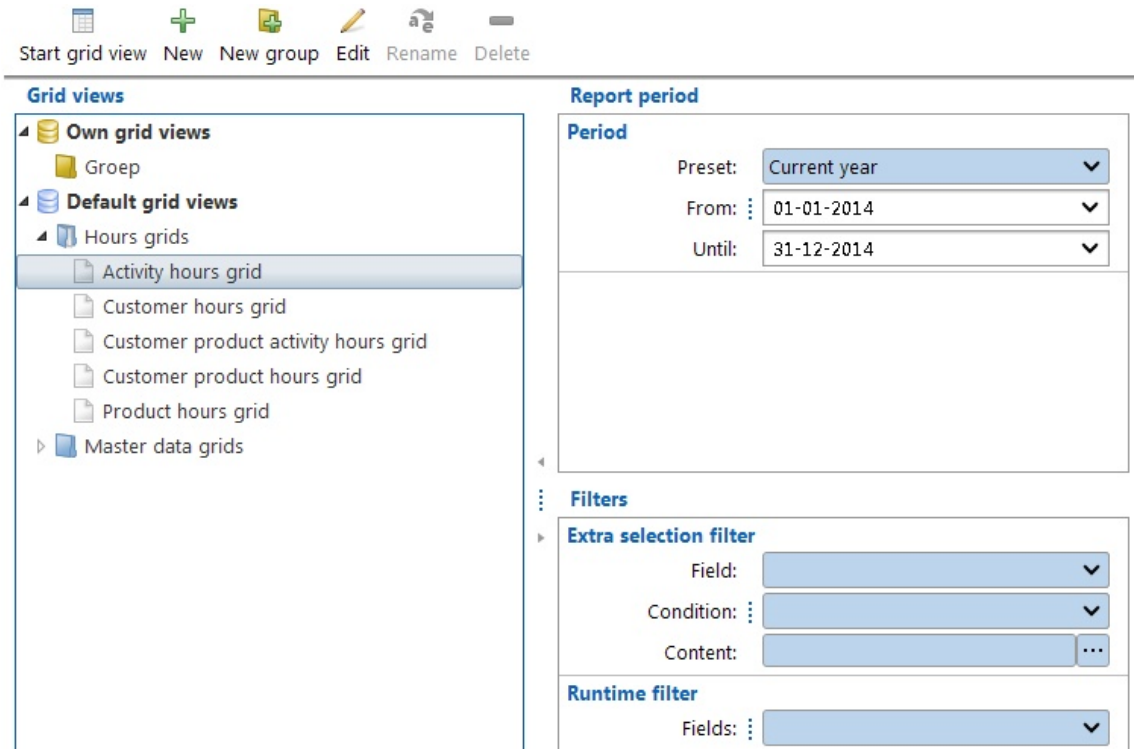
Grid views

TimeWriter Standard offers various grid view formats, arranged in various groups. Select **Reporting | Grid views** in the **Module explorer**.

TimeWriter is supplied with a series of **Default grid views**. These are located in a separate table and cannot be customised. You can generate grid views for booked hours, master data, leave and budgets. You can use the default grid views but you can also create your own grid views as long as you are authorised to do so.

A grid view is a variant of a general report. The biggest differences are:

- Data is shown in a grid format.
- You can interactively group and sort fields. Groups can be expanded and collapsed to show or hide data.
- All numerical fields are automatically being totalled.
- Easily create and change your own grid views.
- The view shown on screen can also be printed (including expanded or collapsed groups).
- Data can be converted into graphs.
- You can arrange data in a pivot table.



Generating a grid view

1. Select the correct grid view group from the list.
2. Select a grid view from the group.
3. Enter the required time period at the right hand side (see also Selection filters).
4. Also enter any Extra and / or Runtime filters at the right hand side (see also Selection filters).
5. Double click on the grid view or click on the **Start grid view** button to view on screen.

Designing and changing grid views

see Report designer.

Selection filters

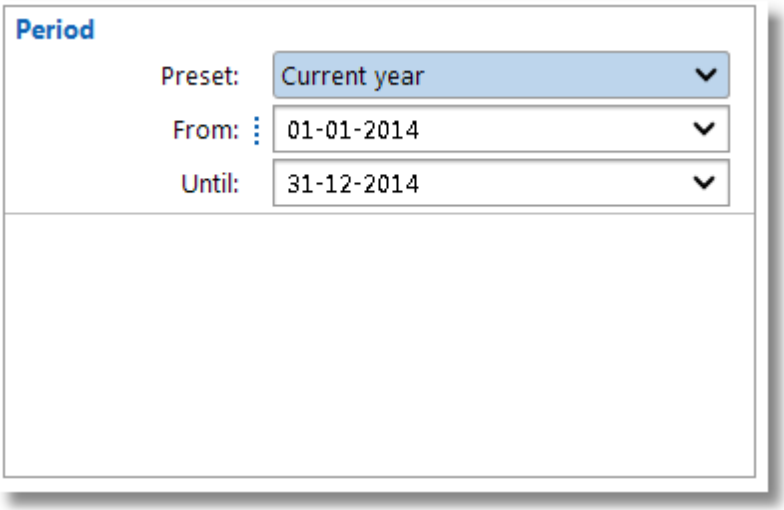
Selection filters can be used for Reports, Exports and Grid views. The following selection options are available:

- Period
- Extra selection filter
- Runtime filter

When in below explanation a reference is made to a report it also applies to an export or grid view.

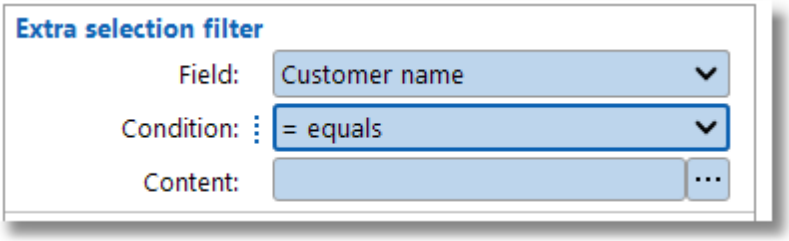
Period

Select the reporting period based on a pre-set or a random time period using the **From** and **To** fields.

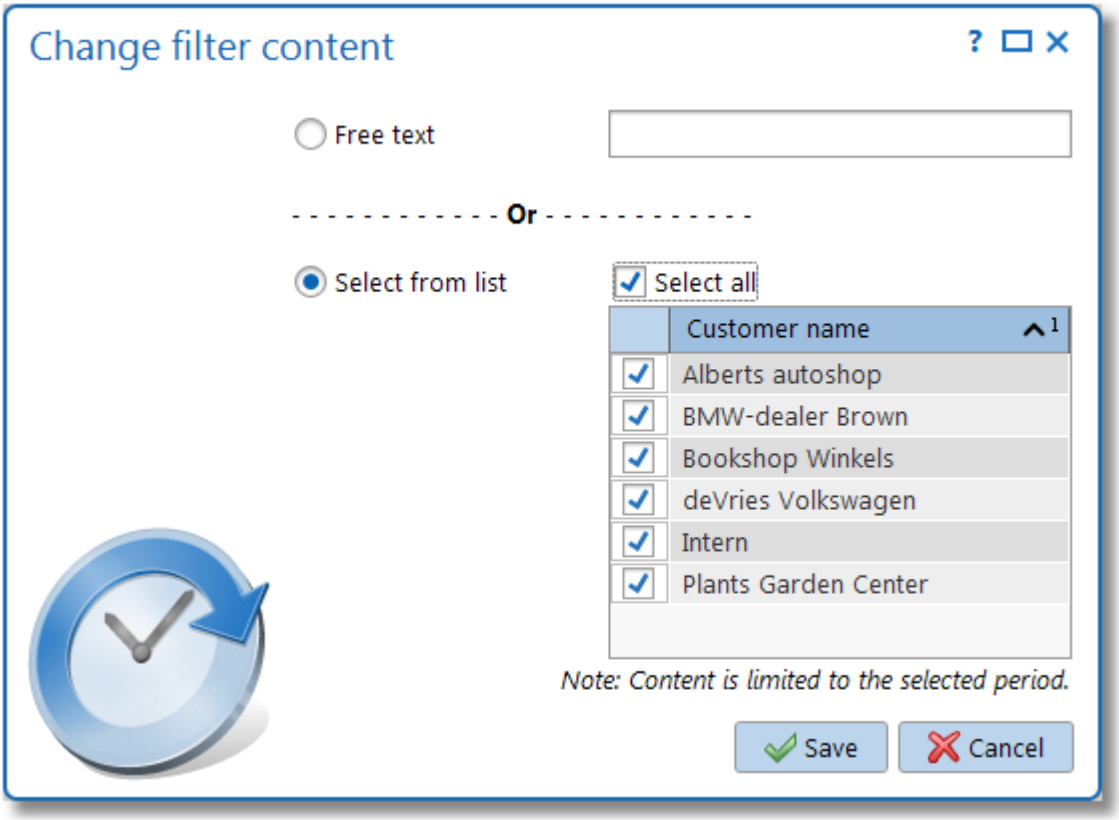


Extra selection filter

The content of reports can be limited by using an Extra selection filter. This can limit the report to only one customer for instance.



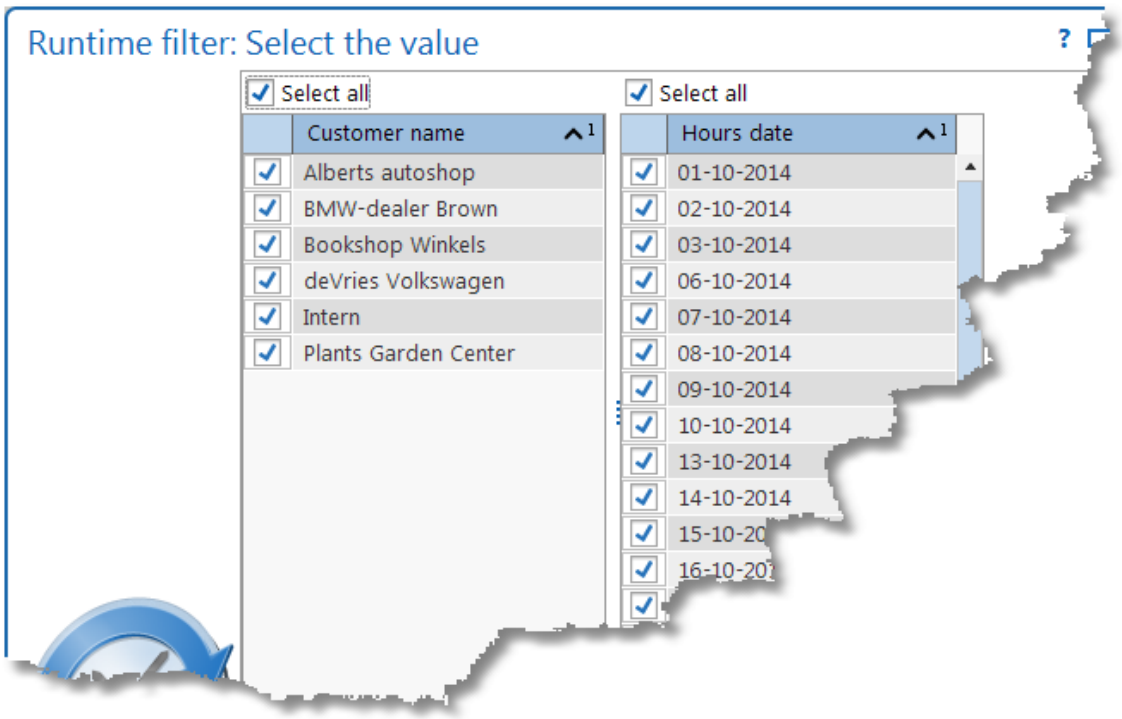
The **Content** field can be populated by using the following dialogue.



Choose the **Free text** option to be able to manually type in (part of) the Customer name, or select the **Select from list** option to select items from a list with available values.

Runtime filter

The Runtime filter shows available values for the filter-selected fields and offers the opportunity to apply any filter combination.



Output documents (split documents)

Specify here whether the document to print or to export should be split into multiple documents, based on the first field of the report output fields list.

Report designer

See also www.timewriter.com/support/video for instruction video's how work with reports.

The Report designer makes it easy to create new reports, exports and grid views. All new designs are saved in the TimeWriter database and will always be available to anyone in your organisation who uses TimeWriter.

General

Creating a design

Select the required module (Reports, Exports or Grid views) in **Reporting** in the **Module explorer**.
Click on **New**, and the **Report designer** will appear.

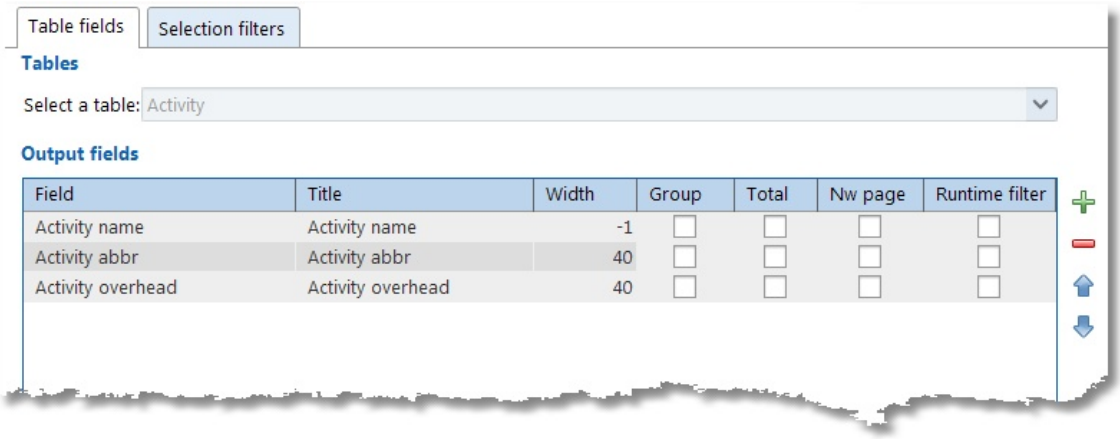


Table fields tab

1. Click on the Table fields tab. This is where you determine what is to go in the columns of the report.
2. Select the data type that is to be processed in the report in **Select a table**.
3. Click on to add one or more fields. Which fields are available depends on previously selected data types. Using allows you to remove a selected field.
   Note: You can not add, delete or move fields of custom made reports, the buttons will be disabled.
4. By double clicking on a column cell, you can alter its contents:
   - Description of field name and field title.
   - Column width. **
   - Group = Yes: field will be grouped; a new value results in a new subheading. **N.B.** The fields to be grouped MUST be located at the top of the list. **
   - Total = Yes: field will be totalled; after every change to the grouped field a total for this field will be produced. **
   - Nw page = Yes: Subheadings will be put on a new page.
   - Runtime filter = Yes: The field will be used by default in the **Runtime filter**.

