

# CaseWare® Time™



## Getting Started Guide

For Time™ 2016.00

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# 1. Getting Started

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## 1.1 System Requirements

Time was designed for the Windows family of operating systems.

### 1.1.1 Workstations

#### Operating Systems

- Microsoft Windows® 10 (supports SQL 2012 Express and above)
- Microsoft Windows® 8 (supports SQL 2012 Express and above)
- Microsoft Windows® 7 Professional

#### Hard Disk

- Minimum 200 MB for the Time application
- Minimum 100 MB for each supplementary Time company file. The size of the company files will vary depending on the features used and the amount of data entered

#### Hardware

- 1 GHz 32-bit (x86) or 64-bit (x64) processor
- Minimum 512 MB of system memory; 1,024 MB or more is recommended for improved performance
- Program requires 15 MB hard drive space
- The size of open Time files will vary depending on the features used and the size of documents managed
- SVGA monitor capable of 256 colors and 800 x 600 resolution is required. A monitor with 1280 x 1024 resolution or higher is recommended
- Dual monitors are supported
- Internet access is required during the installation of Time.
- Updates between releases are available as downloads from the CaseWare International Inc. website at [www.caseware.com/support/time](http://www.caseware.com/support/time).
- High-speed Internet connection is recommended for downloading program updates

#### Additional Components

- Microsoft® Internet Explorer® version 11.0
- Adobe® Acrobat® Reader® 5.0 or higher

### 1.1.2 File Server/Networks

#### Operating Systems

- Microsoft Windows® Server 2012 R2
- Microsoft Windows® Server 2012\*

- Microsoft Windows® Server 2008
- Microsoft Windows® Small Business Server
- Novell® Netware® 5.1 or higher

\*For Windows® Server 2012, you must enable the .NET 3.5 Framework (and .NET 2.0 Framework) using the **Add Roles and Features Wizard**. For instructions, see the Microsoft Help page [here](#)

## Hardware

- Per file server/network operating system recommendations

### 1.1.3 Windows networking

#### Microsoft Terminal Server

For users who access CaseWare products from multiple locations or would like to improve the speed of accessing their files within the same location we suggest exploring Microsoft® Terminal Services.

This multi-user server provides the ability to host multiple, simultaneous client sessions. Terminal Server is capable of directly hosting compatible multi-user client desktops running on a variety of Windows-based and non-Windows-based hardware.

Microsoft's Terminal Services can be further extended with the use of Citrix Systems.

To install Time on a Terminal Server, that can include Citrix, follow the steps to install Time on a Network as listed in this guide.

#### Microsoft Windows Small Business Server

If you use Windows® Small Business Server in conjunction with Time be aware of the number of users and connections. Small Business Server is typically suitable for small and medium enterprises with up to 75 workstations or users. Ensure consideration is given to both the user limit and the connections required per user on all server activities.

## 1.2 Time Structure

Time consists of the following areas:

### Program Files

The Time program files are installed in one location in a shared folder using the network install. It is recommended to use a dedicated server for more than five users.

If you use a dedicated server, each user performs a workstation install to set up their local machine and the paths to the Time program in the shared folder.

### Supplementary Files

The Time supplementary file folder is used to store the Time .ar file and any non-SQL files and documents. This folder needs to be shareable.

**Note:** All Time users MUST have full access rights to the Time program and Time data file folders.

### SQL Database

Time stores its data in a SQL database using two files:

- <your file name>.mdf
- <your file name>\_log.ldf

These files are saved in the same location as the SQL program install directory. For example, *C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Data*.

## SQL Software

An SQL software package is required to run the databases. One of the following SQL software packages can be used:

- Microsoft SQL Server 2016
- Microsoft SQL Server 2016 Express
- Microsoft SQL Server 2014
- Microsoft SQL Server 2014 Express SP1. This is a free version of Microsoft SQL Server.
- Microsoft SQL Server 2012 SP1
- Microsoft SQL Server 2012 Express SP1. This is a free version of Microsoft SQL Server.
- Microsoft SQL Server 2008 R2
- Microsoft SQL Server 2008 R2 Express\*. This is a free version of Microsoft SQL Server that you can install from the Time installer (if required).
- Microsoft SQL Server 2005
- Microsoft SQL Server 2005 Express Edition. This is a free version of Microsoft SQL Server.

