

# Tracking Time with the Standalone Timer

Copies of QuickBooks aren't cheap, so the people who do your bookkeeping are probably the only ones who have access to the program. Meanwhile, you may have dozens of people who perform billable work and need a way to track the time they spend. Even if you run a one-person consulting shop, you may not want to run QuickBooks just so you can time your work.

Timer is a program that runs independently of QuickBooks. You can send this program to anyone and track their time without buying more QuickBooks licenses. With Timer, people can track their time as they work (using the stopwatch mode) or enter their time after they finish working. They then send the data captured by the program to you to load into your QuickBooks company file for billing or payroll.

## Distributing the Standalone Timer

This section describes the tasks you have to complete to let other people use Timer.

### Exporting Lists for Timer Users

Your QuickBooks company file includes all sorts of information that you need for tracking time:

- Your customers and jobs
- The people who do the work
- The items that represent the work they do
- The classes you use to track income and expenses (if you use classes)

The timer program needs all this information to function, so you have to send it to people who use it. Timer can read files exported in the QuickBooks' .iif format. After you've installed Timer (page 5) on the computer you use to run QuickBooks, QuickBooks includes a command to create the export file with all the information that Timer needs. If you export the QuickBooks lists with this info to a file before you distribute the Timer software, you can include the export file along with the installation software.

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**Note:** If your lists change, you have to send updated export files to people who use Timer.

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Here's how you export lists for Timer:

1. **If the company file is in multi-user mode, choose File→“Switch to Single-user Mode”.**

Your company file has to be in single-user mode to export data.

2. **Choose File→Utilities→Export→Timer Lists.**

The first time you export Timer lists, QuickBooks opens the “Export Lists for Timer” dialog box, which includes a diagram of how data flows between QuickBooks and Timer. Once you've seen this dialog box, you probably don't need to see it again, so before clicking OK to open the Export dialog box, turn on the “Don't display this message in the future” checkbox. That way, the next time you export lists for Timer, QuickBooks immediately gets down to the business of creating the export file for you.

3. **Click OK to open the Export dialog box, and then choose the folder where you want to store your Timer lists.**

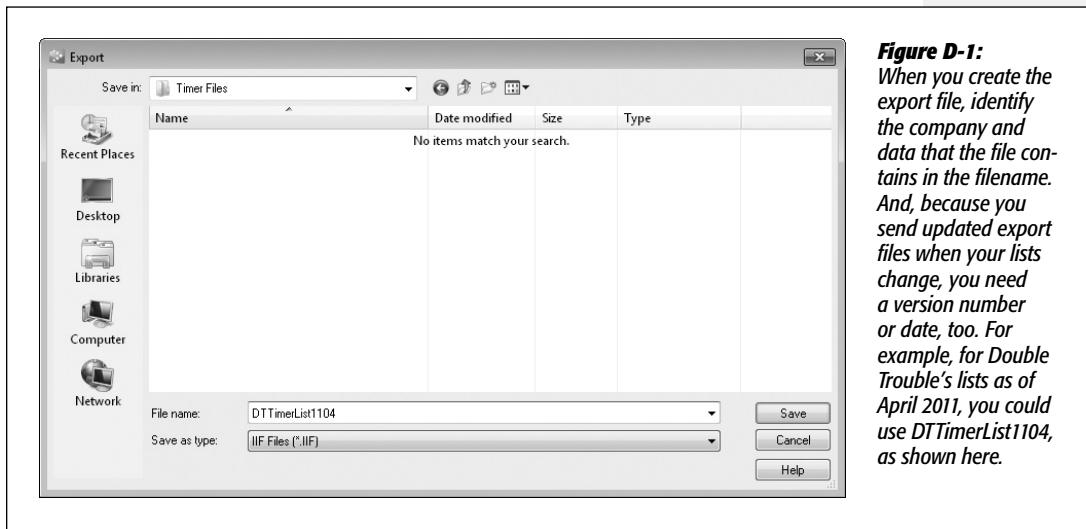
QuickBooks opens the Export dialog box to the folder containing the QuickBooks program. Instead of that location, store the export file with your other data in a folder with a memorable name like *Shared Documents\Export Files\Timer Files*. The next time you export Timer lists, QuickBooks opens the Export dialog box to the last folder you selected, so you only have to navigate to your Timer list folder the first time you export these lists.

