CaseWare® Time™

CaseWare Cloud Integration Guide

For Time™ 2016 and CaseWare Cloud

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CASEWARE

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1. About Time Integration with CaseWare Cloud

Integrate your Time environment with CaseWare Cloud to leverage new features and functionality available with our cloud-based applications. This solution requires minimal setup and eliminates the need to configure, and maintain your own servers at the office.

Time integration with Cloud is an optional feature.

1.1 How it Works

Time integrated with Cloud, allows firms to perform certain Time operations from Cloud such as entering time and expense; setting up clients, staff, and contacts; and generating transaction reports. Because Cloud is optimized for the web, perform these operations from a tablet or smartphone, in addition to your desktop computer. For a detailed list of supported devices and browsers, see the list of:

- Supported browsers
- Supported devices

A connection between Time and Cloud is established to support a process called *merging*, which synchronizes the data between the Time database and the Cloud database ensuring the latest information in your file displays in Time or Cloud.

On an integrated file, your Time data is actively synchronized with the Cloud and you can perform the following operations from Cloud:

- Add and modify Client, Contact, and Staff information.
- Enter Time and Expense and generate basic and detailed reports on the go.

Working Online / Offline

In an integrated environment, when you are in the Time desktop file, you are either working in an **Online** state or an **Offline** state. An icon appears on the lower right corner of the status bar to indicate your state.

- Working **Online** in the Time file establishes a connection with Cloud to send and receive data. The synchronization is a background process that does not affect how you work in the file.
- Working **Offline** in the Time file does not establish a connection with Cloud. In this state, areas of the Time file dependent on Cloud updates are inaccessible.

For details on status, see Time connection status.

Automatic merges and Manual merges

Merging happens automatically in the background when you are working **Online** in the Time file. When you update certain setup areas such as Client, Contact, or Staff information, that data is automatically sent and merged with Cloud to ensure users on Cloud have the latest information available.

A manual merge command is available under **Tools | Merge Time and CaseWare Cloud**, to force a merge with the Cloud server.

Permissions

You must activate **Protection** in Time to integrate with Cloud. Protection enables you to grant rights to users and control who has access to certain areas in the Time file and the Time file itself. When you integrate with Cloud, these rights will be setup for all staff in Cloud. Staff members will have equivalent rights in both Time and Cloud to perform certain operations from either system.

For detailed information on rights in Time and permissions in Cloud, see here.

For more information on Protection, see here.

2. Requirements for Cloud Integration

2.1 Time Requirements

The following are required to integrate Time desktop to CaseWare Cloud:

- Time version 2016
- Protection must be ON in Time file
- Administrator logon credentials for Time 2016

  Note: You cannot use the default "sup" account to perform integration

- Time system requirements

You can view the Time system requirements from our Online Help:

- Workstations, Servers, and Networks
- Files and Microsoft SQL Server

2.2 CaseWare Cloud Requirements

The following are required to integrate Time on the desktop to CaseWare Cloud:

- Administrator logon credentials for Cloud

  Note: No data can be entered or setup performed on the Cloud server prior to or during integration

Note: Your Cloud server can only be integrated with one Time file. If you want to change the Time file that is currently integrated with Cloud, contact CaseWare Support to obtain another clean instance of Cloud.

You can view the list of supported browsers and devices from our Online Help:

- Supported browsers
- Supported devices

3. Preparing for Integration

3.1 Prerequisites on Cloud

CaseWare Cloud

- Ensure you have logged on to CaseWare Cloud using the Admin account and accepted the license agreement.
- Ensure no data was entered into CaseWare Cloud.
- Ensure no custom role or other setup information was added to CaseWare Cloud.

3.2 Before running 'Time on CaseWare Cloud' setup on Time Desktop

The following conditions must be met before you can proceed with the setup.

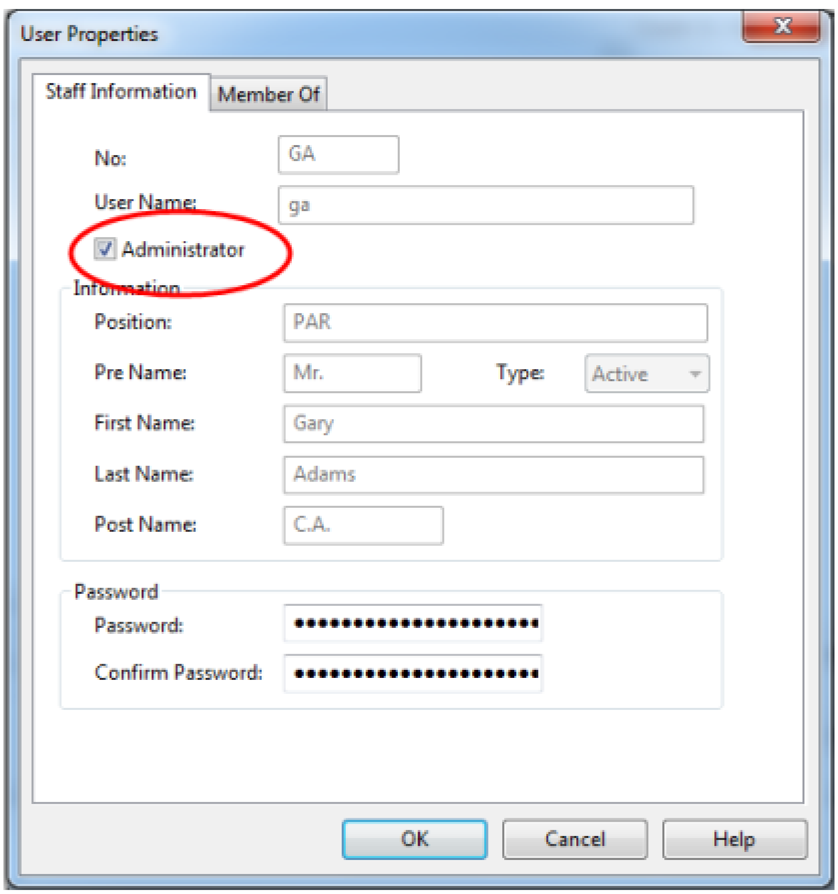
3.2.1 The user processing 'Time on CaseWare Cloud' Setup

- **Cannot be supervisor 'sup'**

  If you are logged on with the supervisor account (sup), you cannot perform the setup.