   Note: The Group, Total, and New page options can not be set for numeric fields. In that case the options will be disabled.

5. With and you can move output fields. The first field will become column 1 in the report, the next one becomes column 2 and so on.
6. When **Show detail lines when grouping** is ticked, the detail lines related to the grouping will be shown in the report.

At the bottom of the tab the total width of columns can be seen in pixels. If the maximum column width is exceeded then the line will turn red and column widths will need to be fixed. **

*** Only available / visible in the designer of the reports module, not in the designer of the exports- and grid views module.*

Selection filters tab

1. Click on the Selection filters tab. This is where you set up what requirements the reporting details need to meet.
2. You can use **Extra selection filter preset** to define a selection filter in advance. When the report is selected this setting is shown in **Extra selection filter**.
3. The **Predefined filter on content** can be used to enter one or more criteria that must be met by the report selection. Click on to add a new filter rule, use to remove a selected filter rule. An existing filter rule can be changed with .

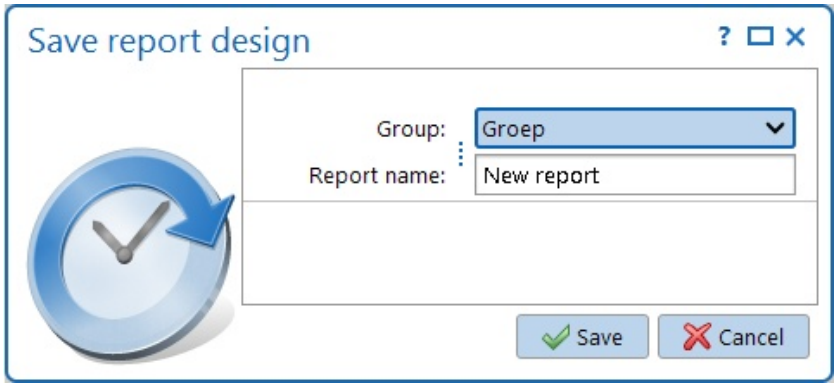
Other tabs

Report specific tabs see: Reports.
Export specific tabs see: Exports.
Grid view specific tabs see: Grid views.

Advanced tab: only available in TimeWriter Professional.
Scripting tab: only available in TimeWriter Professional.

Saving

Click on Save to save the design.



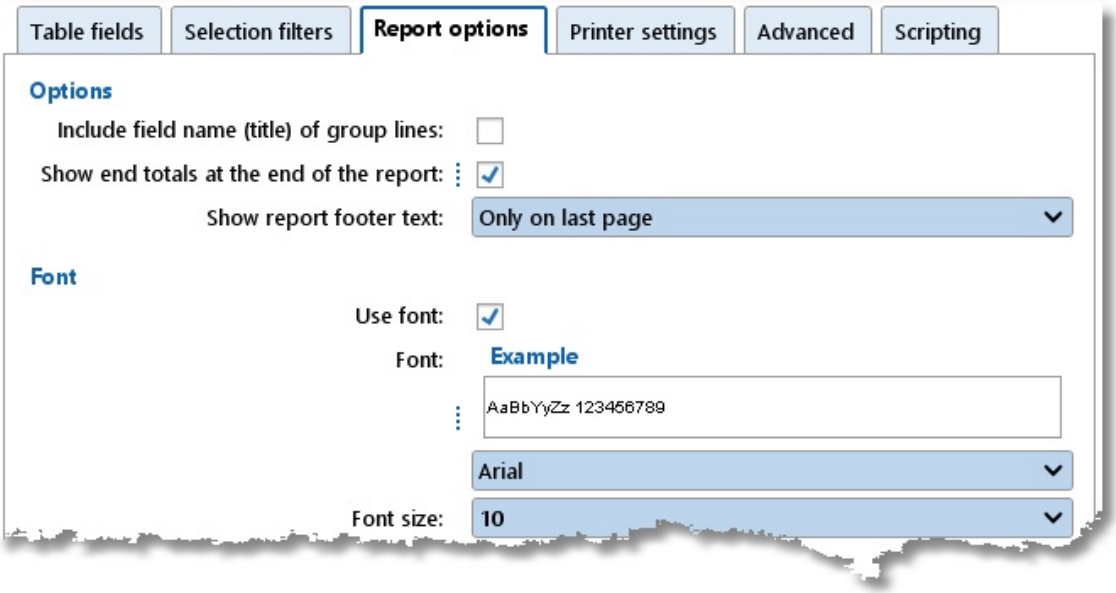
Changing the design

1. Select the required reporting module in the **Module explorer**.
2. Select the correct report, export or grid view group from the list.
3. Select the required report, export or grid view from this group.
4. Click on **Edit**.

5. Proceed the same way as in Creating a design. You can also save a changed design under a new name via **File | Save as**.

Reports

Below is an overview of report-specific settings.



Report options tab

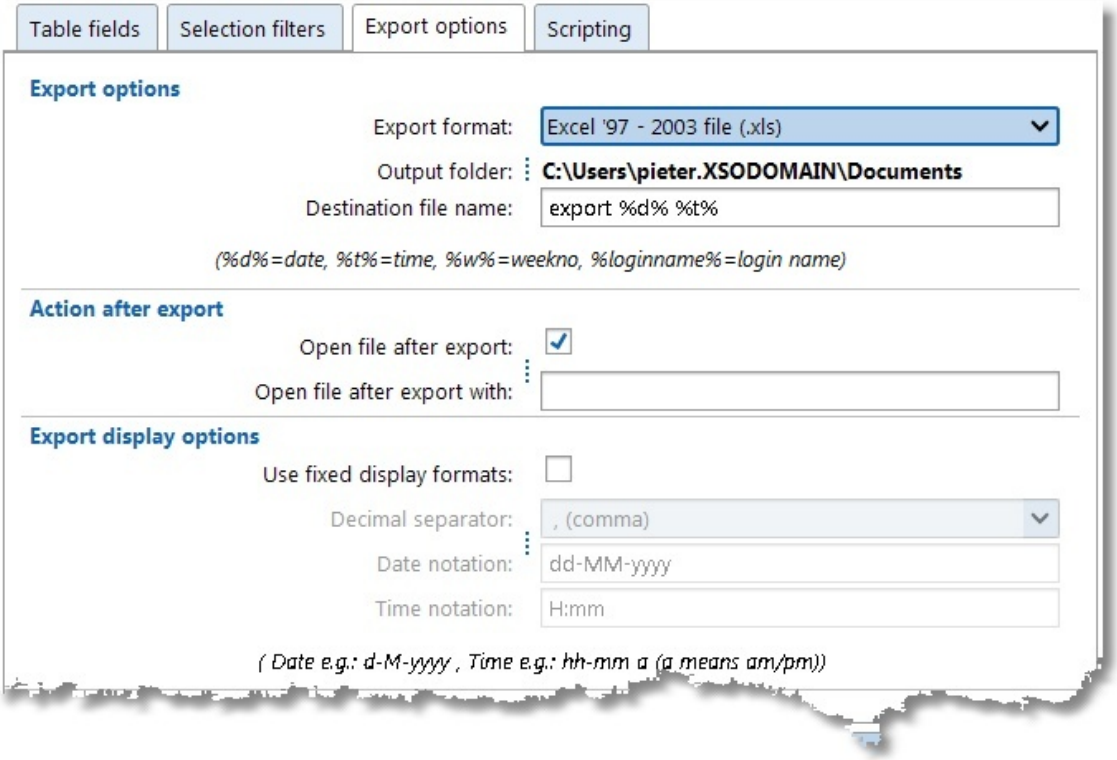
1. Click on the Report options tab. You can edit two format settings for reports here.
2. By ticking **Include field name (title) of group lines** the group name will also become visible in the field title together with the grouping value.
3. By ticking **Show end totals at the end of the report** the end totals for group fields will be shown at the end of the report.
4. With **Show report footer text** you can set if the report footer text will be printed only on last page, on every page or never. Default the footer text will be printed only on last page.
5. By ticking **Use font** you can choose a different font and/or font size to be used for the report.

Printer settings tab

1. Click on the Printer settings tab. You can edit the printer settings for the report here.
2. By ticking **Print in landscape** the report will be printed in Landscape orientation (as opposed to Portrait).
3. By ticking **Use common printer settings** you can set up the default printer for the report. A number of printer properties can also be set for the selected printer.

Exports

Below you will find an overview of export-specific settings.

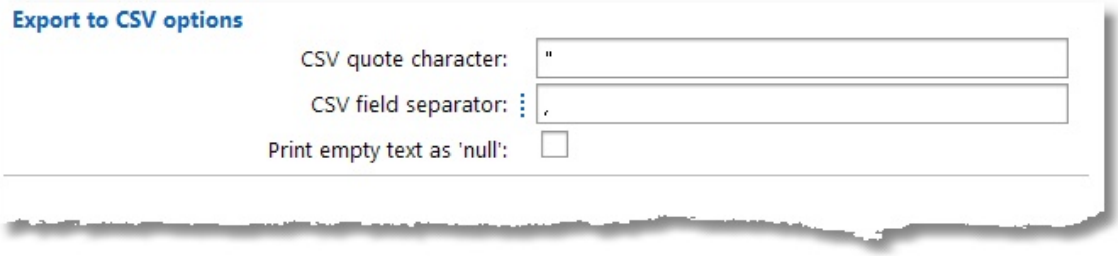


Export options tab

The following options are available:

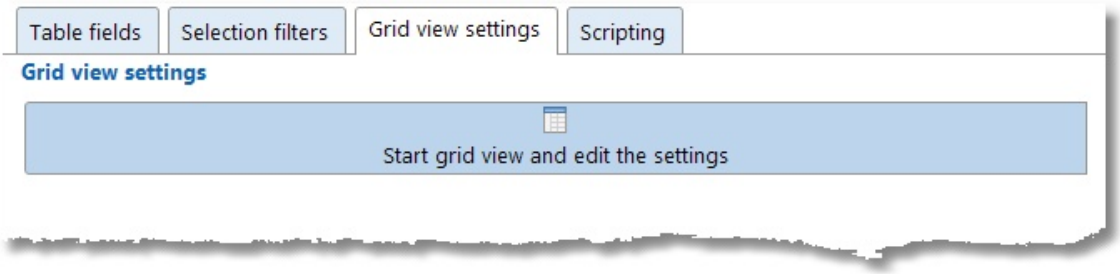
1. Export options
   Indicate here which file format you want to use for exports (.csv, .txt, .xml, .xls, .xlsx or .ods). The default output folder as set up by the Administrator is shown here. If needed, change the by TimeWriter suggested file name. If you want to you can add the complete path to the file name; the file will then be placed in this folder. Variables can be used in the file name. These variables will then be replaced by the associated values when the file is generated. The following variables are available:
   %d% = actual date (year/month/day)
   %t% = actual time (hours/minutes/seconds/_milliseconds)
   %w% = actual week number
   %loginname% = user login name
   In the above example "export %d% %t%.xls" on December 4th 2014 at 14:14 hours will result in: "export 20141204 1414_809.xls".
2. Action after export
   By ticking 'Open file after export' you indicate that the generated export file needs to be opened by the standard application associated with the file format. If needed, use 'Open file after export with' to fill in an alternative program that should open the generated report automatically. The report can then be checked straight away and edited if necessary.
3. Export display options
   Standard display options are taken from the Personal settings. When 'Use fixed display formats' is ticked a (deviating) decimal separator and / or a (deviating) date and time display can be set up.

4. Exporting to CSV options
   This option will only be shown if .csv is chosen in Export options. For this file format, the following can be set up: the quote character (between which field values are posted), the field delimiter and the display for empty text (as blank text or as "null").



Grid views

Below you will find an overview of grid view specific settings.



Grid view settings tab

Clicking the button '**Start grid view and edit the settings'** on this tab, will open a screen containing three tabs:

1. **Grid view**
   Under this tab, you can set up grouping for a grid view by dragging one or more column headings to 'Drag columns here to group' . By clicking on a column header you can sort that column. Clicking again reverses the sorting order. If you hold down the [Ctrl] key and click on second column header, you will get sub sorting of that column.
2. **Chart**
   Charts can be created from the grid view data. In 'Chart options', specify which field indicates the series and which field indicates the values for the chart. Please specify in 'Chart view' whether the default version is to be a bar chart or a pie chart by choosing the appropriate tab. A number of display options can be set for both types.
3. **Pivot table**
   A Pivot table allows you to interactively compare data in columns against the data in rows. By including multiple fields in a row and/or in a column you can group the data in a flexible way. You can also filter on certain data. You can extract different information from a pivot table for which you would normally need to run many reports.
   On the right hand side, the available **S**eries- and **V**alue fields are shown. Drag these fields to the left to their destination locations. By dragging the fields you quickly build up an overview of data and keep getting different perspectives of the data. By clicking on the series fields you can sort using the associated series. It is recommended that you 'play around' with the pivot table. You will see how much information it can provide you with.

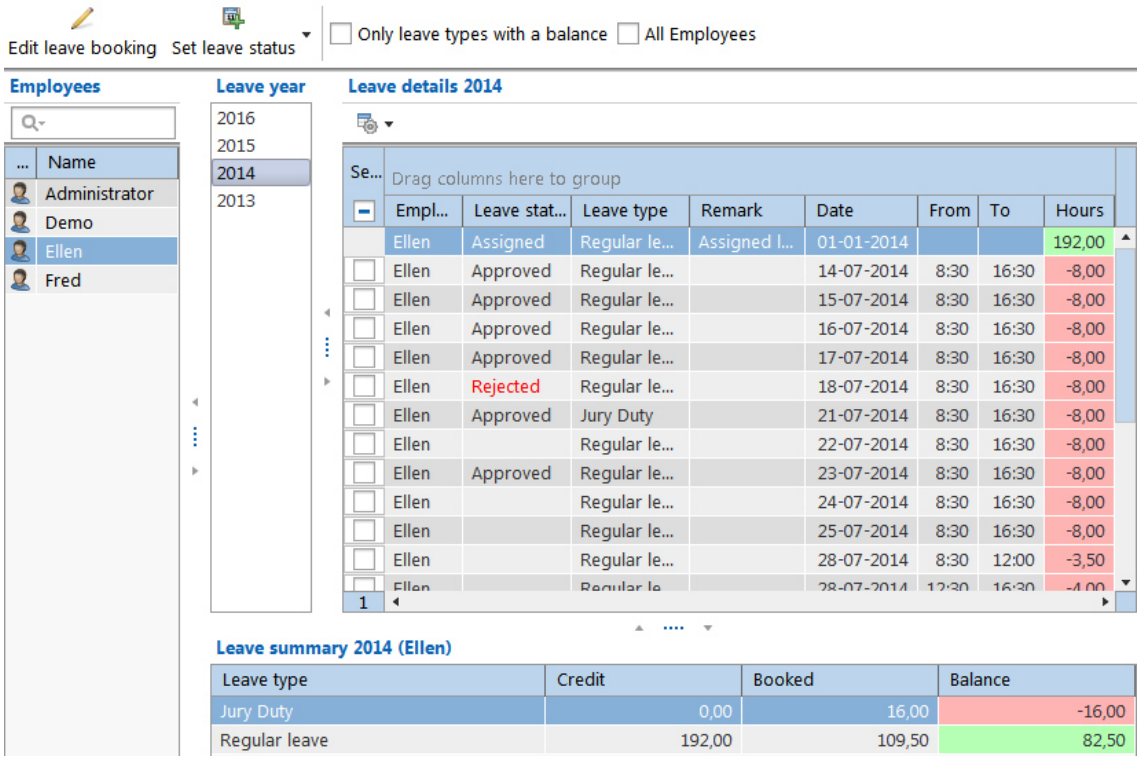
Next, save the settings so they are kept as default for the created display format.

