

Personal Timekeeping
Automation Software



USER GUIDE

Version 1.03

TaskCapture™ Software Users Guide

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Important Notices

Note to Unregistered and Trial Software Users

- ❑ CaptureWorks, Inc. grants trial software use of TaskCapture™ for an evaluation period without charge, after which it may be purchased or discarded.
- ❑ Software use permissions and restrictions are governed by the accompanying software license agreement.

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Changes

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CaptureWorks, Inc. reserves the right to make changes in the product design, functionality and pricing without reservation and without notification to its users.

TaskCapture™ Software Users Guide

CHAPTER 1

Welcome To TaskCapture™ for Windows!

Do you need to account for your time and do you (or your manager) often say “Where did my time go?” If you do, then TaskCapture is for you! TaskCapture™ software provides a highly useful, effective and easy way to capture, store and report your time and activities, and associate them with projects.

TaskCapture is *personal timekeeping* software with unique features to help those who make frequent use of a computer to produce work and who also need to log calls, meetings and other such common business tasks. For work at the computer, TaskCapture contains innovative automation to track your time in software documents. You can also easily log calls and other “away from the computer” tasks.

If you charge fees for your professional time, all the “little” or “quick” adjustments you do in software documents all day long will now be captured, organized and conveniently reported back to you. Also, the ever present TaskCapture toolbar on your desktop is ready to accept ad-hoc time and activity recording.

Because the time collection process is automated and immediate, you are assured of having a much more complete record of how you used your time. On your own, you will discover the many useful benefits of TaskCapture for you at work and even managing your personal time.

If you are interested in workgroup timekeeping, please visit our website to learn about [JobCapture](#).

How Does TaskCapture™ Work?

- ❑ Overall, TaskCapture™ records and reports back to you how you spent your time accomplishing tasks. TaskCapture is a simplified form of an enterprise software product, JobCapture™, which has been available and evolved over many years.
- ❑ TaskCapture employs patent-pending technology to help you record your time with less effort. If you are working in one or more of the many software applications (see list in File>Preferences), TaskCapture™ will automatically time your session(s) for you. When you close your document, a dialogue will pop-up where you will see your exact working time.
- ❑ At the time of document closing, you can assign a completed task to a client/contact and a project name. TaskCapture retains the client and project information on previously opened documents, and therefore speeds time capture even more.
- ❑ At any time, you can view summaries of your time and activities, print a timesheet, and export all or a subset of the data to Excel™, Word™ or other programs using the .TXT and .CSV export formats.
- ❑ If you use Microsoft Outlook™, you can elect to immediately and automatically send a summary of your time directly into your Outlook calendar. When you access Outlook, you will see up-to-to moment summaries of your recorded activities.

What's New in TaskCapture 1.03

- ❑ Additional commercial software applications are now tracked. See File>Preferences in the TaskCapture Desktop Toolbar. (Contact support@captureworks.com if you want an application to be tracked that is not currently supported).
- ❑ Export all or a subset of your data to Excel™, Word™ or other programs using the .TXT and .CSV export formats.

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- ❑ View your time in hours and minutes (HH:MM) format or in decimals-of-one-hour (hundredths of an hour).
- ❑ Quickly limit your TaskViewer activity views to one client using the Client drop-down dialogue. The accompanying text search field will now only search the Description, Task and all other fields, except the Client field.
- ❑ Changing your hourly rates will now cause the TaskViewer to recalculate your time histories for either updating or rate-changing (what-if) scenarios.

TaskCapture Benefit Summary

- ❑ For tasks you perform at or away from the computer, TaskCapture™ provides a combination of timekeeping tools to help you stay on top of how much time you expend on tasks and projects.
- ❑ If you do a lot of work at the computer, TaskCapture™ offers the very best in automated timekeeping. While you are working at your computer, TaskCapture™ automatically and transparently counts your time spent working in one or more documents.
- ❑ TaskCapture is smart about how it keeps time, so no matter how many documents you have open or whether you walk away for lunch or a meeting, the precise time worked on each document is captured.
- ❑ The time you spend on meetings, on the telephone, doing research and other common everyday tasks can be recorded by you very quickly. It will be organized along with the automated timer data and give you a greater and more accurate view into how you actually spend your time.
- ❑ TaskCapture can automatically send your captured activities into Microsoft Outlook™, so you can see what you've completed versus what you planned for the day. This is very convenient for those who publish time reports from Outlook.
- ❑ You can print out or export a concise timesheet with your time and rate tallies.

System Requirements

- ❑ Microsoft Windows™ 98, NT, 2000, XP
- ❑ Microsoft Internet Explorer 4.1+
- ❑ Minimum 2Mb for storing the data that will be collected.

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CHAPTER 2

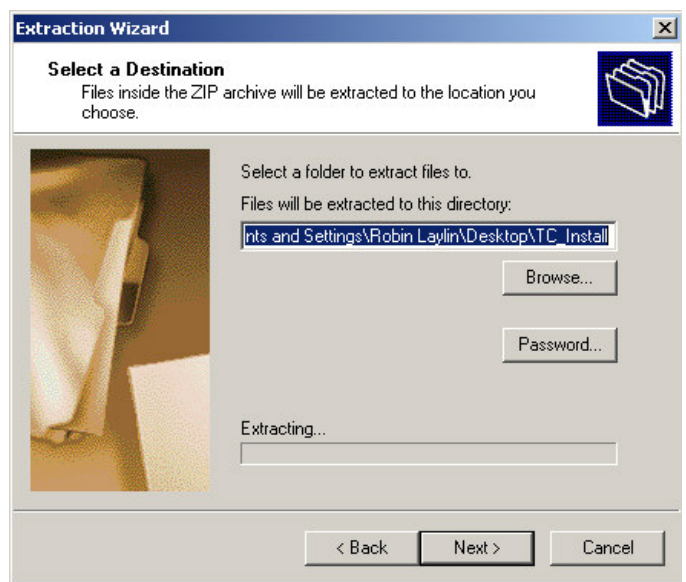
Installing TaskCapture

TaskCapture is shipped to you in compact form to speed the download time. After downloading TaskCapture, your next steps are to decompress the file, run the installer program and launch TaskCapture.

1. Right-click the **TC_Install.zip** folder, and choose the Extract option.

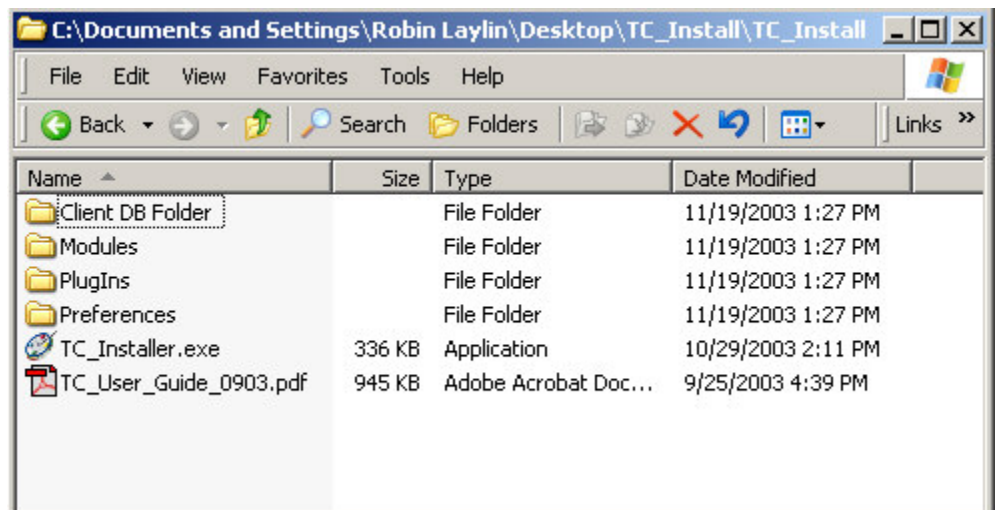


2. Depending on your computer operating system, you may be guided by an extract wizard, or you will be prompted to choose a location to place the files after they have been extracted. In either case, choose to extract to either your Desktop or to another folder location of your choice.



