

# User's Guide

TimeValue Software™

# File InTime™

Due Date Tracking and  
Task Management Software

**TIMEVALUE**  
s o f t w a r e

# File In Time Software User's Guide

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## Guarantee

If File In Time software doesn't fit your needs for any reason, you may return it within one year of purchase. We will promptly refund your purchase price.

## Disclaimer

TimeValue Software File In Time due date tracking and task management software is intended as an aid for tax professionals. It can produce results at variance with legal, contract, or trade practice requirements. The due dates should be reviewed with due professional care. The program does not cover all possible cases, and may not include recent developments. As with any database software tool, it is up to you to use it appropriately. Please see the TimeValue Software license agreement for more information.

## Welcome to File In Time™ Software

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TimeValue Software™ File In Time™ software is the workload management and due date tracking system for tax professionals. File In Time software enables you to manage your practice by tracking your workload quickly and accurately. With File In Time software, you will know when tasks are due and who is responsible for completing each task.

### How to use this User's Guide

Refer to the **Getting Started** section to get the program up and running.

Work through the **File In Time Software Tutorial**. This is a hands-on basic tour of the program that uses the File In Time software tutorial database.

Refer to the remaining sections for further information on File In Time software features and usage.

The **Putting it all Together** section can assist you with the most common operations of File In Time software.

While this User's Guide is an important reference tool, File In Time software also contains a comprehensive help system. The built-in help system should be your first step in finding answers to your questions. To reach the help system, select a topic from the **Help** menu, or press **F1**.

### Customer Support and Maintenance

Our staff can help you get the most from File In Time software. New users are encouraged to call our support staff during the initial setup. We can help you import your existing client information, identify useful features, and help you organize File In Time software in the most effective manner.

Contact Customer Support at **800-426-4741** or 949-727-1800 Monday through Friday from 7:00am to 6:00pm Pacific Time. Contact us via email at **support@TimeValue.com** or by fax at 949-727-3268.

### File In Time Product Maintenance

Your first year of File In Time product maintenance is included with your initial purchase of File In Time software. Maintenance includes product updates, upgrades, downloads, unlimited technical support, replacement CDs, and additional user's guides as needed. Upgrades are sent automatically. File In Time product maintenance is renewable annually beginning one year after your initial purchase.



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# GETTING STARTED

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## System Requirements

File In Time due date tracking and task management software requires a PC running Windows 7, Vista, XP, 2000 or later. To run in a satisfactory manner, File In Time software requires at least 100MB of RAM, and 1GB of available disk space.

## Installing File In Time Software

The File In Time software program files are shipped on a CD in compressed form. In order to run File In Time software, the program must be installed on your computer or server. If you experience any difficulty installing File In Time software, contact our support team at 800-426-4741 or [support@TimeValue.com](mailto:support@TimeValue.com).

### To install the single user edition of File In Time software

1. Insert the File In Time product CD. After a few moments, the File In Time product installation screen will appear. Follow the on-screen instructions.

The File In Time product installation will default to C:\FITWIN. You can change the destination drive to install to a different drive if needed. All the File In Time software program files will be copied into this directory. A Windows program group will be created and a shortcut called “File In Time” will be placed on your Windows desktop.

The single user edition of File In Time software is intended for installation on a single computer. For backup purposes the program can be installed on a server.

If you are installing the network edition of File In Time software, be sure to install the program to your network drive and refer to the guidelines below.

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**Note** When you install File In Time software, we recommend installing it to the default directory. If an earlier version of File In Time software already exists on your computer, install the new version in the same directory. Installing new versions over old **will not** affect your data. This will ensure all users are running the latest version without updating shortcuts.

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## File In Time Software on a Network

The multi-user/network edition of File In Time software is designed to operate efficiently on your network. It supports multiple licensed users running the same program from the same directory, and individual setup files for each user. After installing File In Time software on your network drive, please refer to the steps on the following page to create an icon for each user/workstation.

### To setup network workstations for File In Time software

(Perform the following setup from each workstation after you install the software on your network server.)

1. Go to the directory where File In Time software is installed (e.g., F:\FITWIN).
2. Run **Workstation Setup.exe** from the File In Time program directory.
3. Follow the on-screen instructions. This routine will add icons and required reporting files to the workstations.

### To switch from a single user to a network edition

Refer to the Question and Answer on this topic on pages 87-88.

### To install File In Time software on a peer-to-peer network

In order to run File In Time software from the various workstations, each workstation must have a dedicated mapped drive to the FITWIN directory. Mapped drives can be created through Network Neighborhood. Call the TimeValue Software Support Team at 800-426-4741 if you require assistance.



# **FILE IN TIME SOFTWARE TUTORIAL**

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## Starting File In Time Software

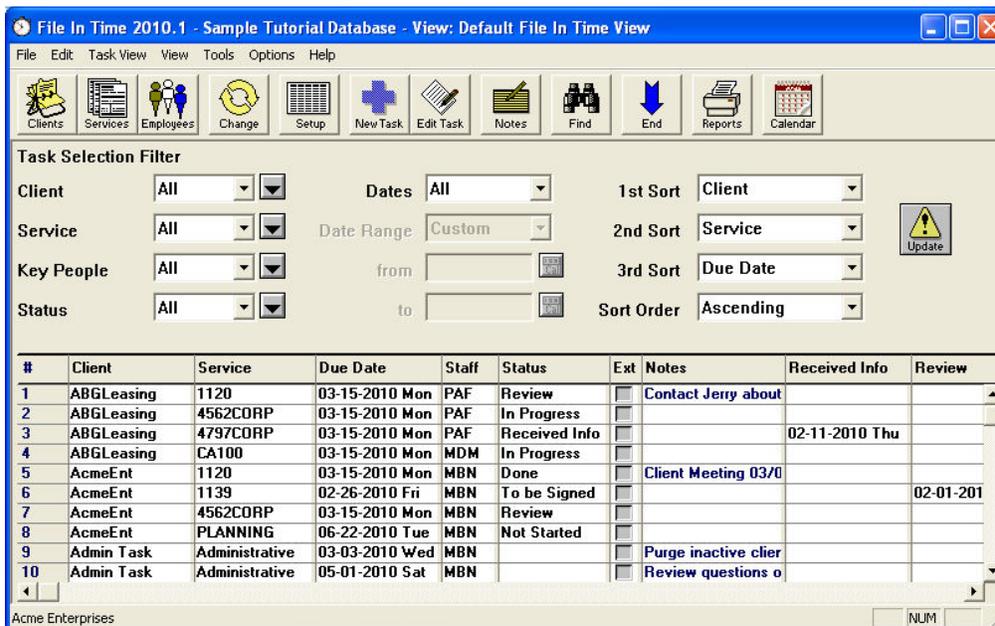
1. Double-click the **File In Time** icon on your desktop. If the File In Time icon does not appear on your desktop, click the Windows **Start** button and select **Programs**. Select the **File In Time for Windows** program group, and then choose the **File In Time for Windows** program icon.

## Loading Sample Data

File In Time software comes with sample data that you can use as you are learning the program. You can load and unload the tutorial database without affecting your real data or the tutorial data.

### To load sample data (tutorial database)

1. Select **Load Tutorial Database** from the **Help** menu. Your screen should appear as shown below (your data may vary).



The screen displays the tasks in the tutorial database. A **task** is a combination of a specific client, service, and due date. The assortment of tasks shown is called the **task view**.

The task view is determined by the Task Selection Filter fields. These fields act to filter and sort the tasks in the task view.

The information for a task consists of clients, services, employees, and dates. **Clients** are people or entities. **Services** are the kinds of services that you perform for a client (e.g., 1040 tax form, payroll, or financial statement). **Employees** are the people who will be performing the services.

## Adding a New Client

Client information can be entered manually or imported.

### To import your Client information

You can import your client information into File In Time software from most any delimited (tab or comma) file. Most tax, database, and spreadsheet software will export client information into a delimited format. **For details on importing information into File In Time software, see pages 64-69.**

### To enter new Client information manually

1. Click the **Clients** button on the tool bar. The Client Selection Window will appear.
2. Click the **New** button in the window to display the Client Edit Window. Enter information about the new Client as shown below.

The screenshot shows the 'Client Edit Window' with the following data entered:

Client	Acacia	Client #	812345
Name	Acacia Industries - dba Acacia Electronics		
General   Key People   User-defined   Notes			
Contact at Client	Marie Samuelson		
Address 1	123 Main Street		
Address 2	PO Box 123		
City/State/Zip	Anytown	CA	90909
Dear	Ms. Samuelson	Country	USA
Phone #1	111-222-3333	Email	msamuelson@aei.com
Fax #	111-222-4444	Year end	December
Fed ID #1	12-3456789	Fed ID #2	
State ID #		Client Type	Corporation

3. Click on the **Key People** tab in the window and select **CCT** as Staff. Key People assigned here will be automatically applied in the corresponding Key Person field on all subsequent tasks created for that Client.
4. When you have finished, click **Save**, and then click **Close**.

## Creating a New Service

File In Time comes with due date and extension information for nearly 200 federal and state tax forms and related items. These items are referred to as Services in File In Time software. You can add additional Services by entering information in the Service Edit Window.

### To add a new Service

1. Click on the **Services** button on the tool bar. The Service Selection Window will appear.
2. Click the **New** button in the window to display an empty Service Edit Window. Enter information about the new service in this window as shown below.

Service Edit Window

Service Name: 100 Compilation  
Description: Annual Compilation  
Frequency: Annual

Original Due Date  
Month due: 2 Day due: 20

Due date  
 Calendar Due Date  
 Skip Weekends

Due date based on  
 Calendar Year  
 Client's Fiscal Year

Allowable Extensions from Original Due Date

	Months	Days		Months	Days
First			Fourth		
Second			Fifth		
Third					

Display Extended Due Dates

File In Time does not calculate extensions for tasks more frequent than quarterly.

Save, New, Prev, Next, Close

3. Click **Save** and click **Close** to exit the window.

## Adding a New Employee

### To enter new employee information

1. Click on the **Employees** button in the Toolbar. The Employee Selection Window will appear.
2. Click the **New** button to display the Employee Edit Window.
3. Enter information in this window as shown below. The employee Nickname is the only required field. Employee rights are described in the Appendix of this user's guide. Click **Save** and **Close** when you are finished.

The screenshot shows the 'Employee Edit Window' with the following details:

- Nickname:** ARB
- Name:** Ann Boyle
- Employee Type:** Manager
- Change Password...** button
- This employee has full access to File In Time
- For any specific task, this employee can change:**
  - Due Date
  - Target Date
  - Key People
  - Status Done
  - Status Code
  - Status Dates
  - Notes
  - Custom Fields
  - Service
  - Client
- With respect to the database, this employee can change:**
  - Services
  - Client Types
  - Employee Types
  - Client information
  - Client Groups
  - Status Codes
  - Service Groups

Navigation buttons on the right: Save, New, Prev, Next, Close.

Once Employees are created, they can be assigned to tasks or clients as Key People. Key person assignments are useful for designating responsible staff, and can be used for filtering reports.

## Creating a New Task

You can add a task to the task view by entering the information on a new task line, or by using the **New Task** button. We will use the New Task button in this example. Other methods for creating tasks will be described in later sections.

**To create a new task using the New Task button**

1. Click the **New Task** button on the tool bar to display an empty Task Information dialog.
2. Click on the drop-down arrow next to the Client field and select **Acacia**. Click **OK**. Acacia should now appear in the Client field.
3. Click on the drop-down arrow next to the service field to display the Service Selection List.
4. Type **100** and you will see the **100 Compilation** service highlighted. Click **OK**. The due date will be generated automatically.
5. In the Status field, select **In Progress**. Select **ARB** as the Manager.

Your screen should now display the following:

The screenshot shows a 'Task Information' dialog box with the following fields and values:

- Client: **Acacia**
- Service: **100 Compilation**
- Due Date: **02-20-2011 Sun**
- Staff: **CCT**
- Mgr: **ARB**
- Status: **In Progress**
- Notes: (Empty text area)

Buttons for 'New', 'Save', and 'Close' are visible in the top right corner.

6. Click **Save** to create the task and add it to the task view. Click **Close** to exit the Task Information dialog.
7. Click the **Update** button on the main screen to update the task view. You will see the task you just created now included in the view.

## Sorting Tasks

Sorting refers to the order that tasks appear on the task view. You can sort information in File In Time software in a variety of ways. The default sort is first by client, then by due date, then by service as shown below. The sort order indicates the hierarchy used to organize the tasks.

1st Sort	Client
2nd Sort	Due Date
3rd Sort	Service
Sort Order	Ascending

### To arrange the order of tasks in the task view

1. Select the appropriate sorts in the Sort fields as shown above. When you change the sort, the 2nd and 3rd sorts will arrange the tasks beneath the 1st sort.
2. Select the arrangement of the tasks in the Sort Order field. Ascending order will arrange the tasks from 1 to 10 or A to Z. Descending order will arrange tasks from 10 to 1 or Z to A.
3. Click the **Update** button to update the task view.

## Filtering Tasks

The default task view shows all tasks. However, you can filter the information to show only certain tasks. The filtering process is accomplished by using the Task Selection Filter fields at the top of the task view.

Task Selection Filter			
Client	All	Dates	All
Service	All	Date Range	Custom
Key People	All	from	
Status	All	to	

The small drop-down arrows display the filters available for the corresponding field.

**To filter the task view to display tasks due during a specified time period**

1. Click on the small drop-down arrow next to the Dates filter in the Task Selection Filter and select **Due Date**. This will activate the Date Range choices. These choices can help you quickly display the tasks due during a specified time period.
2. In the **from** field, type **010110**, and in the **to** field, type **033110**. You have now set the Task Selection Filter to display tasks from January 1, 2010 to March 31, 2010.
3. Change your 1<sup>st</sup> Sort to **Due Date** and your 2<sup>nd</sup> Sort to **Client**.
4. Click on the **Update** button.