Auditing

This chapter describes the Leave survey and Budget auditing functions.

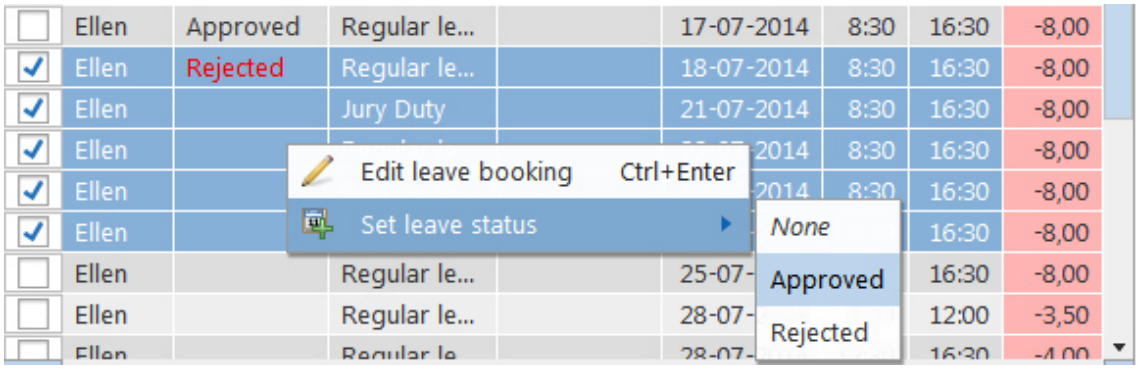
Leave survey

Employees are able to request an annual leave survey of approved leave, booked leave and leave balance. Select **Auditing | Leave survey** in the **Module explorer**.



A leave booking without status or with status rejected can be edited by using the **Edit leave booking** button.

For employees who have access to the hours of other employees, the **Set leave status** button is enabled. This allows editing the status of leave bookings.

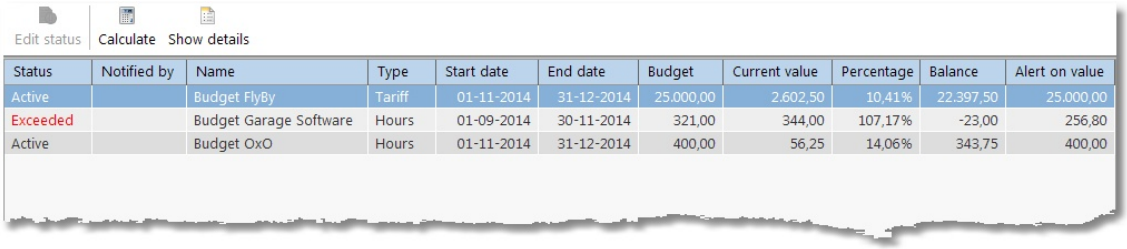


By ticking **Only leave types with a balance**, only leave bookings for leave types requiring a balance administration will be shown in **Leave details**.

If the logged in employee has access to the hours of other employees, these other employees will be shown here also. All employees can be shown in the same leave details grid by using the 'tick' option at **All employees.**

Budget auditing

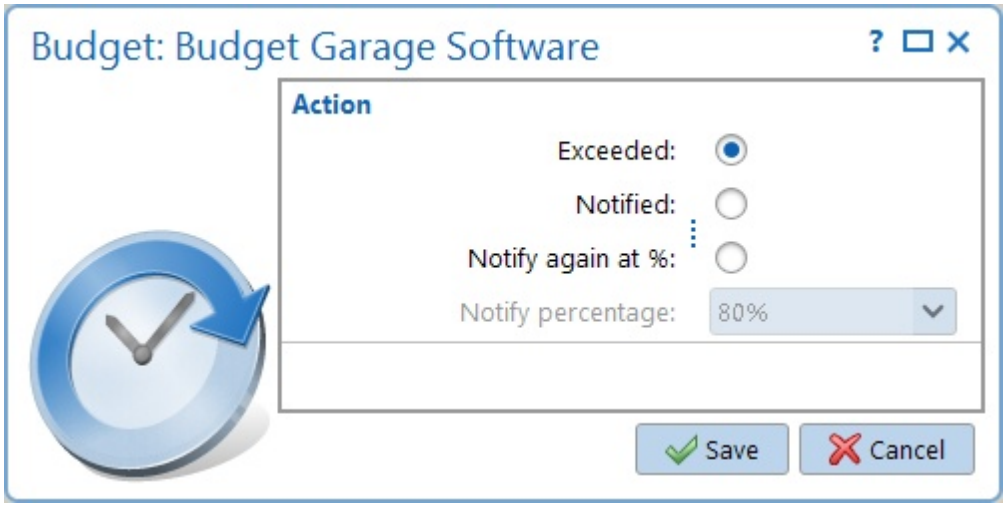
Employees linked to budgets as **Budget keepers** need to check their allocated budgets. Select **Auditing | Budget auditing** in the **Module explorer**.



Status	Notified by	Name	Type	Start date	End date	Budget	Current value	Percentage	Balance	Alert on value
Active		Budget FlyBy	Tariff	01-11-2014	31-12-2014	25.000,00	2.602,50	10,41%	22.397,50	25.000,00
Exceeded		Budget Garage Software	Hours	01-09-2014	30-11-2014	321,00	344,00	107,17%	-23,00	256,80
Active		Budget OxO	Hours	01-11-2014	31-12-2014	400,00	56,25	14,06%	343,75	400,00

The screen shows all active budget information for the logged in budget keeper. If a budget is selected from the list and it is an **Exceeded** or **Notified** budget, the **Edit status** button in the top left hand corner will become active. Clicking on this allows you to choose one of the following options in the next screen:

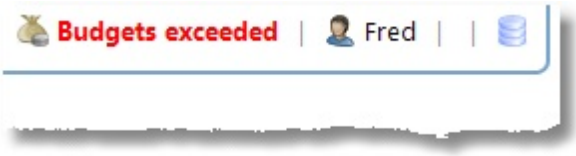
1. Exceeded, the budget will be signaled again.
2. Notified, this will indicate that you have seen that the budget has been exceeded and does not have to be signaled again.
3. Notify again at ... %, when this option is chosen, a new signaling percentage can be entered. When the signaling percentage has changed, the budget's status will be reset to **Active**.



The **Calculate** button is used to recalculate the actual values of the budgets. The chapter on Budgets describes how and when budgets are recalculated.
Via the **Show details** button, an overview of hourly bookings related to the selected budget will be shown.

Automatic budget auditing

When a **Budget keeper** starts up TimeWriter and budgets have been set up for him/her, TimeWriter will check these automatically. If a (to set up) percentage of a budget is exceeded, a red flashing message will appear in the TimeWriter status bar at the bottom to the right:



Click on the message in the status bar to open the **Budgets exceeded** screen. Only the exceeded budgets for the logged in Budget keeper will be shown in this screen.

Status	Name	Type	Start date	End date	Budget	Current value	Percentage
Exceeded	Budget Garage Software	Hours	01-09-2014	30-11-2014	321,00	344,00	107,17%

Functionality of the buttons on this screen is the same as described above in **Budget auditing**.

Invoicing

This chapter describes the use of the TimeWriter invoicing module.

Settings

For the purposes of invoicing there are various settings which will be described in the next chapters.

Company data

Go to the module **Invoicing | Settings | Company data** to set the settings for your company.

Company data are for example needed to generate PDF- and UBL-invoices.

Customer data

Go to the module **Invoicing | Settings | Customer data** to set the settings for invoicing.

Properties

Define here which aspect is the 'Customer aspect'.
You can also set here whether you want to use the online Dutch CoC database for searching and entering the customer data.

Customer invoice data

Indicate here for the chosen aspect (customer) which data (required for invoicing) you want to record. Possible options are: Address data, Contact data (contact person and e-mail address), CoC-number, E-mail, Debtor id, Reference, Ledger account debtor, Ledger account turnover, Ledger account VAT/VAT code and VAT identification no. Of each option can be set whether it should be used and whether it is mandatory. Availability of certain options depends on the chosen accounting link (see: Accounting). The data can be entered at the customer master data.

Invoicing

At **Invoicing | Settings | Invoicing** you can edit the settings for invoicing.

Order number

By default, the order number starts with 1 and will by increased by 1 for every new order. Here you set the order number (starting) value.

Invoice number

By default, the invoice number starts with 1 and will by increased by 1 for every new invoice. Here you set the invoice number (starting) value.

Invoice specification report

Select the report to be used for printing an invoice specification.

Note: The selection list only contains the default Invoice specification report and own reports based on a copy of this default report. The default Invoice specification report can be found in module **Reports**; report group **Default reports**; sub group **Invoice reports**.

Invoice travel costs

Set here, if travel costs are registered, if they have to be invoiced.

Invoice expenses

Set here, if expenses are registered, if they have to be invoiced.

VAT% expenses

Entering expenses is always an amount **including** VAT. However, invoicing is based on amounts **excluding** VAT. Specify here at which VAT percentage the expense amount excluding VAT should be calculated.

Currency

Here you can enter the currency symbol for PDF invoices (e.g. €) and the currency code for UBL invoices (e.g. EUR).

Group by

Grouping is set separately for all available invoicing scenarios (invoicing hours and the different task types).

Default no grouping is set. As a result every hour booking will be one invoice line. If this is not desirable you can group by several fields. Here you can set the grouping.

Grouping examples:

Group by Week: Every week will result in one invoice line.

Group by Week and Employee: Every combination of week and employee will result in one invoice line.

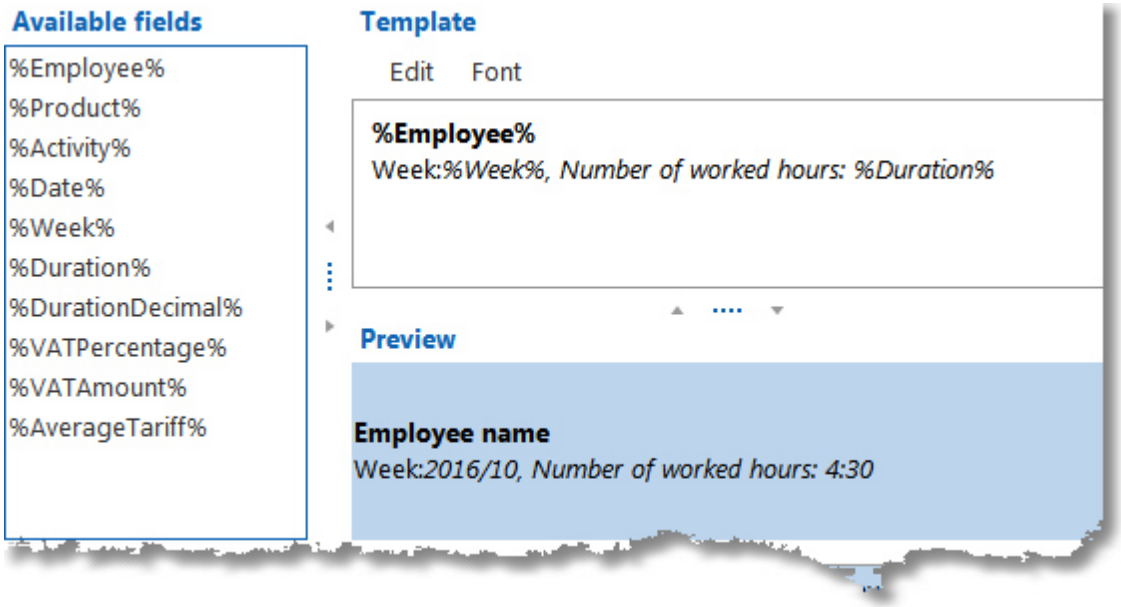
The order can be arranged using the **Up/Down** buttons.

Only when **no grouping** is set, all details (user fields for instance) can be used on the invoice line. Otherwise the available fields for selection depend on the grouping set. Grayed out fields are not selectable.

Invoice line template

At the invoice line template you can set which data must be used and how it will look like. This is set separately for all available invoicing scenarios (invoicing hours, the different task types, travel costs and expenses).

Click on **Proposal** to generate a default invoice line template using the grouping settings from above.
Click on **Edit** to edit the template.



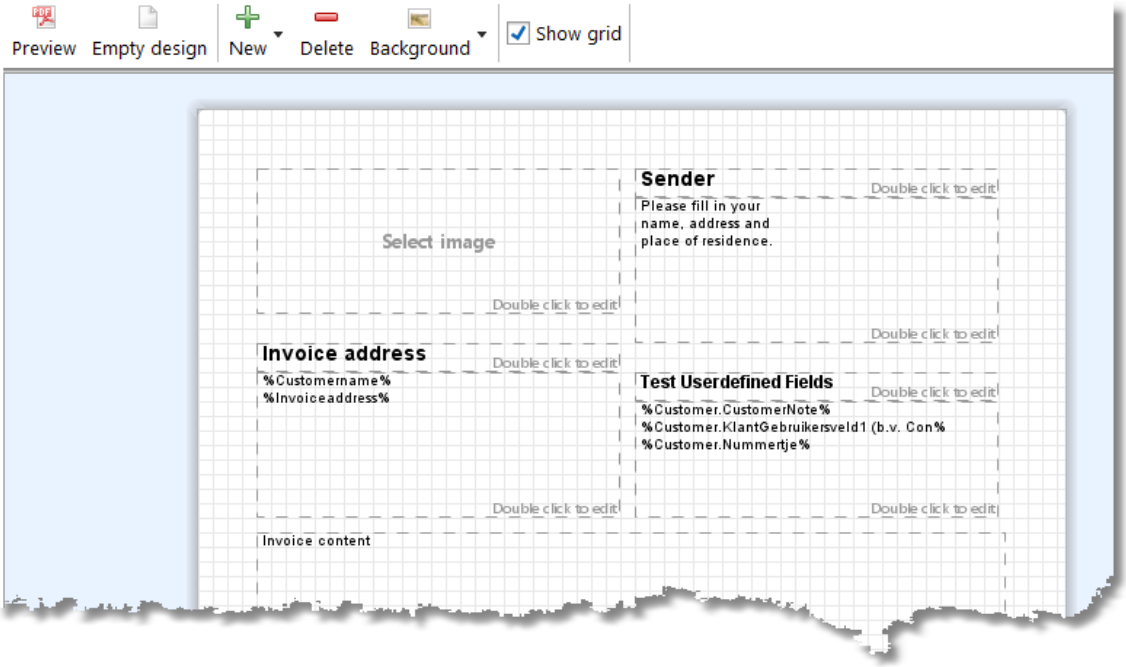
On the left side you can see the available fields. The template is on the right side. Here you can give the template a format (font style).
To add the fields to the template text you can drag & drop them. Below the template you can see an example of how it will appear on the invoice. It is also possible to add ordinary text, as in this example.