4. **In the “File name” box, type the name of the list file, as shown in Figure D-1.**

QuickBooks automatically fills in the “Save as type” box with “IIF Files (\*.iif)”.

5. **Click Save.**

QuickBooks displays an Information message box that tells you that your export was successful. When you click OK, the export file is ready to use with your own copy of Timer or to include with the software that you send to others.



**Figure D-1:** When you create the export file, identify the company and data that the file contains in the filename. And, because you send updated export files when your lists change, you need a version number or date, too. For example, for Double Trouble's lists as of April 2011, you could use *DTTimerList1104*, as shown here.

## Distributing Timer

You can distribute the Timer software using any method you want. Sending compressed files by email might be the easiest, but you can pass a thumb drive around to your colleagues in the office or send a CD to other recipients. Regardless which approach you use to distribute Timer, the first step is to copy the Timer folder onto your computer.

Here's how you copy the Timer folder to your computer if you run Windows XP, Windows Vista, or Windows 7:

1. **Insert the QuickBooks software CD into your CD drive.**

If the QuickBooks Installation window appears automatically, click Quit.

2. **Open Windows Explorer. For example, if your computer runs the Windows 7 operating system, click Start→Computer.**

The Windows Explorer window opens, listing file folders, hard disks, and devices with removable storage connected to your computer.

3. **Double-click the CD drive that contains the QuickBooks CD.**

Another Windows Explorer window opens listing the folders and files on the CD.

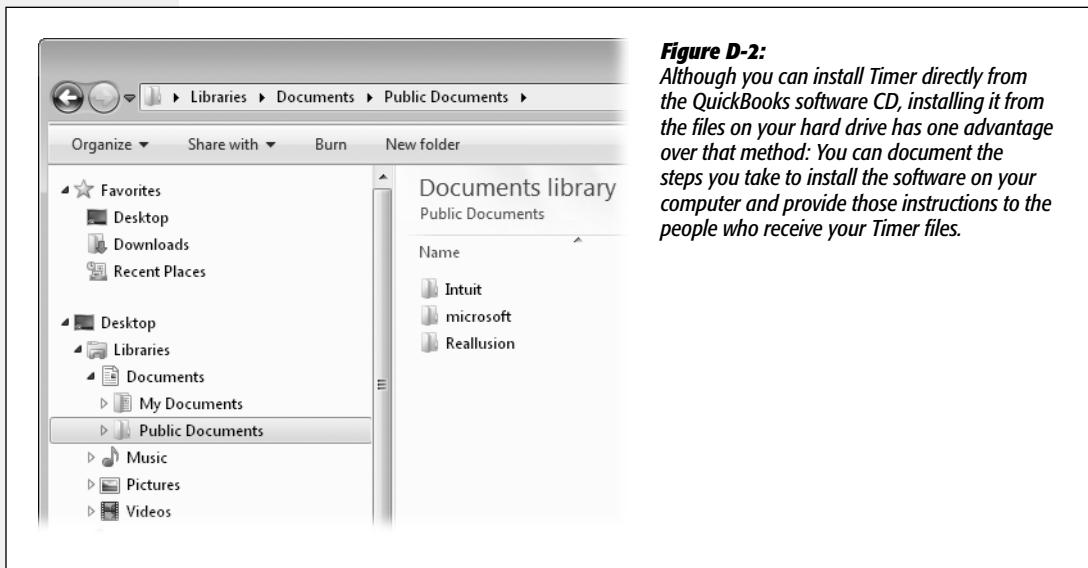
4. **Right-click the QBTimer folder, and then choose Copy.**

If your Windows Explorer window doesn't display folders in the left pane, in Windows 7 or Windows Vista, choose Organize→Layout→Navigation Pane. In

Windows XP, choose View→Explorer Bar→Folders.

5. In the Folders list, navigate to the folder where you want to store the Timer folder you just copied, as shown in Figure D-2. Then right-click the folder and choose Paste from the shortcut menu.

Because these files are for installation only, store them in a folder for downloads or a folder you create to hold software you distribute, such as *Public Documents* or *Shared Folder\Software*. After you've moved the installation files into a folder on your hard drive, you can install Timer on your computer *and* distribute it to others.