Your task view will appear as follows (your data may vary):

Task Selection Filter

Client: All | Dates: Due Date | 1st Sort: Due Date

Service: All | Date Range: Custom | 2nd Sort: Client

Key People: All | from: 01-01-2010 | 3rd Sort: Service

Status: All | to: 03-31-2010 | Sort Order: Ascending



#	Client	Service	Due Date	Staff	Status	Ext	Notes	Received Info	Review
1	Carter	1040ES-4TH	01-15-2010 Fri	RAK	Not Started	<input type="checkbox"/>			
2	DavisMfg	PLANNING	01-15-2010 Fri	GRH		<input type="checkbox"/>	12/12/09 Called Ty		
3	CableGuys	941	01-31-2010 Sun	MBN	Done	<input type="checkbox"/>			
4	Eckhert	940	01-31-2010 Sun	MBN	Done	<input type="checkbox"/>	Follow up with Davi		01-16-201
5	Eckhert	941	01-31-2010 Sun	MBN	Done	<input type="checkbox"/>			01-16-201
6	HebertMuseum	940	01-31-2010 Sun	MBN	Done	<input type="checkbox"/>			
7	AcmeEnt	1139	02-26-2010 Fri	MBN	To be Signed	<input type="checkbox"/>			02-01-201
8	DahlbergDDS	1099	02-28-2010 Sun	VKG	Done	<input type="checkbox"/>			
9	ExtremSrv	W-2	02-28-2010 Sun	MDM	Done	<input type="checkbox"/>			
10	FranklinUrol	1099	02-28-2010 Sun	CCT	In Progress	<input type="checkbox"/>			

**To filter for tasks by a special criteria**

The Client filter can also be set to filter for information contained on the Client record such as Year-end, Client Type, or Client Group.

1. Click on the small drop-down arrow next to the Client filter and select **Special**. This will display the Special Selection Criteria dialog shown on the following page.



2. Click on the **by Client Type** check box. This will display the Client Types list shown below. The contents of this list can be edited by selecting Client Types from the File menu.



3. Select **Corporation** from the list, and click **OK**.
4. Click **OK** again to return to the task view.
5. Click on the **Update** button.



The task view that appears will now display the tasks within the selected date range that also have Corporation set as their Client Type.

## Changing Information in a Task

Once you have a group of tasks displayed in the task view, you can change the information in a single task or for a group of tasks. In this example, we will use two methods for changing information in a task.

### To change a single task using the Edit Task button

1. Click on any field of the task containing the **AcmeEnt** client and **1139** service.
2. Click on the **Edit Task** button on the tool bar. A Task Information window will appear as shown below. You can make changes to the task in this window.

The screenshot shows the 'Task Information' dialog box. The 'Required Information' section has 'Client' set to 'AcmeEnt' and 'Service' set to '1139'. The 'Multiple assignment' section has 'Client groups' and 'Service Groups' buttons. The 'Due Date' is '02-26-2010 Fri'. The 'Status' is 'To be Signed'. The 'Staff' is 'MBN'. There are several empty dropdown menus for 'Target Date', 'User Date 1-4', 'Mgr', 'Key Person 3-6', and 'Custom Field 2-3'. A 'Notes' text area is at the bottom. A toolbar with 'New', 'Save', and 'Close' buttons is in the top right.

3. Click the down arrow to the right of the Status field. A list of Status codes will appear.
4. Select **Done** and click **OK** to exit the Select Status Code dialog.
5. Click **Save** and **Close** to exit the Task Information window.

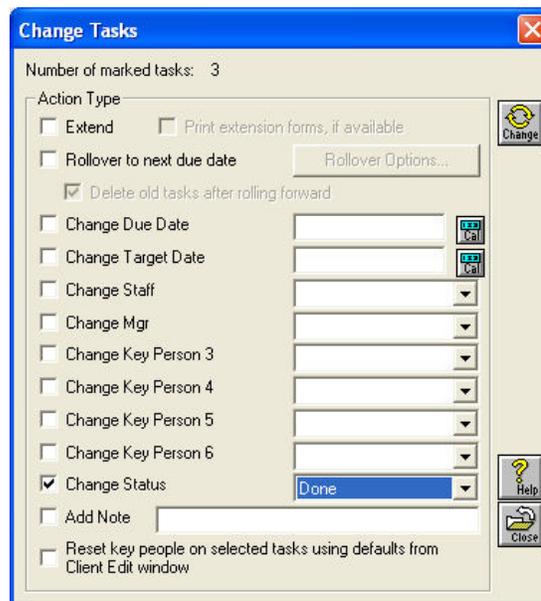
The Status for the AcmeEnt 1139 task is now “Done.”

### To change the status of more than one task at a time

By using the Change button, you can change more than one task at a time. Simply select the tasks to change, and then click the **Change** button.

To illustrate, we'll change the Status for our 1120 tasks. Create a view that shows only 1120 tasks with a status of Not Done (See pages 12-13).

1. Select all the tasks in the task view by pressing **Ctrl+A**, or go to the **Edit** menu and choose **Select All**. All the tasks should be selected.
2. Click on the **Change** button to bring up the Change Tasks dialog.
3. Click on **Change Status** and select **Done** as the status in the Change Status field. The dialog will appear as shown below.

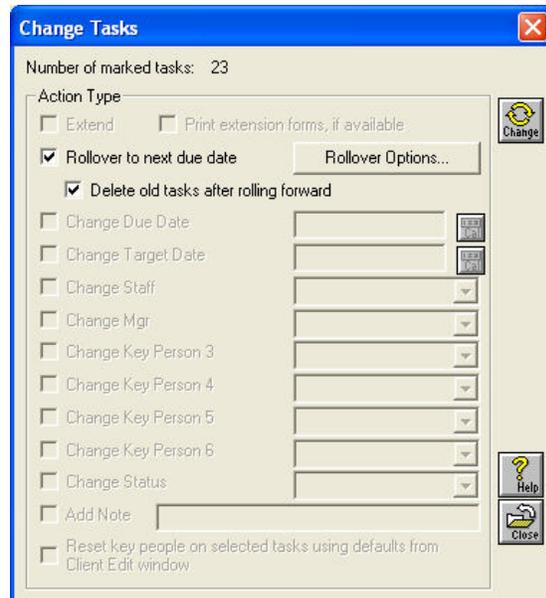


4. Click on the small **Change** button on the upper right-hand side of the dialog to accept the selections and display the Review Changes dialog. Review the task before and after the change to verify the information is correct. Click **OK** to accept the changes, and display the next task.
5. When you are satisfied that the Change routine is functioning correctly, click the **Do All** button to process all tasks selected for the change.
6. To restore a view with all your tasks again, reset the task selection filters to **All** and click **Update**.

## To roll forward the due dates of a group of tasks

Now we will roll all the “Done” tasks to the next due date. Create a view that shows all tasks that have a status of “Done.” (See pages 12-13).

1. Select all the tasks in the task view by pressing Ctrl+A, or go to the **Edit** menu and choose **Select All**. All tasks in the task view will be selected.
2. Click on the **Change** button to bring up the Change tasks dialog.
3. Click on **Rollover to next due date** and then **Delete old tasks after rolling forward**. The dialog should look like this:



4. Click on the **Rollover Options** button to review the settings before proceeding. These settings control what information is carried forward with the tasks when they are rolled forward. Click **OK** when finished.
5. Click on the small **Change** icon in the upper right-hand side of the Change tasks dialog. The Review Changes dialog will appear.
6. Review the Task before and after the change to verify the information is correct. Click the **Do All** button to process all the tasks for the change.

All those tasks are now rolled over to due dates for the next period.

7. To restore a view with all your tasks again, reset the task selection filters to **All** and click **Update**.

## Modifying the Task View Columns

File In Time software allows you to choose and customize the fields displayed in the task view.

### To change the columns in the task view

1. Click on the **Setup** button on the tool bar. The Task View Setup dialog will appear.
2. Select **Year end** from the fields to include on the left of the window and click **Add**. You will see that Year end is added to the selections in the right-hand column.
3. Select **Staff** (Key Person 1) in the right column and click the **Remove** button.
4. Click on **Year end** in the right column and click the **Move Up** button to position the Year end immediately under the Status.
5. Click **OK** to close the Task View Setup dialog.
6. Click **Update**. The arrangement of the columns in the task view should now appear as shown below (your data may differ). If your tasks do not appear, be sure all your Task Selection Filters are set to **All** as shown below.

Task Selection Filter

Client: All    Dates: All    1st Sort: Due Date    Update View! 

Service: All    Date Range: Custom    2nd Sort: Client

Key People: All    from: 01-01-2010    3rd Sort: Service

Status: All    to: 03-31-2010    Sort Order: Ascending

#	Client	Service	Due Date	Status	Year end	Ext	Notes	Received Info	Review
1	AcmeEnt	1139	02-26-2010 Fri	Done	Dec	<input type="checkbox"/>			02-01-2
2	CableGuys	941	01-31-2011 Mon	Done	Dec	<input type="checkbox"/>			
3	Eckher	940	01-31-2011 Mon	Done	Dec	<input type="checkbox"/>	Follow up with Davi		
4	Eckher	941	01-31-2011 Mon	Done	Dec	<input type="checkbox"/>			
5	HebertMuseum	940	01-31-2011 Mon	Done	Dec	<input type="checkbox"/>			
6	DahlbergDDS	1099	02-28-2011 Mon	Done	Dec	<input type="checkbox"/>			
7	ExtremSrv	W-2	02-28-2011 Mon	Done	Dec	<input type="checkbox"/>			
8	ABGLEasing	1120	03-15-2011 Tue	Done	Dec	<input type="checkbox"/>	Contact Jerry about		
9	AcmeEnt	1120	03-15-2011 Tue	Done	Dec	<input type="checkbox"/>	Client Meeting 03/0		

Changes to the task view setup can be saved by selecting Save Task View from the Task View menu.

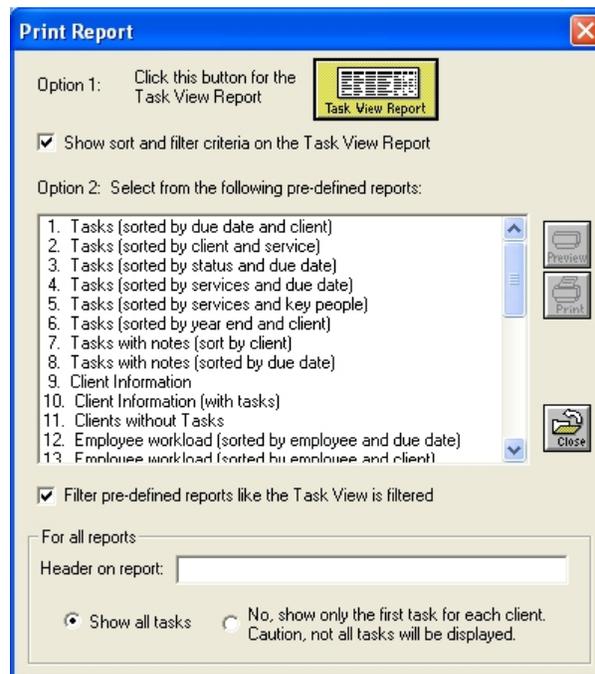
## Viewing and Printing Reports and Labels

File In Time software prints a variety of reports. You can choose to print the information in the current task view or choose from a variety of pre-defined reports and labels. You can also export the task view into Excel.

With a task view report, you can select the information you want to see in the task view like we have done in the past few pages and then simply print a report of the task view.

### To print the current task view

1. Click the **Reports** button on the tool bar or choose **Print Reports** from the File menu. The Print Report dialog will appear.



2. Click the **Task View Report** button at the top of the dialog. The report will be displayed in the Print Preview window.
3. When the report is displayed, click the **Print** button in the Print Preview window.

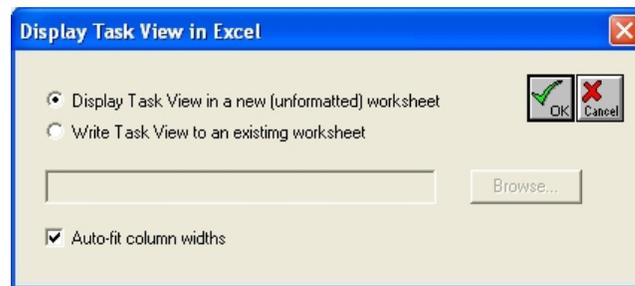
### To print pre-defined reports and labels

1. Click the **Reports** button on the tool bar or choose **Print Reports** from the File menu. The Print Report dialog will appear.
2. Double-click on the first report in the pre-defined reports list titled **Tasks (sorted by due date and client)**. The report will be displayed in the Report Preview window.
3. When the report is displayed, click the **Print** button in the Report Preview window.

## Displaying the Task View in Excel

Creating an Excel spreadsheet that shows a selection of tasks is a convenient way to create emailable workload reports from File In Time software. It is also useful for creating a list of completed tasks to archive.

1. Select **Display Task View in Excel** from the Tools menu. The following dialog will appear.



If you have a spreadsheet that contains formatting that you would like to use each time you display the task view in Excel, select **Write Task View to an existing worksheet**.

Otherwise, select **Display Task View in a new (unformatted) worksheet**. This choice is best used with the **Auto-fit column widths** also checked.



# WORKING WITH TASKS

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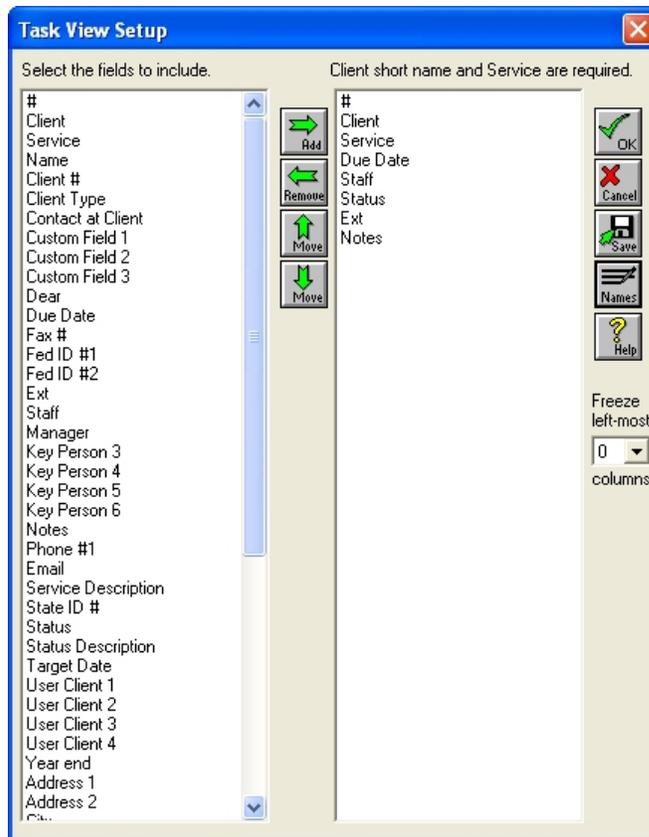
## Customizing the Task View Columns

The default task view in File In Time software displays the columns: client, service, due date, status, key person, whether the task is extended, and notes. You can change the assortment and arrangement of the columns included in the task view along with the column's width and the title. Columns can be static or "frozen" so they remain in view while you scroll to other fields.