NB: The template will be used when generating new orders. A change of the template will only be effective to new orders.

Invoice layout

At **Invoicing | Settings | Invoice layout** you can create the multiple layouts for invoices. One standard invoice layout can be specified which standard is used for the invoices. If, for example, a foreign customer requires a different invoice layout, this can be set at the customer in question.

Note: This setting is only meaningful when link to an accounting is set to: "Export journal entries".



The position and size of every element can be changed easily using the mouse. Double click on a text element to change the text. It is also possible to change the text color, background color, font, font style and alignment. There are several variables available. These variables can be dragged from the list to the text area.

The buttons have the following functions:

Button	Function
Preview	Generate a preview in pdf format.
Empty design	Start a new empty/default layout design.
New	Click on new to add a new element to the layout. This can be a text element or an image.
Delete	Delete the selected element.
Background	A background can be set using the background button.
Translate	Translate/change default invoice content texts.
Show grid	The grid lines in the designer can be show or not using this tick option. The grid lines are only visible at design time for easier aligning of the elements.

E-mail

At **Invoicing | Settings | E-mail** you can edit the settings for outgoing e-mail.

Note: This setting is only meaningful when there is no link to an accounting or link to an accounting is set to: "Export journal entries".

The following settings can be changed here:

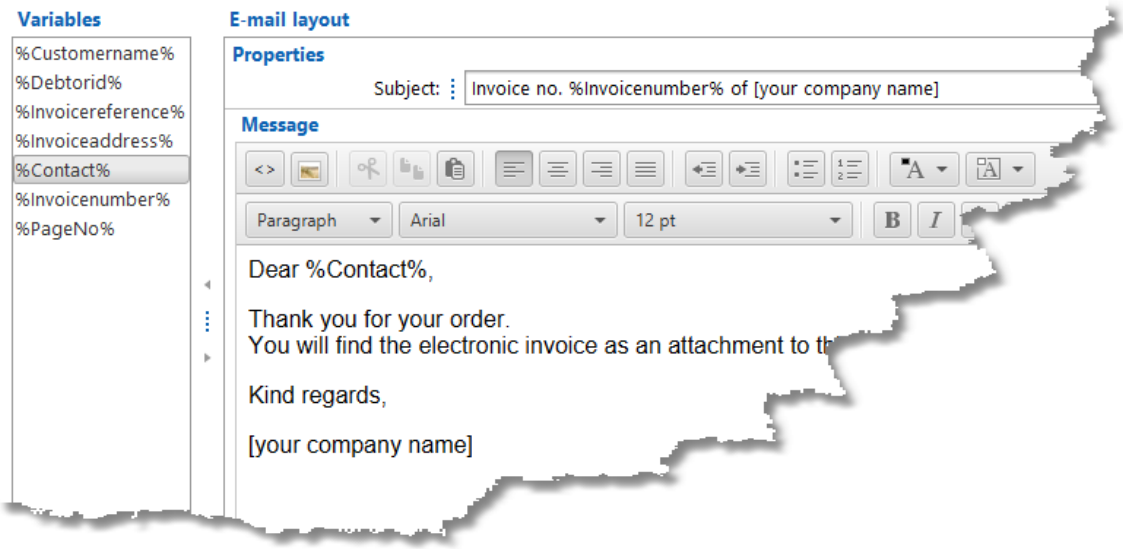
Outgoing e-mail server	Host name for the server for outgoing e-mail
Port	Port number used for the server for outgoing e-mail
User name	User name for authentication (if applicable)
Password	Password for authentication (if applicable)
Company e-mail address	Sender e-mail address for outgoing e-mail ("from" address)
BCC (copy to yourself)	E-mail address for sending a copy to yourself
Use TLS	Set if TLS (Transport Layer Security) has to be used

E-mail layout

At **Invoicing | Settings | E-mail layout** you can create multiple layouts for sending invoices by e-mail. For example, for foreign customers you can create a layout in a different language.

Note: This setting is only meaningful when link to an accounting is set to: "Export journal entries".

You can add variables to the message text as well as the subject line. These variables can be dragged from the list on the left to the subject line or message text area. When sending an e-mail the variables will be replaced by their content. You can also add an image, for example a company logo.



Accounting

At **Invoicing | Settings | Accounting** you can change the settings for linking to an accounting.

On the first tab "Link" you have to set first in which way / to which accounting you want to link. At this moment you can link to an accounting by exporting journal entries or directly by using the API's of accounting software. The necessary settings for the link itself can then be entered on the second tab.

The next link settings are possible:

- No link to accounting
- Export journal entries SnelStart
- Export journal entries Exact
- Export journal entries Reeleezee
- Stip-T API
- SnelStart API
- Exact API sales invoices
- Exact API journal entries
- e-Boekhouden API
- KING Finance API
- Yuki API
- Visma eAccounting API
- Asperion API
- PerfectView API

No link to accounting

Invoicing with TimeWriter is also possible with no link to an accounting.

VAT
For invoicing without a link to an accounting it is only relevant to enter VAT codes and VAT percentages.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). After this step the orders are moved to the tab page **Invoices**. Meanwhile, invoices are generated also in PDF and UBL format. The files are saved in the output folder as set up in Maintenance and settings | Settings | Reporting

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.

Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**

The buttons above the **Invoices** grid have the following functions:

Button	Function
Edit	Edit the paid state of the invoice.
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again!
Print	Print the invoice again.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.
E-mail	Send an e-mail for the selected invoices with the invoice (PDF) as attachment. You can edit the e-mail layout at Maintenance and settings | Settings | E-mail layout
Open folder	Open invoices and exports folder.

Export journal entries SnelStart

The ledger accounts are only meaningful if invoices from TimeWriter have to be exported in order to import them in an accounting application.
To import the invoices from TimeWriter into an accounting application it is necessary to setup the ledger accounts. They are divided into 3 groups: (tab pages): Debtor, Turnover and VAT.

Debtor
At the debtor ledger accounts you can create several ledger accounts. One of them can be marked as default. When you create a new customer, the default ledger account will be automatically set. When generating orders this default ledger account will also be used when there is no ledger account set for a customer. After creating the ledger accounts for debtors you can select them at the customers in **Master data | Customer**.

Turnover and VAT
When generating orders every order line will get a turnover ledger account and a VAT ledger account. Here you can create these ledger accounts and set one as the default. The default ones will be automatically set for every order line. After generating the orders you still can adjust the ledger accounts if needed.

Supplies
The option 'Supplies' of module 'Tasks' can NOT be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.

Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). After this step the orders are moved to the tab page **Invoices**. Meanwhile, invoices are generated also in PDF and UBL format. The files are saved in the output folder as set up in Maintenance and settings | Settings | Reporting

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Edit	Edit the paid state of the invoice.
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again!
Print	Print the invoice again.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.
E-mail	Send an e-mail for the selected invoices with the invoice (PDF) as attachment. You can edit the e-mail layout at Maintenance and settings | Settings | E-mail layout
Open folder	Open invoices and exports folder.
Export journal entries SnelStart	Export journal entries to SnelStart.

Export journal entries Exact

The ledger accounts are only meaningful if invoices from TimeWriter have to be exported in order to import them in an accounting application.
To import the invoices from TimeWriter into an accounting application it is necessary to setup the ledger accounts. They are divided into 3 groups: (tab pages): Debtor, Turnover and VAT.

Debtor
At the debtor ledger accounts you can create several ledger accounts. One of them can be marked as default. When you create a new customer, the default ledger account will be automatically set. When generating orders this default ledger account will also be used when there is no ledger account set for a customer. After creating the ledger accounts for debtors you can select them at the customers in **Master data | Customer**.

Turnover and VAT
When generating orders every order line will get a turnover ledger account and a VAT ledger account. Here you can create these ledger accounts and set one as the default. The default ones will be automatically set for every order line. After generating the orders you still can adjust the ledger accounts if needed.

Supplies
The option 'Supplies' of module 'Tasks' can NOT be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.

Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). After this step the orders are moved to the tab page **Invoices**. Meanwhile, invoices are generated also in PDF and UBL format. The files are saved in the output folder as set up in Maintenance and settings | Settings | Reporting

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Edit	Edit the paid state of the invoice.
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again!
Print	Print the invoice again.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.
E-mail	Send an e-mail for the selected invoices with the invoice (PDF) as attachment. You can edit the e-mail layout at Maintenance and settings | Settings | E-mail layout
Open folder	Open invoices and exports folder.
Export journal entries Exact	Export journal entries to Exact.

Export journal entries Reeleezee

The ledger accounts are only meaningful if invoices from TimeWriter have to be exported in order to import them in an accounting application.
To import the invoices from TimeWriter into an accounting application it is necessary to setup the ledger accounts. They are divided into 3 groups: (tab pages): Debtor, Turnover and VAT.

Debtor
At the debtor ledger accounts you can create several ledger accounts. One of them can be marked as default. When you create a new customer, the default ledger account will be automatically set. When generating orders this default ledger account will also be used when there is no ledger account set for a customer. After creating the ledger accounts for debtors you can select them at the customers in **Master data | Customer**.

Turnover and VAT
When generating orders every order line will get a turnover ledger account and a VAT ledger account. Here you can create these ledger accounts and set one as the default. The default ones will be automatically set for every order line. After generating the orders you still can adjust the ledger accounts if needed.

Supplies
The option 'Supplies' of module 'Tasks' can NOT be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.

Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). After this step the orders are moved to the tab page **Invoices**. Meanwhile, invoices are generated also in PDF and UBL format. The files are saved in the output folder as set up in Maintenance and settings | Settings | Reporting

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Edit	Edit the paid state of the invoice.
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again!
Print	Print the invoice again.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.
E-mail	Send an e-mail for the selected invoices with the invoice (PDF) as attachment. You can edit the e-mail layout at Maintenance and settings | Settings | E-mail layout
Open folder	Open invoices and exports folder.
Export journal entries Reeleezee	Export journal entries to Reeleezee.

Stip-T API

On the tabs below you can enter the settings for linking with the Stip-T API:

API settings
First, enter the Stip-T API- and User key and select the Stip-T administration. Without these setting you cannot add or edit the settings on other tabs.
The keys can be obtained from the Stip-T application at module **Maintenance and settings | Settings | Users**.

Administration
Select the Stip-T invoice layout, product, ledger account and VAT code to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from Stip-T customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with Stip-T.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to Stip-T and converted to invoices. After this step the orders are moved to the tab page **Invoices**.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in Stip-T.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

SnelStart API

On the tabs below you can enter the settings for linking with the SnelStart API:

API settings
First, enter the SnelStart link key. Without these setting you cannot add or edit the settings on other tabs.
Linking is only possible when using the SnelStart online cloud administration. The link key can be obtained from this administration at module **Links | TimeWriter**.

Administration
Select the SnelStart product to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from SnelStart customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with SnelStart.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to SnelStart and converted to SnelStart orders. After this step the orders are moved to the tab page **Invoices**. **Note**: At first the **Invoice** column will contain the SnelStart order number.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in SnelStart.
Invoice numbers	Synchronize invoice numbers with SnelStart. After invoicing to SnelStart in SnelStart also orders are created which will later become invoices.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

Exact API sales invoices

If you want to use the link using the **Export API sales invoices** you need to have a **Exact online subscription with invoicing**. TimeWriter can also make invoices, journal entries can be exported to Exact using the **Export API journal entries**.

On the tabs below you can enter the settings for linking with Exact:

API settings
Choose the Exact location (Country) and enter the Client ID and client secret.

To get a Client ID and Client secret follow next steps:
- Go to: https://apps.exactonline.com.
- Log in (top right).
- Go to 'Register API keys'
- Go to 'Register a new API key'.
- Choose a App name in (e.g.: TimeWriter)
- Use this redirect url: https://secure.xso.nl/Exact
- Click op 'Save'.
- You will return to the App overview. Here you can edit the created App for copying the Client ID end Client secret.

Administration
Select the Exact administration, sales journal, product and VAT code to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from Exact customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.

Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with Exact.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to Exact and converted to Exact orders. After this step the orders are moved to the tab page **Invoices**. **Note**: At first the **Invoice** column will contain the Exact order number.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in Exact.
Invoice numbers	Synchronize invoice numbers with Exact. After invoicing to Exact the sales invoice gets a invoice number after printing the invoice. Until then the column invoice contains the order number from Exact.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

Exact API journal entries

TimeWriter can also make invoices, journal entries can be exported to Exact online using the **Export API journal entries**. Therefore you don't need a subscription with Exact online invoicing, which is much cheaper.

On the tabs below you can enter the settings for linking with Exact:

API settings
Choose the Exact location (Country) and enter the Client ID and client secret.

To get a Client ID and Client secret follow next steps:
- Go to: https://apps.exactonline.com.
- Log in (top right).
- Go to 'Register API keys'
- Go to 'Register a new API key'.
- Choose a App name in (e.g.: TimeWriter)
- Use this redirect url: https://secure.xso.nl/Exact
- Click op 'Save'.
- You will return to the App overview. Here you can edit the created App for copying the Client ID end Client secret.

Administration
Select the Exact administration, sales journal, product and VAT code to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from Exact customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.

Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). Journal entries are created from the invoices and forwarded to Exact. After this step the orders are moved to the tab page **Invoices**. Meanwhile, invoices are generated also in PDF and UBL format. The files are saved in the output folder as set up in Maintenance and settings | Settings | Reporting

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the journal entries will not be deleted in Exact.
Print	Print the invoice again.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.
E-mail	Send an e-mail for the selected invoices with the invoice (PDF) as attachment. You can edit the e-mail layout at Maintenance and settings | Settings | E-mail layout

Open folder	Open invoices and exports folder.

e-Boekhouden API

On the tabs below you can enter the settings for linking with the e-Boekhouden API:

API settings
First, enter the e-Boekhouden API- and User name and Security codes. Without these setting you cannot add or edit the settings on other tabs.
The keys can be obtained from e-Boekhouden online at **Management -> Settings -> Links -> API/SOAP**.

