

TealTracker User's Manual



Program Version 1.26
Last Updated: August 27, 2007

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Introduction

Description



TealTracker is a powerful but easy-to-use time and expense-tracking application for PalmOS handhelds.

Contents

This archive contains the following files:

Program files:

TEALTRAC.PRC	The TealTracker utility program
TPSETUP.EXE	Easy installer program (Windows only)

Document files:

TRACDOC.PDF	This document in Adobe Acrobat (PDF) format
TRACDOC.HTM	This document in HTML format (sans images)
TRACDOC.PRC	This document in TealDoc format
REGISTER.HTM	TealPoint Registration form in HTML format
REGISTER.TXT	TealPoint Registration form in text format

Installing the Program

Windows (automatic)

On a Windows PC you can also use quick setup installer by double clicking on the **TPSETUP.EXE** installer program, and following the on screen prompts.

All Systems (manual)



Use the *Palm Installer* in the *Palm Desktop* to install the program file **TEALTRAC.PRC**.

Instructions on how to use the *Palm Installer* are in the handbook that came with your Treo, Palm, Pilot, PalmPilot, or WorkPad. You can find the installer either as a stand-alone program in your *Palm* install folder, in the *Windows Start Menu* with the other Palm programs, or in the Palm Desktop program as an icon (called *Install* or *Quick Install*) along the left-hand side.

Optional Documentation

You can also optionally install a handheld version of this documentation. This manual is provided in this archive as the PalmPilot document **TRACDOC.PRC**. To read it, install it using the Palm Install Tool and read it with a Palm doc reader program like **TealDoc**.

Chapter 1 – Overview

TealTracker helps you keep track to time spent between multiple accounts, clients or tasks. It keeps an automatic log of activities as you change them, and lets you generate or export reports when it comes time to submit bills or expense reports. While designed primarily to track billable hours, it also lets you log simple mileage and expense entries.

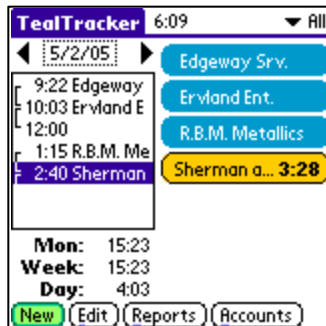


Run the TealTracker application by tapping on TealTracker icon in the Palm applications launcher.

Main Screen

The TealTracker **Main Screen** comes in two flavors, each optimized for a particular style of use. Both layouts are similar, showing time, statistics, and an **Activity Log**, a list of the logged activities recorded for a selected day.

Time-Clock View

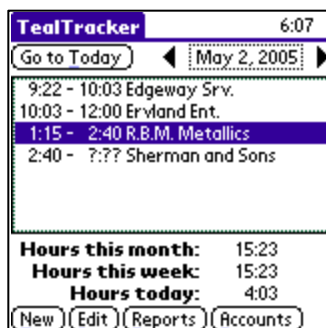


By default, TealTracker starts up in the **Time-Clock View**, which is designed to easily record activities the minute they start or stop.

In the **Time-Clock View**, a column of accounts buttons appears on the right side of the screen. Accounts can represent individual clients or even tasks or subtasks for one or more clients that need to be tracked. See the chapter: "Accounts" for more information on creating and configuring accounts.

Tap on an account button to start, stop, or change the current activity. A new log entry will be automatically be generated, recording the current date and time. See the chapter: "Recording Activities" for more information on using the **Time-Clock View** to record your activities as you do them.

Manual Entry View



In the **Manual Entry View**, selectable by choosing the **Toggle Account Buttons** menu item, the account buttons have been removed to allow for a wider **Activity Log** list. The **Manual Entry View** is designed for folks who don't record their activities the minute they start or stop, and thus don't need the time-clock functionality of the account buttons.

Chapter 2 – Accounts

The first step in using TealTracker is to create a list of accounts. Accounts represent the individual clients or tasks you want to record. You can set them to equal the names of clients you bill, the companies they represent, tasks you perform, or even billing codes for individual projects.

Each account can support a separate pay rate used for reporting purposes, as well as billing minimums and increments, described below.