Any changes made to the task view can be saved. When you retrieve saved task views, they will apply their filters to the current database. You can also set the last saved task view as the default view that will be displayed every time you log into for a new session.

### To change the columns in the task view

1. Click the **Setup** button to display the Task View Setup dialog.



2. To add a field to the task view, select a field from the left column, and click the **Add** button. You will see your selection added to the selections in the right column.

To remove a column from the task view, select an item from the right column and click the **Remove** button.

To change the order of columns from left to right in the task view, click on an item in the right column of the Task View Setup dialog and use the **Move** arrows to position the columns in order.

3. Click **OK** when you are finished to close the Task View Setup dialog. The arrangement of the columns in the task view will reflect the changes you have made.

### To freeze columns for scrolling

1. Click the **Setup** button on the Toolbar to display the Task View Setup dialog. Select the number of columns to freeze in the Freeze left-most columns field.
2. Click **OK**. Frozen columns will be lightly shaded on the main view. You can also freeze columns from the **Task View** menu.

## User-defined Task Fields

Besides choosing task fields from the available fields in File In Time software, you can create new task fields to contain other information. These user-defined fields may be useful to contain information such as refund amount or budgeted hours to complete a task.

User-defined task fields are listed as Custom Field 1, 2, and 3. User-defined date fields are listed as User Date 1, 2, 3 and 4. You can add these fields to the task view as described above.

## Customizing Field Names

If you have a single user version of the program or if you are logged in as Supervisor in the network version, you can change the names of fields displayed in the task view.

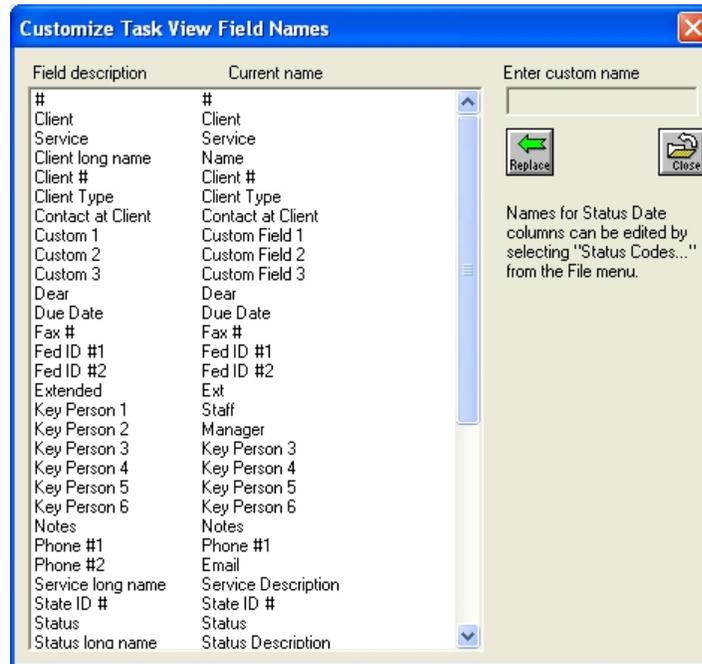
### To change the names of the fields in the task view

1. Select **Customize Field Names** from the Task View menu.

You could also click on the **Setup** button on the tool bar and then click the **Names** button on the right side of the Task View Setup dialog.

The Customize Task View Names dialog will appear as shown below.

The Field description column in this window displays the original name of the field, while the Current name column displays the new field name. Renamed fields appear as the current name in all areas of the program.



2. Click on the field you wish to rename and enter the new name in the Enter custom name field.
3. Click **Replace**. Then click **Close** and **OK**.

## Status Date Fields

Every time you change the status of a task, File In Time software records the date when the change was made. These status dates can be displayed as columns on your main task view. They provide a visual history of the progress each task is making toward completion. Alternatively, you can simply use these dates as additional date fields to record any dates you need to track.

Status date fields are listed in the Task View Setup dialog near the bottom of the list of available fields. If you need to change the name of a status date field, you will do so differently than with other fields.

### To change the names of status date columns in the task view

1. Select **Status Codes** from the File menu.
2. Click on the status code you wish to replace and enter the new name in the Status Code field. You can also change the text in the Status Code Description field.
3. Click the **Replace** button and click **Yes** to replace the name.
4. Click **Save and Close**.

## Freezing and Adjusting the Width of Task View Fields

After you have selected the fields to display in the task view, you can adjust the width of each of those fields. The narrower the fields, the more fields you will see without scrolling to the right. You can also freeze the position of your leftmost columns when you scroll horizontally.

To adjust the width of a field, put your mouse pointer on the border of a column heading in the task view, hold down the left mouse button, and drag the border to the desired size. Any changes you make to the column widths may be saved as part of the task view. See page 27 for more details on saving task views.

To freeze the position of columns for scrolling, click the **Setup** button on the Toolbar to display the Task View Setup dialog. Select the number of columns to freeze in the Freeze left-most columns field. You can also freeze and un-freeze columns from the **Task View** menu.

## Task View Information

### Filter and Sort

The top of the task view has a number of items which are included in a group called the Task Selection Filter. Collectively, these fields create a filter that determines what tasks are shown in the task view. When the list boxes in the Task Selection Filter are set to “All”, the view will show all the tasks in your database.

If you want to see only tasks for a certain client or tasks due within a certain time period, you can change the Task Selection Filter from “All” to the specific client and time period you want.

Task Selection Filter				Update View!	
Client	All	Dates	Due Date	1st Sort	Client
Service	All	Date Range	This Month	2nd Sort	Service
Key People	All	from	05-01-2010	3rd Sort	Due Date
Status	All	to	05-31-2010	Sort Order	Ascending

In addition to filtering by specific clients, the Client filter allows you to use special selection criteria to filter information by certain items. You can select only those clients that have a certain year-end or clients that are a member of a specific Client group or Client type.

The Task Selection Filter also contains fields called 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> Sort. The Sort fields enable you to arrange tasks by client name, due date, or other criteria. You can sort your tasks in ascending or descending order by making a selection in the Sort Order field.

For a step by step look at how to filter and sort tasks, refer to the File In Time Software Tutorial beginning on page 11.

### Update View

After you make changes to the Task Selection Filter, you must update the tasks in the task view. An Update View message will be displayed to prompt you to update. To update the view, click on the **Update** button.

## Saving a Task View

When you make changes to the Task Selection Filter or columns included in the task view, you can save the changes to be used at a later time.

When you save the task view criteria, you are saving the way information is filtered as well as which columns are included. This serves to alleviate the steps necessary to sort and filter the task view to display commonly used views. Consequently, if the task information in the database changes, the list will change to reflect the changes in the underlying database.

### To save a task view

1. Choose **Save Task View** from the File menu.

### To retrieve a saved view

1. Choose **Open Saved Task View** from the File menu to display your list of saved views.
2. Double-click on the view you wish to open. The view will be displayed on your screen.

### To select a task view to use as the default

1. Select **Use last saved task view** from the **Options** menu.
2. Open or create a task view that you would like to use as the default.
3. Choose **Save Task View** from the File menu.

### To delete a saved task view

1. Choose **Open Saved Task View** from the File menu to display your list of saved views.
2. Select the view you wish to delete and click the **Delete** button.

## Exporting a task view to Excel

Click on the **Display Task View in Excel** command located on the Tools menu to export the information from the current task view into an Excel spreadsheet. The data will be aligned into the spreadsheet in the same way the task view is organized and will include the contents of the Notes field.

## Calendar View

The calendar view in File In Time software allows you to quickly see the distribution of your tasks in a calendar page format. Click the **Calendar** button on the Toolbar or select **Calendar View** from the Task View menu.



The calendar view that appears displays the number of tasks due on each day of a given month.

The screenshot shows a window titled "Calendar View" with a blue title bar. At the top, there are three dropdown menus: "May", "2010", and "Due Date". Below these is a link that says "Click on a link to see the tasks for that day in the task view." The main area is a calendar grid with columns for days of the week (Sun to Sat) and rows for dates. The dates shown are from April 25 to May 5. Some cells contain blue links indicating the number of tasks: "2 tasks" on Friday, May 1; "1 task" on Saturday, May 2; "1 task" on Sunday, May 9; and "1 task" on Wednesday, May 25. At the bottom of the window, there are three buttons: "Last Month", "Next Month", and "Done".

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Apr 25	26	27	28	29	30 <a href="#">2 tasks</a>	May 1 <a href="#">1 task</a>
<a href="#">1 task</a>	2	3	4	5	6	7
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25 <a href="#">1 task</a>	26	27	28	29
30	31	Jun 1	2	3	4	5

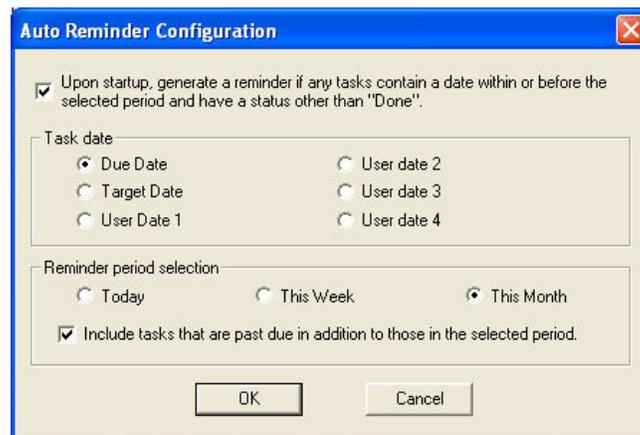
Click on the number of tasks shown for any day to automatically filter your Task View with the selected tasks from the calendar. You can change the column selection and sort selections by clicking the Setup button on the toolbar and saving those for the next time you create a Calendar Task View.

## Auto Reminder

When you start File In Time software, a pop-up reminder can appear to let you know that you have tasks due soon. This Auto Reminder can be configured to alert you when tasks are due today, this week or this month. Once alerted, one click will then display a view showing the critical tasks.

**Note** The Auto Reminder will only display tasks within the chosen date range that have a status other than “Done”.

1. Select **Auto Reminder** from the Options menu. The Auto Reminder Configuration dialog box will appear.



2. To activate the Auto Reminder for the next time you start File In Time software, mark the checkbox at the top of the dialog.
3. Select the task date for which you wish the Auto Reminder to generate the reminders and the period in which to look for tasks upon startup.
4. Mark the checkbox at the bottom of the dialog box if you wish to be reminded of tasks prior to the selected time period that do not have a status of “Done”. Checking this box may increase the number of tasks shown due to prior year’s tasks or if you do not use the “Done” status.
5. Click **OK** when you have finished configuring the Auto Reminder. When the Auto Reminder is activated, the next time File In Time software starts, a reminder will tell how many tasks are due.
6. When the reminder appears, select **Yes** to create a view of those tasks on the main screen.

## Parts of a Task

A task is created when a service is assigned to a client. A task is the combination of at least a client short name, a service, and a due date. Other fields can be added to give you more information about each task. A few of these fields are described below.

### Key Person

File In Time software allows you to identify a key person or several key people for each task. The key person is the individual assigned to perform a task. Sort and filter your reports by the key person to look at workload distribution. You can set the default key people for a client in the Client Edit window. Key people are created as employees. Once you have created records in the Employees section of the program, they in turn can be assigned as Key People.

### Status and Status Dates

You can indicate the progress of a task in File In Time software by assigning a status code. For example, use the status of “In Progress” to indicate a task that is being worked on, and use “Hold” to indicate a hold on a particular task.

To create, view, or edit the list of available status codes, select **Status Codes** from the File menu. Here you can add status codes that reflect how you monitor work in process.

Each time you change the status on a task, the date of the status change is automatically stamped on the task. The status and status dates can be displayed as columns on the task view. Status dates can also be viewed on the status date report, and by right-clicking on the status field for a particular task and selecting Edit status dates.

#### To assign, view, or edit a status date

- **Right-click** on the **Status** field of a task and choose **Select Status Code**.
- Highlight the **Status** field and press **F5**.
- Use the **Change** button to assign status codes to multiple tasks.

## Extension

When you include the Ext field in the task view, you can mark a task as extended and set the new due date. You can also print extension forms for certain tasks (e.g., 1040s and 1120s).

---

**Note** At press time, the forms included in the program are listed below. The final selection of extension forms available may differ.

---

**4868** Automatic 6-month extension, Individuals

**7004** Automatic 6-month extension, Corporations

**2848** Power of Attorney

Blank extension forms can be accessed by choosing **Extension Forms** from the Tools menu.

### To extend the due date of a task

1. Click on the **Ext** field to display possible extension dates. Extension dates can be created or edited in the Service edit window.
2. Select the desired date from the extension dates listed, and click **OK**.

### To print an extension form for a task

1. Click on the **Ext** field to display the Select Extension window.
2. Click the **Print Extension** button. This will generate an IRS-approved form containing information from the client assigned the task. If the button is gray, there is no extension form available for that service.

### To extend and print extension forms for multiple tasks

While extending the due dates for multiple tasks (see page 37), you can print extension forms for those tasks.

1. In the task view, select the tasks for which you wish to extend and print forms.
2. Click the **Change** button to display the Change tasks dialog.
3. Check the **Extend** and **Print extension forms** checkboxes and click **Change**. The due dates of the tasks will be extended and the applicable extension forms will be printed on the default printer.

## Task Notes

The Notes field in a task allows you to add an unlimited amount of notes that are attached to a specific task. You can save room in the task view by having notes represented by a paper clip icon. To do so, un-check the Display Task Notes as Text option in the Options menu.

You can also create or view task notes by going to the task view, highlighting a single task and clicking on the **Notes** button.

You can add the same note to multiple tasks in one operation by using the Change tasks window (see page 37). If you add notes to tasks which already have notes, the new note will be placed after the existing note.

Use the Change tasks window to clear the notes from multiple tasks as well. In the Change tasks window, check the **Add Note** checkbox and leave the adjacent text box empty. When you then click the **Change** button in the Change tasks window, the notes will be cleared from the selected tasks.

## Client Notes

File In Time software lets you keep client notes that are attached to a specific client. You can create client notes in the Client Information window. Client notes are included on the Comprehensive Client Information Report.

## Adding and Deleting Tasks

You can add tasks to File In Time software individually or in batches. Tasks can be created in batches with a common client or common service.

When you create tasks in File In Time software, it will calculate the due date based on the service chosen and the client's year-end.

### Adding a Single Task

#### To create a task "on the fly"

1. Click on the first blank line at the bottom of the current task view (you may have to scroll to the bottom of the displayed tasks).
2. Type in a Client and Service or use the right mouse button to see a menu of ways to select the information in a field. Use the Tab key to move through the fields. Add additional information to the task as needed.