\*This copy of SQL Server with Time can only be installed on operating systems that are Windows® 7 and higher, or Windows® Server 2008 and higher.

The system requirements for SQL Server are:

- Minimum 4 GB hard disk space per database.
- Minimum 1 GB RAM
- 1 CPU – you can install SQL Server on multiprocessor machines, but only 1 CPU is used at any time.

Prior to installation, create a backup of your file using a previous version of Time. This command is available from the menu **Tools | Maintenance | Backup/Restore**. Firms that:

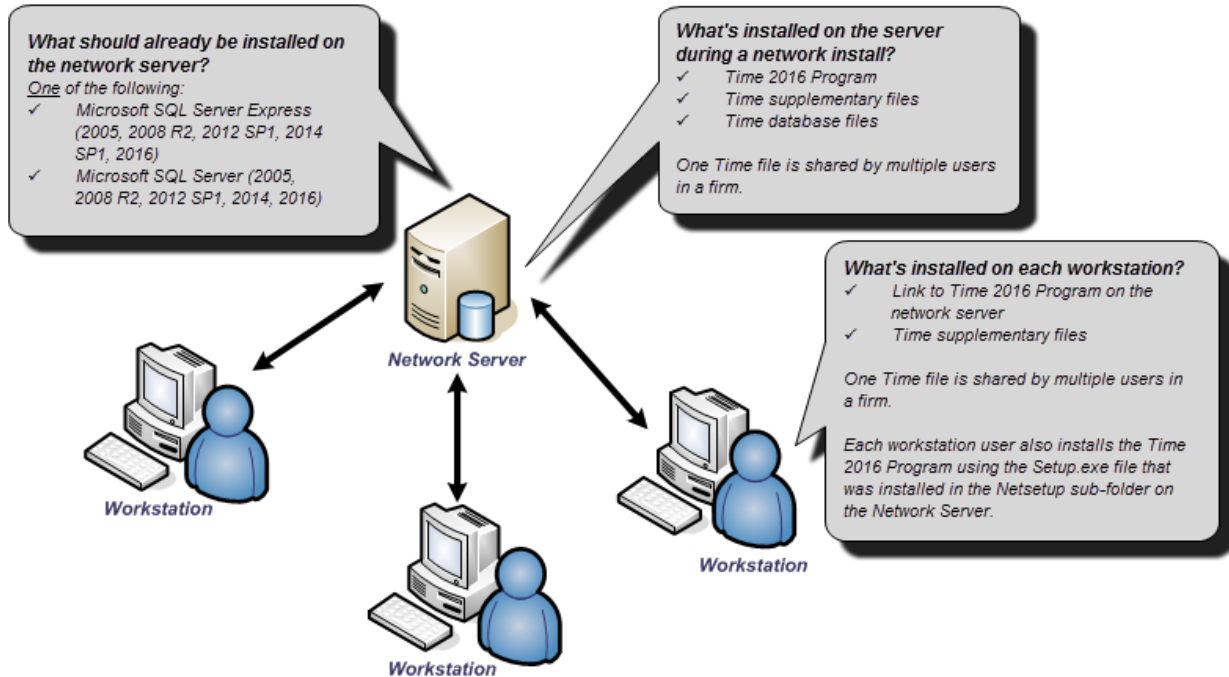
- Do not have a SQL product installed, either the Time network installer with SQL Express, or the Time local installer will install Microsoft SQL Server 2008 Express. It is recommended that you install the SQL software on a dedicated server.
- Already have a SQL product installed, in order to do a backup your SQL Server should have been configured using a 'Local system account'. You can verify this on the SQL Server machine by going to **Control Panel | Administrative Tools | Services | SQL Server (MSSQLSERVER)**, and enabling the **Log On As** property.
- Purchased a version of SQL Server, install it before installing Time 2016. Otherwise, install Time 2016 and select the installation type that includes the Express version of SQL Server 2008.

After installation, open Time 2016 and perform a restore operation using the backup file you created earlier. You can restore this file from the Company File dialog by selecting the **Restore File** option. Alternately, you can access the restore function from the menu **File | Restore**. Your SQL Server file is automatically converted to the version of SQL Server that you installed.