Account List



Tap on the **Accounts** button on the main screen to view the list of active accounts. Tap on **Add** to create a new account, or **Edit**, to open an existing one into the **Account Properties** screen.

Account Properties



On the **Account Properties** screen, you can set the following properties for the account:

Name

Specifies the name of the account.

Category

Specifies the category in which to place this account. Edit the list of categories using the *Edit Categories* menu on the *Main Screen*.

Hourly rate

Specifies the billing rate in dollars (or other currency units) per hour of activity used when generating reports.

Mileage rate

Specifies the billing/reimbursement rate for the account in dollars (or other currency units) per recorded mile (or kilometer) of travel used when generating reports.

Minimum minutes per task

Specifies the minimum number of billable minutes for each entry in the activity log. This value affects short entries with a non-zero time range. If the time falls below the specified limit, the recorded hours are automatically bumped up when totaling reported billable hours.

Use this option if you typically bill clients for a minimum amount of time even for, say, a quick phone call that distracts your work flow but would be insignificant if billed at an hourly rate. Set this value to zero if you don't need it.

HINT: This field only affects the calculation of reports, not the monthly/weekly/daily hours display on the Main Screen. That display always reports actual hours.

Minimum minutes per bill

Specifies a minimum time to bill to an account. If there are some billable minutes for an account but the amount falls below this minimum, the minutes will be boosted automatically to this minimum value. Set this value to 1 minute if you don't wish to have a minimum minute value.

Rounding minutes per bill

Specifies the billing time interval for reports. Total summarized hours for each account are rounded off to the nearest even multiple of this time interval. Set this value to 1 minute if you don't want the minutes rounded off.

Account Categories

Edit Categories

Active Categories:

<input type="checkbox"/> * Unfiled	<input type="checkbox"/> 8 Category H
<input checked="" type="checkbox"/> 1 Industry	<input type="checkbox"/> 9 Category I
<input checked="" type="checkbox"/> 2 Travel	<input type="checkbox"/> 10 Category J
<input checked="" type="checkbox"/> 3 Personal	<input type="checkbox"/> 11 Category K
<input type="checkbox"/> 4 Category D	<input type="checkbox"/> 12 Category L
<input type="checkbox"/> 5 Category E	<input type="checkbox"/> 13 Category M
<input type="checkbox"/> 6 Category F	<input type="checkbox"/> 14 Category N
<input type="checkbox"/> 7 Category G	<input type="checkbox"/> 15 Inactive

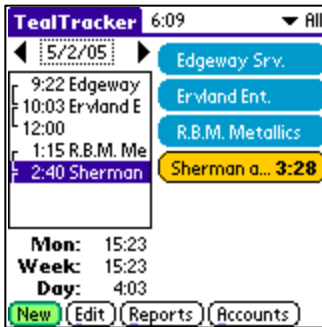
OK Cancel

Accounts can be organized into categories, selectable from the category pick list on *Main Screen*. Select **Edit Categories** from the *Options* menu to show, hide, or rename categories.

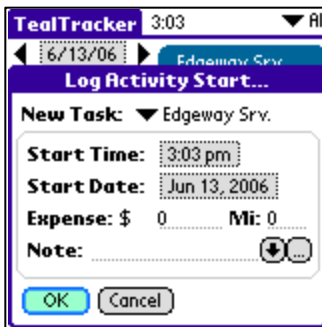
Uncheck categories to hide them. Hidden categories do not appear in the category pick list, and accounts placed into a hidden category do not appear even when the *All* category is selected.

Chapter 3 – Activity Log

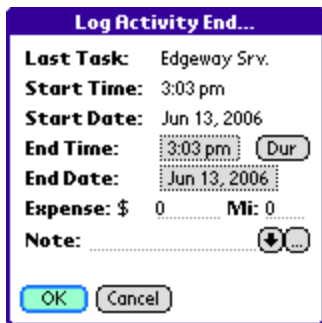
Creating Time-Clock Entries



Log activities in real time using the buttons in the time-clock account list. The button names correspond to the accounts present in the category chosen by the category pick list in the top right corner of the screen. If activity in an account is ongoing, the button for that account is shown highlighted.