#### To create a new task using the New Task button

1. Click on the **New Task** button on the tool bar to display an empty Task Information dialog.
2. Click on the drop-down arrow next to the Client field and select a client. Click **OK**. The selected client should now appear in the Client field.

You can select a group of clients to create tasks for by clicking on the Client Groups button beside the Client field (after first selecting a Service for the tasks).

3. Click on the drop-down arrow next to the Service field to display the Service Selection List.
4. Select the desired service and click **OK**. You will notice after the service is selected the due date is generated automatically for the task.

You can select a group of services for a selected client by clicking on the Service Groups button beside the Service field.

5. Enter the remaining information desired for the task and click **Save**.
6. Click **Close** to exit the Task Information dialog.

## Creating Multiple Tasks

When you are creating your initial list of tasks, you may assign certain services such as 1040s and 1120s for many different clients. You may also find that you need to create many different tasks for a single client. File In Time software makes both of the operations more efficient with the Multiple Assignment command in the Task Information dialog.

### To create tasks with the same service for a number of clients simultaneously

1. Click on the **New Task** button on the tool bar. The Task Information dialog will appear.
2. Click on the **Service** field and select the service you wish to assign.
3. Click on the **Multiple Assignment** button in the center of the dialog. The Client Selection dialog will appear as shown below.



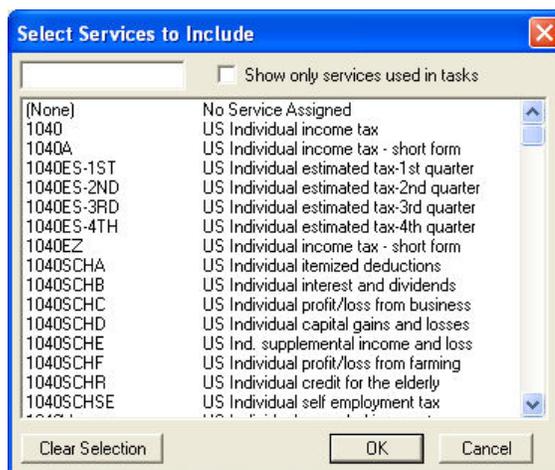
4. Click on all the clients to which you wish to have the selected service assigned.

The **Client Groups** button in the Task Information dialog enables you to select a group of clients that was previously assembled. To create a Client Group, select **Client Group** from the File menu.

5. Click **OK** when you are finished. File In Time software will display a message indicating the total number of tasks created.

### To create multiple tasks for a single client

1. Click on the **New Task** button on the tool bar.
2. Click on the **Client** field and select the client you wish to create tasks for.
3. Click on the **Multiple Assignment** button in the center of the dialog. The Service Selection dialog will appear as shown below.



4. Click on all the services you wish to create tasks for.

The **Service Groups** button in the Task Information dialog enables you to select a group of services that was previously assembled. To create a Service Group, select **Service Group** from the File menu.

5. Click **OK** when you are finished. File In Time software will display a message indicating the total number of tasks created.

### Creating a Year's Worth of Tasks

When you create a task with a service that is more frequent than annual, File In Time software gives you the option to automatically create a year's worth of tasks. For example, if you create a task for a 941, the program asks whether you want to create one task or four quarterly 941 tasks.

You can view or edit the frequency of a service by clicking on the **Services** button on the tool bar, selecting the particular service, and clicking Edit.

## Deleting a Task

You can delete a task by clicking on the number to the left of the task and pressing the **Delete** key on your keyboard or selecting **Delete Task** from the Edit menu. You can restore deleted tasks through the Restore Deleted Item command located under the tools menu.

## Modifying Tasks

When you have tasks displayed in the task view, you can change the information in a single task or a group of tasks. Changes to individual tasks can be made directly on a task in the task view. In most fields you can use the right mouse button to see a selection of alternative ways to change the information in that field. You can also modify individual tasks by using the Edit Task button on the tool bar.

Changes such as rolling forward, extending, status, or key person changes can be done in batches. Using the Change button on the tool bar performs this “batch processing.”

### To change a single task “on the fly”

1. Click on any field of an existing task and type the new information. For example, you can change the due date for a task from May 15 to May 30, by typing over the existing date information. You can also right-click to display a menu of choices. The changes you make will automatically be saved as they are made.

### To change a single task using the Edit Task button

1. Click on any field of an existing task.
2. Click on the **Edit Task** button on the tool bar. A Task Information window (as shown on the following page) will appear that displays the information in that task. Make changes and add information to the task in this window.

Task Information

Required Information

Client: **BrownTom**

Service: **1040**

Multiple assignment: Client groups Service Groups

Due Date: **04-15-2010 Thu**

Target Date: **03-31-2010 Wed**

User Date 1

User date 2

User date 3

User date 4

Status: **Not Started**

Custom Field 1

Staff: **GRH**

Mgr

Key Person 3

Key Person 4

Key Person 5

Key Person 6

Custom Field 2

Custom Field 3

Notes:

3. When you are finished, click **Save** and **Close** to exit the Task Information window.

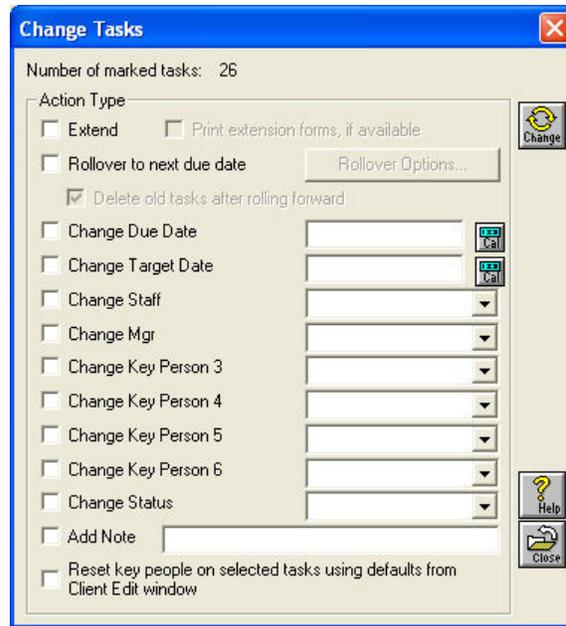
### Change Tasks Window

With the **Change tasks** window, you can change certain information for more than one task at a time. Use this window to:

- Extend or rollover (roll forward) tasks
- Print extension forms for multiple tasks
- Change the due date or target date
- Change key persons
- Change the status code
- Add notes to multiple tasks

When you click the **Change** button on the tool bar (shown below), the Change Tasks window will appear as shown on the following page.





Changing information for a group of tasks using the Change tasks dialog is described below.

## Rolling Tasks Forward to the Next Due Date

When you use the **Change Tasks** window to "rollover" tasks, File In Time software will create a new task with a due date based on the frequency of the Service. For example, when you have completed Joe Taxpayer's 1040 for one year, rolling over the task will create a new 1040 task for the next year.

---

**Note** We recommend backing up your data before you use the Change command for large numbers of tasks. See the File In Time Software Database section for more information on backing up.

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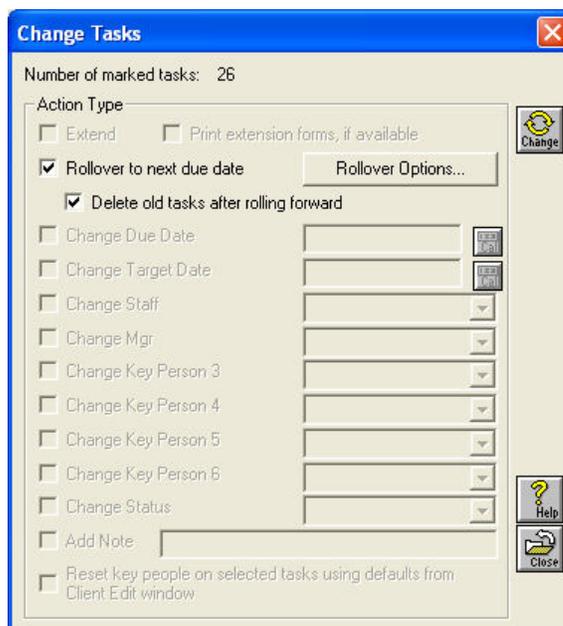
### To extend, roll forward, or change tasks

1. Select the tasks you wish to change in the task view.

To select a particular task, click on the number on the far left-hand side of the task view. The selected task will be highlighted black. To select more than one task, hold down the **Control** or **Shift** keys and then click on additional tasks. To select all tasks contained in the current task view, press **Ctrl + A**.

2. Click on the **Change** button to display the Change tasks dialog.
3. Check the boxes for the items you want to change and enter the new information in the space provided.

If you select **Rollover to next due date**, you can also select **Delete old tasks after rolling forward**. This selection will delete the tasks from the prior period. If you do not delete the old tasks, they will remain in your database of tasks until you choose to delete them.

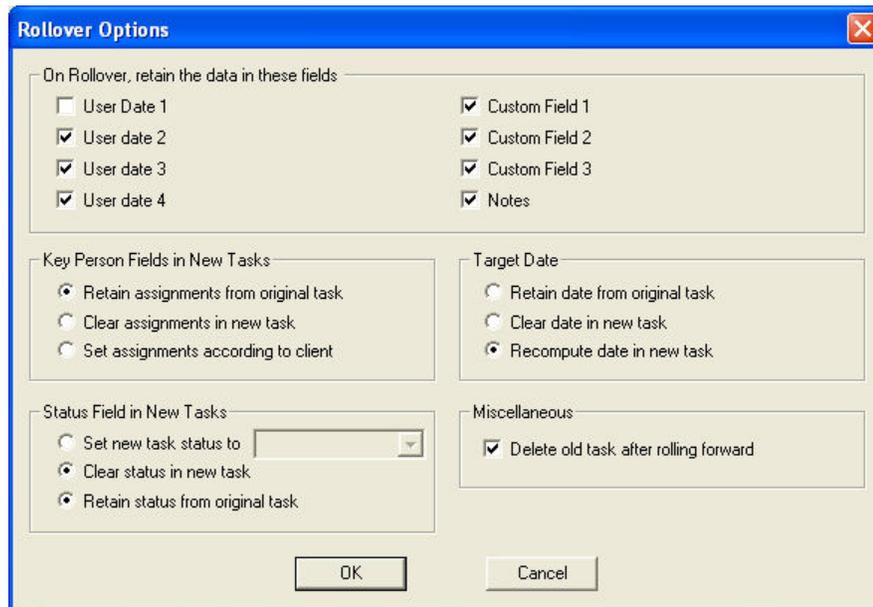


There are other rollover options that can be selected *before* rolling tasks forward. Clicking the **Rollover Options** button in the Change tasks window or choosing **On Rollover** from the Options menu can access them. See the On Rollover section that follows for more details.

4. Click **Change**. The program will prompt you on a task-by-task basis to see if you want to make the change. When you are satisfied that the rollover is proceeding correctly, choose **Do All**. File In Time software will then complete the rollover routine.

## On Rollover

The **Rollover Options** button in the Change tasks window and the **On Rollover** option in the Options menu will display the Rollover Options dialog as shown below. The selections in this dialog determine whether to clear or retain data contained in a number of fields. Select or de-select options before rolling tasks forward.



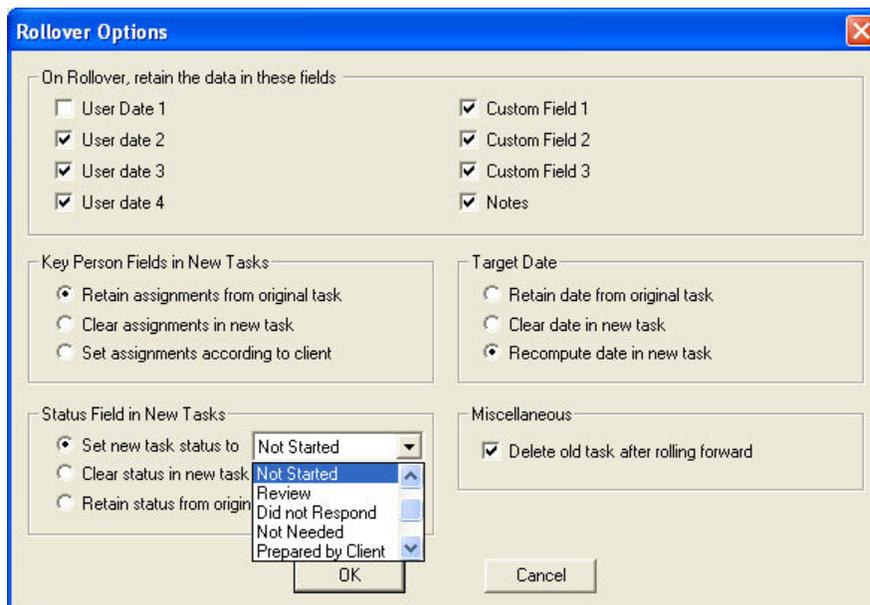
### To roll forward target dates along with due dates

You can automatically compute new target dates when you roll tasks forward. File In Time will use the number of days between the current target date and due date to calculate the new target date.

1. Select **On Rollover** from the Options menu to display the Rollover Options.
2. In the Target Date section, select **Recompute date in new task** as shown above. Click **OK** to close the Rollover Options dialog.
3. When the task is rolled over, the target date will be calculated in accordance with the new due date.

### To set the default status when rolling forward tasks

1. Choose **On Rollover** from the Option menu to see the Rollover Options.
2. In the Status Field in New Tasks section, select **Set new task status to** and choose the new status for the task(s) as shown below.



3. Click **OK** to close the Rollover Options dialog.
4. When you roll your tasks forward, the new tasks will each contain the status you had selected.

### Black and Blue Task View Fields

The information in some fields of a task can be changed by simply typing or selecting new information. These fields are displayed in **black**. They include the Client, Service, Due Date, Status, Key person, Target date, Extension status, and the various Status date fields.

Other fields cannot be edited from the task view. You need to go to the window in which the information was initially entered to make the change. These fields are displayed in **blue**. For example, if the Client's phone number is displayed in the task view and you want to change the number, you need to go into the Client Information window to make the change.



# **CLIENTS, SERVICES, AND EMPLOYEES**

**Client Information 44**

**Service Information 47**

**Employee Information 50**

**Deleting Clients, Services, or Employees 51**

**Client and Service Groups 52**

## Client Information

File In Time software stores client information such as address, contact, and tax ID numbers. You can assign key staff to each client and record notes.