## 2. Types of Installations

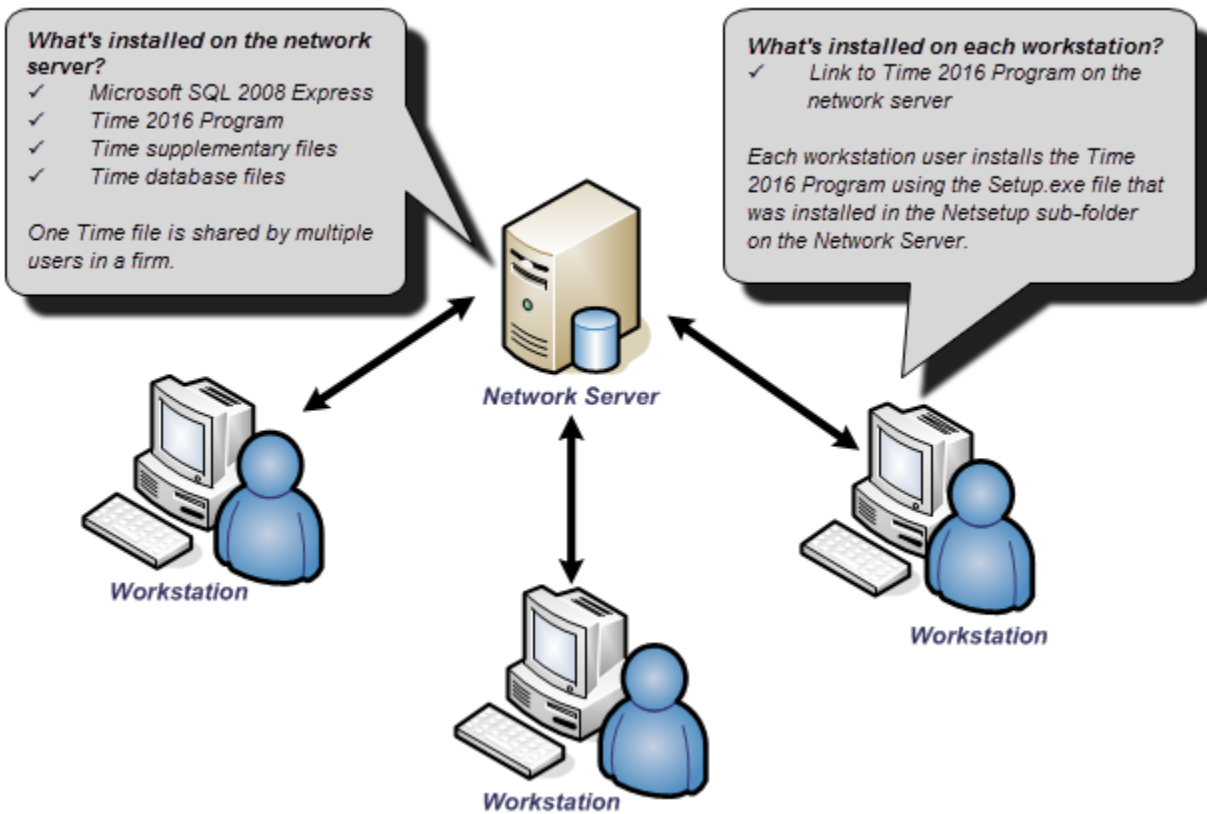
### Network

Select this setup type if your firm already has a supported Microsoft SQL Server installed for use with Time 2016.



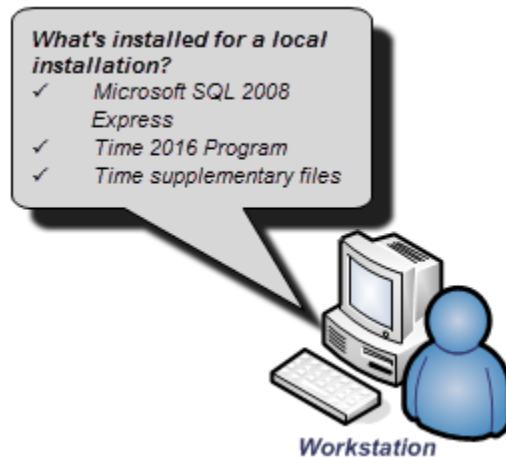
### Network with SQL Express

Select this setup type if your firm does not have a supported Microsoft SQL Server installed for use with Time 2016. The Installation Wizard installs SQL Server 2008 Express to the current machine in use.