When no task is in progress, you can mark the start of an activity by just tapping on an account button. You'll be given the opportunity to confirm the date, time, and account associated with the new log entry, as well as given the opportunity to log an expense value, mileage, or note associated with that entry.



When the activity on the task is done, just tap on the account button again to log a stop time for the activity. You'll be given a chance to confirm the end time, expense value, mileage, and note for the activity entry.

NOTE: The expense, mileage, and note fields here give you a chance to modify values you previously set when starting the activity. There aren't distinct notes associated with the start and end of each task.



As an alternative to end time, select the **Dur** button to calculate an end time from a task duration in hours:minutes. **(New in 1.12)**

If you tap on a different account when another is active, you can log the start the new activity and end the old one in a single step. Here, you can set a note and value for the new activity as well as modify ones for the task you are finishing.

Creating Manual Entries

You can also manually create log entries using the **New** button on the *Main Screen*. The **Activity Entry Screen** will open. A new log entry will be created, defaulting to the time range set in *TealTracker Preferences*, if possible.

Editing Entries

You can also modify an existing entry using the *Activity Entry Screen*. To modify an entry, select it in the *Activity Log* and tap on the **Edit** button.

If an entry is still running, you'll be asked to stop it first before editing. When done, you can later choose the **Restart last entry** menu, which restarts the last (most recent) entry in the log.

HINT: When editing log entries, you cannot move an entry to overlap the time range of another activity. You can, however, set an entry's start and end times to the same value. This is useful to record a mileage or expense with no associated hours.

Purging Entries

To delete older entries from the history log, choose **Purge log entries** from the main *TealTracker Tools* menu.

Entry Notes

Each task entry contains note field which you can use for any purpose. Tap on the notes button (...) to expand this note field to full screen.

You can also use the notes field to store a “Quick List” of pre-selected keywords. Tap on the down-arrow button next to the field list to chose an entry to add to the current notes area, or “Edit quick list” to change the list of available keywords. **(New in 1.12)**

When adding keywords to the quick list, add one term or phrase per line, separated by line breaks (carriage returns).

Chapter 4 – Reports

What good is time-logging program if you can't get the data back out? Not much. Fortunately, TealTracker boasts some really powerful reporting, export, and charting capabilities using the data you've entered.

To generate a new report, select **Reports** from the *Main Screen*.

You can generate a report that includes all accounts, or limit the report to a single account or account category.

The **Reports Screen** lets you choose the type of report as well as the date range for which log entries to include in the report. You can set the date range manually, or choose from the following list of buttons:

- Today
- Current Pay Period (set in Preferences)
- Last Pay Period
- 1-Week
- 2-Weeks
- Month-to-Date

HINT: If a logged activity entry spans two days, it will be included in the report if its start time falls within the specified inclusive date range.

Text Reports

TealTracker supports three different text-format reports:

Full Reports

A full report lists each activity entry in the requested time range, as well as a summary of hours, expenses, travel distance, and billable totals.

Summary Reports



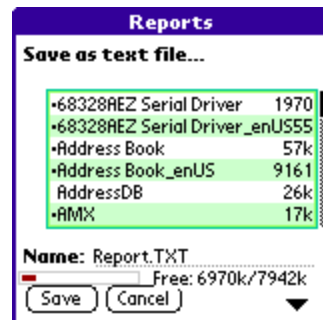
A summary report only includes the last summary portion of a full report.

CSV Reports



A CSV Report is typically used to export raw activity log entries to a spreadsheet program. Individual entries are written out, one line per entry.

Saving Reports



To save a text report, select the **Save...** button. You have the option to save the file as a text file or as a memo.

The **Memo** option saves the text report as a memo in the standard MemoPad application, or multiple memos if the report is too large to fit in a single memo. Since HotSynced memos can be read in the Palm Desktop application, memos are an easy way to transfer reports back to the desktop PC if an external card and reader are not available.

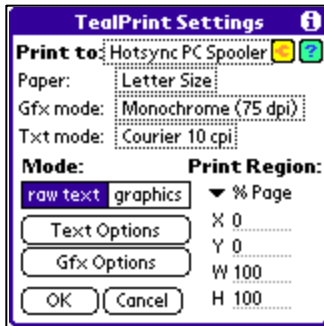
The **Text** option lets you export a report to a RAM or directly to an external SD/MMC/MS/CF card, if available.