### To import your client information from other software

You can import your client information into File In Time software from most any delimited (tab or comma) file. Most tax, database, and spreadsheet software will export client information into a delimited format. **For details on importing information into File In Time software, see pages 64-69.**

### To add or edit information for a client

1. Click the **Clients** button on the tool bar to or select **Clients** from the File Menu to display the Client Selection Window. Here you can add, edit, or delete clients, or view the tasks associated with an existing client.
2. If you would like to edit information, select a client in the Client Selection Window and choose **Edit**. If you would like to add a client, click **New**. The Client Edit Window will appear.

The screenshot shows the 'Client Edit Window' with the following data:

Client	Acacia	Client #	812345
Name	Acacia Industries - dba Acacia Electronics		
General   Key People   User-defined   Notes			
Contact at Client	Marie Samuelson		
Address 1	123 Main Street		
Address 2	PO Box 123		
City/State/Zip	Anytown	CA	90909
Dear	Ms. Samuelson	Country	USA
Phone #1	111-222-3333	Email	msamuelson@aei.com
Fax #	111-222-3333	Year end	December
Fed ID #1	12-3456789	Fed ID #2	
State ID #		Client Type	Corporation

**Note** The changes you make to a client record will not retroactively alter information in previously created tasks. If you have made changes to a client record and would like those changes to be reflected on existing tasks, batch changes can be made using the Change button. See Modifying Tasks.

3. Enter information or make changes as needed. Click **Save** when you are finished with the client. Click **New**, **Prev** (Previous), or **Next** to create another client or move forward or back through the existing list.
4. Click **Close** to exit the Client Edit Window.

The Client Edit window contains four tabs for information about the client.

**General** This tab contains standard contact data such as address, phone numbers, ID numbers, and year-end. The year-end will affect due dates for tasks as they are created for the client. The information in this tab can be imported from other database applications.

**Key People** This tab lets you assign staff to a client. You can assign up to six key people to each client. The staff assigned here will default as key people in tasks created for that client. You will still be able to change the Key person on a task-by-task basis.

**User-defined** This tab shows custom client related fields that you have created. The titles for these fields can be changed by choosing Customize Field Names from the Task View menu.

**Notes** This tab shows any notes for the client. The notes entered here are separate from the notes attached to a task.

Some other fields in the Client Edit Window are described below.

## Client

The Client field is a name that File In Time software uses to identify a client. All clients must have a unique Client short name of no more than 15 characters. When you change the information in this field, you may be given the option to make this change to tasks that already exist for the client.

## Client Type

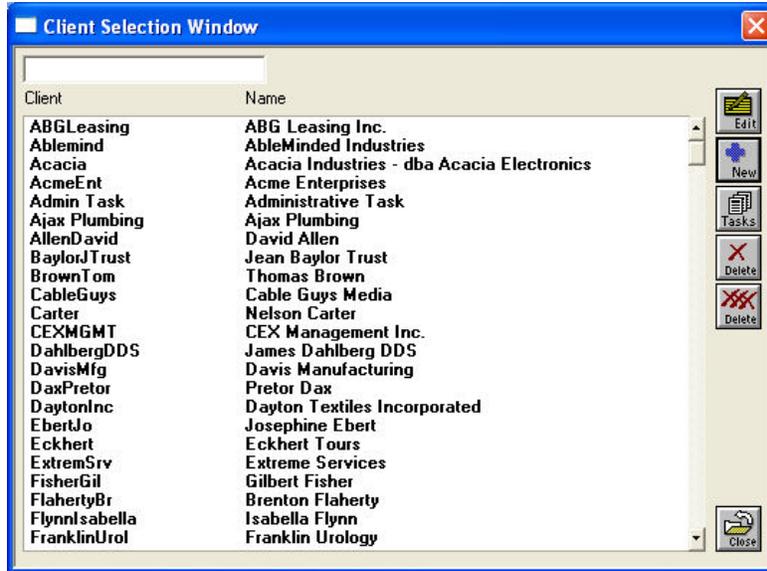
Client Types can be used to identify common characteristics within your clientele. File In Time software comes with several sample client types, such as Corporation, Individual, and Estate. These client types can be used to filter your tasks down to only clients which contain these common traits.

To assign a client type to a client, go to the Client Edit Window and choose a Client Type from the drop-down list. To edit or add to the list of available choices, select **Client Types** from the File menu.

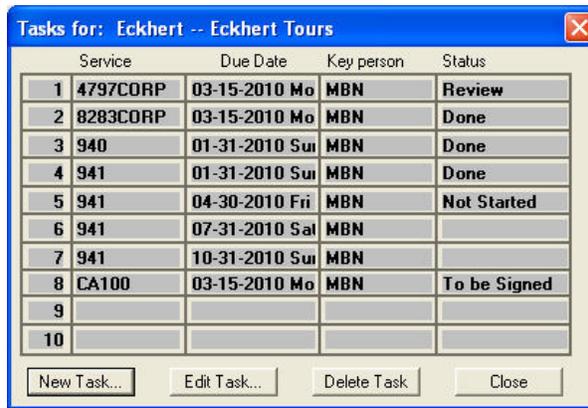
To filter the task view by client type, see task filtering steps on pages 12-13.

**To view, add, or edit tasks for a client**

1. Click the **Clients** button on the tool bar to or select **Clients** from the File Menu to display the Client Selection window.



2. Select a client and click the **Tasks** button at the right side of the window. File In Time software will display a small task view for the client.

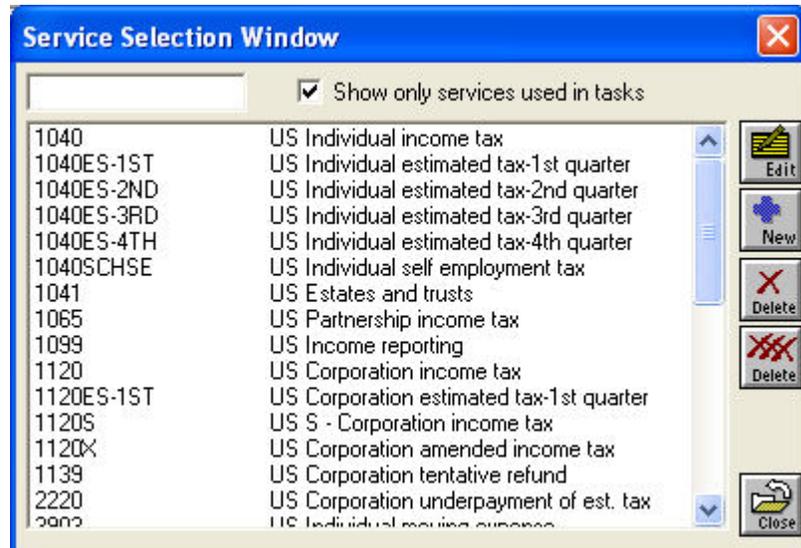


3. Use the buttons in this window to add, edit, or delete tasks for the client.
4. Click **Close** when you are finished. Any tasks you add, change, or delete in this window will be added, changed, or deleted in the main task view.

## Service Information

File In Time software will store information for thousands of Services. Service information may include due dates, frequency, extension dates, and more. File In Time software comes complete with information for many commonly used federal and state tax forms. You can also create custom services that you perform for your clients.

To see the selection of services in File In Time software, click on the **Services** button on the main Toolbar or select **Services** from the File Menu to display the Service Selection Window.



The buttons in this window let you add a new service, delete an existing service, or edit the information for a service.

Click the **Show only services used in tasks** checkbox to customize the displayed list to only those services that are relevant to your database. Uncheck the option to show all services available.

### To add or edit the information for a service

1. Click the **Services** button on the tool bar. The Service Selection Window will appear.
2. If you are editing information, select a service in the Service Selection Window and click **Edit**. If you are adding a service, click **New**. The

Service Edit Window will appear. The fields in this window determine the due date of a service.

3. Enter information or make changes as needed.

---

**Note** If you change the Service Name, you will be given the option to make this change to tasks that already exist with this service. Any other changes you make to a service record will not retroactively alter information in previously created tasks. If you have made changes to a service record and would like those changes to be reflected on existing tasks, batch changes can be made using the Change button. See Modifying Tasks.

---

4. Click **Save** when you are finished with the service.
5. Click **New**, **Prev** (Previous), or **Next** to create another service or move forward or back through the existing list.
6. Click **Close** to exit the Service Edit Window.

The fields in the Service Edit Window are described below.

## Frequency

The Frequency is the period at which a service recurs. File In Time software uses the frequency to establish due dates as completed tasks are rolled forward to the next period. For example, a 1040 with an annual frequency and a due date of April 15 will roll over to April 15 of the next year.

When you create a task with a service that has a frequency other than annual, File In Time software will ask if you would like to create one year's worth of tasks. File In Time software will automatically create the correct number of tasks such as 52 tasks with a weekly frequency, or 4 tasks with a quarterly frequency.

The semi-monthly frequency is useful for payroll or other tasks that may occur twice a month. A service with a semi-monthly frequency will generate tasks on the Day due that is specified in the Service Edit Window as well as 15 days later. File In Time will create a year's worth of tasks with a semi-monthly frequency in one operation.

## **Original Due Date**

The Original Due Date information determines the month and day for the service's original due date. This information also decides whether the service's due date is set by the calendar year or the Client's fiscal year.

For example, a 941 form is due on the last day of the 1st, 4th, 7th, and 10th month of the year. The due date is based on the first business day and the calendar year. To show a task due on the last day of the month, enter 31 for the day due, even if the month has fewer than 31 days.

## **Allowable Extensions from Original Due Date**

You can enter up to 5 extensions from the original due date. These will be used when you extend a task in the task view. You can display the allowable extensions by clicking on the Display Extended Due Dates button.

## Employee Information

File In Time software stores information for employees and staff within your firm. The individuals listed can be given selected access rights to File In Time software. An employee can also be assigned as a key person responsible for a task or as a main contact for a client.

To see the list of employees in File In Time software, click on the **Employees** button on the tool bar or select **Employees** from the File Menu to display the Employee Selection Window. The buttons in this window let you add and delete employees, and edit an employee's information.

### To add or edit the information for an employee

1. Click the **Employees** button on the tool bar. The Employee Selection List dialog will appear.
2. If you are editing information, select an employee and click **Edit**. If you are adding an employee, click **New**. The Employee Edit Window will appear (network version shown below).

3. Enter information or make changes as needed.

The fields in the lower half of the window let you assign File In Time software rights and passwords to employees. See the Security and Rights section of the Appendix for more information.

4. Click **Save** when you are finished with the Employee.

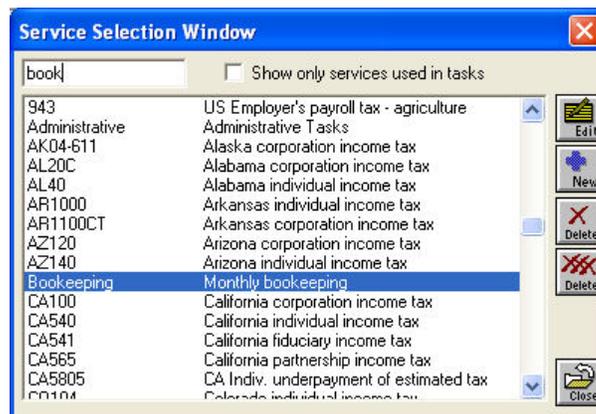
5. Click **New**, **Prev** (Previous), or **Next** to create another Employee or move forward or back through the existing list.
6. Click **Close** to exit the Employee Edit Window.

## Deleting Clients, Services, or Employees

Clients, Services, and Employees can be deleted from the File In Time software database when they are no longer in use.

### To delete clients, services, or employees

1. Click the **Clients**, **Services**, or **Employees** button on the tool bar or select Clients, Services, or Employees from the File menu. The respective Selection window will appear.
2. Select the item to delete (as shown below).



3. Click the **Delete** button at the right side of the window. If you wish to delete multiple items, click the **Delete XXX** button. You will then be able to select multiple items to delete.

If the item you are deleting is currently used in any tasks, you will be prompted whether you want to continue.

4. Click **Close** to exit the Selection window.

## Client and Service Groups

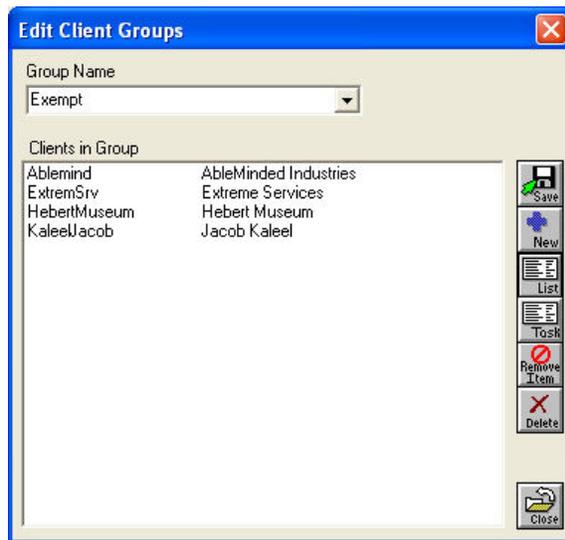
### Client Groups

Client groups are useful for quickly creating tasks for a large number of clients. Groups are also helpful for assembling views or reports on clients.

File In Time software can filter the task view to display all the clients that are members of a group. In addition, you can create a new task for each member of a client group. For example, you may create a group called “Payroll Clients,” and then create a 941 task for all the clients in the group.

To assign a service to a group of clients, click the **New Task** button on the tool bar. Enter the name of the service and click on the **Client Groups** button. If no client groups are displayed, read on.

To create or edit a client group, choose **Client Groups** from the File menu. Click the **List** button to display a list of your clients previously entered into the program. Highlight those clients you would like to include in the group.



### What's the difference between Client Types and Client Groups?

A client can be only one type. For example, a client would be either an individual or a corporation. However a client can belong to a number of different client groups. For example, a corporation might belong to both a Payroll Client Group and a New Jersey Clients Group.

## Service Groups

If you have a group of services that you generally assign to clients, File In Time software allows you create a service group. For example, let's say you have payroll clients for whom you prepare 940 and 941 forms. If you create a payroll service group with the 940 and 941 Services, you can create tasks for both services at the same time.

To assign a group of services to a client, click the **New Task** button on the tool bar. Enter the name of the client and click on the **Service Groups** button. If no service groups are displayed, make sure you have previously created a service group (read on).

To create a service group or to add services to a group, choose **Service Groups** from the File menu. Click on the **List** button to display a complete list of Services contained in your database previously entered into the program. Simply highlight those services you would like to include in the group.



# **CREATING REPORTS**

**Creating a Task View Report 56**

**Creating a Pre-defined Report 57**

**Exporting Data for Use in Other Applications 59**

File In Time software creates a variety of reports to meet your particular needs. When you create a report, the structure of the report (e.g., columns selected) is independent of the data selected for the report. The structure of the report is determined by the report format you choose. The data selected for the report is determined by the task view you create.