**Local**

Select this setup type if performing an install for a single user for the purpose of software testing or software demonstrations. The Installation Wizard installs Microsoft SQL Server 2008 Express to your local drive if Microsoft SQL Server does not exist on your local drive.





## 3. Installing Time

### 3.1 Before Installation

Please ensure the following as they may interfere with the Time installation:

- Ensure no other programs are running
- Disable virus-checking software

Most virus-checking software can interfere with the copying process

Follow the installation wizard to configure your settings. The installation program will set up all the necessary files, program groups, and icons to run Time.

**Note:** During installation, please read each window carefully before continuing to the next.

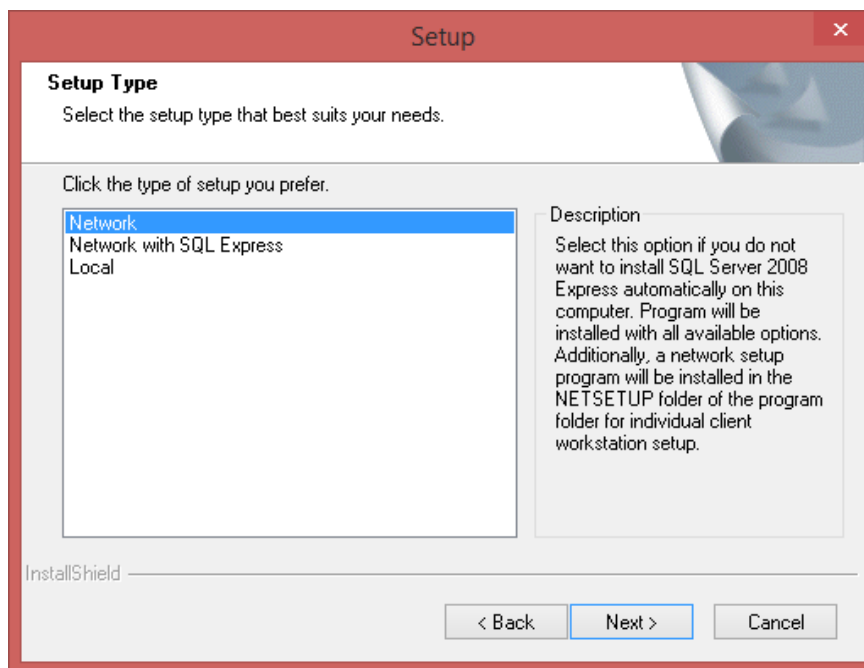
### 3.2 Installing Time for Multi-User Setup

For easy management of files, install the Time program, the SQL programs, and the Time supplementary file folder on the same server. For larger firms with an IT department, installing the Time program and the SQL programs on separate servers may improve performance.

**Note:** If you choose the option **Network with SQL Express**, you must run the installer on the network server that Microsoft SQL Server 2008 Express will be installed on (refer to the 'Network with SQL Express' diagram). The installation will automatically install SQL Server 2008 Express in the "Program files\Microsoft SQL Server" folder.