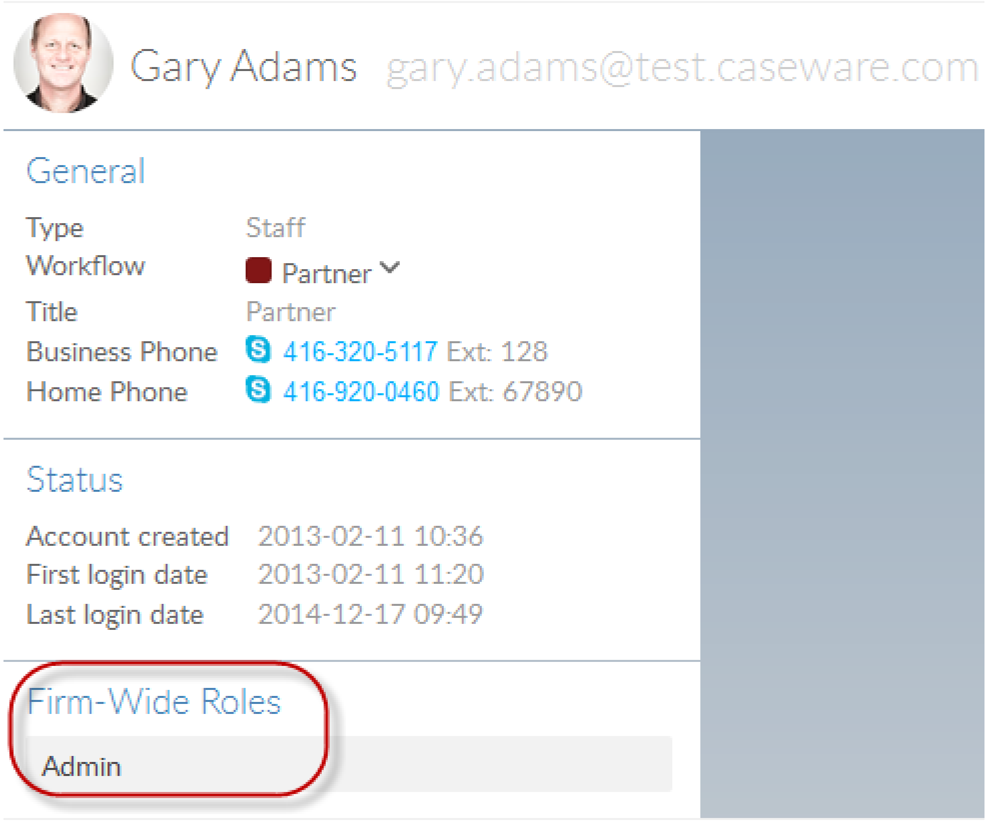
- **Must be an administrator in Time desktop**

  Ensure to log on with an administrator account. You can verify if your account is an administrator by checking your user properties from the Protection Setup dialog.



- **Must have an admin role in CaseWare Cloud**

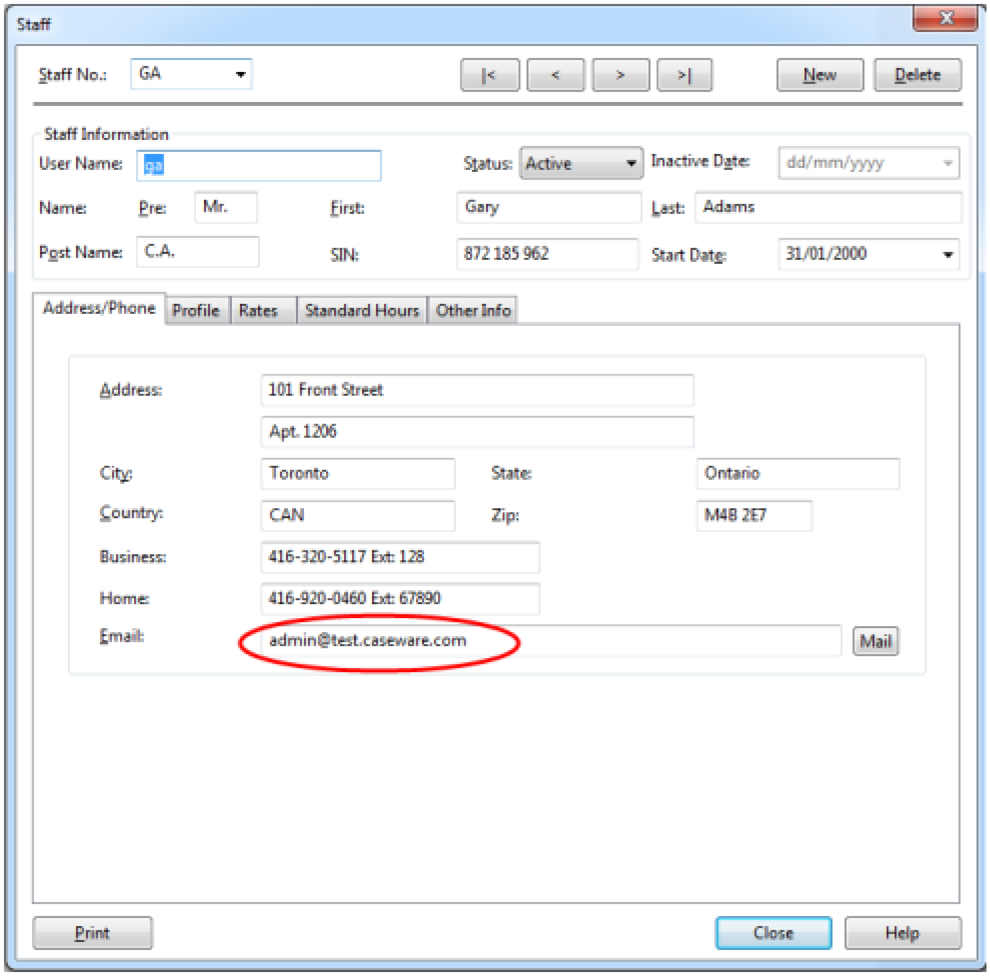
During the setup you will need to enter the administrator's credentials for CaseWare Cloud. You can verify the credentials by checking the user profile from the People app.