NOTE: When stored in RAM, text files are written as **Public Text** format files recognized by TealDoc and other TealPoint applications. When written to an external card, they are written as raw plain text files.

Browsing Reports

You can lookup any saved reports later using the Browse button on the *Reports Screen*.

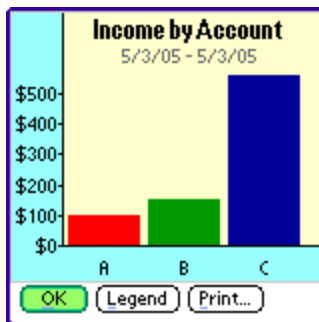
Printing Reports



Tap on the **Print** button to print a report using TealPrint (if installed).

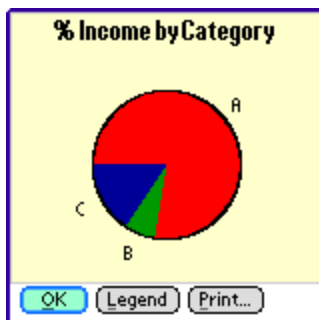
Account Charts

Account Charts show summarized totals as a bar or pie graph broken down by account. Supported charts include:



- Total Income by Account
- Total Income by Account in Percentage
- Total Income by Account in Pie Chart (**New in 1.12**)
- Total Hours by Account
- Total Hours by Account in Percentage
- Total Hours by Account in Pie Chart (**New in 1.12**)
- Total Expenses by Account
- Total Miles by Account (or Kilometers)

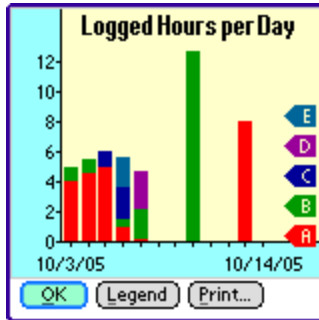
Category Charts



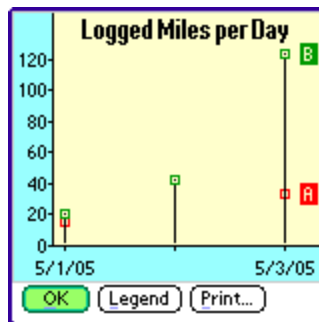
Category Charts show summarized totals as a bar or pie graph broken down by account. Supported charts include:

- Total Income by Category (**New in 1.12**)
- Total Income by Category in Percentage (**New in 1.12**)
- Total Income by Category in Pie Chart (**New in 1.12**)
- Total Hours by Category (**New in 1.12**)
- Total Hours by Category in Percentage (**New in 1.12**)
- Total Hours by Category in Pie Chart (**New in 1.12**)
- Total Expenses by Category (**New in 1.12**)
- Total Miles by Category (or Kilometers) (**New in 1.12**)

Day Charts



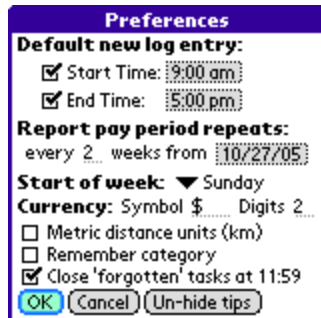
Day Charts show individual entries in the requested date range. hours and income are shown as “stack” graphs, with the data for each account layered up the last, while expenses and mileage are shown as “scatter” graphs, with each entry appearing as a boxed point on the graph.



Supported charts include:

- Total Income
- Total Hours
- Total Expenses
- Total Miles (or Kilometers)

Chapter 5 – Preferences



Select **Preferences** from the TealTracker main menu to adjust the following global program preference items:

Default entry times

Set default start and end times for an entry created using the **New** button. If there is already an entry that exists overlapping the default time range set here, the new entry will begin after the overlapping entry.

If either the start or end time is not checked, that item will default to the current time.

Report pay period

Sets the pay period starting day and weekly interval. These values control the *Last Pay* and *Curr Pay* buttons on the *Reports Screen*.

Start of week

Sets the starting day of the week used by the *Weekly Total* statistics value on the TealTracker *Main Screen*.