**Figure D-2:** Although you can install Timer directly from the QuickBooks software CD, installing it from the files on your hard drive has one advantage over that method: You can document the steps you take to install the software on your computer and provide those instructions to the people who receive your Timer files.

6. Once the QBTimer folder is on your computer, you can copy it to a thumb drive, attach it to an email, or copy it onto a CD.

Also be sure to add the export file of lists (page 1) to the drive, email, or CD, so people who track time have all the files they need to use Timer.

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**Note:** A USB thumb drive is the quickest way to distribute Timer: Plug the thumb drive into your computer and, in Windows Explorer, drag the QBTimer folder from the QuickBooks CD onto the thumb drive. Then simply hand the thumb drive to the person who needs Timer so he can plug it in and drag the files onto his computer.

You can also send the Timer files via email, as long as you pay attention to a few issues: Use file compression software, such as WinZip, to create a single file to send. (Compressing the files won't reduce the number of bytes you have to send because software files are already concentrated.) The compressed file will be at least 3 megabytes, so you won't be able to email it to recipients whose ISPs limit the size of email attachments to less than that. It's a good idea to ask your recipients if it's OK to email a file that large, which could take up to 30 minutes to download using a dial-up connection.

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## Using Timer to Track Time

Now that you've distributed Timer, this section explains how people who track their own time use Timer and send the resulting time records to you, the person running QuickBooks.

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**Tip:** Even if your computer has QuickBooks installed replete with its built-in time-tracking features, you might prefer to track time using Timer. You can use Timer's stopwatch and quickly switch between different activities during the day—all without running QuickBooks.

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### Installing Timer

Timer uses an installation wizard, so the process for installing the program should be familiar. In case one of your employees isn't as experienced with a computer as you are, here are the steps:

1. In Windows Explorer, navigate to the CD or folder containing the installation files (the folder on the QuickBooks CD is named QBTimer) and then double-click the Setup application (Setup.exe).

The installation wizard opens the QuickBooks Pro Timer Installation window and displays a Welcome dialog box. Click Next to get to the good stuff.

2. In the "Destination folder for application" screen, click Browse to select the folder where you want to install the Timer software. After you choose the folder you want, click OK.

The installation wizard chooses a folder, such as *C:\Program Files\Intuit\Quick Books\QuickBooks Pro Timer*, which is as good a place as any. But if you want to keep Timer in a different folder, click Browse and choose a folder under Program Files, such as *C:\Program Files\QBTimer*.

3. In the "Destination folder for application" screen, click Install.

You'll see a screen with a progress bar and a few inconsequential messages, but the installation takes less than a minute. When it's complete, the "Installation Wizard complete" screen appears.

4. Click Finish.

The installation dialog box closes, and QuickBooks Pro Timer joins the others on the Start→All Programs or Start→Program Files menu, depending on how your computer's operating system is set up.

5. Before you remove the CD, copy the export file of QuickBooks lists from the CD to a folder on your computer.

The person who created the CD for you should have included an export file of QuickBooks lists. You have to import the lists in the export file into the Timer

program (as described in the next section) so you can assign customers and items to the time you work.

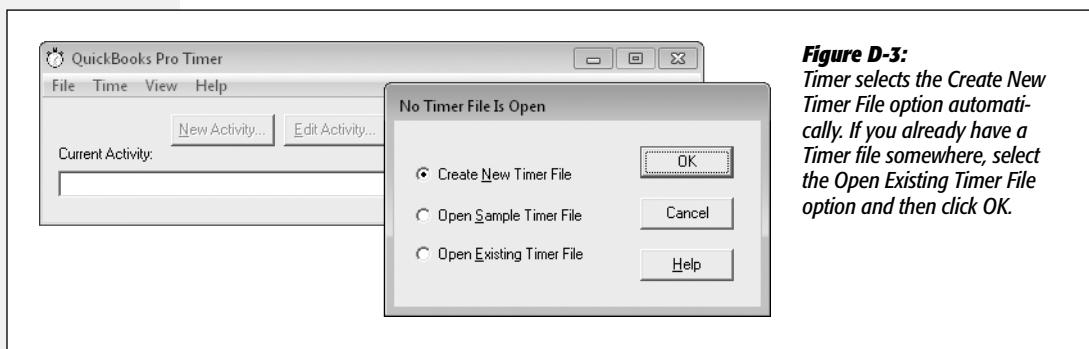
## Setting Up Timer

The first time you run Timer, you have to set it up before you can record any time:

1. On the Windows Start menu, navigate to the submenu that contains the Timer program and then choose QuickBooks Pro Timer.