Administration
Select the e-Boekhouden invoice layout, product, ledger account and VAT code to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from e-Boekhouden customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with e-Boekhouden.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to e-Boekhouden and converted to e-Boekhouden invoices. After this step the orders are moved to the tab page **Invoices**.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in e-Boekhouden.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

KING Finance API

On the tabs below you can enter the settings for linking with the KING Finance API (formerly iMUIS):

API settings
First, enter the KING Finance Environment code, this code can be obtained from KING Finance. Without these setting you cannot add or edit the settings on other tabs.
Linking is only possible when using the KING Finance online administration with a Cloudswitch subscription.

Administration
Select the KING Finance order type, order way and product to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from KING Finance customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with KING Finance.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.

Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to KING Finance and converted to KING Finance orders. After this step the orders are moved to the tab page **Invoices**. **Note**: At first the **Invoice** column will contain the KING Finance order number.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in KING Finance.
Invoice numbers	Synchronize invoice numbers with KING Finance. After invoicing to KING Finance in KING Finance also orders are created which will later become invoices.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

Yuki API

On the tabs below you can enter the settings for linking with the Yuki API:

API settings
First, enter the Yuki API key and Administration ID. Without these setting you cannot add or edit the settings on other tabs.
The keys can be generated at/obtained from Yuki at **My domain -> Webservices**.

Administration
Enter the Yuki product, VAT type and the corresponding VAT percentage and select the ledger account to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from Yuki customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with Yuki.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to Yuki and converted to Yuki (draft) invoices. After this step the orders are moved to the tab page **Invoices**. **Note**: At first the **Invoice** column will contain the TimeWriter order number.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in Yuki.
Invoice numbers	Synchronize invoice numbers with Yuki. After invoicing to Yuki in Yuki (draft) invoices are created which will become invoices after processing.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

Visma eAccounting API

On the tabs below you can enter the settings for linking with the Visma eAccounting API:

API settings
Choose edit and "Test API login".
The Visma eAccounting login screen will be shown in a browser.
Login at Visma.
After logging in Visma will ask permission to connect to TimeWriter; choose Allow/Toestaan.
After a successful login to Visma and permission to connect, return to TimeWriter.
Then press continue.

Administration
Select the Visma product to be used for invoicing from TimeWriter.

Update customers

On this tab TimeWriter customers can be updated with, linked to and imported from Visma customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice will be created in Visma.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to Visma and converted to Visma invoices. After this step the orders are moved to the tab page **Invoices**.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.

Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**

The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in Visma.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

Asperion API

On the tabs below you can enter the settings for linking with the Asperion API:

API settings
Choose edit and "Test API login".
The Asperion login screen will be shown in a browser.
Login at Asperion.
After logging in, Asperion will ask permission to connect to TimeWriter; choose "Yes, Allow".
After a successful login to Asperion and permission to connect, return to TimeWriter.
Then press continue.

Administration
Select the Asperion administration, the Asperion product, VAT code, debtor kind and payment condition to be used for invoicing from TimeWriter.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from Asperion customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with Asperion.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.

Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to Asperion and converted to Asperion draft sales invoices. After this step the orders are moved to the tab page **Invoices**. **Note**: At first the **Invoice** column will contain the Asperion draft sales invoice id.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in Asperion.
Invoice numbers	Synchronize invoice numbers with Asperion. After invoicing to Asperion in Asperion draft sales invoices are created which will later become actual invoices.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

PerfectView API

On the tabs below you can enter the settings for linking with the PerfectView API:

API settings
First, enter the PerfectView API key, Database ID and User ID. Without these setting you cannot add or edit the settings on other tabs.
The keys can be generated at/obtained from PerfectView at **Settings -> Links -> Api**.

Administration
Select the PerfectView product and PerfectView VAT code to be used for invoicing from TimeWriter. The selected product must be set in PerfectView in such a way that price and description may be changed.
Select to which PerfectView relation ID must be linked with TimeWriter: Relation number, Relation code or Debtor number.
Set whether PerfectView is leading in relation to TimeWriter. If PerfectView is leading then the customer data in PerfectView is never overwritten by TimeWriter data. If PerfectView is not leading then, when generating invoices, the customer data in PerfectView is overwritten with the data set "In use" from TimeWriter (see: **Invoicing -> Settings -> Customer data -> Customer invoice data**). **Note:** In this case the organization name is also overwritten.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from PerfectView customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with PerfectView.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.

Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to PerfectView and converted to PerfectView draft invoices. After this step the orders are moved to the tab page **Invoices**. **Note**: At first the **Invoice** column will contain the TimeWriter order number.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.
The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

All the invoices are visible on the tab page **Invoices.**
The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in PerfectView.
Invoice numbers	Synchronize invoice numbers with PerfectView. After invoicing to PerfectView in PerfectView draft invoices are created which will become invoices after "create invoice".
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

Moneybird API

On the tabs below you can enter the settings for linking with the Moneybird API:

API settings
Choose edit and "Test API login".
The Moneybird login screen will be shown in a browser.
Login at Moneybird.

After logging in Moneybird will ask to select an administration and ask for permission to connect to TimeWriter; choose Allow/Toestaan.
After a successful login to Moneybird and permission to connect, return to TimeWriter.
Then press continue.

Administration
Select the Moneybird administration (mandatory).
Optionally select the Moneybird Ledgeraccount turnover, VAT code, Workflow and Layout to be used for invoicing from TimeWriter. If not selected Moneybird will use it's own default settings.

Update customers
On this tab TimeWriter customers can be updated with, linked to and imported from Moneybird customer data.

Supplies
The option 'Supplies' of module 'Tasks' can be used.

Invoicing

In the module **Invoicing | Invoice** you can find the next buttons:

The buttons above the **Orders** grid have the following functions:

Button	Function
New	Add a new order (not based on hour bookings).
Edit	Edit the order.
Delete	Delete the complete order(s) and all order lines of the selected order(s).
Generate orders	For hours and task to invoice, orders will be generated first, see: Generate orders.
Concept invoice	Click to print a concept invoice to a pdf and see how the invoice will look like. **Note**: the final invoice should be created with Moneybird.
Specification	Print the specification report (as set at Invoicing | Settings | Invoicing) for the selected order.
Merge	Merge orders form the same customer into one order.
Create invoice	If the **Order** tab page is selected there is a **Create invoice** button. Click here to create the invoice(s) of the selected order(s). The orders will be sent to Moneybird and converted to Moneybird draft sales invoices. After this step the orders are moved to the tab page **Invoices**. **Note**: At first the **Invoice** column will contain the Moneybird draft sales invoice id.

Below the orders grid are the **Lines** and **Details for line** tabs of the selected order.

The buttons on the **Lines** tab have the following functions:

Button	Function
New	Add a new order line.
Edit	Edit the order line.
Delete	tab page **Lines** : Delete the selected order line(s). tab page **Details for line**: Only available with multiple detail lines. Delete the selected detail line from the order line. Duration and amount of the order line will be adjusted.
Up Down	Move the order line up/down.

Tab page invoices

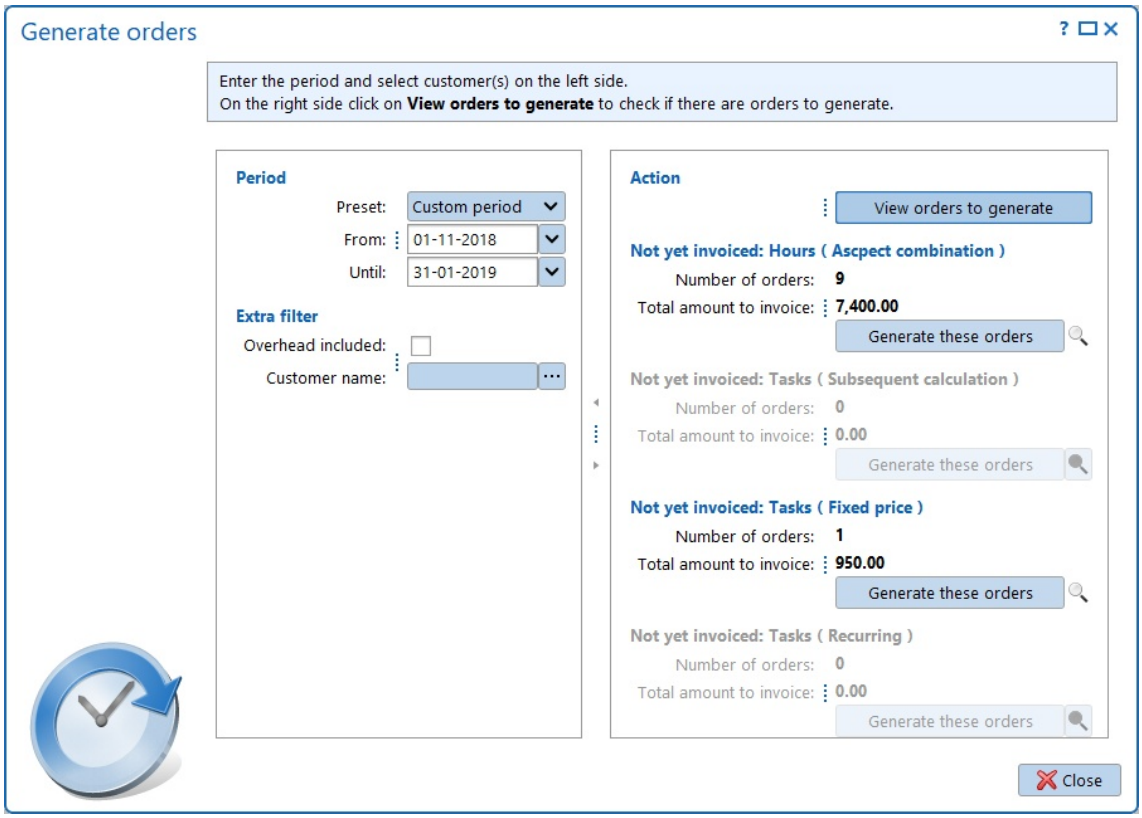
All the invoices are visible on the tab page **Invoices.**

The buttons above the **Invoices** grid have the following functions:

Button	Function
Delete	Delete the complete invoice. **Note**: deleted invoice numbers are not used again and the invoice will not be deleted in Moneybird.
Invoice numbers	Synchronize invoice numbers with Moneybird. After invoicing to Moneybird in Moneybird draft sales invoices are created which will later become actual invoices.
Specification	Print the invoice specification report (as set at Invoicing | Settings | Invoicing) for the selected invoice.

Generate orders

The next window will be shown when you want to generate orders for hours and tasks to be invoiced.



On the left hand side you can select the period over which the orders have to be generated.
It is possible to set extra filters such as Overhead and Customer name. If no extra filters are set, orders will be generated for all customers.

On the right hand side click **View orders to generate**.
For the hours and different task types (subsequent calculation, fixed price and recurring) will be determined if orders can be generated. For each type the number of orders to generate and the total invoicing amount will be shown. By clicking button the details for the orders to generate can be viewed. Next, for eacht type, the orders can be generated by clicking **Generate these orders**.

After the orders are generated the orders and/or order lines can be reviewed and, if necessary, be edited or deleted. It's also possible to add new order lines. If all is satisfactory invoices can be created for the (selected) orders by clicking button **Create invoice** on the **Orders** tab (see also: Invoice).

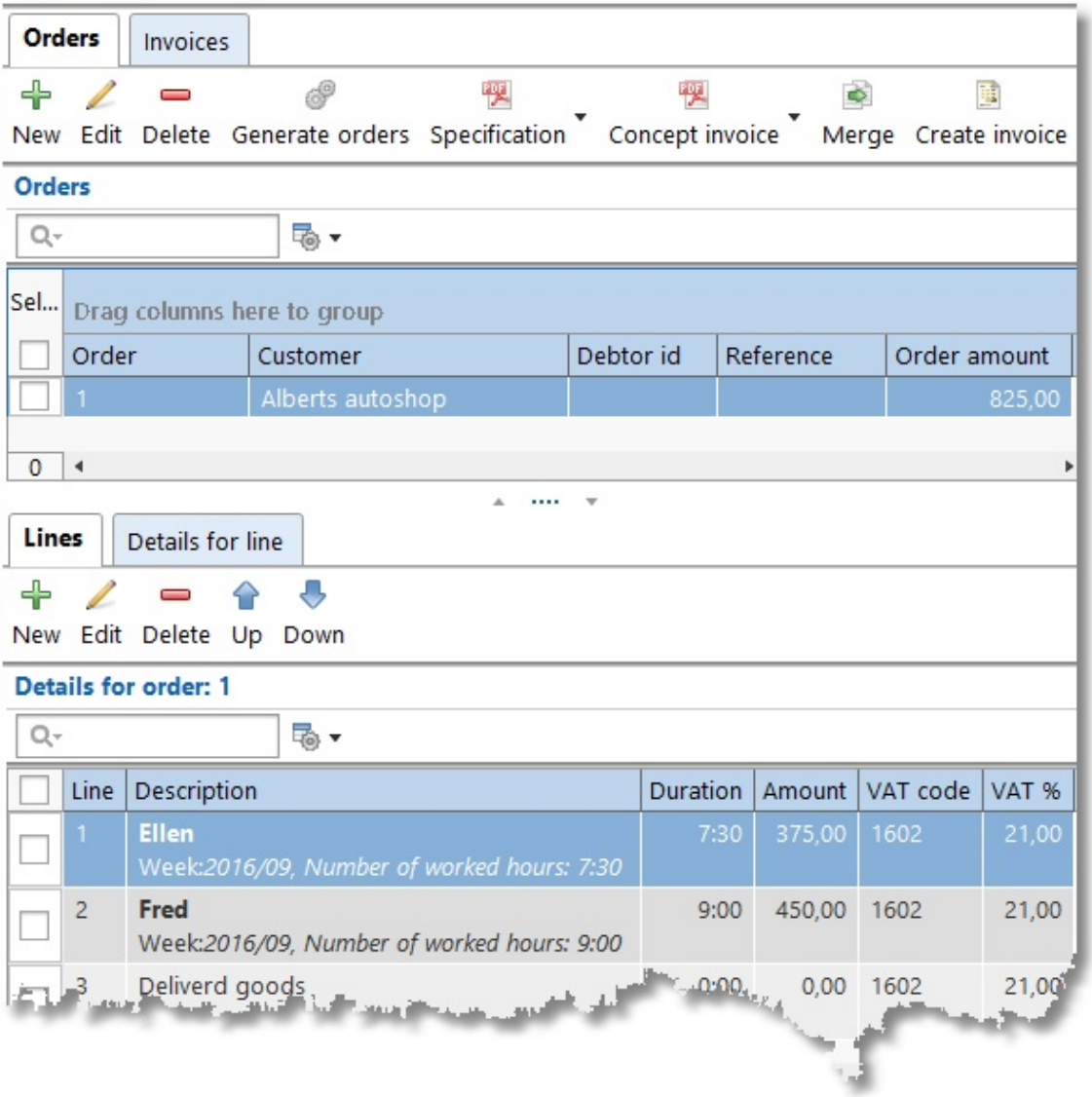
Invoice

Select **Invoicing | Invoice** in the **Module explorer**.
First go to Invoicing | Settings if nothing is set for invoicing.