Currency symbol and digits

Sets the current symbol(s) and decimal places used in reports and throughout the program.

Currency symbols may be up to 4 characters long, but longer symbols might overlap text on some screens.

Metric distance units

Changes the mileage label from "Miles" to "Kilometers" in reports and throughout the program.

Remember category

If set, TealTracker restores to the last account category used each time you return. If not checked, the category resets to "All" each time.

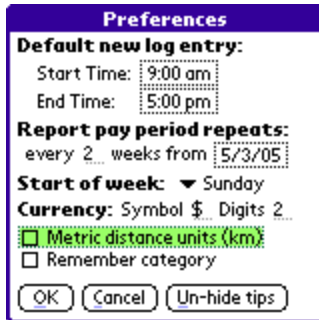
Close 'forgotten' tasks at 11:59

If this option is set, when you close an open task (tapping on the account list) and the elapsed time ends after 5am on the next day, TealTracker assumes you forgot to close that task and default the end time to 11:59pm on the previous day.

Appendix A – TealPoint Pen-Free Navigation

TealPoint Pen-Free Navigation provides access to almost all programs screens and functions via keyboard or device 5-way rocker pad. Similar to the 5-way interface on the Treo 600, TICL pen-free navigation also adds similar functionality to older PalmOS handhelds with directional pads or devices with add-on keyboard peripherals.

Pad Navigation



With 5-way controls, a current button, checkbox, or text field control is highlighted in green or drawn bolded in monochrome handhelds. The current control is changed by presses of the directional pad, which moves the selection to a control in the general direction of the button press. The center “select” button will activate the highlighted control, pressing buttons, toggling checkboxes, or turn on or off the cursor in a text entry field.

On some devices, like the Treo600, the direction pad is mapped in the operating system to move the cursor in an active text field.

When this is the case, the direction pad will move the cursor by default, but will change the active control selection once the cursor has reached the end of the text field and can move no further in that direction.

Keyboard Navigation

With an add-on keyboard, arrow keys replace the directional pad of a 5-way control. To select a control, the Enter key may be used, except when the text cursor is active in a multi-line text field. When this is true, the Enter key will enter a line break into the text field instead.

Accelerator Keys

On screens without text entry fields or other elements which accept keystroke input, buttons may also support an accelerator key which may be pressed to simulate a press of the key. When this is the case, the letter is shown underlined in the button.

Appendix B – Revision History

Version 1.26 – August 27, 2007

- Added ability to delete an account even if currently used by history entries
- Added category field to CSV and full reports
- Added new "0:00" button to zero duration screen
- Added progress bar updating when generating charts
- Added support for a second column of account buttons in landscape display modes
- Added support for additional account buttons when in full screen mode
- Fixed chart colors when graphing more than 10 items
- Fixed chart reports from overflowing (OVR) from invalid data points
- Fixed chunk overlock crash caused by bug in PalmOS 5.2
- Fixed corruption of account records resulting from naming an account with 32 letters
- Fixed legend popup in category graphs to show correct entries
- Fixed support for multichar currency symbols in reports
- Improved account button drawing to trim text of very long accounts
- Improved 'Cur' buttons in entry screens to default to 0:00 if current range is negative (set default time to midnight to force new entries to always start with a 0 range)
- Improved pie graphs to remove labels for empty pie slices
- Improved pie graphs to stagger labels to make more space when necessary
- Improved report generation dates, auto-updating fields previously set to 'today' and restoring other dates
- Improved report generation with arrow button to determine which field is affected by day/week range buttons
- Improved stacked bar chart caption labels to intelligently layout
- Improved task entry list to support double-clicking of entries to open them

Version 1.22 - April 25, 2007

- Fixed main screen to redraw properly after entering registration key (would leave image of previous window open in 1.21)

Version 1.21 – April 22, 2007

- Fixed intermittent crash exiting program due to bug in external ui code library in 1.20

Version 1.20 – April 13, 2007

- Fixed pie charts to draw properly on devices that do not support direct screen access (Z22)
- Fixed date charts to show proper date range for chosen data

Version 1.16 – February 28, 2007

- Increased maximum report size to 16k
- Fixed crash making pie chart with only one data point