## Creating a Task View Report

A Task View Report can be thought of as a snapshot of the tasks displayed on your main screen. The first step in creating a task view report is to filter your data to include the data you want to appear in the report. Then you can select the columns on the report.

### To create a task view report

1. Use the Task selection fields to select the data for the report. If you want to include all tasks in the report, set the Task selection fields to **All** as shown below.

The screenshot shows a 'Task Selection Filter' dialog box with the following settings:

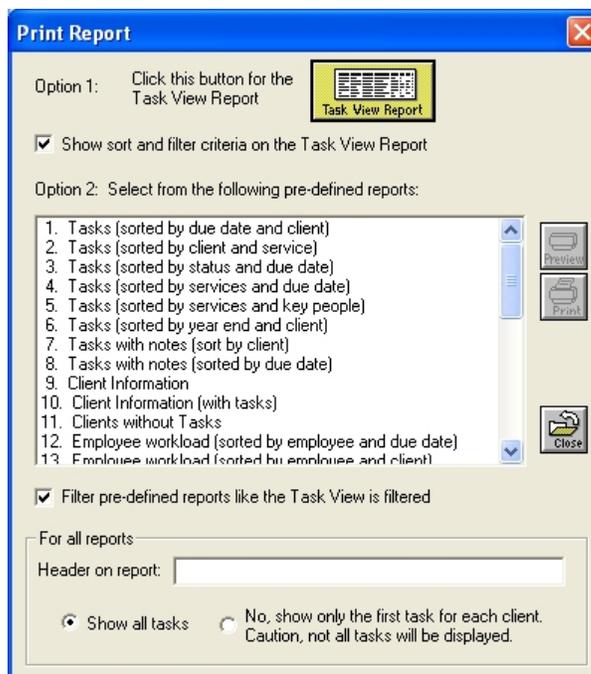
- Client: All
- Service: All
- Key People: All
- Status: All
- Dates: All
- Date Range: Custom
- from: [empty]
- to: [empty]
- 1st Sort: Client
- 2nd Sort: Due Date
- 3rd Sort: Service
- Sort Order: Ascending

An 'Update' button with a warning icon is located on the right side of the dialog.

2. Set the sort order for the tasks using the 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> Sort fields.
3. Choose the columns for the task view. If you want to change the columns that are displayed, click the **Setup** button on the tool bar. Refer to pages 22-25 for more information about changing columns.

If you want to include the contents of the note field on the report, be sure the **Display Task Notes as Text** option is selected in the **Options** menu.

4. Click the **Reports** button on the tool bar or choose **Print Reports** from the File menu. This will display the Print Report dialog.



The options in this dialog are described later.

5. Click the **Task View Report** button. This will create a report that contains the same content and format as your task view screen.

You can also export the contents of the task view directly to Microsoft Excel. See pages 19 and 27 for more details.

## Creating a Pre-defined Report

File In Time software comes with a number of pre-defined reports. They are similar to a Task View report in that they can use only the data you select in the task view. They differ from a Task View report in that they have a set format. The pre-defined reports in File In Time software are designed and printed using Crystal Reports, a standard report generator.

### To create a pre-defined report

1. Use the Task selection fields to select the data for the report. If you want to include all tasks in the report, set the Task selection fields to **All** as shown on the following page.

Task Selection Filter				Update View!	
Client	All	Dates	All	1st Sort	Client
Service	All	Date Range	Custom	2nd Sort	Due Date
Key People	All	from		3rd Sort	Service
Status	All	to		Sort Order	Ascending

- Set the sort order for the tasks with the 1st, 2<sup>nd</sup>, and 3<sup>rd</sup> Sort fields.
- Click the **Reports** button on the tool bar or choose **Print Reports** from the File menu. This will display the Print Report dialog.

**Print Report**

Option 1: Click this button for the Task View Report 

Show sort and filter criteria on the Task View Report

Option 2: Select from the following pre-defined reports:

- 1. Tasks (sorted by due date and client)
- 2. Tasks (sorted by client and service)
- 3. Tasks (sorted by status and due date)
- 4. Tasks (sorted by services and due date)
- 5. Tasks (sorted by services and key people)
- 6. Tasks (sorted by year end and client)
- 7. Tasks with notes (sort by client)
- 8. Tasks with notes (sorted by due date)
- 9. Client Information
- 10. Client Information (with tasks)
- 11. Clients without Tasks
- 12. Employee workload (sorted by employee and due date)
- 13. Employee workload (sorted by employee and client)

Filter pre-defined reports like the Task View is filtered

For all reports  
Header on report: 2010 1040's

Show all tasks     No, show only the first task for each client.  
Caution, not all tasks will be displayed.


The options in this dialog are described on the following page.

- If you would like your report to contain information from only the tasks displayed with the current task view filter, click **Filter pre-defined reports like the Task View is filtered**. To include all tasks, un-check this field.
- Click the name of the report you wish to print and click **Preview** or **Print**.

## Printing Options

The Print Report dialog contains the following fields that will affect the information on the report.

**Show sort and filter criteria on the Task View Report** Select this option to display the sort and filter criteria as a header on the task view report.

**Filter pre-defined reports like the Task View is filtered** Uses the Task selection filters to determine which tasks are included in the report.

**Header on report** Enter a header that will appear on all pages of the report.

**Show all tasks** When selected, your report will show all the tasks. To display just one entry per client, select **No, show only the first task for each client**.

## Adding additional reports to File In Time software

File In Time software uses a third party reporting program called *Crystal Reports* to generate reports. The software for creating custom reports is not included with File In Time software.

If you have a report writer and know how to use it, you can create custom reports. Included in the File In Time directory is a file called layout.wri, which sets forth the layout of the database. TimeValue Software does not provide technical support on creating custom reports.

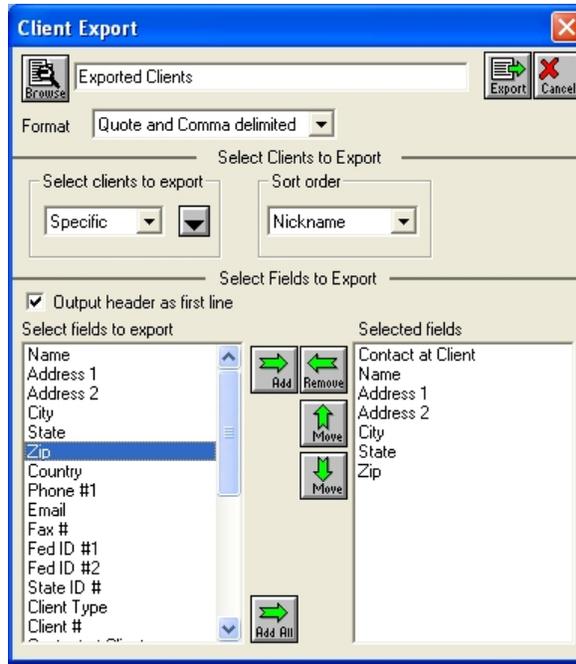
## Exporting Data for Use in Other Applications

To enable you to use the printing and formatting capabilities of word processing, spreadsheet, or database programs, File In Time software will export information that can be used for merged letters, labels, and other printed materials. You can also export the contents of the task view to an Excel spreadsheet file which is a convenient way to apply special formatting within a spreadsheet or database program.

### To export client information for mail merging and labels

1. Choose **Export Client Information** from the Tools menu.
2. At the top of the Client Export dialog that appears, enter a name for the exported file and click the **Browse** button to select a destination.

3. In the **Select clients to export field**, select the clients that you wish to include in the exported file.
4. Select the fields you wish to export in the lower half of the dialog.
5. When you are finished, click the **Export** button.



The exported file will be saved in the directory you specified.

### Displaying the Task View in Excel

Creating an Excel spreadsheet that shows a selection of tasks is a convenient way to create e-mailable workload reports from File In Time software.

1. Select **Display Task View in Excel** from the Tools menu.

If you have a spreadsheet that contains formatting that you would like to use each time you display the task view in Excel, select **Write Task View to an existing worksheet**.

Otherwise, select **Display Task View in a new (unformatted) worksheet**. This choice is best used with the **Auto-fit column widths** also checked.

# **PUTTING FILE IN TIME SOFTWARE TO WORK**

<b>Creating Tasks for All Clients in a Group</b>	<b>62</b>
<b>Creating Tasks for a Client Using a Group of Services</b>	<b>62</b>
<b>Changing the Columns Displayed in the Task View</b>	<b>63</b>
<b>Displaying Tasks Due This Week</b>	<b>63</b>
<b>Displaying Tasks That Do Not Have an Assigned Status</b>	<b>63</b>
<b>Showing Tasks for Clients With the Same Year-end</b>	<b>64</b>
<b>Showing the Tasks for All Corporate Clients</b>	<b>64</b>
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If you've spent any time looking through this user's guide, you've seen descriptions of how to use the various functions of File In Time software. This section is about putting the pieces together. It's about using the capabilities of File In Time software to help you get your work done.

Before proceeding, we recommend that you work through the File In Time Software Tutorial beginning on page 5. Afterwards, come back here to see the selection of topics that File In Time software users frequently address with the software.

If, at any time, you need help using File In Time software, please contact our customer support team at 800-426-4741 or support@TimeValue.com. We're here to help you get the most from File In Time software.

## Creating Tasks for All Clients in a Group

1. Click the **New Task** button on the toolbar.
2. In the resulting Task Information dialog, select the desired service in the Service field.
3. Click the **Client Groups** button to the right of the Service field to select the appropriate Group of clients. The software will then create tasks for each of the clients in the selected group. This may take a few moments if there are a large number of clients in the group.

For more information creating tasks, see pages 9 and 33-35.

## Creating Tasks for a Client Using a Group of Services

1. Click the **New Task** button on the toolbar.
2. In the resulting Task Information dialog, select the desired client in the Client field.
3. Click the **Service Groups** button to the right of the Service field to select the appropriate group of services. The software will then create tasks for the selected client for each of the services in the Service Group. This may take a few moments if there are a large number of services in the group.

For more information about creating tasks, see pages 9 and 33-35.

## Changing the Columns Displayed in the Task View

1. Click the **Setup** button on the toolbar to see the Task View Setup dialog.  
The leftmost list in the dialog displays the available fields while the list on the right indicates those fields currently included in the task view.
2. Use the horizontal green arrow buttons to add or remove fields. You can also change the order of the columns on the task view by changing the order of the fields on the right using the vertical green arrow buttons.

See pages 22-25 for further information.

### How do I change the name of a column (field) in the task view?

1. Click the **Setup** button on the toolbar.
2. From within the Task View Setup dialog, click on the **Names** button. The **Customize Task View Names** window will appear where you can change the titles of the fields. You can also rename the field using the Customize Field Names option found under the Task view menu.

Only the supervisor can customize field names.

## Displaying Tasks Due This Week

1. In the Task Selection Filter, click the **Dates** field and select **Due Date**.
2. In the Date Range field, select **This Week**. You will notice the appropriate dates will appear in the From and To fields.
3. Click on the **Update** button. Your tasks will be filtered to the tasks within that range of dates.

See another description of filtering tasks on pages 12-13. Also see the description of the Auto reminder on page 29.

## Displaying Tasks That Do Not Have an Assigned Status

1. In the Task Selection Filter, click the **Status** field and select **<blank>**.
2. Click the **Update** button. File In Time software will display those tasks which do not have a status assigned to them.

## Showing Tasks for Clients With the Same Year-end

1. In the Task Selection Filter, click the drop-down arrow in the Client field.
2. Select **Special** to display the Special Criteria dialog.
3. Click on by **Year-end** and click **OK**.
4. Select the appropriate year-end(s) then click **OK** to close the dialog.
5. Click the **Update** button.

See another description of filtering tasks on pages 12-13.

## Showing the Tasks for All Corporate Clients

You can designate a client type to identify common characteristics within your clientele. Some examples of client types are Corporation, Individual, Partnership, LLC, Estate, Foundation, or Not for Profit. Client types can be assigned to your clients during a client import or within the client edit window for each client. For more information about assigning client types, refer to page 45.

These client types can be used to filter your tasks down to only clients which contain these common traits.

1. In the Task Selection Filter, click the drop-down arrow in the Client field.
2. Select **Special** to display the Special Criteria dialog.
3. Click on by **Client Type** and click **OK**.
4. Select the **Corporate** client type or appropriate choice.
5. Click **OK** to close the dialog. Click the **Update** button.

## Calculating the Extension Dates for Overdue Tasks

### To see the available extension date(s) for a single task

1. Click the check box in the **Ext** column for the task. The available extension dates for that task will be displayed.

### To extend multiple tasks at one time

1. Select the tasks you wish to extend.
2. Click the **Change** button on the toolbar to display the Change Tasks dialog.
3. In the Change Tasks dialog, select **Extend** and click **Change**. All the selected tasks will be extended to their next available due dates.

## Producing a Weekly Workload Report for an Employee

1. In the Task Selection Filter, click the **Key People** field and select **Specific**.
2. Select the desired employee.
3. In the Task Selection Filter, click the **Dates** field and select **Due Date**.
4. Select **This Week** or **Next Week** as the Date Range. The appropriate dates will appear in the From and To fields.
5. Click on the **Update** button. Your tasks will be filtered to the tasks within that range of dates for the selected key person.
6. Click the **Reports** button and click the yellow **Task View Report** button to display your filtered report.

## Archiving the Past Years Tasks Before Rolling Over

1. Filter your tasks to show only the tasks for the prior year with a status of Done. For more information about filtering tasks, refer to pages 11-13.
2. When your task view shows the tasks you wish to archive, choose **Display Task View in Excel** from the Tools menu. The resulting Excel spreadsheet will contain all the information for the prior year's tasks as they were displayed in File In Time software.
3. Save this file as a record of your prior years work.

## Rolling Completed Tasks Forward to Next Year

Refer to Rolling Tasks Forward to the next Due Date on pages 38-40.



# **THE FILE IN TIME SOFTWARE DATABASE**

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**Creating a New Database 69**

**Importing Client Data From Another Program 70**

**Opening a Database 76**

**Viewing and Communicating With Your Current Network  
Users 76**

**Checking and Optimizing the File In Time Software  
Database 77**

**Backing Up the File In Time Software Database 78**

**Database Tools 79**

## Database Introduction

File In Time software operates by using a database of information. This information consists of clients, services, employees, and tasks. **Clients** are people or entities (e.g., John Jones or ABC Industries). **Services** are the types of work that you might perform for a client (e.g., 1040 tax form or financial statement). **Employees** are the people who will be performing the service.