3. The extract program will complete its task. Now go to the folder location (i.e., the Desktop) to see the extracted file.
4. Double-click the **TC_Install** folder to view the contents.

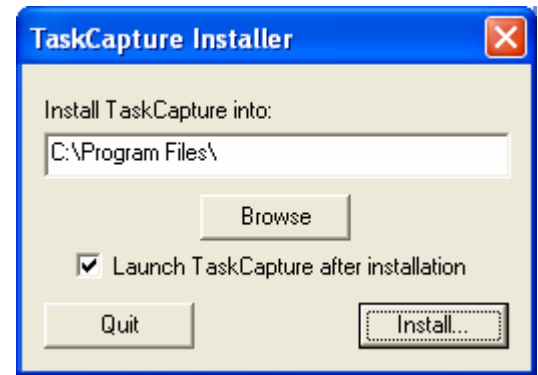
5. Double-click the file **TC_Installer.exe** inside of the TC_Install folder. By default, TaskCapture will be installed to the "C:\Programs" location. You may choose an alternate location if you wish.



6. Note that the TaskCapture User Guide (this guide) is also located here.

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7. By default, the Launch TaskCapture after installation checkbox is selected to start TaskCapture immediately.
8. Click **Install** to complete the installation

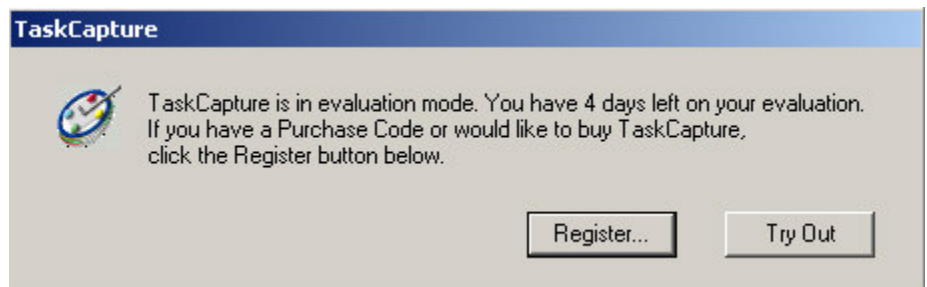


Installing TaskCapture Over Previous Versions

If a previous installation of TaskCapture is detected you will be asked if you want to overwrite your preferences files. Clicking YES will cause all of your previous settings and your data to be deleted. This is not reversible through TaskCapture.

Launching TaskCapture For The First Time

When you launch TaskCapture for the first time, or at any time during the software evaluation period, you will see the dialog at right.

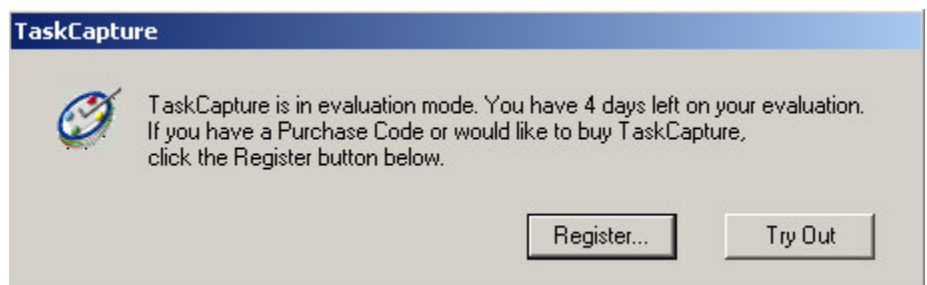


Using TaskCapture During The Evaluation Period.

- Select the Try Out button if you want to evaluate TaskCapture for up to 10 days.
- Each time TaskCapture is launched during the evaluation period, you will see this dialogue and the number of days remaining for the evaluation period. Continue to select Try Out button during the evaluation period until you are ready to make your purchase and register your software.

Using QuickPurchase to Buy and Register TaskCapture.

- Click the **Register** button when you are ready to make your purchase.
- Clicking **Register** will cause the CaptureWorks, Inc., SSL Secure Quick Purchase dialogue to appear, making it convenient to buy TaskCapture from within the software.



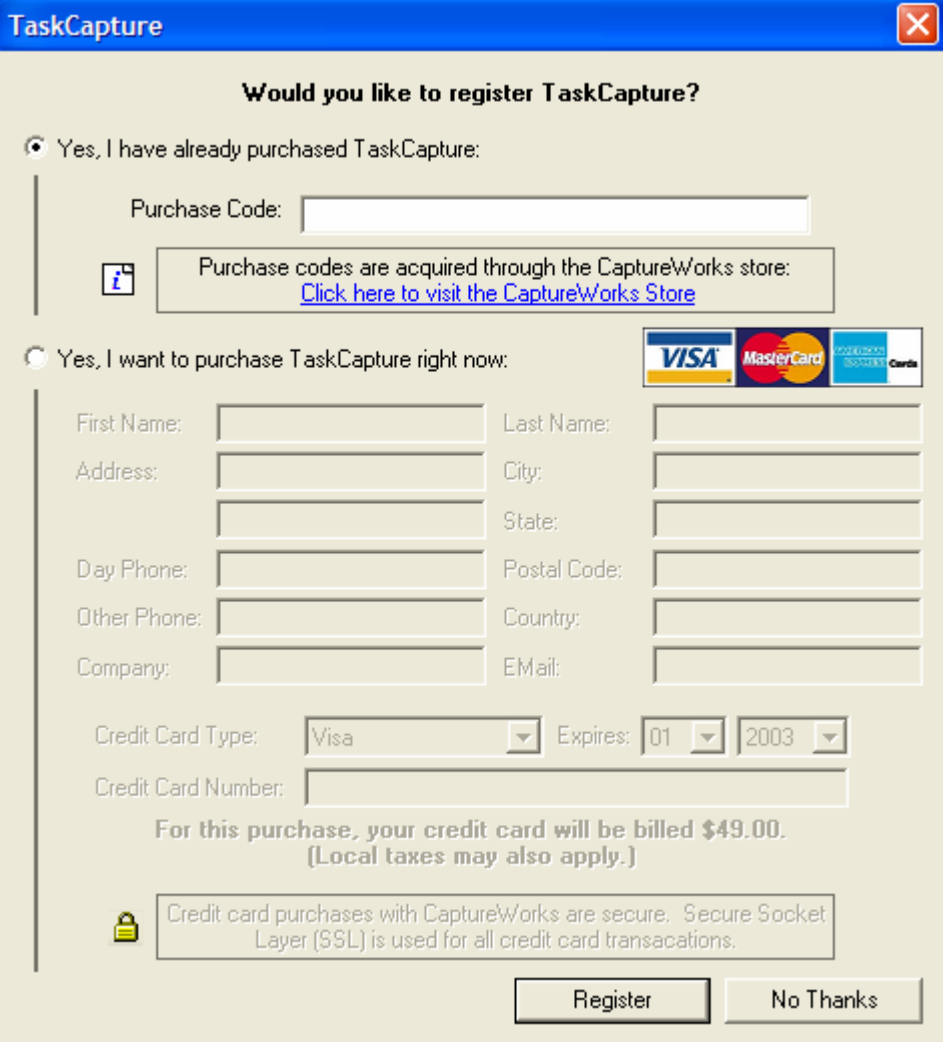
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IMPORTANT NOTE: you must have an active internet connection in order to use this method to buy TaskCapture. Please start your Internet connection before proceeding with QuickPurchase. If you do not or cannot obtain an Internet connection, you will be prompted to contact CaptureWorks by phone to complete your purchase.