Version 1.14 – June 23, 2005

- Fixed extra invalid entries from appearing in summary reports

Version 1.13 – June 14, 2005

- Added button to 'Log Entry' screens to add "quick list" notes from preselected list
- Added button to 'Log Entry' screens to calculate end time from a task duration
- Added reports to graph income and time by category
- Added reports to graph income and time as pie charts
- Fixed math calculation errors with very large numbers
- Fixed charting layout when graphing only one or two days entries
- Fixed compatibility with ancient PalmOS 3.5 and earlier devices

Version 1.10 - December 6, 2005

- Fixed bug causing wrong account button to be selected or highlighted when some categories are hidden

Version 1.00 – May 15, 2005

- Initial program release

Appendix C – Contact Info

TealTracker by TealPoint Software
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TealPoint Software
TealTracker for PalmOS
454 Las Gallinas Ave #318
San Rafael, CA 94903-3618
We look forward to hearing from you.

Please visit us at www.tealpoint.com, or email us at support@tealpoint.com.

Appendix D – Registering

Registering allows you to use the program past the 30 day expiration period and turns off registration reminders.

Currently, you may register by snail mail or online with a credit card and a secured server from the store where you downloaded the software. For the first option, send the following information on a sheet of paper separate from your payment.

- Product Name
- E-Mail Address
- HotSync User ID (Palm Name Required for Passkey generation. It can be found on the main screen of the HotSync application on the handheld in the upper right corner (or as "Welcome _____" on very old PalmPilot devices).
- Check (drawn off a US Bank) or Money Order for (\$19.95 US). No international checks or money orders please.

Appendix E – Products

Visit us online for our complete product line, including:

SHORTCIRCUIT (<http://www.tealpoint.com/softshrt.htm>)

A new twist on gameplay fused from your all time action puzzle favorite games, connect falling conduit pieces into explosive loops in this frantic race against the clock.

SUDOKUADDICT (<http://www.tealpoint.com/softsudo.htm>)

Sudoku Addict brings to your handheld the addictive worldwide puzzle craze that has displaced crossword puzzles in many newspapers in Great Britain and Japan.

TEALAGENT (<http://www.tealpoint.com/softagnt.htm>)

Get news, movie times, stock quotes, driving directions, web pages and more without need for a wireless connection. TealAgent fetches and formats web-based content for offline viewing.

TEALALIAS (<http://www.tealpoint.com/softalia.htm>)

Free up memory and make the most of external expansion cards. Placeholder 'Alias' shortcut files automatically find, load, and launch apps and data from external SD cards, increasing free main memory.

TEALAUTO (<http://www.tealpoint.com/softauto.htm>)

Track and graph automobile mileage, service, and expenses with TealAuto, the complete log book for your car or any vehicle. Extensive customization options and unmatched in features and functionality.

TEALBACKUP (<http://www.tealpoint.com/softback.htm>)

Backup your valuable data with TealBackup, supporting manual and automatic backups to SD/MMC/CF cards and Memory Stick, backups through HotSync, and optional compression and encryption.

TEALDESKTOP (<http://www.tealpoint.com/softdesk.htm>)

Launch applications with TealDesktop, the themed replacement for the standard system launcher screen with tabs, multiple card folders, drag and drop, and more

TEALDOC (<http://www.tealpoint.com/softdoc.htm>)

Read, edit, and browse documents, Doc files, eBooks and text files with TealDoc, the enhanced doc reader. Extensive display and customization options; TealDoc is unmatched in features and usability.

TEALDIET (<http://www.tealpoint.com/softdiet.htm>)

Shape up your life with TealDiet, the diet, exercise, and personal tracking application for mobile devices. Lose weight, build more muscle, and live healthier with TealDiet.

TEALECHO (<http://www.tealpoint.com/softecho.htm>)

Improve your Graffiti text input speed and accuracy, seeing what you write with TealEcho digital "ink". No more writing blind!

TEALGLANCE (<http://www.tealpoint.com/softglnc.htm>)

See the time, date, upcoming appointments and todo items at power-up with TealGlance. The TealGlance pop-up utility and key guard comes up when you power up, letting you see your day "at a glance."