The submenu that holds Timer depends on the program folder you specified during installation. For example, if you added the program to your QuickBooks folder, choose Start→All Programs→QuickBooks <edition>→QuickBooks Pro Timer, where <edition> is the name of the QuickBooks edition you use, like Pro or Premier. To keep the Timer within reach, drag the QuickBooks Pro Timer menu entry onto the Windows taskbar (where its icon looks like a stopwatch) so you can start it with a single click.

The Timer window opens, but so does the No Timer File Is Open dialog box. That's because you need to create a file to hold the time that you track, as shown in Figure D-3.



**Figure D-3:** Timer selects the Create New Timer File option automatically. If you already have a Timer file somewhere, select the Open Existing Timer File option and then click OK.

2. If you've never used Timer before, click OK to open the New Timer File dialog box.

If you already have a Timer file somewhere, select the Open Existing Timer File option and then click OK. In the Open Time File dialog box that appears, double-click the Timer file you want to open, and you're ready to jump to step 4 and import the lists you received.

3. In the New Timer File dialog box, navigate to the folder where you'd like to store the database file that Timer creates, type a name for the database, and then click OK to create the Timer database.

In QuickBooks 2008 and later, you can name the database file anything you want. (Earlier versions limited you to no more than eight characters.)

4. Timer displays a message offering to show you how to import your lists into QuickBooks. Click Yes to read the instructions.

If you've imported files before or if you prefer to read the instructions in this book (next step), click No. The Timer window now includes the name of the Timer database file that you created in the title bar, but you still aren't ready to track time.

5. To import the QuickBooks lists from the export file you received with the Timer software, choose File→Import QuickBooks Lists.

The Import QuickBooks Lists dialog box opens, which includes a diagram showing how data flows between Timer and QuickBooks.

6. Turn on the “Don't show me this message again” checkbox, and then click Continue.

The Open File For Import dialog box opens.

7. In the Open File For Import dialog box, double-click the folder where you stored the QuickBooks lists export file (page 2).

For example, if you copied the export file to the same folder as the Timer software, the folder might be something like *C:\Program Files\QBTimer*. The file is in .iif format.

8. After you open the folder containing the export file, double-click the export file's name to import the lists into Timer.

Click OK to dismiss the message box telling you that the import was successful. The Timer window doesn't look any different than it did before you imported the lists, but you can now track time.

## Setting Up an Activity

When you track time, you have to associate the time you work with the activities you perform. The next step in setting up time tracking is to add one or more activities. Activities in Timer share most of the fields you find in the Time/Enter Single Activity dialog box (see page 188 in your copy of *QuickBooks 2011: The Missing Manual*), which should come as no surprise if you expect to import Timer records into QuickBooks. Here's how you create an activity:

1. In the Timer window, click New Activity.

The New Activity dialog box opens with the Date box automatically set to today. If you intend to use Timer as a stopwatch, the Date box *has* to have today's date. But if you're creating an activity for work you've already done, choose the date that you did the work.

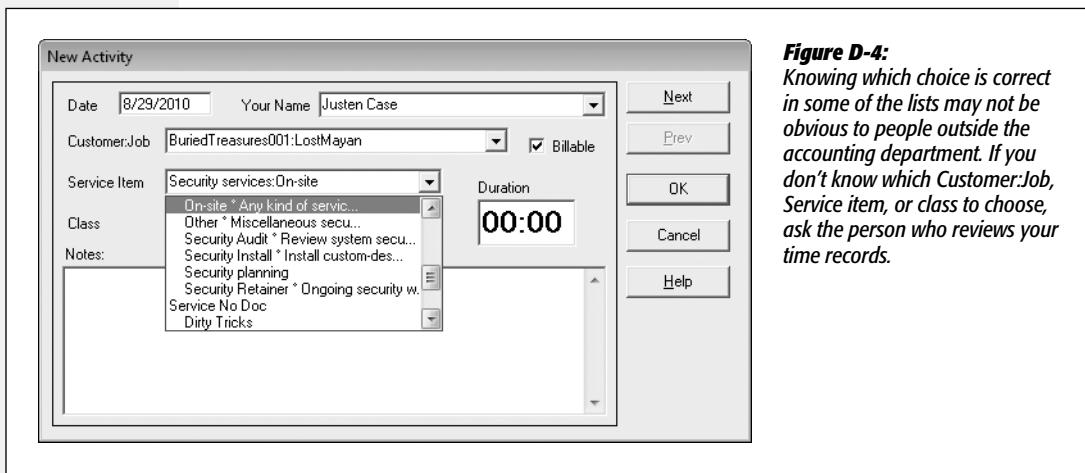
2. In the Your Name drop-down list, choose your name.