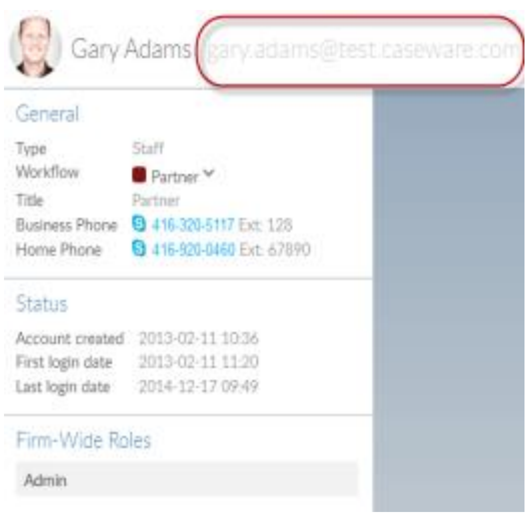
- **Must have email address in Time desktop which matches email address in CaseWare Cloud**

  Ensure the Time Administrator account has the same email address as the Cloud Admin account. Otherwise, change the email address for the Admin account on Cloud to match the Time administrator account.

  - From **Time**, Navigate to **Setup | Staff** and choose a staff member from the Staff No. drop-down list to verify a user's email address.



- From **Cloud**, Navigate to the People app and select a staff member to verify a user's email address. In the example below "**gary.adams@test.caseware.com**" is the same email address used in the Time Administrator account in Time.



3.2.2 Time Desktop Setup

- **Protection must be ON**

Click **Tools | Protection | Turn Protection On** to turn on protection.

For information on Protection, see our Online Help here.

- **Run Diagnostics**

  Click **Tools | Diagnostics** to open the **Diagnostics** dialog. Run the following diagnostic reports for:

  - **Staff** - all staff must have a first name, a last name, and a valid / unique email address:
    - W300 - Staff missing first name
    - W301 - Staff missing last name
    - W304 - Staff duplicate email address with other people type
    - W305 - Staff missing email address
    - E301 - Staff duplicate email address
    - E302 - Invalid email address

    Staff information can be edited in the **Staff Monitor** report.
  - **Contact** - all contacts must have a first name and a last name:
    - W508 - Contact duplicate email address with other people type
    - W509 - Contact missing first name
    - E500 - Contact duplicate email address
    - E501 - Invalid email address
    - C500 - Contact missing last name

    Contact information can be edited in the **Contact Monitor** report.
  - **Client/Group/Contact Company** - all clients, groups, and contact companies must have a name and a valid email address:
    - W55 - Missing name
    - W59 - Client missing email address
    - E51 - Invalid email address

    Client information can be edited in the **Client Monitor** report.

    Group information can be edited in the **Group Monitor** report.

    Contact company information can be edited in the **Contact Companies** dialog.

  Note: We recommend running diagnostic reports for all areas, showing **Warnings**, **Errors**, and **Critical Errors**, and resolving any issues to ensure a successful merge.

- **Company must have a name and valid email address**

  Click **File | Company Profile** to open the Company Profile. Specify a name and email for your firm under the **Address** tab.

3.3 Backup the Time File

We recommend you backup your Time file prior to running the '**Time on CaseWare Cloud Setup**'.

Create the backup file within Time from **Tools | Maintenance | Backup/Restore**.

For information on Backup and Restore, see our Online help here.

4. Setup Integration Wizard

After all requirements and prerequisite conditions are met, you can proceed with the Integration Setup Wizard. No staff can work in Time desktop or Cloud when the integration is processing. The integration can take a few hours to complete.

Note:

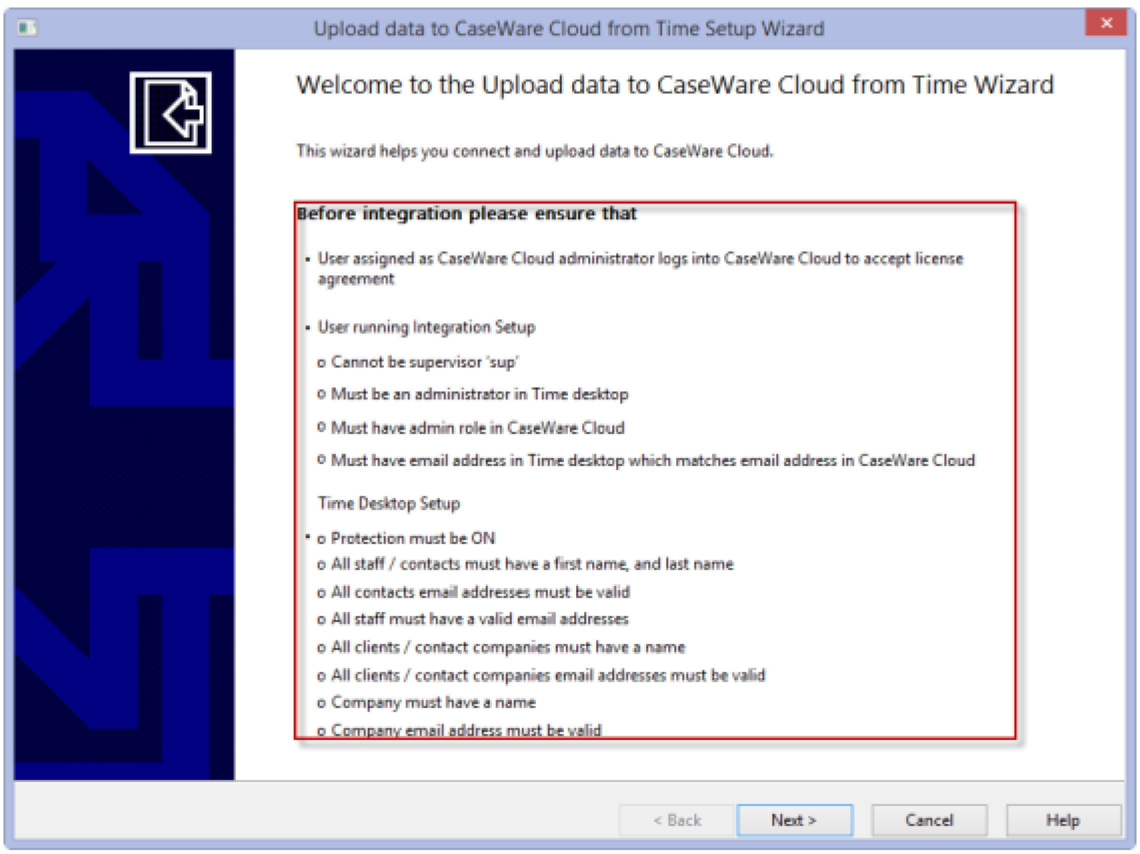
- Integrated Time files cannot be renamed. If you plan to rename a Time file at some point, do so before integrating.
- For more information on integrating a Cloud file into Time, see the CaseWare Cloud Integration Guide.