Generating invoices is a two-step process:

1. Generate orders. After generating orders the orders and/or order lines can still be edited or deleted. It's also possible to add new order lines.
2. Create invoice. Depending on the chosen link to an accounting invoices will be created or orders will be transferred to the linked accounting. Once invoices are created the invoices and invoice lines cannot be edited any more.

On top of the screen image below one order is visible. At the bottom there are two tab pages. First the order lines, next the details tab with the actual hours/tasks.
Note: Which columns are displayed in the order and order line rows depends on the selected link to an accounting (see: Invoicing | Settings | Accounting).



When linked to an accounting via an API, the foreground or the background of the Debtor id can have a different color on the **Orders** tab page:

- Red foreground: The TimeWriter customer name does not match the customer name of the linked accounting or the TimeWriter Debtor id can't be found in the linked accounting.
- Orange background: The Debtor id is empty. This means this is a new customer for the linked accounting. The customer will automatically be added to the linked accounting.

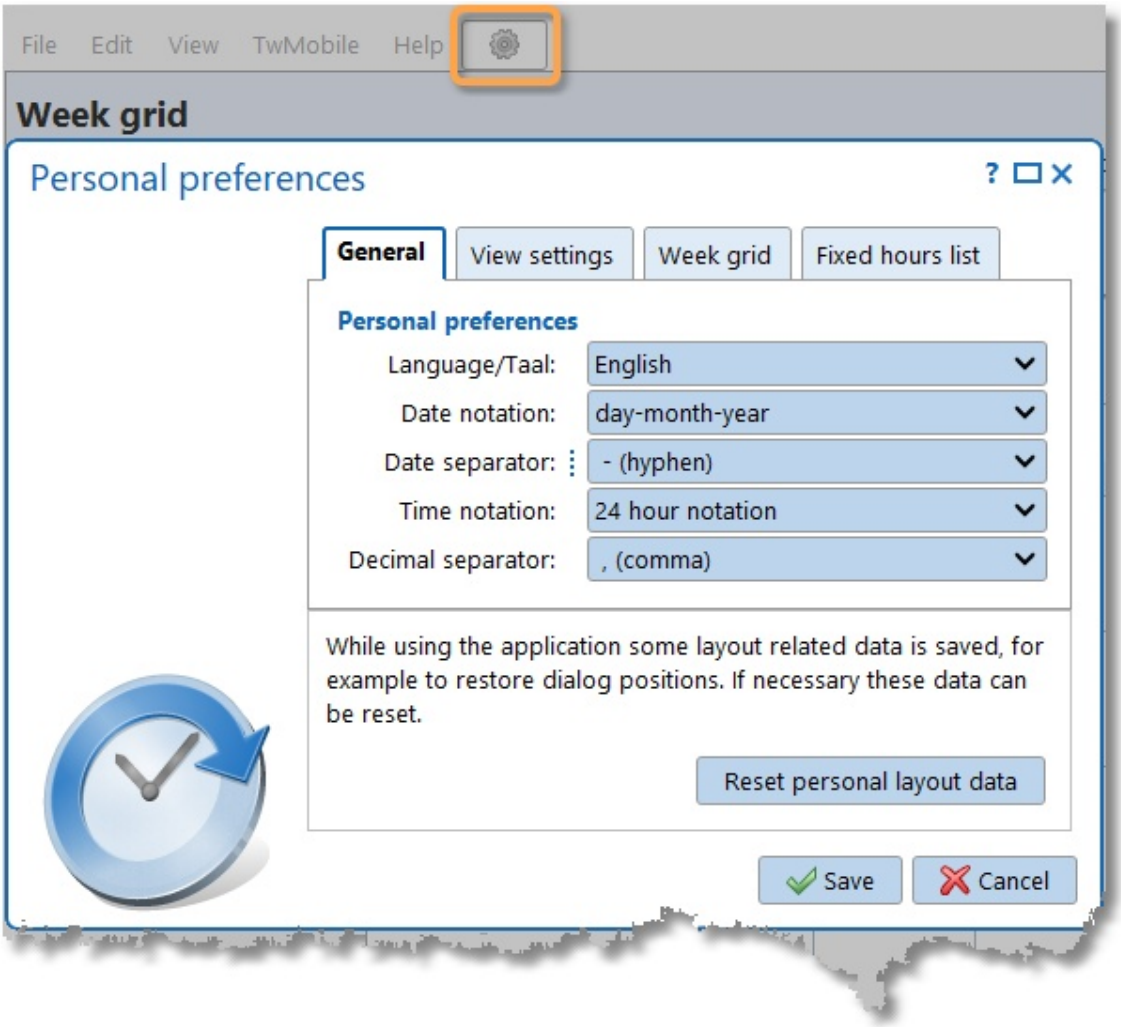
By using the **Edit** button you can, if necessary, search for the Debtor id in the linked accounting and save it to the TimeWriter customer data.

The buttons on the toolbar depends on the used link. The next links are possible:

- No link to accounting
- Export journal entries SnelStart
- Export journal entries Exact
- Export journal entries Reeleezee
- Stip-T API
- SnelStart API
- Exact API sales invoices
- Exact API journal entries
- e-Boekhouden API
- KING Finance API
- Yuki API
- Visma eAccounting API
- Asperion API
- PerfectView API
- Moneybird API

Personal settings

Personal settings, such as language and date notation can be set up by using in the upper menu bar.



The personal settings screen consists of four tab sheets: General, View settings, Week grid and Fixed hours list.

General

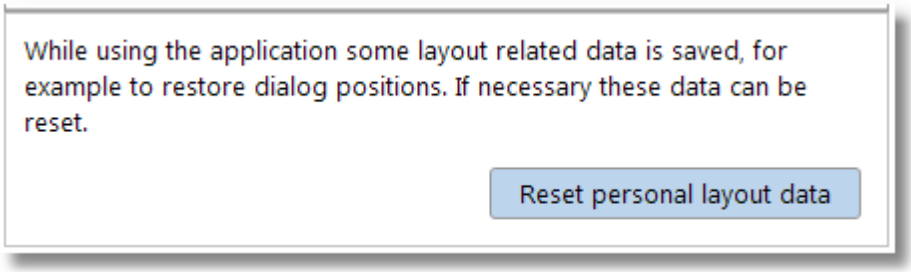
Personal preferences

Language/Taal	Set up language to be used (English or Dutch).
Date notation	The way in which dates are to be represented.
Date separator	The symbol to be used between day, month and year (- or /).
Time notation	24-hour notation or 12-hour notation (with AM/PM).
Decimal separator	If a comma appears in a number, this separation symbol will be used.

Application behavior

Automatically solve overlaps	Set here how you want to solve overlapping bookings when saving a new or changed booking:	
	Yes	Always solve automatically. The application will try to s overlaps by rearranging the bookings top down. If the conflicts a warning will be shown and saving is cancele
	No	Never solve automatically, allow overlaps.
	Always ask	Ask if the overlap(s) should be solved automatically Ye

When the program is being used, various screen settings will be saved, such as screen locations, selected module, column widths in tables, splitter positions and most recently chosen reporting period.



It is possible for these details to cause problems in program functioning or create a minor problem and need to be reset again. To reset, click on **Reset personal layout data**.

View settings

Here you can change the default view settings of the application. Any changes made are directly applied.

Module explorer	When ticked the old module explorer will be activated again
Button bar	When unticked the labels of buttons on the buttonbars will be hidden by default
Font settings	Change the default font and/or the font size

Week grid

If the working hours for an employee differ from the standard company working hours (as set under **Maintenance and settings | Settings | Week grid**), these can be set here personally after "Use personal week grid settings" is checked.

Times:

Week starts on	Starting day of the week. Default setting is Monday. This can be changed to Sunday if necessary. This setting only affects the Week grid and the Fixed hours list. Reporting reflects the ISO standard that has Monday as its weekly starting date.
Work week starts on	The first day of the work week. **
Work week ends on	The last day of the work week. **
Working day starts at	Starting time of a working day. **
Working day ends at	End time of a working day. **
Lunch break starts at	Start time of lunch break.
Lunch break end at	End time of lunch break.

*** The default setting for the Week grid is to show working week and working hours. The Week grid saves and restores its zoom level. This means that changes to this setting are not always visible.*

Program function:

Do not book on lunch break	When a booking is made across a break, you will be asked if the hourly booking should be split.
Copy activities of last entry to new booking	Previously chosen aspects and filled in details for user fields will be stored in memory. When a new booking is made these will be filled in again.
Show special days in week grid	Show special days in the Week grid with title and selected colour.
Fill in gaps	When a time slot is drawn over existing bookings, overlapping bookings are made by default. If you enable this option, no overlapping bookings will be made, but the remaining time between bookings will be filled.

Fixed hours list

Number of weeks	Set here how many weeks must be 'looked back' to retrieve the unique aspect combinations.
Display time as	**Hour decimal:** Hours will be represented in comma format e.g.: 2,50 is 2:30. **Minutes:** Hours will be represented in minutes: 60 minutes is 1:00 hour. **Time:** Hours are 'normally' presented as time.
Entering time	Choose a punctuation mark form the available list to indicate how a decimal point should behave when entering the time in the fixed hours list.

TimeWriter Mobile

The TimeWriter web client can also be started on a phone.

A user can be invited for this by his/her TimeWriter administrator via an e-mail with a personal QR code and/or link.
A logged in user can also scan the personal QR code with his/her phone from the week grid via the **Mobile** button to start the web client on that phone.

Web client

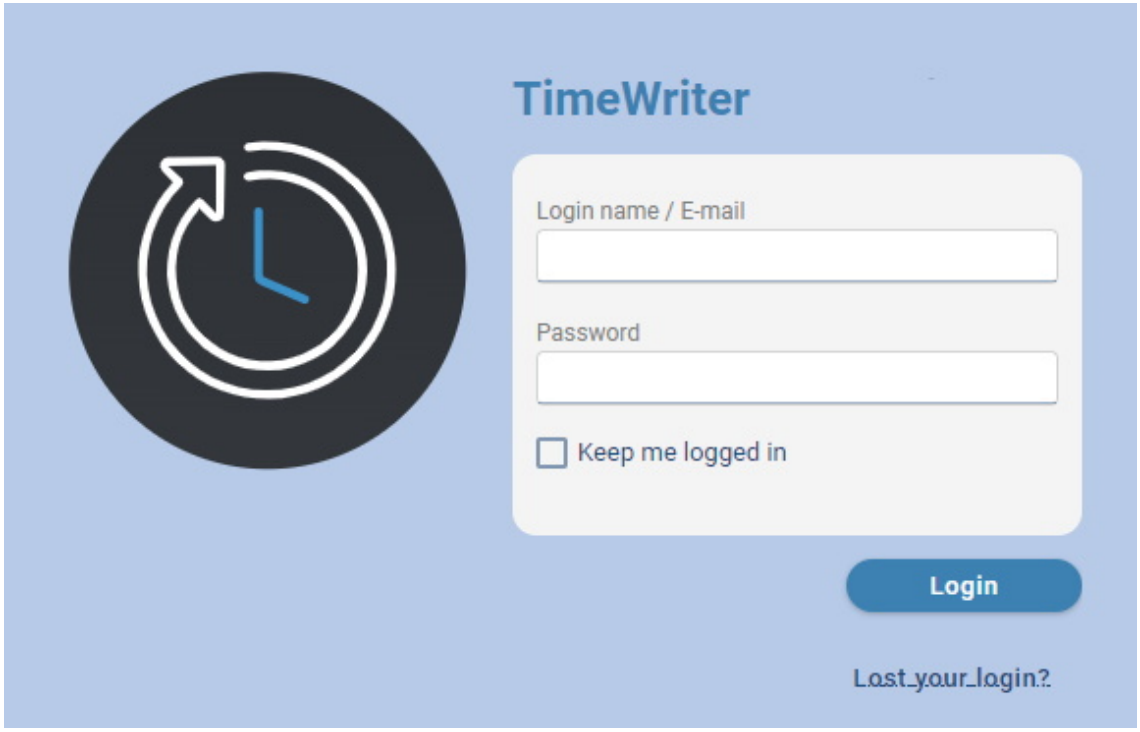
With the web client, TimeWriter can be started within a web browser such as Internet Explorer, Google Chrome, Mozilla Firefox and Safari. The web client includes the same functionality as the desktop client. The Web client can be used when the use of a cloud database has been set up. Read about setting up a cloud database in the Database management chapter.

Starting and logging in

To log in to the Web client a login name, e-mail and password need to set up in the desktop client (\client\twClientStd).

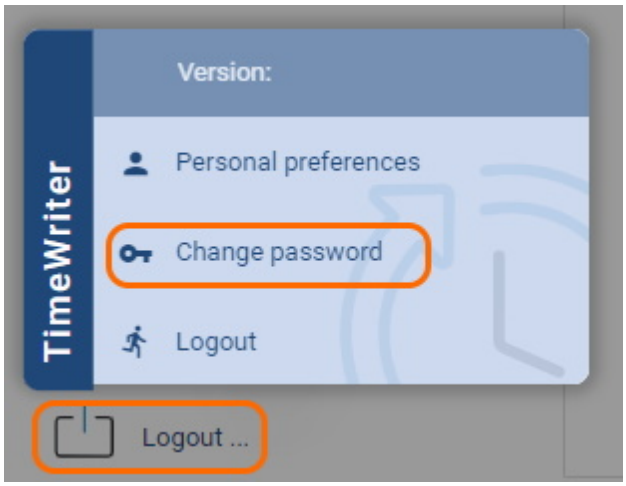
Do this as follows:

1. If the cloud is not being used yet, use Database management to set up the database for use in the cloud. If this is done, go to step 2.
2. Start \client\twClientStd.
3. Go to **Master data | Employee** and set up the login name, e-mail and password here. Save this information.
4. Change modules. Go to the Week grid for example. This is because details are not automatically transferred to the cloud server but during a module change.
5. Then go to **File | Open web client** in the main menu of the desktop client.
6. Enter the login name or e-mail and the password.



After you have entered your login name/email and password, you can indicate whether you want to be kept logged in permanently by selecting the '**Keep me logged in**' check box. Then click **'Login'** to login.