The Your Name drop-down list sorts names in alphabetical order, jumbling employees, vendors, and names from the Other Names list into one long alphabetical list.

**Note:** If your name doesn't appear in the Your Name drop-down list, *you* can't add it to the list unless you're also the person who exports name lists from QuickBooks. Tell the person who sent you the Timer program that your name is missing from the QuickBooks company file and politely ask for a new export file of QuickBooks lists with your name in it. Likewise, if you don't see the Service item or class that you want to use, ask for a new export file.

3. In the New Activity dialog box, fill in the fields for the activity.

As you can see in Figure D-4, this step mostly involves choosing from drop-down lists (Customer:Job, Service item, and Class) similar to the ones in the Time/Enter Single Activity dialog box (page 188 in the print edition of the book). If you don't see the Service item or class that you want to use, ask for a new export file.



**Figure D-4:** Knowing which choice is correct in some of the lists may not be obvious to people outside the accounting department. If you don't know which Customer:Job, Service item, or class to choose, ask the person who reviews your time records.

**Tip:** Timer exports new customers you create in Timer along with your time. So if you perform work for a customer who doesn't appear in Timer, choose View→Customer:Job List. In the dialog box that opens, click Add Customer. In the Contact Information dialog box, fill in at least the Customer box and then click OK.

4. If the activity isn't billable, turn off the Billable checkbox.

Timer automatically turns on this checkbox, so you have to change this setting only when time isn't billable.

5. If you want to describe the activity in more detail, type info in the Notes box.

QuickBooks imports these notes into the Notes field in its time records (page 187 in the print edition of the book).

6. Click Next to create another activity.

If you're done creating activities, click OK to return to the Timer window.

## Entering Time

After you've set up at least one activity, you can time your work or type in hours that you've already worked. To record time either way, you first have to select an activity. In the Timer window's Current Activity drop-down list, activities appear under two headings, as shown in Figure D-5. (The box on page 11 explains how you can alter this behavior.) Here's how you decide which activity to choose:

- **Activity Templates.** Every time you create a new activity (page 6), Timer adds it to the Activity Templates list. When you want to track time for that activity, click its name under the Activity Templates heading. Timer then adds the activity under the Today's Activities heading. Activity templates remain on the Current Activity drop-down menu for the length of time you specify in Timer's preferences, as the box on page 11 explains.



**Figure D-5:**

The Timer window's Current Activity drop-down list displays the activities you create under both Today's Activities and Activity Templates. Today's Activities represent the activities you're working on today. Activity Templates are activities that you can choose when you spend time on them.

- **Today's Activities.** If you want to record time for an activity that you've already worked on today, choose it under this heading.