Procedure

1. Open your Time file and log on using the Time administrator account.

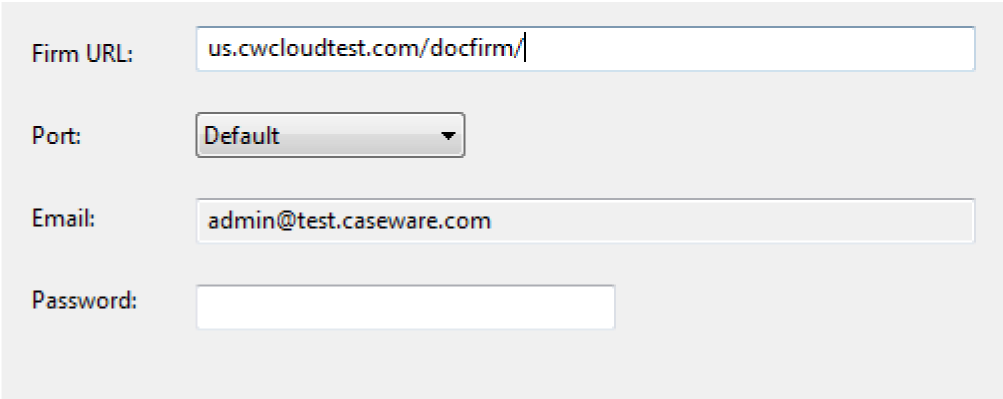
   Note: You cannot use the default supervisor (sup) account.

2. Click **Tools | Time on CaseWare Cloud Setup | Upload data to CaseWare Cloud from Time**.
3. Ensure all prerequisites are met and then click **Next**. The Time program performs checks to verify that all prerequisites are met.

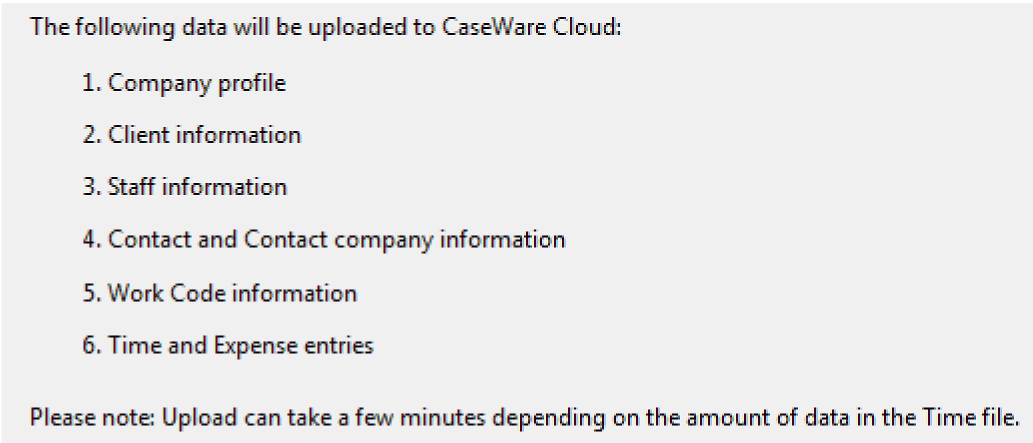


Note: Each Time client file can only integrate with one instance of Cloud. If you already integrated this file with Cloud, you will not be able to proceed. Contact CaseWare Support if you cannot perform integration.

4. Specify your Cloud server information:
    - **Firm URL**: The URL **without** the web protocol (http:// or https://). For example, **us.casewarecloud.com/ABCFirm**.
    - **Port**: The server port number to establish connection with Cloud. If you were not provided a special port number, select **Default**.
    - **Email**: The email address associated with the Time Administrator account. This is a read-only field and should match the email address specified for the Cloud Admin user (gary.adams@test.caseware.com for example).
    - **Password**: The Cloud Admin account password.



5. Click **Next | Finish**. Time activates integration with Cloud. The following details are merged to Cloud:
    - Company Profile settings
    - Client information
    - Staff information
    - Staff rates
    - Contact and Contact Company
    - Work Code information (negative work code rates and surcharges will be merged to the Cloud with the rates and surcharges set to zero)
    - Time and Expense entries (negative Time and Expense entries will not be merged).
    - Permissions



Results

After integration is completed successfully, your Time file data will be merged with Cloud. To use the Time integrated file, re-login into the Time desktop file.