Use the lower portion of this dialog to Purchase TaskCapture online.

If you have already purchased TaskCapture by another method, such as over the phone, enter your Purchase Code into the top portion of the dialog and click **OK**.

If you experience any difficulties with the registration process, please e-mail CaptureWorks at support@captureworks.com



The image shows a Windows-style dialog box titled "TaskCapture" with a blue header bar and a red close button in the top right corner. The main content area is titled "Would you like to register TaskCapture?". There are two radio button options. The first option, "Yes, I have already purchased TaskCapture:", is selected. Below it is a text field for "Purchase Code:". To the right of this field is a small information icon (i) and a text box that says "Purchase codes are acquired through the CaptureWorks store: [Click here to visit the CaptureWorks Store](#)". The second option, "Yes, I want to purchase TaskCapture right now:", is unselected. To the right of this option are logos for VISA, MasterCard, and American Express. Below the second option is a form with several text fields: "First Name:", "Last Name:", "Address:", "City:", "State:", "Day Phone:", "Postal Code:", "Other Phone:", "Country:", "Company:", and "E-Mail:". Below these fields are "Credit Card Type:" (a dropdown menu showing "Visa"), "Expires:" (two dropdown menus showing "01" and "2003"), and "Credit Card Number:". Below the credit card fields is a bold statement: "For this purchase, your credit card will be billed \$49.00. (Local taxes may also apply.)". Below this statement is a small padlock icon and a text box that says "Credit card purchases with CaptureWorks are secure. Secure Socket Layer (SSL) is used for all credit card transactions." At the bottom right of the dialog are two buttons: "Register" and "No Thanks".

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Uninstalling TaskCapture

You can use the Windows Add/Remove Programs feature under the Windows **START** menu, in the **Control Panel**, or you can use the uninstaller provided with TaskCapture. The TaskCapture uninstaller is located in the Start, Programs list, under TaskCapture folder.

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CHAPTER 3

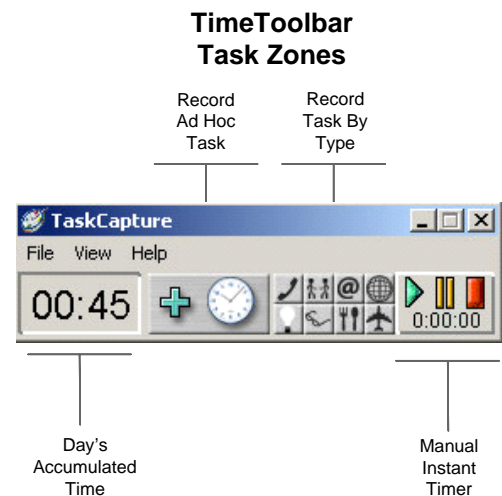
Introducing the TaskCapture Desktop Toolbar

The Toolbar is the TaskCapture application, and you will use it for all your automatic and manual timekeeping, as well as reporting and configuration.

TaskCapture™ automatically captures your time spent in software documents, and also records ad-hoc activities such as time spent on research/thought time, meetings, phone calls, business meals, travel, etc. The compact TaskCapture Toolbar automatically starts when you turn on your computer and, when running, is ready to time or accept your completed tasks. The toolbar is always present on your desktop. All these functions are outlined in this and following chapters. After you review the basic functions in this chapter, you can follow [the guided tour](#) in chapter 5.

TaskCapture Toolbar Layout

For ease-of-use the TaskCapture Toolbar is organized into zones for activity collection, stopwatch functions, and reporting back accumulated time to you, as shown to the right. This toolbar is always present on your desktop.



Day's Gross Time:

The hours and minutes you see here is your accumulated time for the day. It resets to zero at the start of each new day.

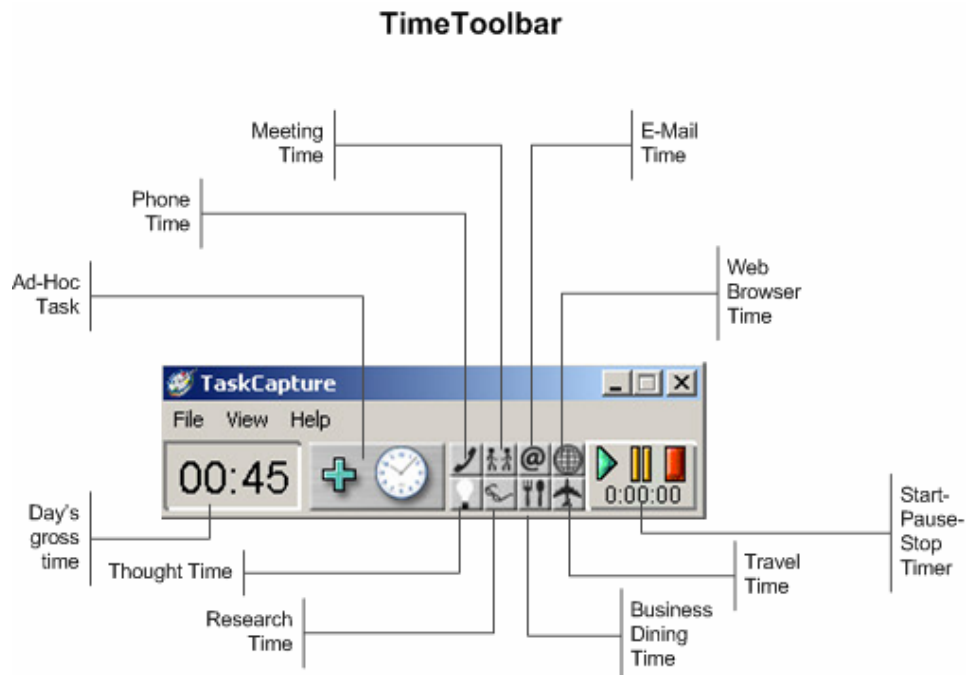
Record Ad-Hoc Task:

If you are assigned a quick task which is not covered by one of the task types, such as an errand, use the Ad-Hoc Task button. Think of its use as a miscellaneous catch-all.

Record Task by Type:

Place your mouse pointer over each symbol to see button definitions. Click the appropriate task symbol to record a task by type. Using these buttons organizes your activity reporting. Use them for your phone calls, meetings, doing research on the web, or if you need to log your thinking time, etc.

The Manual Instant Timer:



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Use the start, pause and stop buttons to time an event, such as a phone call, an impromptu meeting in your office, or just as you are about to leave to a meeting. When you come back, click the stop button and assign the time to a project.