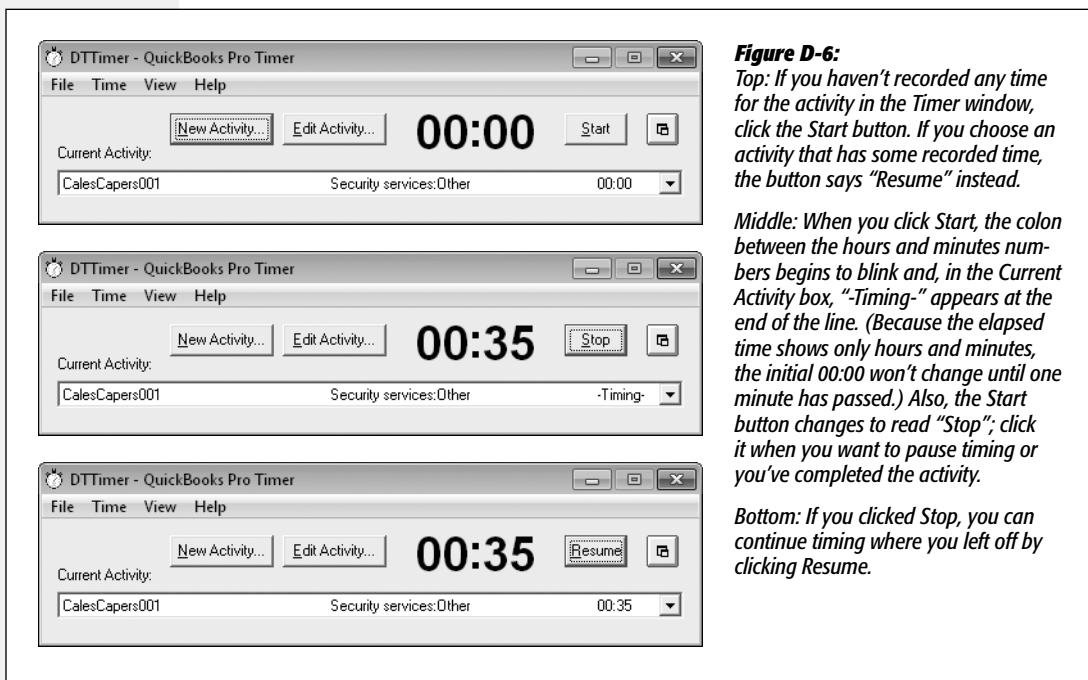
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**Note:** When you start Timer each day, your Today's Activities list is empty. The Current Activity box displays the text "Select an Activity Template from this list or click 'New Activity'". To work on an existing activity, choose its name under the Activity Templates heading; Timer starts a new record with today's date for that activity and adds it under the Today's Activities heading. If you're starting an activity you've never worked on before, click New Activity.

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## Stopwatch timing

In the Timer window, when you select an activity, you'll see one of three buttons, as shown in Figure D-6.



**Figure D-6:**  
*Top: If you haven't recorded any time for the activity in the Timer window, click the Start button. If you choose an activity that has some recorded time, the button says "Resume" instead.*

*Middle: When you click Start, the colon between the hours and minutes numbers begins to blink and, in the Current Activity box, "-Timing-" appears at the end of the line. (Because the elapsed time shows only hours and minutes, the initial 00:00 won't change until one minute has passed.) Also, the Start button changes to read "Stop"; click it when you want to pause timing or you've completed the activity.*

*Bottom: If you clicked Stop, you can continue timing where you left off by clicking Resume.*

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**Tip:** You can also pause timing on an activity by choosing a different activity in the Current Activity box. During a single workday, switching activities automatically pauses the current activity, and resumes timing to add more time to the next activity.

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## Typing in time

If you want to record time after the fact, in the Current Activity drop-down list, choose an activity and then click Edit Activity. In the Edit Activity dialog box's Duration field, type the hours and minutes you devoted to that project. (You can type the time as hours and minutes or as a decimal.) Click OK to finish up.

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**Tip:** If you like Timer's stopwatch feature but want the program's window to be smaller, click the button with the icon of two windows on it (its to the right of the Start/Stop/Resume button). The Timer window shrinks to show only the elapsed time, the Edit button, the Start/Stop/Resume button, and the Window button—which brings back the full Timer window.

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## POWER USERS' CLINIC

**Customizing Timer**

Timer is relatively set in its ways, but you can tweak a few preferences:

- The most helpful preference is Default Name, which lets you set the name that Timer automatically adds to the Your Name box. In the Timer window, choose File→Preferences→Default Name. In the “Choose a Default Name” dialog box that opens, choose your name and then click OK.
- If you usually work on billable activities, in the “Choose a Default Name” dialog box, turn on the “Time defaults to billable” checkbox. If you’re a staff person who always works on overhead activities, leave this checkbox turned off.
- To keep your list of activities manageable, you can set the number of days that Timer keeps activity templates (choose File→Preferences→Number of days to remember activities). For example, if you work on the same task for several weeks, you might set the number of days to 60. On the other hand, if you rarely work for the same customer from day to day, choose a low number, such as 5.
- Timer automatically turns on the “Show time when minimized” preference, which is a setting you’re unlikely to change. With it turned on, when you minimize the Timer window, the button in the Windows taskbar includes the label “Timer” and the current elapsed time for the activity being timed.
- Because it’s such a simple program, Timer’s one-time messages (about stuff like how Timer transfers info between its files and QuickBooks) are more annoying than they are helpful. But if you want to see those messages again, choose File→Preferences→“Turn on all one time messages”.