Note: If an error or a warning occurred during the merge process you can access the integration error and/or warning logs to resolve any issues.

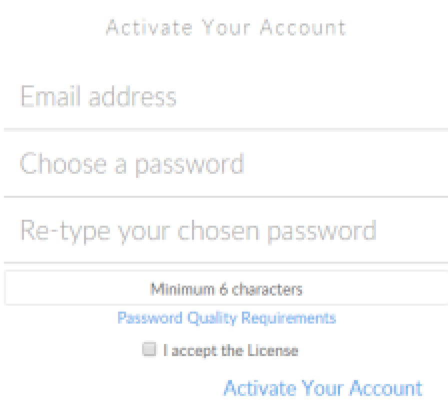
4.1 Logging into Time File

Administrator Account

When the Time administrator logs into the Time file they are automatically '**Online**' with the Cloud .

Time Staff

Each staff member in the Time file is added on Cloud and sent an email to set up their password for their new Cloud account.



Once the staff member is activated on Cloud they can log into Time and be connected to Cloud. When the Time staff log into Time they will be asked to provide their Cloud credentials.

If the staff member has not activated their Cloud account, they will not be able to connect and will be working '**Offline**' in Time .

For instructions on logging on to Cloud, see Logging on to CaseWare Cloud.

5. Time Components Integrated with Cloud

When you enable Cloud Integration with Time, the following areas are actively merged between Time and Cloud. Ensure you are working **Online** to maintain data consistency between both products.

- ***What is a Merge?***

  When you update integrated fields from Time or Cloud, a merge is performed in either direction to ensure your data is up-to-date on both systems.

- ***How will contacts be merged?***

  The relationship between a contact and the company they work for (client or contact company) will integrate to Cloud. Ensure contacts are assigned to a client or contact company in Time desktop prior to integration. If a contact is assigned to a company other than the one they work for, they will receive an Associated role to the relevant entity when merged to Cloud.

Integration points between Time and Cloud are detailed in the links below. Each link has information about relevant fields and options and there is a column, **Cloud Integrated**, that indicates which fields or options are available from Cloud as well.

Time	Cloud
Clients	Entities (Type: Client)
Staff and Staff Rates	People (Type: Staff)
Contacts	People (Type: Contact)
Contact Companies	Entities (Type: Other)
Time and Expense	Time - Time and Expense
Work Codes	Firm Settings - Work Codes (Time / Expense)
Company Profile	Firm Settings - Firm Firm Settings - Customization Firm Settings - Time - General Dates

5.1 Time Components not Integrated with Cloud

The chart below illustrates Time components that are not available in a Time file integrated with Cloud. Although some areas below are integrated, certain operations are only available in Time desktop.

Area	Integrated to Cloud?	Operations	Supported in Cloud?	Supported in Time desktop?
Work Codes Work codes are integrated with the Cloud. However, editing and creating work codes is only available in Time. After creating or editing work codes in Time, perform a	Yes	Create Edit	**No** **No**	**Yes** **Yes**

Area	Integrated to Cloud?	Operations	Supported in Cloud?	Supported in Time desktop?
manual merge to display these work codes in Cloud.				
Clients (Contacts) Contacts and the company they work for is integrated to the Cloud.	Yes	All	**Yes**	**Yes**
Clients (Staff) Staff are integrated to the Cloud, however, staff assigned to clients are not automatically granted roles to the corresponding entity. You must assign your staff members to entities.	Yes	All	**Yes**	**Yes**
Clients (Entity groups) Available in Time desktop.	No	All	**No**	**Yes**
Staff Rates Staff rates are integrated with the Cloud. However, staff rates can only be created and edited in Time desktop. After creating or editing staff rates in Time, perform a manual merge to display these rates in Cloud.	Yes	Create Edit	**No** **No**	**Yes** **Yes**
Billing Time integrated files do not offer billing in Time (including interest and recurring invoices). In a Time integrated file, billing is only available in Time. Time offers billing if there is no time integrated file.	No	Interest Recurring invoices	**No** **No**	**Yes** **Yes**
Issues Available in Time desktop. Issues in Time do not integrate with Tasks in Cloud.	No	All	**No**	**Yes**
Year End Close Available in Time desktop.	No	All	**No**	**Yes**
Receivables Available in Time desktop.	No	Cash receipts Credit notes Account reconciliation	**No** **No** **No**	**Yes** **Yes** **Yes**
Project Management	No	All	**No**	**Yes**

Area	Integrated to Cloud?	Operations	Supported in Cloud?	Supported in Time desktop?
Largely only available in Time desktop. However, you can enter projects and subprojects in Cloud when entering Time and expense entries in Time.				
Offices and Departments Available in Time desktop.	No	All	**No**	**Yes**
Scheduling Available in Time desktop.	No	All	**No**	**Yes**

6. Working from CaseWare Time

6.1 Working Online or Offline in Time

In a Cloud integrated Time environment, you can work **Online** or **Offline** in the file. When working **Online**, the Time file is connected to the Cloud database and synchronizing all data between both systems; users on Time desktop and Cloud are receiving and sending all updates made from their respective systems.

Most operations in Time are still available when working Offline in the Time file, however, you must be Online to update specific setup areas in the file. These are areas where the data must be consistent in both systems.

Time Areas only Available when Working Online

The following areas can only be updated when you are Online (connected to Cloud) in the Time file:

- Company Profile (including updates to work codes)
- Clients
- Staff (including updates to Staff rates)
- Contacts
- Contact Companies
- Project Management
- Import (Ascii / Excel)

6.2 Connecting to Cloud

When you log on to a Time file that is integrated with CaseWare Cloud, you will be prompted to establish a connection with Cloud. Specify your logon credentials for Cloud to establish a connection.

If you do not log on to Cloud you can work in the file but in an offline state.