Introducing the Job Jacket Dialogue

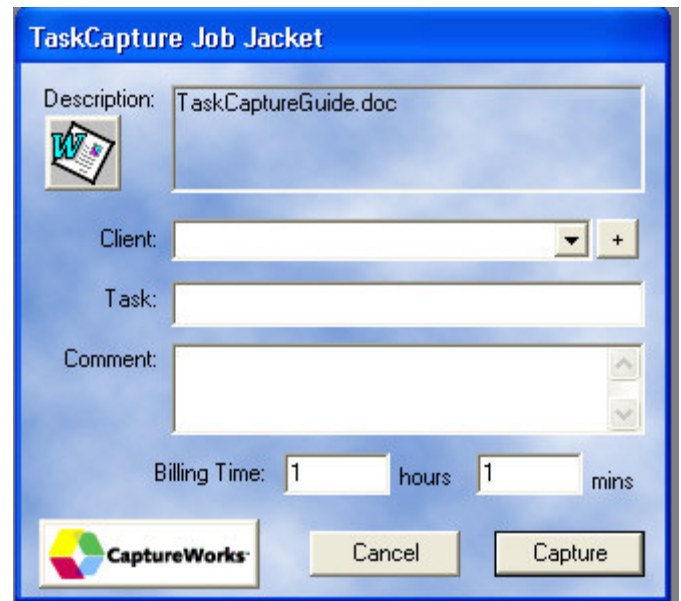
The TaskCapture Job Jacket records your tasks and times, and appears in both the automatic timing mode (for documents) and in the manual timing mode (for all the Toolbar functions described later on in this Chapter).

The Job Jacket in Auto-Timing Mode

As soon as TaskCapture is installed, you can start recording the time you spend in documents. There is no limit to the number of simultaneously open applications and documents TaskCapture can simultaneously record. While you are working in many popular business software application documents (see the list in **File>Preferences** or get an up-to-date listing at <http://www.captureworks.com>), TaskCapture will automatically count your time and tell you how much time you used upon closing the document.

The Job Jacket in Manual Timing Mode

Similarly, the same Job Jacket will pop-up when you manually enter in calls, meetings, ad-hoc entries, etc. from the Time Toolbar. This ensures that all of your information is collected in the same manner to help keep your time and accomplishments organized.

The 'TaskCapture Job Jacket' dialog box has a blue title bar. It contains a 'Description' field with a document icon and the text 'TaskCaptureGuide.doc'. Below this is a 'Client' dropdown menu with a '+' button to its right. A 'Task' text field follows. Then is a 'Comment' text area with up and down arrow buttons. At the bottom, there is a 'Billing Time' section with two input boxes, both containing the number '1', followed by the labels 'hours' and 'mins'. At the very bottom are the 'CaptureWorks' logo, a 'Cancel' button, and a 'Capture' button.

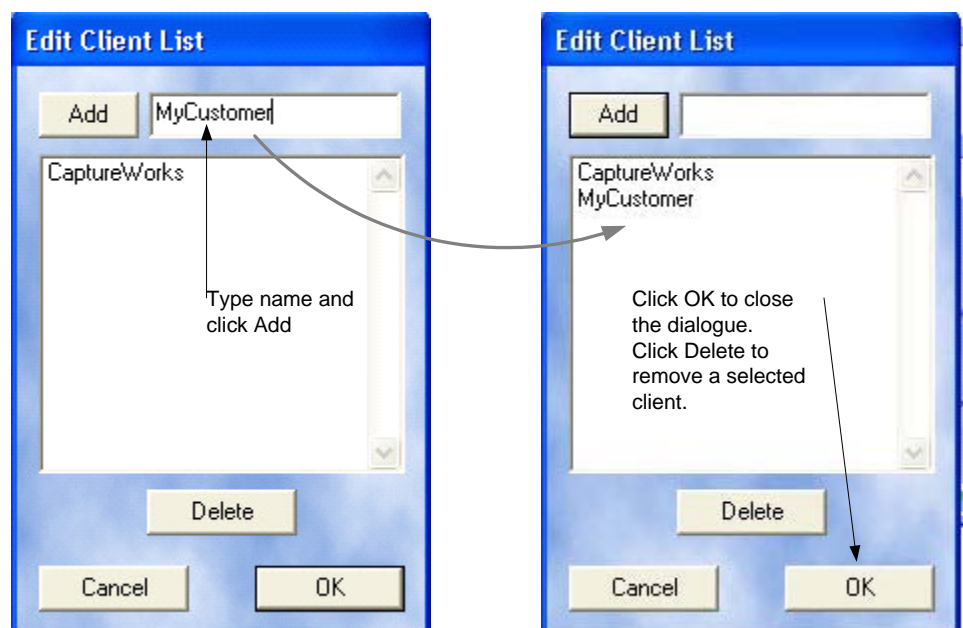
Adding Clients

Anytime a Job Jacket is open, you can add a client (or a customer, sponsor, project) so that, going forward, TaskCapture can capture, organize and report your collected work by client. You can directly type your client name in the JobJacket field and it will appear in the list from then on.

To add your clients all at once, simply click the + (plus) sign. Once you have added clients by pressing the + button top the right of the Client field, it will appear in the Job Jacket Client list.

Deleting Clients

Adding a Client to the Client List

Two side-by-side screenshots of the 'Edit Client List' dialog box. The left screenshot shows an 'Add' button, a text field containing 'MyCustomer', and a list box containing 'CaptureWorks' and 'MyCustomer'. An arrow points from the text field to the list box with the text 'Type name and click Add'. At the bottom are 'Delete', 'Cancel', and 'OK' buttons. The right screenshot shows the same dialog box but with the text field empty. An arrow points from the 'OK' button to the text 'Click OK to close the dialogue. Click Delete to remove a selected client.'.

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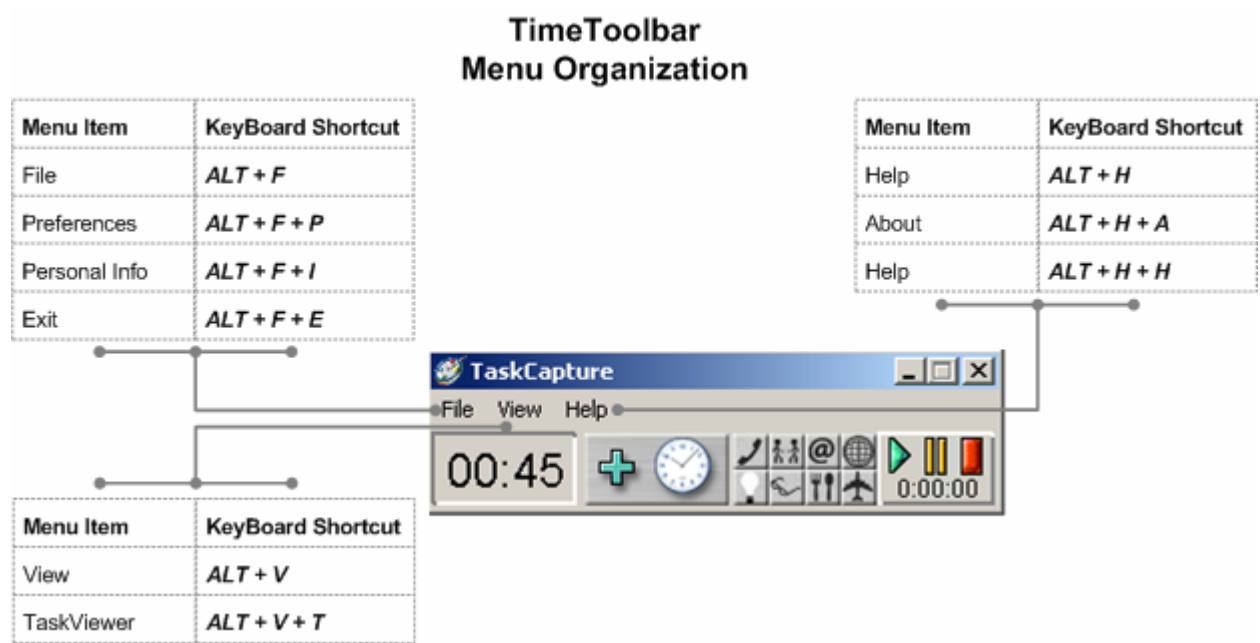
You **can delete any client from the list.** 🚫* This **hides** the time records associated with this client, so think twice before you delete!