If the password is incorrect, e.g. because you have forgotten your password, the link '**Lost your login?**' on the screen. By clicking on this link you will receive a new (temporary) password by e-mail with which you can log in. You can then change the password in the web client under the Logout button, Change password option (see below).

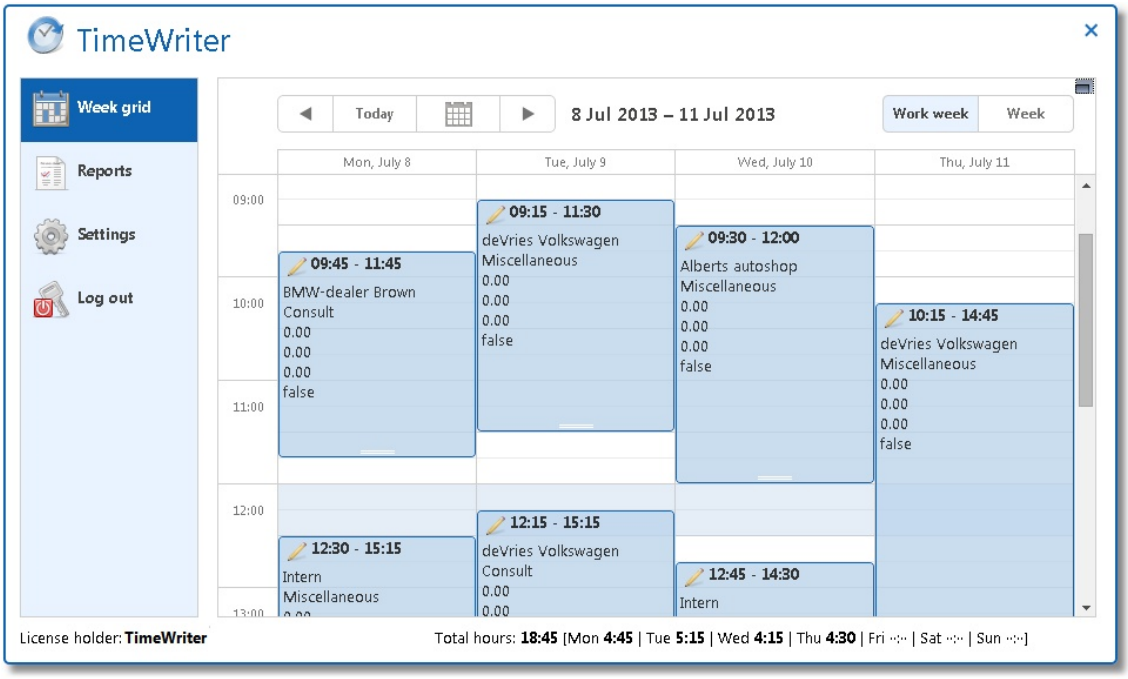


If the login name or e-mail is unknown or has not been entered, the TimeWriter administrator will be notified of the forgotten login and may change the password for you.

***N.B.**: As you can see the URL does not contain a name that is easy to remember, but sometimes also includes a series of numbers, letters and punctuations. Via these series of numbers and letters we can determine which administration belongs to you. From a security point of view, a URL that cannot be guessed has been generated. This makes it harder for hackers to find out the correct URL. You can save the URL as a favorite, so you don't have to type this in every time.*

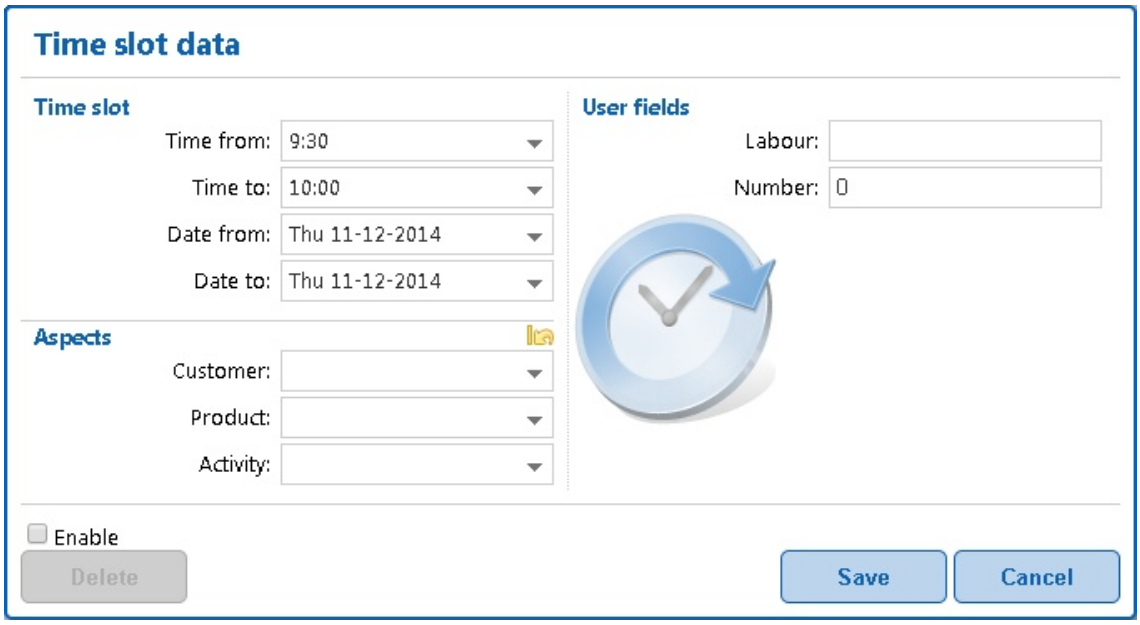
Week grid

After logging in, the Week grid will open. Both in the Web client Week grid as well as in the desktop client, time slots can be created by clicking on the mouse on the start time and dragging down to the end time. When the mouse is released a screen will appear that can be used for data entry.



Changing existing bookings

Double click on a time slot on the Week grid to edit an existing booking.
The following screen will then open:



Text boxes with a downwards pointing arrow are drop-down lists. By typing text in the text box, the list will be limited to items containing the entered text.

Navigating

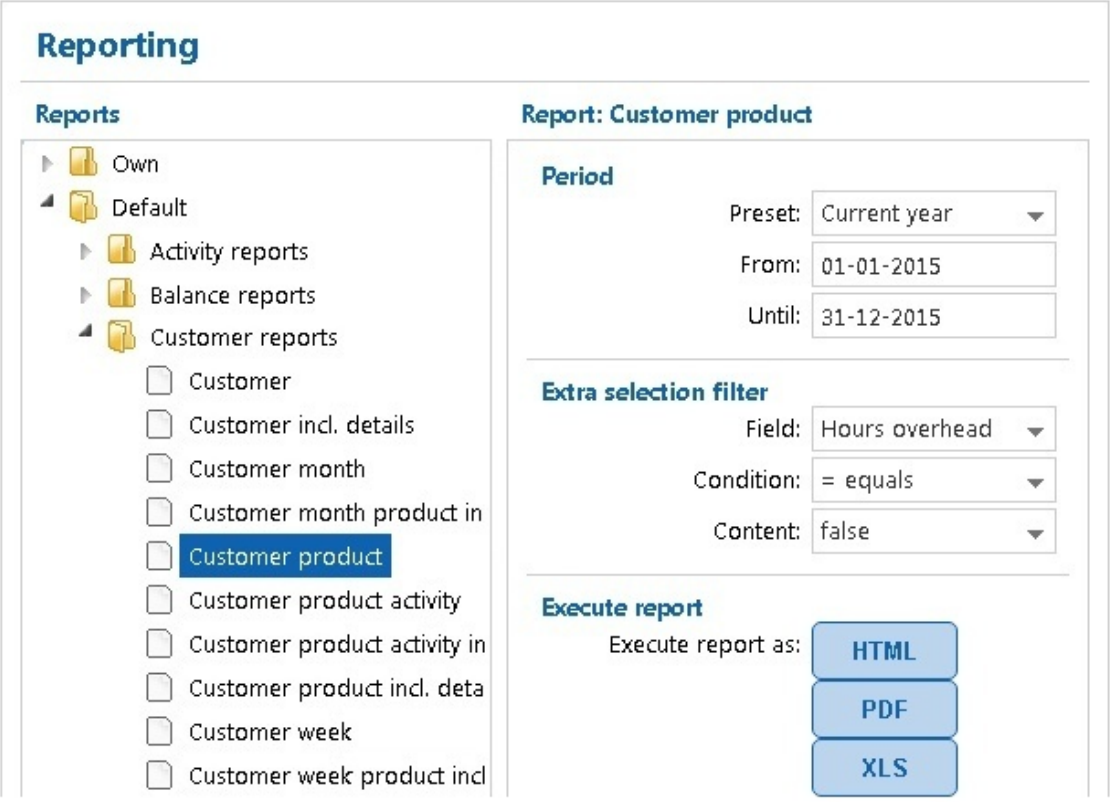
The buttons at the top of the Week grid have the following functions:

Button(s)	Function
◀	Navigate to the previous week.
Today	Navigate to the current week.
▶	Navigate to the next week.
	Navigate to any week via the calendar (popup).
Work week	Limit the Week grid to hours and days within a working week.
Week	Show the whole week.

Reporting

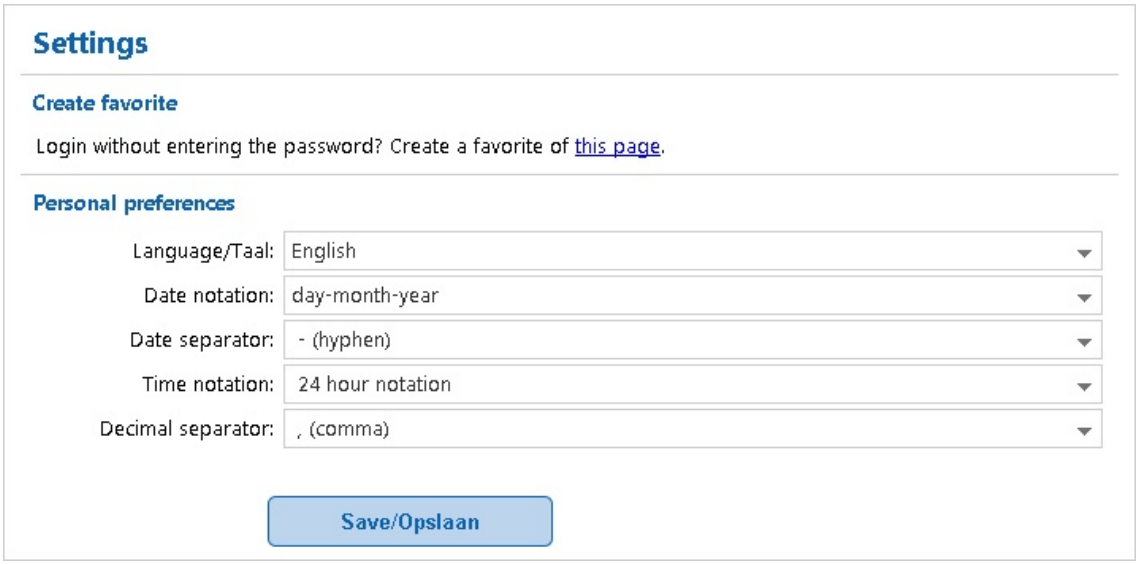
Generate a report as follows:

1. Select a report group from the list.
2. Select a report from the group.
3. Enter the required time period on the right.
4. If necessary set up an Extra selection filter.
5. Click on the button for the required export (HTML, PDF or XLS).
6. The report will open in a new screen.



Settings

The Web client will also allow you to set up language, numerical- and date notations. All possible settings can be seen in the Personal settings chapter.



Create favorite

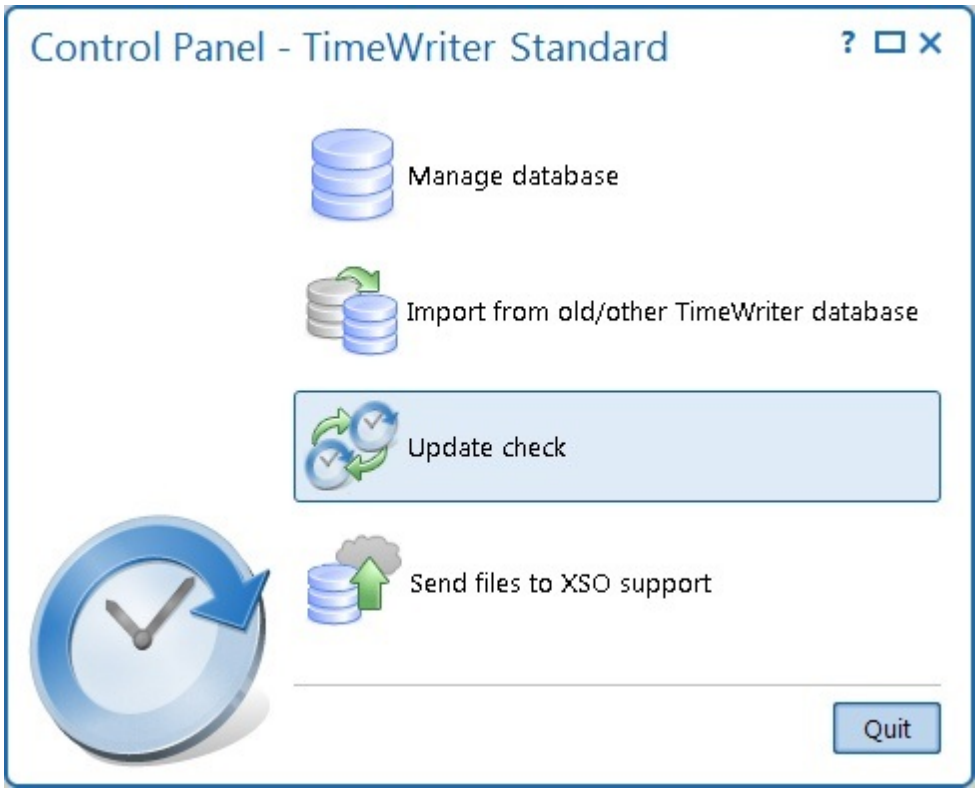
The URL contains no default login name or password, but only an ID for the correct administration. If you create a favorite of this page you will need to keep logging in. If preferred, a favorite can be set up for a URL that can login at the same time. To do this, go to **Settings | Create favorite** and click the 'this page' link. The home screen for the Web client will reappear. There is now a longer URL in the address box, which includes the encoded login name and password. Create a favorite for this page which lets you easily get into the TimeWriter Web client without logging in.

Managing application and database (ControlPanelStd)

Use the **\control\ControlPanelStd** program to manage the TimeWriter application and database.

The program has the following functionalities:

- Manage database (set ups, backups etc.).
- Import from older/other TimeWriter database.
- Update check.
- Send files to XSO support.