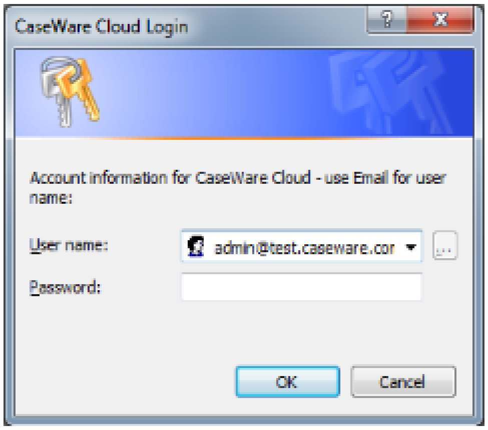
Prerequisites

- Logon credentials for the Time file
- Logon credentials for CaseWare Cloud

  Note: The email used to log on to CaseWare Cloud must match the email on your Time file that was set for you by your administrator.

Procedure

1. Open the Time file.
2. Provide your Time logon credentials and then click **OK**.
3. Provide your Cloud logon credentials and then click **OK**.



6.2.1 Online Status

After establishing a connection to CaseWare Cloud you are now working in an **Online** state. When working Online you can make changes to setup areas in the file, including:

- Company Profile settings
- Work Codes
- Client, Contact, and Contact Companies setup areas
- Staff (including updates to Staff rates)
- Project Management setup areas

Note: CaseWare Cloud will only be updated with your new information once you close the setup window you were in.

When to Perform a Manual Merge

Perform a manual merge if you have existing transactions affected by an update to:

- Work codes
- Staff rates
- Time and expense entries

The update to the work code or staff rate is automatically merged to CaseWare Cloud, however, recalculated time and expense transactions are not.

Perform a manual merge to ensure users on Cloud can see any recalculated amounts on their transactions. Ensure you are **Online** (connected to Cloud) in the Time file.

6.3 Performing a Manual Merge with Cloud

In a Cloud integrated environment there are times when you will need to manually perform a merge with Cloud.

- When to perform a manual merge

Performing a manual merge will force any updates made in the Time file or Cloud to be merged.

Prerequisites

With Protection activated, you require the following right in the file

- *Merge Time and CaseWare Cloud* under the **Tools: Merge Time and CaseWare Cloud** category

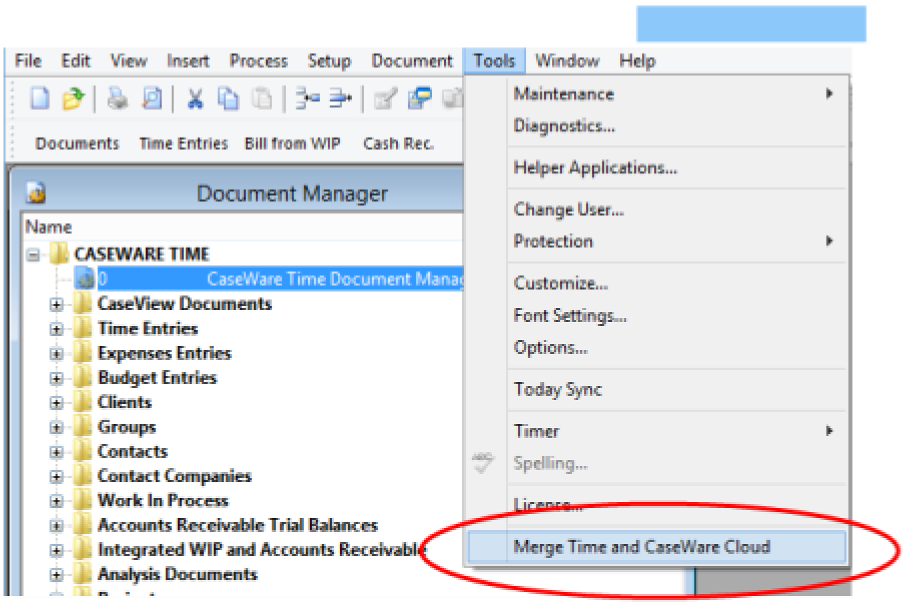
If Cloud Integration is enabled,

- You must be **Online** to perform this operation. When you are Offline, this operation is disabled.

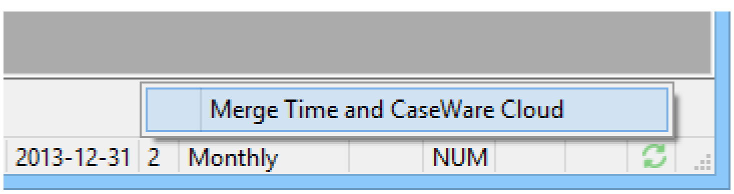
Procedure

You can perform a manual merge in two ways, either from:

- The Tools menu by clicking **Tools | Merge Time and CaseWare Cloud**



- The status icon notifies user 'New Updates are Available', click the status icon and click **Merge Time and CaseWare Cloud**.

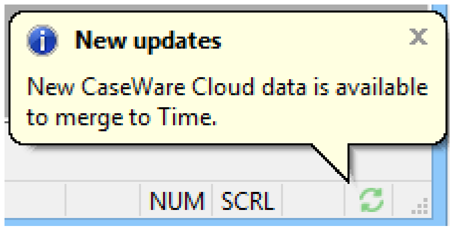


After the merge is performed all data on Time and CaseWare Cloud will be up-to-date.

6.4 Time Connection Status

When Cloud integration is enabled with Time, an indicator appears on the status bar to show the current connection status with Cloud. A user with **Merge Time and CaseWare Cloud** permission can see merge conflicts and notifications.

Status	Icon	Description
Offline		No connection established with Cloud. All updates made to Time cannot merge with Cloud, and all updates made from Cloud cannot merge with Time.

Status	Icon	Description
Online		A connection is established with Cloud. When new data is available from Cloud or Time, you will receive a merge notification.
Merge Conflicts		A connection is established with Cloud, but there was an issue with the last merge. To troubleshoot these conflicts, see [Troubleshooting merge issues with Cloud].
Merge Notification		A connection is established with Cloud and there is new data from Cloud that needs to be merged with Time or from Time to Cloud. 