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CHAPTER 4

Configuring TaskCapture™

The TaskCapture Toolbar on your desktop is also where you can view and modify TaskCapture’s working parameters. Below shows you the three menu items File, View, and Help, and how you can access them with either your mouse or using shortcuts with your keyboard.



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Adding Your Personal Information

Select (or use the ALT+F+I keyboard shortcut)

File>Personal Info, and enter your contact information in the blank fields. This information will appear on your time reports. When you are finished, click OK.



A dialog box titled "Personal Info" with a blue header and a close button (X) in the top right corner. It contains several text input fields for personal information: Name (placeholder: Your Name), Company (placeholder: Your Company), Address (placeholder: Your Address), City (placeholder: Your City), State (dropdown menu showing NJ), ZIP (placeholder: 07040), Phone (placeholder: 973-763-9494), Fax (placeholder: 973-763-9988), and email (placeholder: me@mail.com). At the bottom left is the CaptureWorks logo, and at the bottom right are "Cancel" and "OK" buttons.

Viewing/Modifying Your TaskCapture™ Preferences

To view and optionally make changes to TaskCapture's default configuration, go to **File>Preferences** to view the dialogue, at right.

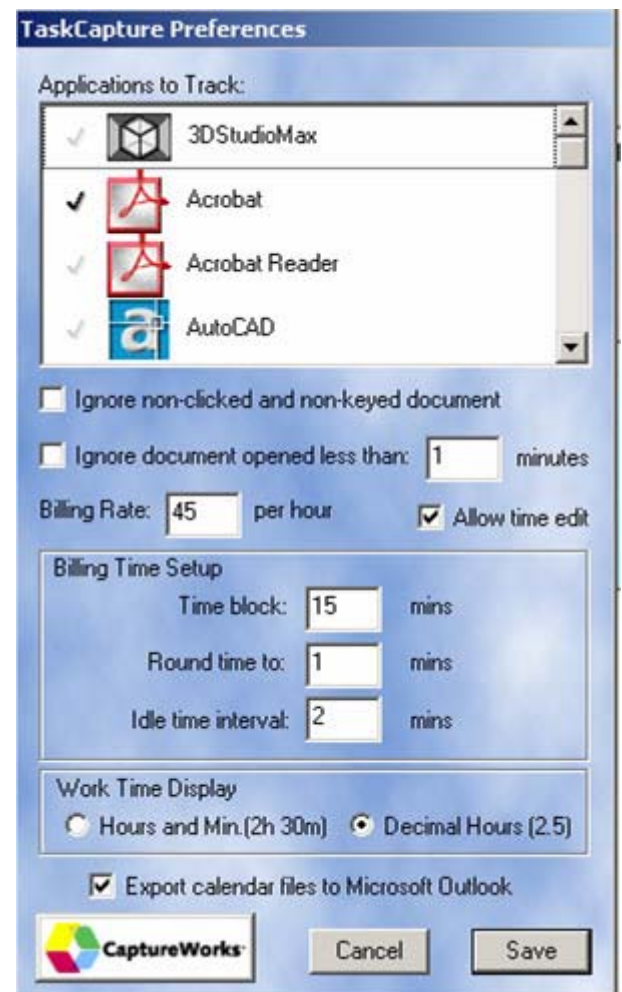
Application and Document Tracking

This is a listing of software applications and the documents you create in them that TaskCapture will automatically track time. Use the scroll bar on the right-side of the dialogue to scroll through the list of currently supported applications and make sure to check-mark the applications that you want to track. Otherwise, TaskCapture will not track time for them.

If you need to track document activity for a software application that is not listed in your tracked applications list, please e-mail: support@captureworks.com and paste the URL (web page) of the company software and version you are interested in tracking.

Ignore Non-Clicked/Non-Keyed Document Option

If you do not want to record a time session for documents which were quickly viewed and you don't want to log any time for the activity, click this check box on. If this is not selected and you have a document open *for less* than one minute,



A dialog box titled "TaskCapture Preferences" with a blue header. It contains several sections: "Applications to Track:" with a list of applications (3DStudioMax, Acrobat, Acrobat Reader, AutoCAD) each with a checked checkbox and a small icon; "Ignore non-clicked and non-keyed document" with an unchecked checkbox; "Ignore document opened less than:" with a dropdown menu showing 1 minutes; "Billing Rate:" with a dropdown menu showing 45 per hour and a checked "Allow time edit" checkbox; "Billing Time Setup" with three sub-sections: "Time block:" with a dropdown menu showing 15 mins, "Round time to:" with a dropdown menu showing 1 mins, and "Idle time interval:" with a dropdown menu showing 2 mins; "Work Time Display" with two radio buttons: "Hours and Min.(2h 30m)" and "Decimal Hours (2.5)"; and "Export calendar files to Microsoft Outlook" with a checked checkbox. At the bottom left is the CaptureWorks logo, and at the bottom right are "Cancel" and "Save" buttons.

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TaskCapture will count your time as one minute in the automatic job jacket pop-up.

Ignore Documents Opened Less Than [n] Minutes Option

If you do not want to record a time session for documents which were opened and closed for an amount of time in minutes you define here, click the check box on and put in the number of minutes.

Billing Rate Option

Put an hourly rate here to have TaskCapture calculate the billable time for your completed project/task work. You can change your rate any time and TaskCapture will retroactively recalculate your times based on your new rate.

You can view your billable-time tallies anytime by going to the TaskViewer in the View menu as described later in this guide. The rate calculation is a straight line calculation for manual time entries, and, for automated time capture the calculation is subject to your time rounding rules, unless you changed the time manually. Refer to Billing Time Setup, below.

Allow Time Edit Option

If you want to be able to override the exact (and possibly rounded time-see Billing Time Setup) time that TaskCapture records for your time spent in application documents, select the check box to enable time editing at the time of Job Jacket pop-up.

Billing Time Setup

The following options allow you to round the exact time up or down, depending on your requirements.

The **Time Block** and **Round Time** fields apply only to automated document timing, and they function as a pair to calculate rounded time. The following serve as examples to help you determine the effect of your inputs.

Exact Time	Time Block (round)	Time Round (snap to nearest)	Result
14 min, 12 secs.	15	1	15 minutes
16 min.	15	1	15 minutes
17 min.	15	2	15 minutes
5 min.	10	1	10 minutes
0 min. 30 secs.	10	1	1 minute

Idle Time Interval

For each automatically timed document, TaskCapture will immediately start counting time upon opening the named software document(s). By default, if you do not work in a document for five (5) consecutive minutes, the timer for the idle document will automatically pause until it senses that you are working again on the document. If you want to change the idle time to another minute value, enter it here.