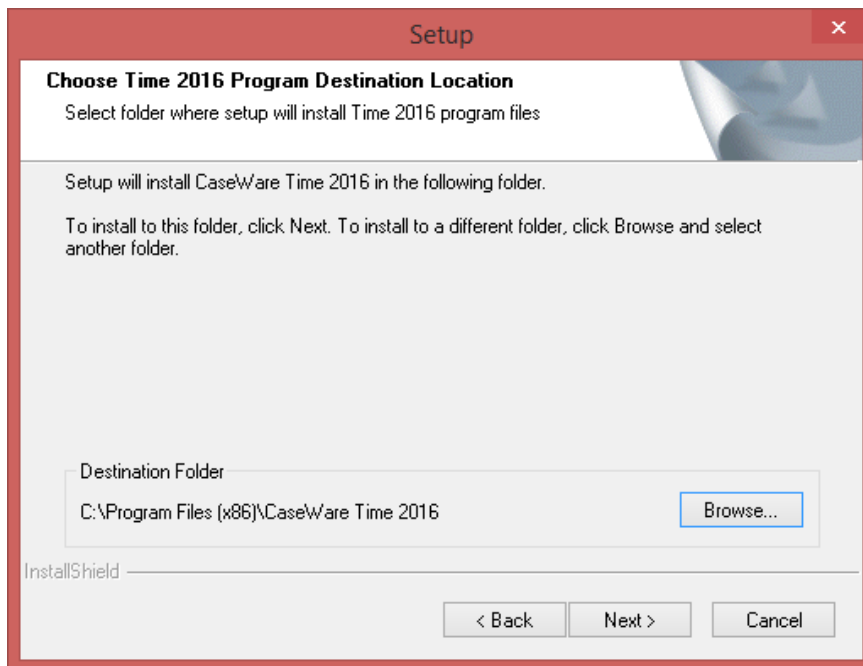
Only one user needs to install Time on the network server.

1. Launch the Time installer. Double-click the **setup.exe** file provided to you.
2. Follow the instructions on the screen.
3. At the **Setup Type** screen, select the type of installation to run.

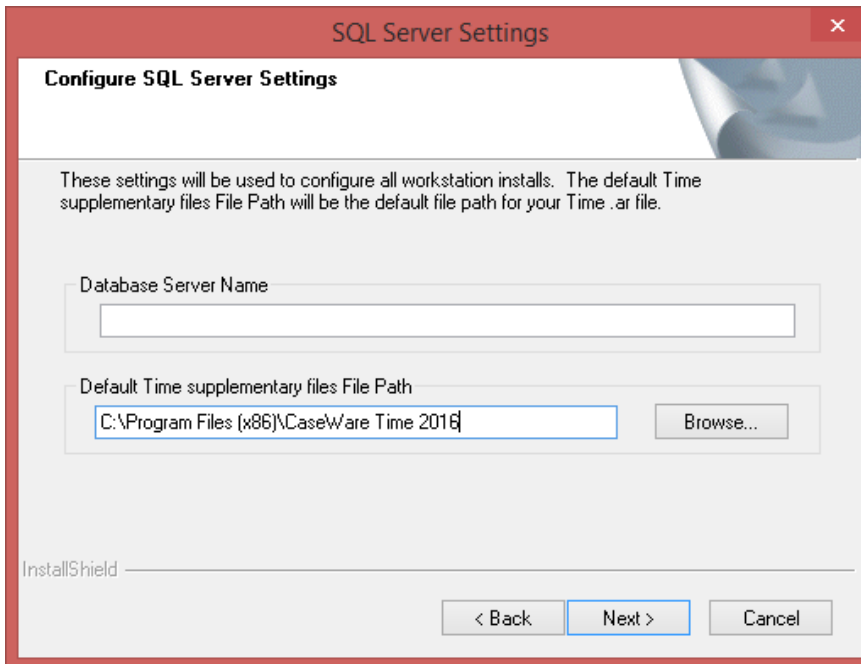


- **Network with SQL Express:** Select this option if you do not have a SQL program and you want Time to install Microsoft SQL Server 2008 Express. If you choose this option, you must run the installer from the same machine that Microsoft SQL Server 2008 Express will be installed on. The installation will automatically install SQL Server 2008 Express in the Program files/Microsoft SQL Server folder.
  - **Network:** Select this option if you already have a SQL program installed.
4. At the **Choose Destination Location** screen, ensure that the **Destination Folder** is a network folder; otherwise, use the **Browse** button to change the location. Install Time in a directory that is different than previously installed versions.