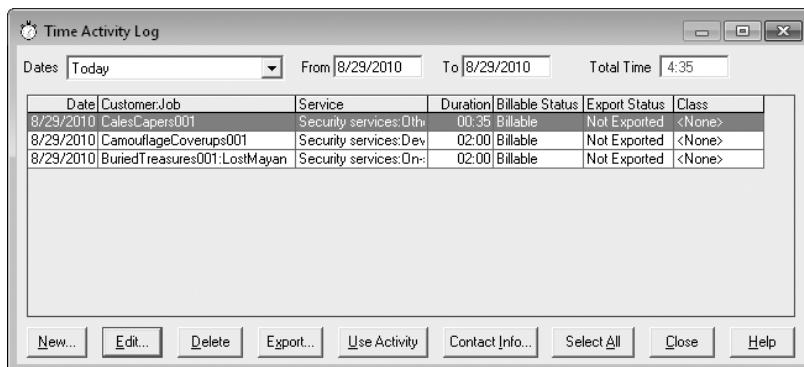
**Creating an Export File of Your Time**

If you’re tracking time, the company you work for probably wants you to send in your time records on a regular schedule. The most common reporting period is weekly, but you might have to send your time daily, every other week, or only when you’ve completed an activity.

You want to be sure you’re exporting the correct information, particularly when your paycheck depends on the time you’ve worked. In Timer, you can review, correct, and export your time all from the same dialog box. Here’s how:

**1. In the Timer window, choose View→Time Activity Log.**

The Time Activity Log dialog box (Figure D-7) opens, where you can review and correct your time. To review the time you plan to export, in the Dates drop-down list, choose a date range, such as This Week. If you want to choose From and To dates, in the Dates drop-down list, choose Custom.



**Figure D-7:** The Time Activity Log dialog box lists all the activities for the selected date range, and its Total Time field shows the total hours for all the activities displayed. If an activity is missing, click the New button and then add the activity and its time. To correct an activity, select it and then click Edit. To remove an activity that you added by mistake, select it and then click Delete.

2. To select all the activities shown in the dialog box, click the Select All button.

If you want to select some of the activities, hold down the Ctrl key as you click each activity in the list. To select contiguous activities, hold down the Shift key while you click the first and last activities.

3. Click Export.

If you see a window with one of those one-time messages showing how data transfers back and forth, just click Continue. The Export Time Activities dialog box appears.

4. In the Export Time Activities dialog box, choose the option for the time you want to export.

If you selected activities in the Time Activity Log dialog box, Timer automatically selects the “Selected activities” option. For example, if you exported time earlier today, select the activities you’ve worked on since then and then choose the “Selected activities” option so Timer exports only the selected activities. To export all activities through a specific date, choose the “All unexported time activities through” option, and then choose the date.

5. Click OK to open the Create Export File dialog box. Navigate to the folder where you want to save your time export file. In the “File name” box, type the filename you want.

Save the export file in a folder reserved for time export files. Include your name and the export date in the filename. (With the QuickBooks 2008 Timer and later, you aren’t limited to eight characters like you were in previous versions.)

**6. Click OK.**

When you see the message telling you that the export succeeded, click OK. Back in the Time Activity Log dialog box, the Export Status column now displays the word “Exported” for all the activities that you included in the export file.

**Note:** If you export activities during the day, Today's Activities are still available for the rest of the day. To keep your records straight, use Activity Templates to create new activities if you continue to work after the export. That way, you can export again to export the additional time you worked.

**7. Send the export file to the person who imports data into QuickBooks.**

Time export files are usually quite small, which means email is the easiest way to send them.

## **Importing Workers' Time into QuickBooks**

After you distribute the Timer program (and the lists needed to run it), you'll begin receiving data files containing the time people tracked with Timer. Your mission: Move that time data into your company file.