Work Time Display

Choose either Hours and Minutes or Decimals of an Hour for calculating, displaying and reporting your time in the TaskViewer. You may switch back and forth at any time, depending on your requirements. If you plan to export your records in .CSV format, choosing decimals of an hour may prove more convenient.

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See your TaskCapture Files to Microsoft Outlook™

If you use Microsoft's Outlook calendar as your scheduler for your meetings and other daily activities, TaskCapture can place a copy of your complete tasks to your Outlook calendar. How they appear depends on Outlook appearance options you may have selected. By default, your tasks will appear as slightly grayed-out. In Outlook, grayed-out text means that a task is completed. See the FAQ's section later on in this guide for more information.

Personal Folders - Outlook Today

Tuesday, November 18, 2003

Calendar

Today

9:54 AM - 10:09 AM	proposal:Quark Business Proposal.ppt (Quark)
11:31 AM - 1:31 PM	update manual prep:Documentation prep: gather bitmaps (Our Company)
12:29 PM - 1:29 PM	<u>PC connection to CW products Db:Ideas: PointCapture (Our Company)</u>
12:43 PM - 1:28 PM	Business strategy:Meeting: Peter (Our Company)
12:46 PM - 1:31 PM	Test new TC:Research: Product testing (Our Company)
1:20 PM - 1:30 PM	Software packaging question:Phone Call: support (Publicis)
3:07 PM - 4:37 PM	dining:Dining: company luncheon (Our Company)
3:34 PM - 4:35 PM	Documentation:PointCaptureUGuide.doc (Business Financial Services)
4:06 PM - 4:36 PM	Management Meeting:Meeting: Peter (Our Company)
4:26 PM - 4:36 PM	usability:Meeting: Developers (Our Company)
4:27 PM - 4:37 PM	week plans:Phone Call: Laura (Personal Business)

Software packaging question:Phone Call: support - Appointment

File Edit View Insert Format Tools Actions Help

Save and Close Recurrence... Invite Attendees

Link to History Select... Name Select...

Appointment | Scheduling

This appointment occurs in the past.

Subject: Software packaging question:Phone Call: support

Location: Publicis Label: ☐ None

Start time: Tue 11/18/2003 1:20 PM ☐ All day event

End time: Tue 11/18/2003 1:30 PM

☐ Reminder: 0 minutes Show time as: ☒ Busy

Manual Job

Total Time Spent: 0h 10m

Total Billing: 7.50

Contacts... Categories... Private ☐

CHAPTER 5

Take a Guided Tour of TaskCapture™

Automatically Capturing Time Spent In Software Documents

- 1) Start an application, such as Microsoft Word™. Create a document and save it so that it has a document name. TaskCapture requires documents to be named via the save/save as procedure. If you work on the document for at least one minute, save and close the document as you normally do. TaskCapture's Job Jacket will appear with the automatically captured time. As presented earlier on, document timing parameters are defined in File>Preferences.
- 2) You will see the automatically captured time (see Configuring TaskCapture for time rounding options that may be in effect) in the Hours and Minutes boxes. If you have not already added a Client name to the list, add one (or click the + sign to add one), as well as a project/task name. Click the Capture button or press your keyboard Enter key and your time information is saved.
- 3) Now, say you are working on two, three or more documents in different software applications. Start all of them up, start working in them, and *Alt+Tab* back and forth through the documents as you would normally do when you are multi-tasking at your normal hectic pace at work! There are transparent timers starting, pausing, running and stopping according to your configuration preferences.

Remember, for TaskCapture to automatically track your time in documents the document must have a file name. In the background TaskCapture™ is keeping track of your time in each document.

TaskCapture™ will automatically and transparently pause any document timer when a document is idle for the amount of minutes defined in Preferences. See Viewing/Modifying Your TaskCapture™ Preferences for more info.

- 4) If you need to track document activity for one or more software applications that are not listed in your tracked applications list, e-mail support@captureworks.com and paste the URL (web page) of the company software and version you are interested in tracking. In many cases we can oblige free of charge and in a reasonable time frame.

Timing Meetings, Calls, Brainstorms, Lunches, Etc

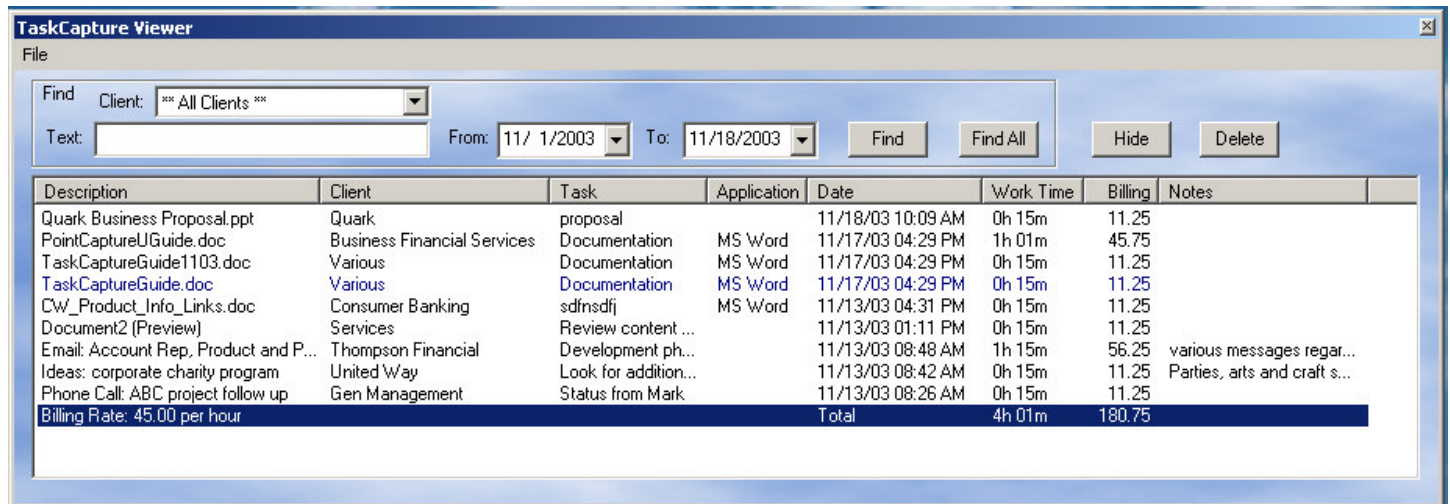
- 5) Next, let's imagine that you need to go to a meeting down the hallway and you want TaskCapture™ to time it so that you have a record of it, who was there, the meeting subject, etc.
- 6) Go to the Time Toolbar (Alt+Tab if you don't see it) and click on the green start-timer arrow and depart for the meeting! Now imagine you've returned from the meeting and click the stop button. The Job Jacket will appear for you to see the elapsed time and enter the meeting information.
- 7) Similarly, you could have gone off to a meeting, (or taken a phone call, etc) and forgot to start the timer. No problem! Just click the appropriate icon on the Time Toolbar and a pop-up will appear where you can indicate how the approximate time spent. Again, you can optionally indicate for what client/contact and project you dedicated your time to.