TEALINFO (<http://www.tealpoint.com/softinfo.htm>)

Lookup postal rates, area codes, tip tables, schedules, airports, and info from hundreds of free TealInfo databases. Create you own mini-apps; a handheld reference library.

TEALLAUNCH (<http://www.tealpoint.com/softlnch.htm>)

Launch applications instantly with the TealLaunch pop-up launcher and button/stroke-mapping utility. Map applications to button presses and pen swipes so you can get to your apps quickly.

TEALLOCK (<http://www.tealpoint.com/softlock.htm>)

Secure and protect your handheld with TealLock, the automatic locking program with encryption and card support. TealLock has unmatched features and customization options for personal or corporate use.

TEALMAGNIFY (<http://www.tealpoint.com/softlens.htm>)

Save your eyesight with TealMagnify, an ever-ready magnifying glass that works with most any program. TealMagnify lets you enlarge the screen for those times the text is too small to read.

TEALMASTER (<http://www.tealpoint.com/softmstr.htm>)

Replace Hackmaster with TealMaster, the supercharged 100%-compatible system extensions manager. TealMaster adds enhanced stability, configuration and diagnostic features and PalmOS 5.0 hack emulation.

TEALMEAL (<http://www.tealpoint.com/softmeal.htm>)

Save and recall your favorite restaurants with TealMeal, the personal restaurant database. With TealMeal's handy sorting and selection options, never ask "where to eat" again.

TEALMEMBRAIN (<http://www.tealpoint.com/softmemb.htm>)

Stop crashes and monitor your memory use with TealMemBrain, the application stack stabilizer. TealMemBrain boosts your stack space on OS3 and OS4 handhelds, eliminating the major cause of system instability.

TEALMOVER (<http://www.tealpoint.com/softmovr.htm>)

Beam, delete, rename, and copy files with TealMover, the file management utility for SD/CF/MS cards. TealMover lets you see, move, modify, hex edit, and delete individual files.

TEALMOVIE (<http://www.tealpoint.com/softmovi.htm>)

Play and convert high-quality video and synchronized sound with the TealMovie multimedia system. TealMovie includes a handheld audio/movie player and a Windows AVI/MPEG/Quicktime converter program.

TEALNOTES (<http://www.tealpoint.com/softnote.htm>)

Insert freehand graphics anywhere with TealNotes "sticky notes" for Palm OS. TealNotes can be inserted into memos, to-do lists, address book entries--almost anywhere you currently have editable text.

TEALPAINT (<http://www.tealpoint.com/softpnt.htm>)

Paint, sketch, or draw with TealPaint, the all-in-one mobile graphics paint program and photo editor. Highlights include 25 tools, 32 patterns, 49 brushes, zoom, hires, layers, multi-undo, and JPEG/GIF/BMP support.

TEALPHONE (<http://www.tealpoint.com/softphon.htm>)

Supercharge the address book with TealPhone, the contacts replacement with superior interface and options. Highlights include enhanced display, search, phone-dialing, groups, and linking.

TEALPRINT (<http://www.tealpoint.com/softprnt.htm>)

Print text and graphics to IR, serial, and Windows printers with TealPrint. With numerous connection options, TealPrint, is the all-in-one text and graphic printing solution.

TEALSAFE (<http://www.tealpoint.com/softsafe.htm>)

Store your passwords, credit cards, PIN numbers, and bank accounts in the TealSafe data wallet. With maximum security and encryption, TealSafe is a must for features and security.

TEALSCRIPT (<http://www.tealpoint.com/softscrp.htm>)

Replace or restore Graffiti with TealScript, the text recognition system you can customize. Unlike other systems, you can make or change your own strokes for better speed and accuracy.

TEALTRACKER (<http://www.tealpoint.com/softtrac.htm>)

Track time and expenses with a fast, easy to use interface that requires minimal effort. Generate reports and export data to a spreadsheet. TealTracker is your personal time clock.

TEALTOOLS (<http://www.tealpoint.com/softtool.htm>)

Improve productivity with TealTools pop-up Palm Desk Accessories. TealTools includes a popup calculator, clock/stopwatch, preferences panel, editing panel, memopad, and a file/backup manager.

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