7. Troubleshooting

7.1 Merge Conflicts

Conflicts can arise if a merge was not successfully processed. When merge conflicts occur, check what action and solution is suggested. Considering the solution, you may be able to manually fix these issues. Please contact CaseWare Support for more assistance when required.

How do I know if a merge conflict occurs?

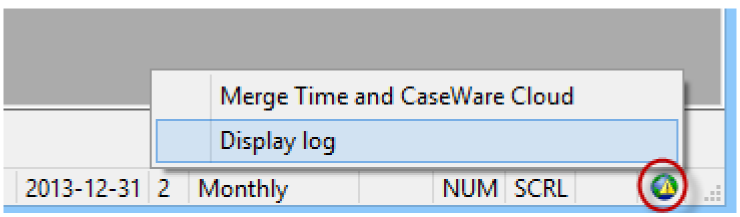
A merge conflict notification will appear over the status indicator in the Time file with the status icon changed to: .

Note: Only the staff member that triggered the merge (either automatically when they opened the file or by performing a manual merge) will receive the merge conflict notification.

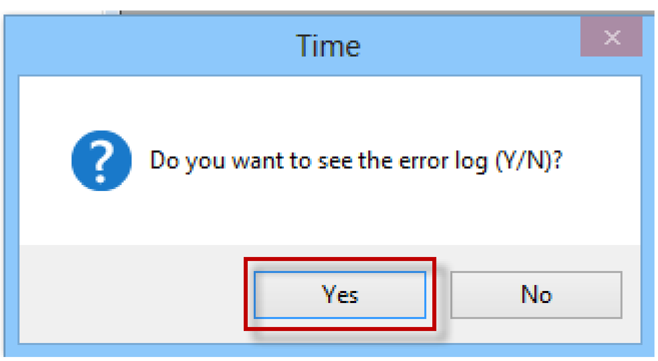
How do I resolve merge conflicts?

Use the Time Integration log to see any conflicts that occurred in the file. You can then update these areas in the file to correct any conflicts.

- Click on the merge conflict status indicator and click **Display log** to access the conflict error log.



- Click **Yes** when prompted to open the error log.



- This will open the Time Integration log (TimeIntegrationLog.htm) in a new Browser window. Here, you can review what the issue is, where the problem is being reported and what Action was taken by Time.

Merging Entity assocations to CaseWare Cloud

Type	Description	Area	Problem	Action	Solution
Error	Unknown	Create new or update record	The server returned an invalid result	Record is not merged	Fix the record's problem
Error	Unknown	Create new or update record	The server returned an invalid result	Record is not merged	Fix the record's problem

7.2 Warning Log

When merging a Time file with the Cloud, a warning message may appear after the integration setup is complete if any of the following conditions are met:

- If any Time or Expense entries are found that have negative hours, quantity, rate, surcharge and/ or amount;
- If any Expense work codes are found with rates or surcharges that are negative amounts.

What do I need to do?

This will just be a warning message and there will be nothing to fix. Clicking **Yes** will allow you to review the Warning Log.

What will happen to the records?

The Time and/ or Expense entries that have negative hours, quantity, rate, surcharge and/ or amount will not be merged to Cloud.

The Expense work codes with rates or surcharges that are negative amounts are merged to Cloud with zero rates and surcharges.

7.3 Restoring a Cloud Integrated Time File

If you need to restore your Time file, the Time file is the master file.

How do I restore the Time database file?

The backup function is performed under **Tools | Maintenance | Backup/Restore** and should be done on a regular basis. The backup creates a *.tbk file which is used in the restore function.

How the restore works

1. Compares the data in the Cloud database to the backup Time database file.
2. Deletes all data not found in the Time database file that is in the Cloud database, except for certain entities.
3. Makes changes to the Cloud if there are differences in the Time database and the Cloud database.
4. Merges data from the restored Time database not found in the Cloud database.
5. Merges entities from the Cloud database to the Time database that are not on the restored Time database.
6. At the end of the restore, a list of entities that cannot be deleted on the Cloud database is shown along with any merge conflicts.

Notes

- Only a person with a Cloud Admin role can restore a backup Time database file.
- Restoring a backup Time database file created before Cloud integration was implemented will disable integration.

For information on Backup and Restore, see our Online help here.

8. Permissions on Cloud

Protection must be activated in your Time file to integrate your environment with Cloud. In addition, your user account requires the equivalent Cloud permissions to perform certain operations from either Time or Cloud. CaseWare Cloud permissions are setup during the integration setup. Any new staff after the integration setup, need the Cloud roles set up manually. Use this chart when creating new staff.

Area	Operation	Time Rights (Category - Command)		Cloud Role	Cloud Permissions
Clients	Create	Setup: Clients - Clients: Create/Delete	→	Entity Admin	Entity - Create
	Edit	Setup: Clients - Clients: Edit All	→	Editor - All clients	Entity Details - Edit
		Setup: Clients - Clients: View Own	→	Editor - Own clients shared	
		Setup: Clients - Clients: Assigned	→	Editor - Assigned clients shared	
	View	Setup: Clients - Clients: View All	→	Viewer - All clients	Entity Details - Read
		Setup: Clients - Clients: Own	→	Viewer - Own client shared	
		Setup: Clients - Clients: Assigned	→	Viewer - Assigned clients shared	
	Delete	Setup: Clients - Clients: Create/Delete	→	Entity Admin	Entity - Delete
Staff	Create	Setup: Staff - Staff: Edit	→	Staff Admin	Staff - Create
	Edit	Setup: Staff - Staff: Edit	→	Staff Admin	Staff Details - Edit
	View	Setup: Staff - Staff: View	→	Staff Viewer	Staff Detail - Read
	Delete	Setup: Staff - Staff: Edit	→	Staff Admin	Staff - Delete
Staff Rates	Edit	Setup: Staff - Staff: Edit	→	Staff Admin	Staff Details - Edit
Contacts	Create	Setup: Contacts - Contacts: Create/Delete	→	Contact Admin	Contact - Create
	Edit	Setup: Contacts - Contacts: Edit	→	Contact Editor	Contact Details - Edit
	Delete	Setup: Contacts - Contacts: Create/Delete	→	Contact Admin	Contact - Delete
Contact Companies	Create	Setup: Contacts - Contacts: Create/Delete	→	Entity Admin	Entity - Create
	Edit	Setup: Contacts - Contacts: Edit	→	Editor	Entity Details - Edit
	View	Setup: Contacts - View	→	Viewer	Entity Details - Read
	Delete	Setup: Contacts - Contacts: Create/Delete	→	Entity Admin	Entity - Delete
Work Codes	Create Edit Delete	Setup: Codes - Work codes	→	Firm Settings Admin	Firm - Edit