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Reviewing and Reporting Captured Time

The TaskViewer

The TaskViewer offers a straight-forward, fast and easy means to quickly review and report your time. Access the TaskViewer screen by click **File>TaskViewer**, and the following screen will appear:



The screenshot shows the TaskCapture Viewer window. At the top, there is a 'Find' section with a 'Client' dropdown menu set to '*** All Clients ***', a 'Text' input field, and 'From' and 'To' date pickers set to '11/ 1/2003' and '11/18/2003' respectively. There are 'Find', 'Find All', 'Hide', and 'Delete' buttons. Below this is a table with the following data:

Description	Client	Task	Application	Date	Work Time	Billing	Notes
Quark Business Proposal.ppt	Quark	proposal		11/18/03 10:09 AM	0h 15m	11.25	
PointCaptureUGuide.doc	Business Financial Services	Documentation	MS Word	11/17/03 04:29 PM	1h 01m	45.75	
TaskCaptureGuide1103.doc	Various	Documentation	MS Word	11/17/03 04:29 PM	0h 15m	11.25	
TaskCaptureGuide.doc	Various	Documentation	MS Word	11/17/03 04:29 PM	0h 15m	11.25	
CW_Product_Info_Links.doc	Consumer Banking	sdlnsdj	MS Word	11/13/03 04:31 PM	0h 15m	11.25	
Document2 (Preview)	Services	Review content ...		11/13/03 01:11 PM	0h 15m	11.25	
Email: Account Rep., Product and P...	Thompson Financial	Development ph...		11/13/03 08:48 AM	1h 15m	56.25	various messages regar...
Ideas: corporate charity program	United Way	Look for addition...		11/13/03 08:42 AM	0h 15m	11.25	Parties, arts and craft s...
Phone Call: ABC project follow up	Gen Management	Status from Mark		11/13/03 08:26 AM	0h 15m	11.25	
Billing Rate: 45.00 per hour				Total	4h 01m	180.75	

The TaskViewer contains **sorting** and **filtering** features to allow you to define and refine what you see in the TaskViewer screen as well as on the Timesheet report.

Filtering: The Find section in the top third of the dialogue enables you to perform the following

1. Use the **Find>Client** drop-down to limit your listing to a Client.
2. Use the **Find>Text** field to narrow your search to a Description, Task, Application and Notes fields. Type in your text and click the Find button.
3. Use the **From** and **To** date fields to define the date range of your search. By default, the TaskViewer shows you activities for the current day. Type in your dates and click the Find button.

You may use the foregoing fields together. For example: Client=Our Company, Text =Phone Call, From=MM/DD/YY To: MM/DD/YY

4. The **Find All** button provides you with every record of your time (except for those clients you have deleted).
5. The **Hide** button can be used to temporarily hide one or more lines from your view and your reports. Using the **Hide** button does not delete the record(s). Simply click **FindAll** to restore all the records.
6. Use the **Delete** button to permanently remove one or more entries from TaskCapture.

Sorting:

You can sort your information in the TaskViewer screen by clicking any column.

Print a Timesheet and Task Reports

Once you have defined what you want to report in the TaskViewer (see the foregoing paragraphs), point your cursor to File and chose Tasks or Timesheet. The pre-formatted report will reflect only what you are seeing in the TaskViewer screen. Use the Filter and Sort functions outlined above to alter your report. If you own Adobe Acrobat, you will be able to create a PDF file.

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Export Your Data

TaskCapture makes it easy for you to copy your data to another application by using the Export function in the TaskViewer File menu. You can export all or a subset of your data by using the sorting and filtering features described above. You can export your data in formats suitable for word processing software (.txt) or spreadsheet software (.CSV).

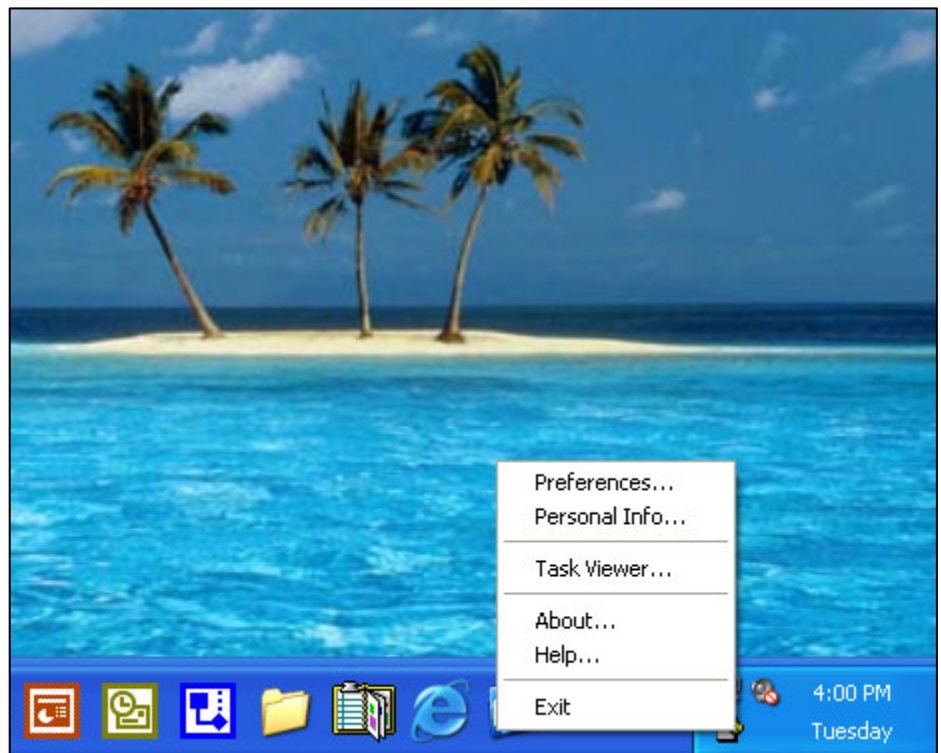
View Completed Activities in Outlook™

TaskCapture™ can send your completed time information directly into the Outlook calendar. This is convenient for those who use Outlook as a central repository of planned meetings, calls, and tasks.

TaskCapture™ is sending into Outlook what you have accomplished, and therefore offers you the opportunity to see what you planned and what you actually did.

Quick Access to TaskCapture Functions via the System Tray

TaskCapture menu items can be quickly accessed via the Windows System Tray, located at the bottom right corner of your screen. Clicking the TaskCapture icon will cause the menu shown at right to appear, allowing you to gain quick access to the menu items.



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CHAPTER 6

TaskCapture Product Support

Your Purchase Code

When you purchase your TaskCapture software license and obtain your purchase code, write it down in here so that you can refer to it later on. **TaskCapture Purchase Code:** _____

Limited Complimentary Technical Support

- ❑ Sixty consecutive (60) days of complimentary technical support assistance from your purchase date for TaskCapture software from CaptureWorks, Inc. (OEM product is excluded). To receive online, phone or any other form of offered technical support (not including this guide), you will need to supply your serial number and the name you used when purchasing the software, and your full contact information so please keep the information in a safe place for ready reference.
- ❑ Submit all support requests through the CaptureWorks online support request page at <http://www.captureworks.com/>, including the information requirements discussed immediately above. Missing or incomplete information will result in either no response or a delayed response.

Fee Based Technical Support

- ❑ Fast support is available by telephone at 973-763-9494 for which you will be charged \$25 per 10 minutes of phone call time. To make the most of your time on the phone with us, please have your credit card ready when you call, as well as a specific description of your issues. We want to help resolve problems that may arise, but we cannot provide free support
- ❑ If at the time we aware that your phone-in problem is a bug, you will not be charged and we will update customers via the CaptureWorks support page, and, if deemed necessary, also by e-mail.
- ❑ If after-the-fact we determine that your phone-in problem is a software bug for which only we are responsible to fix, then we will credit back our charge for taking your call.
- ❑ CaptureWorks, Inc and its employees are not responsible for software operation conflicts or deficiencies resulting from other party software applications or operating system. We will make reasonable efforts to remedy issues which are in our control to correct, but callers will be billed in the event we diagnose the problem source is located in the other party application or operating system.