Once you have a database of clients, services, and employees, you will be able to create tasks. A **Task** is a combination of a specific client, service, and due date. When you have created a database of tasks, you will be able to sort and filter the tasks to display the information you need. Tasks are displayed in the task view on the main screen.

You can maintain more than one database with File In Time software. Separate databases are useful when various departments within a firm share a multi-user edition of File In Time software. If multiple databases are used, please note that they cannot be merged together if needed at a later time.

### **You can create or add to the File In Time software database in one of two ways:**

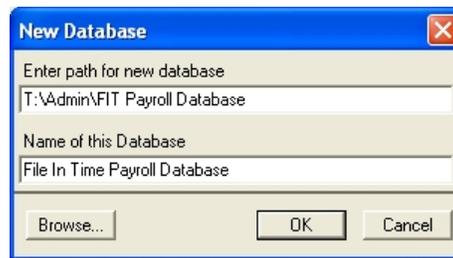
1. Enter the information manually. You can enter information for clients, services, and employees.
2. Import client information into File In Time software from another program. For information about importing data, see pages 70-75 of this user's guide.

## Creating a New Database

File In Time software creates a new database when you install the program. You can create additional File In Time software databases if needed.

### To create a new database

1. Select **Database** from the File menu.
2. Choose **New Database**. File In Time software will display the following window that will allow you to select the location for your new database.



3. In the Name field enter a name for your new database.
4. Click the **Browse** button to specify the directory where you would like to create the new database. If you specify the location of an existing database that database will be overwritten with a new blank database.

## Importing Client Data From Another Program

Importing client information into File In Time software from another software application saves you the time of entering each client in the Client Information window. File In Time software is capable of importing data that is in a comma or tab delimited text format.

### Data Formats

#### Comma Delimited File

Data fields in a comma-delimited format are separated by commas and quotation marks surrounding each field. A carriage return separates the records. The following is an example of a comma-delimited file.

```
"Nick Ross","RossCo","12 Alton, #100","Irvine","CA","92618"  
"William J. Board","","35 La Brea","Los Angeles","CA","90026"
```

As you can see in the first record, the comma in Alton, Suite 100 is not surrounded by quotes. This means that it is a real comma and not a field delimiter. Also in the second record, since there is no company name, the company name field is shown as ,"". Comma delimited files are usually followed by the \*.csv extension.

#### Tab Delimited File

Data fields in a tab-delimited format are separated by tabs. A carriage return separates the records. Following is an example of a tab-delimited file. As you see, the tabs are usually displayed by a blank space between the fields.

```
Nick Ross RossCo 12 Alton #100 Irvine CA 92618  
William J. Board 5 La Brea Los Angeles CA 90026
```

### To Import Data From Another Application

1. Export client data from your existing program as a comma delimited or tab delimited file. Most software packages that maintain client information will let you export it. Make note of the name and location of the export file you create. If you have difficulty exporting your data, contact our support team at 800-426-4741.
2. If you are adding data to an existing File In Time software database, now is a good time to backup your existing File In Time software data. To do so, choose **Backup Database** from the Tools menu in File In Time software.

3. Choose **Import Client Information** from the File In Time software Tools menu. Select the file you created in Step 1, then click **Open**. The following screen will appear.

Client Import

Choose the file type of your data

Quote and Comma Delimited  Tab delimited

Skip first row (header) on import

Preview of file C:\Documents and Settings\Administrator\Desktop\Client File 2.csv

Field 1	Field 2	Field 3	Field 4
Shaine Crosby	KrosbyMin	Krosby Ministries	1212 Noce
Mike Dhare	BlindingLight	Blinding Light Technologies	4 Technok
Roger Santiago	SantiagoSec	Santiago Security	100 Newtc
Mike Applegate	Stylecraft	StyleCraft Printing	42 Pioneer
Brad Wendland	SalesStules	Sales Stules	20001 Mat

Click and drag fields from your imported data (above) to the appropriate fields in the File In Time Client database (below). The field noted with an "\*" is the index field. If this field is not imported, it will be automatically created from the field noted with "\*\*" during the import.

General | Key People | User-defined

\* Client  Client #

\*\* Name

Contact at Client

Address 1

Address 2

City/State/Zip

Dear  Country

Phone #1  Email

Fax #  Year end

Fed ID #1  Fed ID #2

State ID #  Client Type

Reset   Import  Cancel  Help

A preview of the first few records of the file to be imported is displayed in the upper half of the Client Import dialog.

The fields available in the File In Time Client database are displayed in the lower half of the dialog. The field marked by an \* (default is "Client") is used by File In Time software to identify the individual client

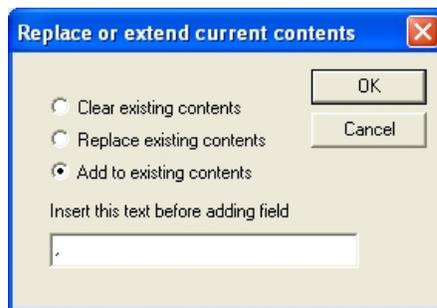
record. This field must be unique because you will often use it to select clients. Some other programs refer to this as an index field. If data for this field is not imported, File In Time software will create it from the information in the field noted with \*\* (default is “Name”). This field is generally used to show the company or client name.

4. Choose the type of file – Quote and Comma Delimited or Tab Delimited – at the top of the dialog in order to display a preview of the data properly.
5. Match the data with the appropriate File In Time software field by clicking and dragging a field from the previewed data to the corresponding File In Time software field.

If you do not want to import a field from the previewed data, do not match the data to a File In Time software field.

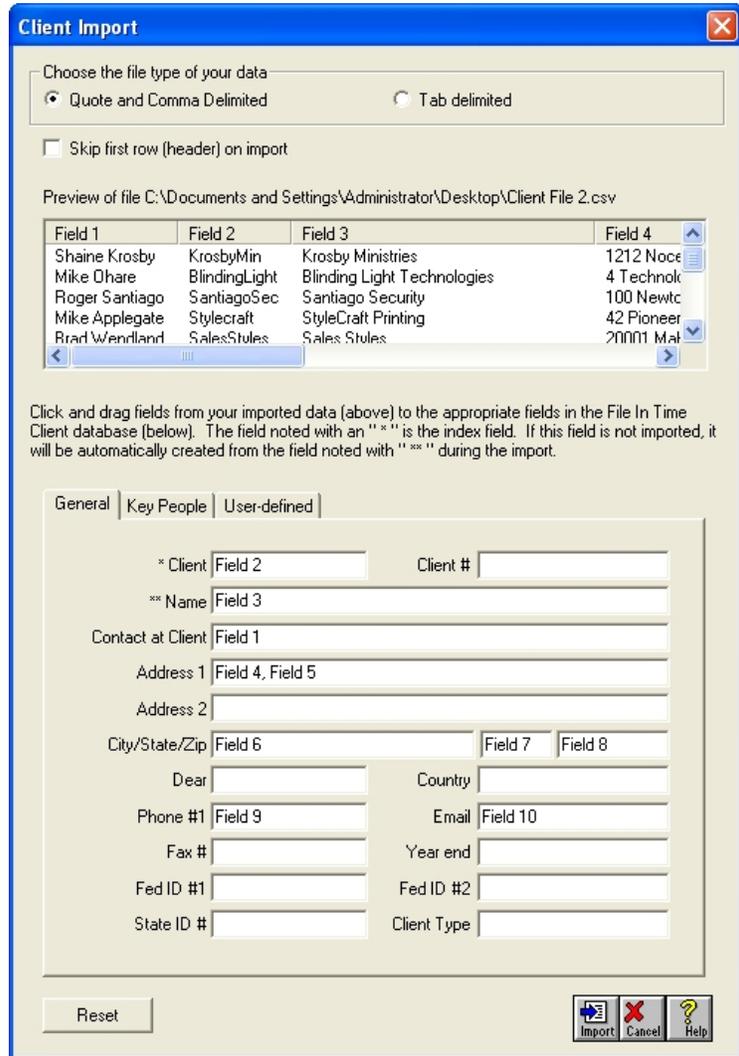
6. If you would like to combine two separate fields from your imported file into one field in File In Time software, simply drag both fields to the same field in the File In Time software database. Examples would be separate first and last name fields combined into the File In Time software “Contact at Client” field. Or separate street address and suite numbers combined into the File In Time software “Address 1” field.

When you combine two fields, the following dialog will appear.



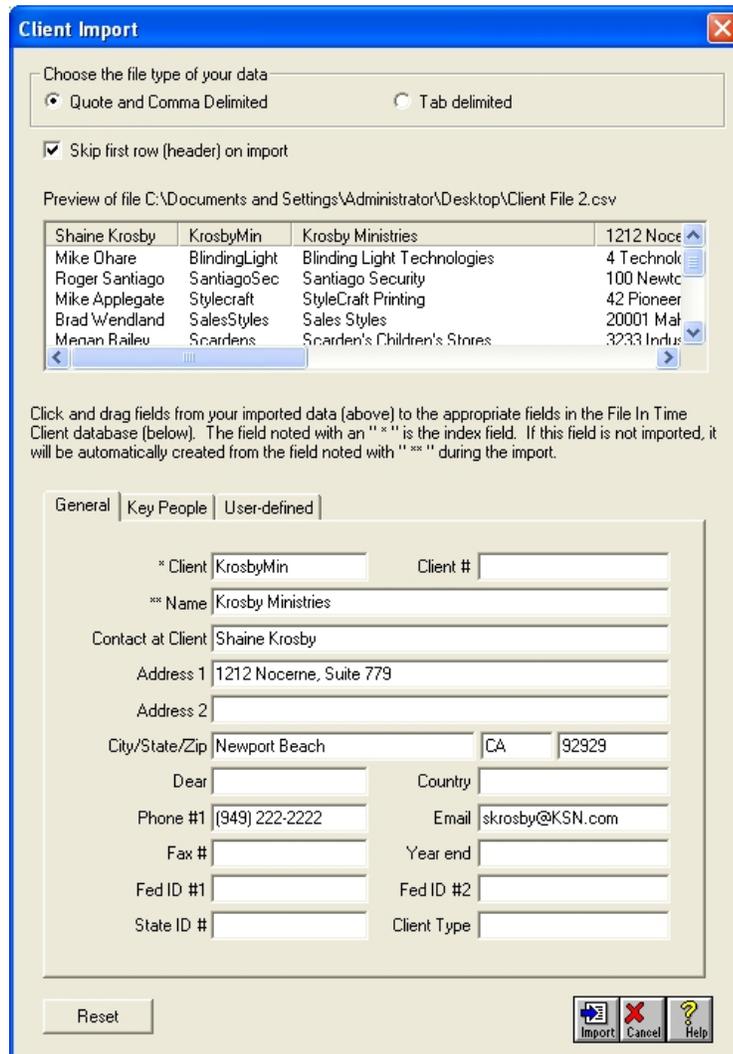
7. Select the option that best applies and click **OK**. If you would like to add a comma and space between the two combined fields, select **Add to existing contents** and type a comma followed by a space in the text field below the selection (as shown in the dialog above).

8. When you have all the necessary fields assigned to the File In Time software database, your client import dialog will resemble the one shown here.



If at any time you would like to start over in assigning the data to the File In Time software database fields, click the Reset button at the bottom left of the dialog. This will clear the assignments you have made and allow you to begin again.

To see a sample of your data in the File In Time database fields, check the box near the top of the dialog that reads **Skip first row (header) on import**. Your client import dialog will then appear as shown below.



Please note the text shown in the top gray line of the previewed data will not import when the import is initiated. Be sure to set the **Skip first row (header) on import** checkbox appropriately before importing.

- When you have all the data to be imported appropriately assigned to fields in File In Time software, Click the **Import** button.

If you are importing a file containing client records that are already in your File In Time software database, the following dialog will appear to help you resolve the duplicate client issues.

**Resolve duplicate client record**

This column shows the client being imported. Double-click on a field to copy it to the database record at right.

This column shows the client as it currently exists in the database, and as it will appear when the "Import" button is clicked. Double-click on a field to restore its original contents.

KROSBYMIN	Client	KROSBYMIN
	Client #	
Krosby Ministries	Name	Krosby Ministries

General | Key People | User-defined | Notes

Shaine Krosby	Contact at Client	Patti Orlando
1212 Nocerne, Suite 779	Address 1	1212 Nocerne, Suite 779
	Address 2	
Newport Beach	City	Newport Beach
CA	State	CA
92929	Zip	92929
	Country	
	Dear	
(949) 222-2222	Phone #1	(949) 222-4433
skrosby@KSN.com	Email	porlando@KSN.com
	Fax #	
	Fed ID #1	
	Fed ID #2	
	State ID #	
	Client Type	
December	Year end	December

Skip Import Cancel

The red “unequal” symbols to the right of the fields indicate where the client record to be imported differs from the existing client record.

**10.** Resolve the duplicate records individually to continue with the import.

When the import is complete, you can begin to create tasks within File In Time. To proceed, see the Creating a New Task beginning on page 9.

If you have any questions, call our technical support team at 800-426-4741.

## Opening a Database

The **Open Database** command is used when you have more than one File In Time software database. To open an existing File In Time software database, select **Database** from the File menu. Choose **Open Database**. If File In Time software does not recognize and display the database you are looking for, you can browse for the database or create a new database.

To browse for the location of a database, click on the **Browse** button. To create a new database, click on the **Create New Database** button.

### Having trouble locating a database?

If you are having trouble locating a File In Time software database, click the **Find All** button in the Open Database dialog. File In Time software will locate all of its databases on the drive you select.

## Viewing and Communicating With Your Current Network Users

When you log in to File In Time software as the Supervisor, you can view a list of network users who are logged into the same File In Time software database. You can communicate with these users about maintenance or updates. As Supervisor, you will also have the ability to log users out of File In Time software before performing a function such as a database optimize.

### To view users currently logged into File In Time software

1. Select **User List** from the Tools menu to display the Current User List.



The entries in the Current User List shows the login and network location of each user who is currently logged into that File In Time software database.

Click on the **Send Message** button in the Current User List dialog to type and send a message to current File In Time software users who are logged into the same database. This is especially useful to let users know you are about to log them out of the software.

Click on the **Log Off Users** button to immediately log out all File In Time software users listed in the Current User List. This is useful to be sure all users are out of File In Time software before running a routine such as a database optimization or installing a new version of File In Time software.

## Checking and Optimizing the File In Time Software Database

Periodically, you may need to check and optimize the File In Time software database. These operations ensure database integrity and reclaim space in tables that is no longer used because of deleted records. Before you check and optimize the database, be sure to backup the database. If you have the network version of the program, you need to be logged in as Supervisor. No other users may be currently running the program.