Manage database

Database management can be used for example to set up the database location and to run backups. This chapter covers the **local database** and **cloud database**. What this involves is explained in the introduction of the chapter: Local database or Cloud database.

Set up database

Set up database can be used to set up a database location. In TimeWriter Standard this can be done locally or in the cloud. The default is set to: 'Database on this computer'.

Do you want to work on the same TimeWriter database at another location or via a web browser? You can choose to put the database in the cloud. The database will then be located on one of our servers and you can access it from various locations. The wizard will direct you in this.

If you want to use TimeWriter on **both** Windows and Mac OS X, choose for putting the database in the cloud.

Set up database is, only for administrators, also available by choosing menu option **File | Reconfigure database**.

Backup and restore database

Backup and restore database' allows you set up backups, remove them, restore them or archive them. The screen shows a tab sheet for both local and cloud backups.

- When you work with a local database, the backups will be made in the folder: **\data\xso_standard\default\backup**.
- When you work with a cloud database backups are made on a location on the cloud server.

If you want to save a copy of a cloud backup in a different location, you can download it from the cloud.
If you would like to open a copy of a backup in TimeWriter without overwriting your database, you can do a restore to an archive. This archive can be opened again from TimeWriter by choosing menu option **File | Open archive**.

Transfer database

If you previously worked with a local database and you have changed to a cloud database (or vice versa) then you can transfer the database here to continue with the same database. You will see some information about the contents of the databases in both locations.

- Click on to transfer the **cloud** database to the **local** database. The **local** database will be overwritten by the **cloud** database.
- Click on to transfer the **local** database to the **cloud** database. The **cloud** database will be overwritten by the **local** database.

Block database

Blocking a database will prevent it from being used after transferring it from a local to a cloud database or vice versa. A block message can be set up per database.

Fix database

If a database is suspected to be corrupted, you can check the database for errors here. If possible, you can then get the errors fixed. A backup is automatically made first. Local temporary files can also be deleted here.

Archive database

A database can be archived here by entering a customised self-selected archive name. Archives can also be deleted again as required. Archives can be opened in TimeWriter by choosing menu option **File | Open archive**. An opened archive can be used in the same way as the main (Default) administration.

Import from old / other TimeWriter database

If an older version of TimeWriter was being used, you can import the data from the old version into the new version. It is possible to run the import on the standard administration or to an archive. The wizard will guide you through this import process.

NOTE: When importing to the main (Default) administration, this administration will be overwritten (a backup will be created first).

By using the import wizard, data can be transferred from older versions of TimeWriter. It is important for you to know which version of TimeWriter you are using. When you start the current TimeWriter it shows which version is being used in the top left hand corner. The **Help | About** menu also shows version details.

The import wizard shows the following options:

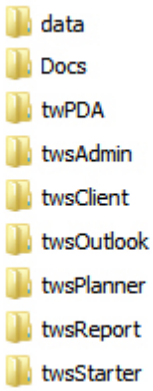
Import from	To: TimeWriter Standard (V. 5.x.x)
TimeWriter Freeware (V. 3.10.x)	Contact XSO support.
TimeWriter Standard (V. 4.9.x)	Go to Import from TimeWriter Standard V4.
TimeWriter Professional (V. 1.14.x)	Go to Import from TimeWriter Professional V1.14.
TimeWriter Freeware (V. 5.x.x)	Go to Import from TimeWriter V5.
TimeWriter Standard (V. 5.x.x)	Go to Import from TimeWriter V5.
TimeWriter Professional (V. 5.x.x)	Not yet available.

Import from TimeWriter Standard V4

An installation folder in TimeWriter Standard looks something like this. If no settings are changed the database will be located in the **data** folder.

If the database location is elsewhere you will be able to find it in twsAdmin\twsAdmin.ini.

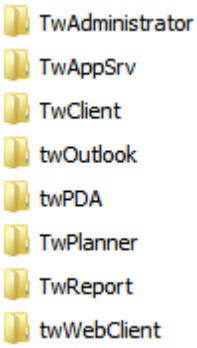
Select this folder in the wizard as the database folder to be imported.



A significant functionality change that has been made is the use of tariff agreements. For more information see Tariff agreements.

Import from TimeWriter Professional V1.14

An installation folder in TimeWriter Standard looks something like this. If no changes are made to settings the database will be located in the **TwAppSrv\data\twpro** folder.



Select this folder in the wizard as the database folder to be imported.

In the old TimeWriter Professional you could use tariff agreements and a tariff(factor) fixed per aspect. TimeWriter V5 only uses tariff agreements. For more information, please refer to the Tariff agreement chapter.

In the old TimeWriter Professional it was possible to work with groups. In TimeWriter Standard authorisations and combinations via groups are not available. During conversion, these groups are 'expanded'.

In the old TimeWriter Professional an unlimited number of user fields could be used. In TimeWriter Standard there is a fixed number of user fields. The import wizard lets you choose which user fields need to be retrieved.

Import from TimeWriter V5

For imports from another TimeWriter V5 application it is important that the database is set to local (and not cloud). If the cloud is being used, change this to local database first via Control panel | Manage database.

The database will then be located in the folder: **\data\xso_free\default** (freeware version) or **\data\xso_standard\default** (standard version).
Select this folder in the wizard as the database folder to be imported.

Tariff agreements

The functionality of TimeWriter V5 is comparable to earlier versions in many ways. However in one particular aspect of functionality it is very different, namely in setting up **tariffs**.

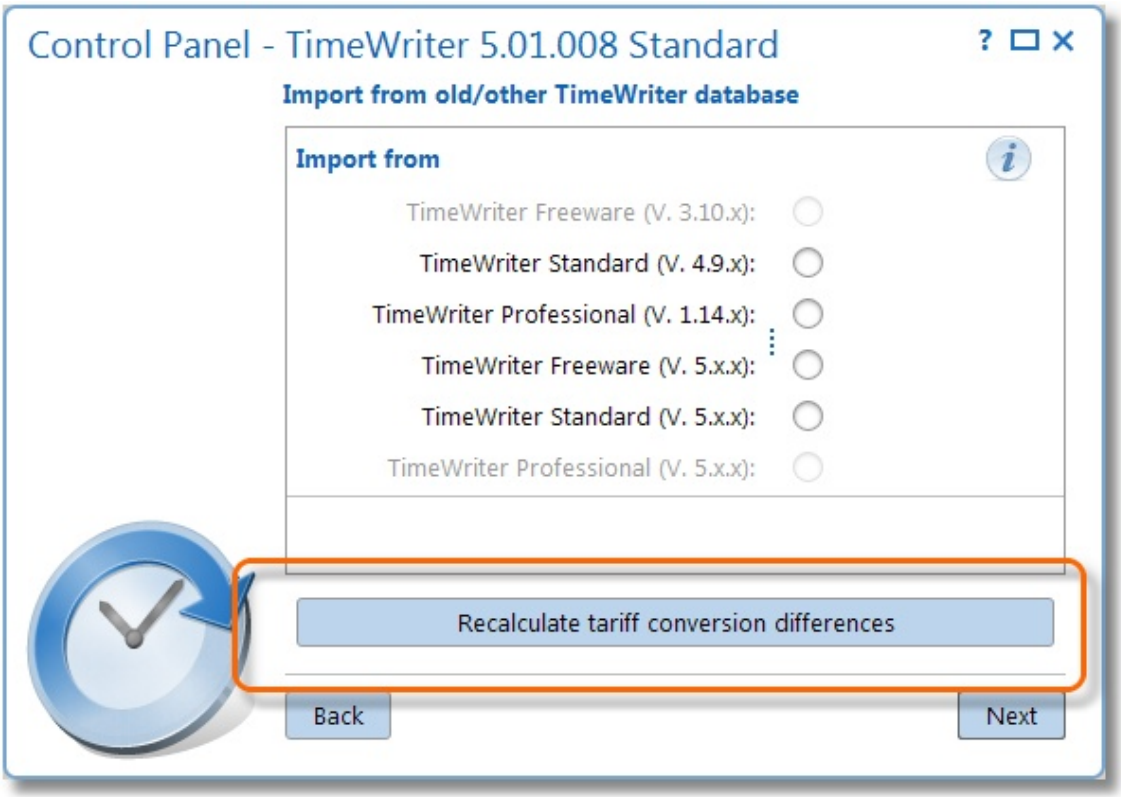
In TimeWriter V5 tariffs are set up as so called **'Tariff agreements'**. A tariff agreement is any combination of master data that is linked to a time period and to an amount. If an hour booking matches the associated master data, then the tariff will apply.
In the import wizard your current pricing structure will be converted to these new tariff agreements. As far as the rates have been set with one type of master data (e.g. Employees) and you have not used the tariff factor (in the other master data), the conversion will be possible without further manual adjustments.

Historical hourly bookings can be 'frozen' until a date to be set, this retains the original tariff calculation. However, the bookings can no longer be adjusted.

For hour bookings that are not 'frozen' a new tariff agreement will be chosen. If a difference appears between the original and the new tariff calculations, you will be notified by means of a report.

Recalculate tariff conversion differences

If any differences are found when converting to tariff agreements, a report on these will be shown. After conversion the tariff agreements can, if needed, be adjusted in the new administration to limit the number of differences. The report can be rerun through 'Control Panel | Import from ... | Recalculate tariff conversion differences'.



Update check

You can use 'Update check' to check if there is a program update available. If there is a newer version, you can download and install it here.

If you use a local database updating is not required. Click on **Update check** to check if a new version is available.
When using a local database, you can setup to be weekly notified to execute an update check. Go to **Maintenance and settings | Settings | Update check** to enable or disable the weekly update check. The update check will only be executed for administrators.

If you use the cloud an update check will be done automatically at start up of the program and the update needs to be installed directly.

Update is being installed by?

Installing an update can only be performed by 1 person. During installation a temporary file will be created in the application folder. This file contains some information about the person who is performing the update. When the update is completed the temporary file will be deleted. In some rare cases deletion of this file fails and a second person who tries to install the update will get a warning message that someone else is already busy installing the update. If the warning message is incorrect, you can delete the file **TimeWriterV5\lib\UpdateSemaphore**.

Send files to XSO support

This function sends all relevant files associated with your administration to the support department at XSO:
- database
- log-files
- license files
- settings- and configuration files.

Only use this option if you are asked to do so by the XSO support department.

TimeWriter API

Using the TimeWriter API it is possible to import, export or delete the following data:

- Aspects (employees, customers, projects, activities)
- Relations (combinations en authorizations)
- Hour bookings

Before using the TimeWriter API you need to generate a user key at Maintenance and settings | Settings | TimeWriter API.
You can find the manual about using the TimeWriter API here:
https://timewriter.com/media/webhelpapi.

Index

- A -

Accounting 100
Android 8, 140
App 8, 140
Archive 14
Archive database 148, 149
Aspect 14
Aspect combinations 31
Aspect names 73
Aspects 22
Asperion 126
Authorizations and combinations 66

- B -

Backup and restore database 148
Backup database 148
Backup reminder 66
Block database 148, 149
Breaks 17
Browser 14
Budget auditing 59, 92, 93
Budget details 93
Budget exceeded 93
Budget keeper 59, 93
Budget status 59, 93
Budgets 59, 93

- C -

calendars 27
Cell 31
Chart 87
Cleanup 75
Cloud database 10
Combined 31
Company data 95
Company logo 67
ControlPanelStd 147
Copy 17
Copying a time slot 17
Create favorite 146
Creating a new time slot 17
Creating an export 80
Currency 96
Customer data 95

- D -

Deleted-marking 47, 49
Demo master data 64
Designing exports 80
Designing grid views 82
Designing reports 78
Desktop client 10
Dolumn selector 31
Duration 22

- E -

e-Boekhouden 118
e-Boekhouden API 100
Editing a time slot 17
E-mail 98
E-mail layout 99
Employee 43
Exact 105, 113, 115
Exact API 100
Excel 65
Excluding breaks 22
Expenses 25, 96
Export journal entries 100
Export options 87
Exports 80, 87
Extra selection filter 84

- F -

Favorite 31
Favorites 31
Fields 73
File server 14
Filling in gaps 17
Fix database 148, 149
Fixed hours list 31, 139
Frequently used tasks 17

- G -

Generate orders 132
Generating a grid view 82
Generating a report 78
Google calendar 27
Grid view options 87
Grid views 82, 87
Group by 96

- H -

Hourly booking 22

Hours checking 67
Hours decimal 135

- I -

Import 65
Import from old / other TimeWriter database 150
iMUIS 120
iMUIS API 100
Input 17
Installation 9
Installation wizard 9
Internal tariffs 50
Invoice layout 97
Invoice line template 96
Invoice specification 96
Invoices 133
Invoicing 95, 96, 133
Invoicing settings 95
iOS 8, 140
iPad 8, 140
iPhone 8, 140

- K -

KING Finance 120

- L -

Leave 57, 67, 92
Leave balance 92
Leave booking 92
Leave details 92
Leave rights 57
Leave status 57, 92
Leave survey 92
Leave year 57
Linux 8
Local database 10
Login 68
Login name 43

- M -

Mac 8
Maintenance and settings 66
Maintenance tasks 75
Manage database 148
Master data 42
Merge aspects 75
Migration 11
Minimal time unit 22
Mobile 140
Module explorer 16
Modules 14
Moneybird API 100
Multi platform 8

- O -

Orders 133
OS X 8
Outlook calendar 27
Overhead 22, 47
Overlapping bookings 17
Overwriting a time slot 17

- P -

Password 43
Password strength 68
Paste 17
PerfectView 128
PerfectView API 100
Period blocking 66
Period filter 84
Personal settings 135, 146
Pivot table 87
Printer settings 87
Proxy 13

- R -

Reeleezee 107
Report designer 87
Report options 87
Report printing options 78
Reporting 69, 77, 145
Reports 78, 87
Reset personal layout data 135
Restore 49
Runtime filter 84

- S -

Selection filters 84
Set up database 148
Settings 66
SnelStart 103, 111
SnelStart API 100
Special days 69
Split documents 84
Stip-T 109
Stip-T API 100
Subscriptions 50
Supplies 33

Swap aspects 75
Synchronise 140

- T -

Tariff 22
Tariff agreement 50
Tariff agreement sequence 50
Task groups 33
Tasks 33
Terminlogy 73
Time slot 14, 17, 22
Time slot data 22
TimeWriter API 70, 155
Transfer database 148
Transferring data 12
Travel costs 24, 50, 96
Twinfield API 100

- U -

Update check 70, 153
URL 14, 146
User fields 14, 22, 74

- V -

Visma 123
Visma eAccounting API 100

- W -

Web browser 10, 14, 141
Web client 141
Week grid 70, 138, 143
Week list 17, 30
Week navigator 17
Windows 8
Workplace 17, 72

- X -

XSO support 154

- Y -

Yuki 122
Yuki API 100