Reporting problems with TaskCapture

- ❑ CaptureWorks will promptly review your submissions and respond back to you in a reasonable timeframe. Submit your support questions via support@captureworks.com.

Requesting additional applications to automatically track

- ❑ If you need to track document activity for a software application that is not listed in your tracked applications list, please e-mail support@captureworks.com and paste the URL (web page) of the company software and version you are interested in tracking. If you need it right away, you will be quoted a fee for us to accomplish the work on your timetable.

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Software Updates

- ❑ Registered users can obtain software updates at <http://www.captureworks.com>. If you are using unregistered software, you can purchase and register your software and then obtain an update.
- ❑ If we deem it important to notify you of a critical update, we will send permission-based e-mail campaigns to registered users.

FAQ's

1) We already have a timekeeping and project management systems at our company. Why JobCapture or TaskCapture?

- a) Your systems typically require people to manually input all their time and task information. They may be great systems in many aspects, but the lack of automated timekeeping has a number of negative impacts, which in the end result in wasted time and money and inaccurate data.
- b) Ask yourself: what business decisions and actions are based on the data in your current timekeeping and project systems? Many important decisions and they concern your core operations, sales, human resources, accounting, individual and groups performance and so on.
- c) JobCapture and TaskCapture should be understood to be highly important complement to your existing timekeeping systems:
- d) They collect time automatically, ensuring a high degree of accuracy.
- e) They eliminate the never-ending burden placed on you and your co-workers to manually recall what you did, for whom, which project and how much time it took.
- f) TaskCapture and JobCapture yield far more accurate time and activity information to feed your timekeeping and project systems because the information is collected when a task is completed.
- g) Management does not need to continually remind people to input their time.

TaskCapture is apparently not tracking my document. What are the reasons and remedies?

- a) Verify that TaskCapture is running and that you can see the toolbar on your desktop. If it isn't, start it, and make sure that a TaskCapture program shortcut is in your Programs Start Up folder.
- b) Confirm that your document belongs to a supported software application (i.e. Microsoft Word). Your version of TaskCapture contains a list of supported applications which can be see by going to File>Preferences and scrolling through the Applications To Track list.
- c) If your application is listed, then make sure that your document has a filename attached to it that you gave to it. TaskCapture does not track unnamed documents. Save your document and give it a name, which is a good practice under any circumstance.
- d) Check the CaptureWorks website to see if there are software updates which may contain support for your application.
- e) If your application is not listed and you want TaskCapture to track the software documents, please contact CaptureWorks at support@captureworks.com. Your message must identify the software maker and the version you are using. Certain software applications and documents may not be able to be tracked, but generally most can.

Can I change the 'skin' color of the JobJacket?

- a) Yes. You can replace the default skin.bmp file that is located in the TaskCapture System folder. Save any picture as a bitmap (*.BMP) file and place. If you installed TaskCapture with its installation defaults, the folder and file location would be C:\Programs\TaskCapture System

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TaskCapture is not putting my completed tasks into Outlook™

- b) Check to File>Preferences to make sure that you have selected the send-to-Outlook option.
- c) If the option was not selected and you selected it just now, please restart your computer.

My completed tasks in Outlook are not placed in the time slot where TaskCapture shows it as completed. Why?

- Make sure that your computer timing and daylight savings settings are correct. Go to Start>Control Panel and launch the Date, Time Language and Regional Options, and make certain that your time, time zone are correct, and that the Automatically Adjust Clock for Daylight Savings is check on.

Is there a limit on how many documents TaskCapture can simultaneously track?

There is no limit.

What are the system requirements for TaskCapture?

TaskCapture is available today for users of Microsoft Windows™, '95, '98SE, NT, 2000, and XP. An Apple OS X version will become available soon. Memory requirements are comparatively small. For the average user, plan on using about 1-4 megabytes of hard drive space per year for your time data.

What happens to my captured time data if I delete a name from the client list?

You will still be able to see your previously captured time information in the TaskViewer. If your records do not appear in the TaskViewer, it is because they were removed by using the Remove button in the TaskViewer window.

Can I export my data?

CaptureWorks will offer for purchase add-on modules to export TaskCapture data to QuickBooks™, MYOB™ and other applications based on customer feedback.

If your plans are to use TaskCapture on multiple computers, you should be looking at [JobCapture](#), which has robust XML export capability.

What's the difference between TaskCapture and JobCapture?

JobCapture is designed for workgroups or companies that want to track and aggregate individual time information, perform analyses, and export information to other databases and accounting systems.

TaskCapture is a personal timekeeping tool, where your information is not shared in a network or other database.

I bill for my project time, so can I apply a rate in TaskCapture?

Yes, you can apply a flat rate in your profile and TaskCapture will report your billables. JobCapture has more pricing flexibility options if you have variable rates that you charge.

I'm convinced that JobCapture and/or TaskCapture are solid complements to our existing timekeeping systems. I/we need automated timekeeping. What are my next steps and options?

You can deploy TaskCapture for individual timekeeping or JobCapture for your company. We suggest the following road map to determine which works for your situation.

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1. Try TaskCapture to determine if it meets your personal timekeeping requirements. You may elect to buy TaskCapture for yourself and leave it at that. If you are enthusiastic and see that TaskCapture and JobCapture will eliminate the huge waste of time and energy at your company, go to the next step.
2. Discuss TaskCapture with your co-workers and manager(s), and have them try it. Obtain complete background information for both products from our website.
3. Regroup in a week or two and discuss which deployment route makes sense: TaskCapture or JobCapture.
 - a. If TaskCapture, you will obtain the benefits of personal automated timekeeping, but no centralization into a database, or export capability to your existing timekeeping or other systems.
 - b. If JobCapture, you will obtain all the benefits of workgroup or companywide time aggregation, and robust XML based import/export tools. Plus much more.
4. If JobCapture is your recommendation, then meet with your Technology Support (IT) contacts and present your findings and outline the business benefits.
 - a. Have your IT contacts download fully-functioning JobCapture evaluation software, to deploy to a few desktops in one workgroup within or across regional, national or global offices. The point is keep the initial deployment small, focused and controlled at first. Fine-tune how you want to configure JobCapture before moving to a larger deployment. For example, you may want to run JobCapture in invisibility mode in some groups and not others.
 - b. The personal reaction that you got from TaskCapture will likely be mirrored with JobCapture among management, but realize that some people may not be comfortable with the concept of JobCapture's automated and centralized timekeeping functions. You may end up with a mixed deployment of TaskCapture and JobCapture.
 - c. If your management, IT, and accounting people see the immediate and long term benefits JobCapture and/or TaskCapture:
 - i. Buy the number of licenses you need and deploy it.
 - ii. Call us if you have specific concerns or requirements.
 - d. If you need to track a software application that's currently not on our list of tracked applications, please go to our website and fill out a request form, or call us.

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- **End-User Copying:** friends loaning disks to each other, or organizations under reporting the number of software installations they have made.
- **Counterfeiting:** large scale duplication and distribution of illegally copied software.

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Penalties for pirating software are quite extensive. Piracy can expose you and/or your business to serious punishment, ranging from civil penalties to criminal prosecution, fines and even prison.

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