Checking the database will display any records that should be examined for missing or invalid data.

Once the check database routine is completed, you will have the option to optimize the database. Optimizing will decrease the size of the database and may increase the performance of the software. However, when you run the optimizing routines, you will permanently lose any information you have deleted.

The **Check and Optimize Database** routine is found on the Tools menu.

## Backing Up the File In Time Software Database

You should maintain current backups of your File In Time software database. File In Time software comes with a utility that performs an automatic backup. This utility is not a substitute for the commercially available backup hardware and software that you should use and that we recommend to maintain the integrity of your information.

File In Time software will automatically create a backup of the database the first time it is started daily. These backups are saved to the same directory as the File In Time software database or another specified directory. The automatic daily backups are named AutomaticDailyBackup mm-dd-yy.fbk.

When the program reaches a user-defined maximum number of backups (up to 120 days), it replaces the oldest backup first to start over again. In this way, the program will keep an archive of backups. File In Time software will not create a backup until a database is opened. If you have multiple databases, you will need to open each database in order to back up that database.

### To customize the backup options within File In Time software

1. Choose **Daily Backup Options** from the Options menu. The Backup Options dialog will appear.



2. Select **Enable Automatic Daily Backup** to enable the options in the dialog. Deselect this option to turn off the automatic backup.
3. Choose the location where your backup will be saved. If you prefer to store your important data in a location different from where your File In Time software database resides, browse to the desired location.
4. Enter the number of days over which to automatically store backups.
5. Click **OK** when you are finished.

Another way to backup the database is to select **Backup Database** from the Tools menu. If you use multiple databases, you will need to backup each one. Backups generated in this fashion are named UserInitiatedBackup mm-dd-yy.fbk (the date in the file name represents the date the backup occurred).

To restore from a backup, choose **Restore from Backup** on the Tools menu.

## Database Tools

File In Time software includes useful database information tools. Below are descriptions of some of these tools that are in the Tools menu.

**Database Information** To see information about a File In Time software database, choose Database Information from the Tools menu. The Database Information window will show you the location of the current database as well as the number of tasks, employees, clients, services, and status codes.

**Clients with No Tasks** To see a list of clients with no tasks, choose Clients with No Tasks from the Tools menu.

**Show Duplicate Tasks** To see a list of duplicate tasks, choose Show Duplicate Tasks from the Tools menu.

**Purge Duplicate Tasks** To purge any duplicate tasks, choose Purge Duplicate Tasks from the Tools menu.

**Check and Optimize Database** To check for errors in the database, choose Check/Optimize Database from the Tools menu. If there are errors, the program will display the record with the error. Check the record, make any needed changes, and save the record. Run Check Database again to check the remaining records. To optimize the database, wait for the end of the check routine. You will then be presented with the option to optimize. (When you delete records in File In Time software, the program marks the records as deleted, but does not remove them from the database. This optimization routine will permanently delete records from the database.)

**Restore Deleted Item** File In Time software allows you to restore certain deletions. To restore a deleted item, choose **Restore Deleted Item** from the Tools menu. A history of changes is maintained in a buffer while the program is running. The history is lost when you exit the program.

---

**Caution** This utility may not restore all information. The **Restore Deleted Item** utility will not restore notes associated with tasks. Similarly, if an employee associated with a task is deleted, Restoring will reinstate the employee but will not re-associate the employee with the task.

---

**Backup Database** To backup the database, choose Backup Database from the Tools menu.

**Restore from Backup** To restore from a backup file, choose Restore from Backup from the Tools menu. Backups are named \*.fbk.

**Import Client Information** To import client data from an existing program, choose Import Client Information. You can import information from a standard text format. For more on importing, see pages 70-75.

**Export Client Information** To export your client data into a text file, choose Export Client Information. Exporting can be useful for creating data sources for merge documents, sending data to other applications, and more.

**Display Task View in Excel** To display the current task view data in Excel, choose Display Task View in Excel. This can be a useful alternative to the Task View report. Task Views displayed in Excel show the entire contents of the Notes field.

**Export Task View Data** To export task view data into a standard text file, choose Export Task View Data.

**Extension Forms** Choose Extension Forms to generate extension forms.

**User List** Choose User List to see the users who are currently logged into the same File In Time software database as yourself. You can send and receive messages from these users. The Supervisor is also able to remove users from their File In Time software session.

# APPENDIX

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## Tool Bar Buttons

The tool bar allows you to quickly access common commands. Below is a list of the buttons.



**Clients** The Clients button displays a list of your clients. You can add, delete, or edit client information. Client information can be imported from other applications. See the *Importing Client Data* section on pages 70-75 for more information.

**Services** The Services button displays a list of services that can be assigned to clients. You can add, delete, or edit service information. You can also create new services to add to the list.

**Employees** The Employees button shows you a list of the firm's employees. You can add, delete, or edit employee information. Network users can edit employee rights.

**Change** The Change button lets you make changes to one or more tasks at a time. For example, you can change the key person, roll forward, or extend numerous tasks at the same time. Refer to the *Working With Tasks* section on pages 21-38 for more information.

**Setup** The Setup button lets you determine what you see in the task view. The default task view contains the client, service, due date, key person (employee), status, extension status, and any notes. You can customize the task view by clicking on the Setup button and adding or removing fields. In addition, you can change the names of fields.

**New Task** The New Task button opens a window that allows you to add a new task.

**Edit Task** The Edit Task button opens a window that allows you to edit information about a selected task.

**Notes** The Notes button accesses the notepad for a selected task. Be sure the cursor is somewhere on the task for which you want to add or edit a note.

**Find** The Find button helps you find a specific task. You can search for text in the following fields: Client, Service, Due Date, Key person, Notes, or Status.

**End** The End button places the cursor at the first open cell at the end of the task view. This is a convenient way to add a new task on the fly.

**Reports** The Reports button displays the list of standard reports. The Task View report is also accessed through the report button.

**Calendar** The Calendar button displays a calendar with the number of tasks due on any given day in a month. Click on the number of tasks listed for a day to filter the task view for that day.

**Update** The Update button updates the current view with any changes you have made in the Task selection or Sort order field. An **“Update View!”** message will appear above the Sort order fields when you need to update the current view.

## Keyboard

Here are some keyboard shortcuts:

- Alt+?** The Alt key plus the first letter of a menu will open a menu.
- Tab** The Tab key (not the Enter key) moves the cursor through a window.
- Enter** The Enter key selects the default button, usually the OK button.
- Ctrl+F** This combination opens the Find dialog.
- Ctrl + A** Selects all tasks contained in the task view.
- Space Bar** The Space Bar selects a checkbox or radio button. If a button is selected or highlighted, the space bar presses the button.
- Esc** The Esc key selects the cancel button.
- Ctrl + Click** By holding down the Control key while clicking on successive tasks the user can highlight more than one task.
- Shift + Click** Holding down the Shift key while clicking on the row number of various task will highlight both tasks selected as well as every task in between.
- Ctrl+M** This combination will freeze the position of one more column on the main task view.
- Ctrl+N** This combination will freeze the position of one less column on the main task view.

## Options

The choices on the **Options** menu are described here:

**Use Last Saved Task View** Check this option if you want the program to automatically start with the last saved task view.

**Display Day of Week** Check this option to display the day of the week.

**Speed Edit Helper** This option allows you to type just the first few letters of an item and File In Time software will anticipate what you are trying to type.

**Show Century in Dates** Check to include the century in dates.

**Daily Backup Options** Set the frequency and location for automatic daily backups.

**On Rollover** Select which data is retained from tasks during rollover.

**Automatic Update Options** Select how to handle updates to File In Time software as they become available.

**Use Automatic Date Setting** When checked, the program automatically computes due dates and extension dates.

**Warn About Unsaved View** Check this option if you want the program to prompt you to save after you make changes to a task view.

**Disable Automatic Cache Update** This option disables a cache update that may affect the performance of File In Time software. Try checking this option if you are experiencing delays while adding clients or adding tasks from the main screen.

**Display Task Notes as Text** Check this option to display the contents of the notes field on the main task view. When de-selected, notes will be represented by a paper clip icon.

## Passwords, Security, and Rights

File In Time software contains components that enhance the security of the information in the database. You may want to restrict the ability of some users of the program to change certain types of information. As a result, File In Time software allows you to assign specific rights to each user.

You can assign passwords and rights in the Employee Edit window. To open an Employee Edit window for a selected employee, click on the **Employees** button on the Toolbar, and double click on an employee's name. The Employee Edit Window will appear as shown here:

If the File In Time software database does not have any employees, you can add employees by clicking on the new button.

### Passwords

You can set up the network edition of File In Time software to require a password in order use the software. The Employee Edit Window allows you to assign and change your password. If you forget your password, the system supervisor can reset it. If the system supervisor forgets his or her password, call TimeValue Software customer support at 800-426-4741.

## Technical Support

Your first year of File In Time software maintenance is included with your initial purchase of File In Time software. Maintenance includes product updates, upgrades, downloads, unlimited technical support, replacement CD's, and additional user's guides as needed. File In Time software maintenance is renewable annually beginning one year after your initial purchase.

Technical support is available Monday through Friday from 7:00 AM to 6:00 PM Pacific Time. Contact us at 800-426-4741 or support@TimeValue.com. You can fax questions to Technical support at 949-727-3268.

**When you call for technical support, please be at your computer with File In Time software running.**

## Frequently Asked Questions

**Question 1** After I rollover a task, what happens to the first task?

File In Time software creates a new task when you choose rollover. As a result, you will have your original task and a new task. When you select the Rollover routine on the Change menu, the option to Delete old task when Rolling Over will become available.

**Question 2** How can I record a dollar amount or hours spent on a task?

Add a user-defined field to your task view for entering billable hours, dollar amounts, etc. See page 23.

**Question 3** I have an existing database. Can I import client information?

If the client list to be imported is mutually exclusive you can import the new client information. If there are overlapping clients contained in the import file, duplicate client records will be created.

**Question 4** Can I combine two File In Time software databases?

No. In order to add the information from one File In Time software database to an existing database, you must import the client data and reassign services to the newly imported clients.

**Question 5** I have File In Time software installed on my local hard drive. I would like this information backed up. Can I run the database from the network? How can I transfer the data?

Yes, both single user and network versions can be installed to a network drive. If you are installing File In Time software for the first time, make sure to specify the network drive where you would like the program to reside during the installation process. If you would like to transfer the database from an existing installation of the program, perform the following steps:

1. Log into the program. Click on the **Tools** menu and select **Backup database** from the list of options.
2. The default name for the backup will be **UserInitiatedBackup-mm-dd-yy**. Click **Save** to create the backup in your current FITWIN directory.
3. Now that you have created the backup file, the next step is to create a new blank database on the network. Click on the **File** menu and select **Database > New Database**.
4. Click on the **Browse** button to select the desired destination for the new directory. You can also type in the path.
5. Once you have selected the destination of the new database, click **OK**. A message will be displayed asking if you would like to create a new database, click **Yes** to create the new blank database.
6. To restore your existing data into the new blank database, use the **Restore from Backup** command located under the **Tools** menu.
7. Click the **Browse** button to display the Select location of backup file dialog. Select the directory location of your old database, and click **OK**.
8. You will now be returned to the File In Time software restore dialog. Highlight the appropriate backup file by clicking on it. **UserInitiatedBackup-mm-dd-yy.fbk**, the file you created earlier, should be listed. Click **Start Restore** to complete the process.

**Question 6** I have a single user edition of File In Time software installed locally and I have upgraded to a multi-user edition to be installed on my network. How do I make that conversion?

1. Log into your current program. Click on the **Tools** menu and select **Backup database** from the list of options.
2. The default name for the backup will be **UserInitiatedBackup-11-30-06** (date will differ). Click **Save** to create the backup in your current FITWIN directory.
3. Exit File In Time software and install your network edition onto your server. For network installation instructions, see pages 2-3. This new installation will create an empty database on your server.

4. Open your network edition of File In Time software. Select **Restore from Backup** in the **Tools** menu.
5. Click the **Browse** button, select the directory location of your old database, and click **OK**. Your data should appear.
6. When your network edition is working properly, you can delete the File In Time (FITWIN) folder on your local drive.

**Question 7** I like to work at home. Is there anyway to update the database at work with the changes I make at home?

Yes. Use the Backup database command on the Tools menu to create a complete copy of your database. Then you can restore from this backup to any new instance of File In Time software. To copy the changes you made at home to the database at work, create a backup from your home computer and then restore that backup at work.

See question 7 for a detailed explanation of the Backup database and the Restore from backup routines.

**Question 8** I installed an update for File In Time software and now my data is missing.

You have most likely installed the update in a different location from the previous installation of File In Time software. The program does not know where to look for the database. Go to the File menu and Choose **Database > Open Database**. Browse to the directory that contains your database or click **Find All** to have File In Time software locate it for you.

## Printing Problems

In order to use the Crystal Reports, specific files must be located in specific directories on your hard drive. Because other programs may have installed these files before or after your installation of File In Time software, some files may be inappropriately overwritten or duplicated. If you have printing problems, please take the following steps.

1. Reboot your computer and do not start any programs.
2. Locate and run **WorkstationSetup.exe**. The WorkstationSetup.exe file will install the needed files.

If this fails to solve the problem, get the names and sizes of the required files from the File In Time software Help system. To find this information, start File In Time and press **F1** to start the Help system, click on Search, and type Printing problems. The help topic will contain the information you need.

## Uninstall Information

To make sure that data is not inadvertently lost, this version does not include an automatic uninstall. If you want to remove the program and the database, simply delete the directories/folders that contain the File In Time software program and database(s). The following files were installed or created when you used File In Time software:

File	Location installed to	Comments
fitwin.exe	program directory	program executable
createdb.exe	program directory	utilities to import and optimize data
workstationsetup.exe	program directory	workstation setup file for client/server networks
fitrep.exe	program directory	report file
extmag.exe	program directory	extension magician
fitwin.hlp	program directory	help file
fitwin.chm	program directory	help file
*.wri	program directory	read me and information files
*.rpt	program directory	report templates
*.dbf, *.dbt, *.mdx	program directory	database files
*.ft~	program directory	Note these are *.ft~ files NOT *.FT files!
*.usr	program directory	user login
*.pdf	program directory	extension forms
*.tpl	program directory	old extension forms
program directory\tutor\*.*	program directory\tutor	tutorial files
program directory\win\*.*	program directory\win	network setup files
fitwin.ini	\windows	program information file
crpe32.dll	\windows\system	Crystal Reports file
other Crystal Reports .dll's	program directory	Crystal Reports files



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