Area	Operation	Time Rights (Category - Command)		Cloud Role	Cloud Permissions
Company Profile	Edit	File - Company Profile	→	Firm Settings Admin	Firm - Edit
Time / Expense	Edit	Process - Time: Own	→	Time and Expense - Own	Time and Expense - Own
		Process - Time: All	→	No built-in role	Time and Expense - All Staff
Client Lists	View	View - Own, Assigned, All	→	Viewer	Entity Read
Project Lists	View	View - Own, Assigned, All	→	Viewer	Entity Read
Administration	All	Administrator	→	Admin	All operations in the firm

9. Working from CaseWare Cloud

9.1 Logging on to CaseWare Cloud

You can access data from CaseWare Cloud by logging on to CaseWare Collaborate - a web application built for Cloud.

Requirements

- CaseWare Collaborate URL

Prerequisites

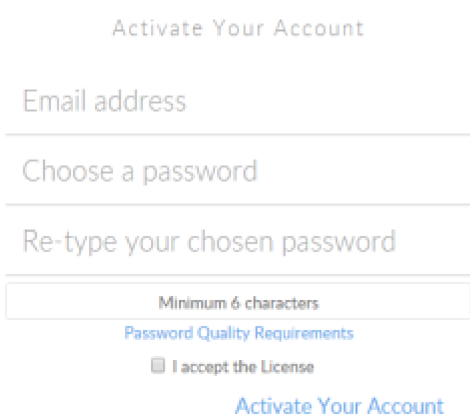
- Ensure your Cloud account was set up during the Time integration with Cloud setup and you have valid login credentials

Note: If your staff account was set up in the Time file prior to Cloud setup, then you should have received an email with a link to set your Cloud password. Use this link to access Cloud.

Procedure

1. Open your preferred browser on your desktop computer, tablet, or smartphone device.
2. Access Cloud using the firm URL that was provided to you. This URL may have been sent to the email address specified in the Time file under your Staff account.
3. Specify your Cloud logon credentials.

Note: If you are logging on for the first time, then you will be asked to set a password for your Cloud account. This password is not synchronized with your Time file password. This means that changing your password on Cloud does not affect your password on Time and vice versa.



Results

After logging on, you can:

- View and set up staff and contact information from the People app.
- View and set up client and contact company information from the Entities app.
- Post time and expense transactions using the Time and Expense apps from Time.
- Analyze time and expense transactions using the Analysis app from Time.

- View Company information.
- View Work Code information.

9.2 Time Operations Supported on Cloud

When Time is integrated with CaseWare Cloud, data from several areas of the program are synchronized between both systems. When performing operations such as Create, Edit, or Delete, only some areas of the program can be performed from both programs; other operations can only be performed from Time.

The following table lists the operations that you can perform from Cloud. For data merges to occur from Cloud to Time, the Time file must be open and **Online** (connection is established with Cloud).

Area	Operation	Supported on Cloud?	How Do I?
Clients	Create	**Yes**	Use the **Entities app** to add or modify an entity of type *Client*
	Edit	**Yes**	
	Delete	No	Can only be done within Time
Staff	Create	**Yes**	Use the **People app** to add or modify a person of type *Staff*
	Edit	**Yes**	
	Delete	No	Can only be done within Time
Staff Rates	Create	No	Can only be done within Time
	Edit	No	Can only be done within Time
	Delete	No	Can only be done within Time
Contacts	Create	**Yes**	Use the **People app** to add, modify, or delete a person of type *Contact*
	Edit	**Yes**	
	Delete	**Yes**	
Contact Companies	Create	**Yes**	Use the **Entities app** to add, modify, or delete an entity of type *Other*
	Edit	**Yes**	
	Delete	**Yes**	
Work Codes	Create	No	Can only be done within Time
	Edit	No	Can only be done within Time
	Delete	No	Can only be done within Time
Company Profile	Edit	**Yes**	Modify the firm details from **Firm Settings | Firm | Profile**
Time / Expense	Add	**Yes**	Use the **Time app** to add a time or expense entry
	Edit	**Yes**	Can only edit un-submitted time / expense entries
	Delete	**Yes**	Can only delete un-submitted time / expense entries

9.3 Submitting Time and Expenses

When Time desktop is integrated with CaseWare Cloud the user needs to submit their time and expense on the Cloud entries before those entries will be merged to the desktop. This allows the user a period to review the entries before being merged to the desktop.

Once you have entered your time or expenses in Time, there is a submit button in the Time and Expense pages. Once submitted the entries cannot be edited on Cloud and will be merged to Time desktop in the next merge batch. The symbol '' means that the entry has been submitted.

Users can also submit entries in the Analysis area. This area allows the user to view all their entries to be submitted. Under the ‘Submit’ tab you can filter un-submitted time / expense entries and then submit the entries you want. The submit button will submit the time / expense entries which have been filtered.

10. Appendix - Cancelling Integration

10.1 Cancel Integration with Cloud

Contact info@caseware.com to cancel Time integration with CaseWare Cloud. After integration is canceled, it cannot be reactivated for the file.

Ensure to provide your account number in the email.