Importing the time that people send you is easy, particularly when you keep time files in one folder on your computer. Here's how to import time data as efficiently as possible:

**1. As you receive time files (by email or on a CD, USB thumb drive, or even floppy disk), copy them into a folder specifically for time files.**

Create a folder for people's exported time files where you store other company data. For example, if you have a folder for QuickBooks company files, create a subfolder for time-related files there, such as *\Shared Documents\Company Files\Timer Files*.

**2. Back up your company file (page 162).**

If you run into any problems when you import time, you can restore the backup copy and try again.

**3. Choose File→Utilities→Import→Timer Activities.**

If you see a diagram of the path that data takes between Timer and QuickBooks in the “Import Activities from Timer” dialog box, turn on the “Don't display this message in the future” checkbox before you click OK to begin importing a file.

**4. In the Import dialog box, navigate to the folder with the time files.**

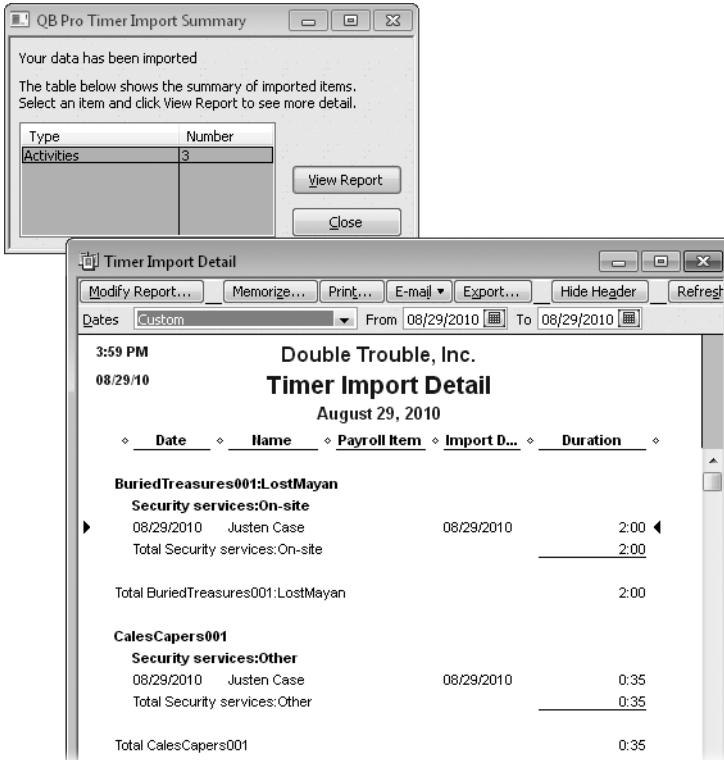
The next time you import Timer activities, QuickBooks automatically opens the Import dialog box to the folder you chose the previous time. So as long as you continue to store time files in the same folder, you only have to perform this step during the first import.

**5. Double-click the filename you want to import.**

After QuickBooks imports the data, it displays the QB Pro Timer Import Summary, which shows how many activities it imported.

**6. Click View Report to see the details for the imported transactions.**

As shown in Figure D-8, the report groups time transactions first by customer or job, and then by Service item. Each time entry in the report includes the date, person's name, the date imported, and the number of hours.



**Figure D-8:**  
The QB Pro Timer Import Summary dialog box (background) tells you how many activities QuickBooks imported and whether it imported any list items that people created with Timer. When you click the View Report button, the Timer Detail Report (foreground) shows the full details of every activity that you imported.

Although QuickBooks has already loaded the time records into your company file, it's a good idea to review the Timer Import Summary report. If you spot an obvious typo such as 26 work hours in one day, you can correct the activity in QuickBooks (see page 188 of the print edition of the book).

Also keep watch for list changes your employees might have made—even if by mistake. For example, if an employee created a new customer (page 8), QuickBooks imports those into the lists in your company file. If you find changes like these, make sure the entries are correct or fill in missing information.

**7. In the QB Pro Timer Import Summary dialog box, click Close.**

You're done!

After you import the time, it looks the same as time entered in QuickBooks using the Weekly Timesheet or Time/Enter Single Activity dialog boxes.