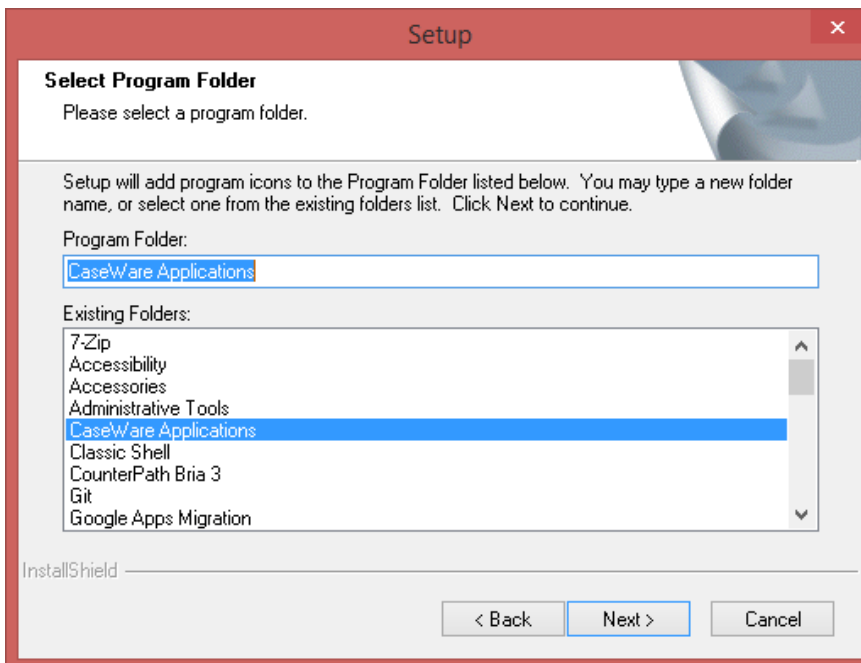
**Note:** Install Time 2016 in a directory different from the one used for prior versions of Time. This directory must be shared. In addition, all Time users **MUST** have full access rights to the Time program and Time data file folders.



5. At the **SQL Server Settings** screen, specify the following:
- **Database Server Name:** This is the server the SQL software is installed on. If Time is installing Microsoft SQL Server 2008 Express then the server is the machine you are installing on.
  - **Default Time supplementary files File Path:** This is the folder that will store the Time .ar file and other non-SQL files. This path needs to be shareable.



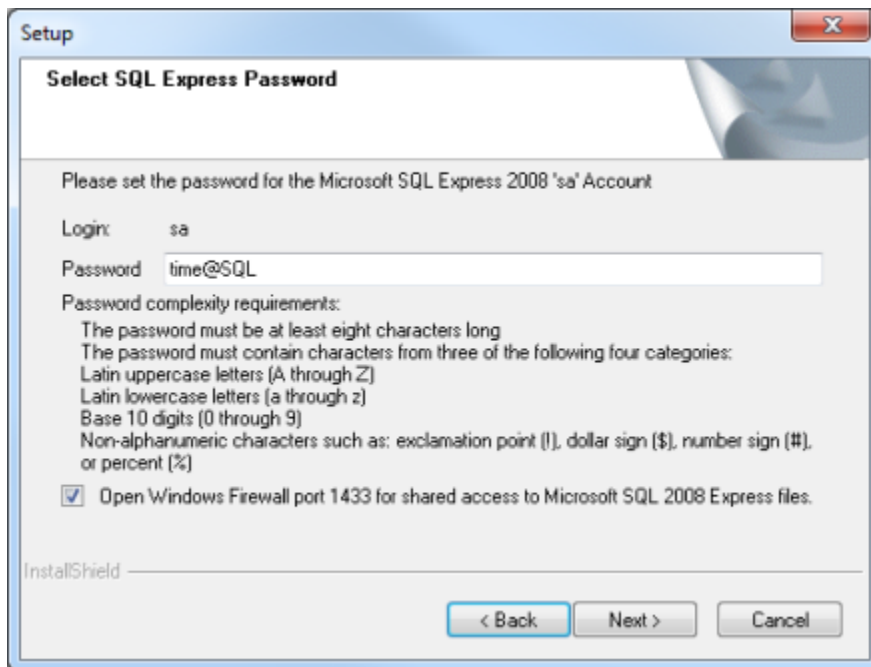
6. Type a new folder name, or select a folder from the Existing Folders list. Click **Next**.



### If you choose the 'Network with SQL Express' option

- **Login:** The default login is 'sa'.
- **Password:** Select the password for the SQL administrator account. The default password is *time@SQL*. This account is needed to connect to Microsoft SQL Server 2008 Express. Save the login and password to be used to connect to the SQL server to create, convert and restore Time files.

- **Open Windows Firewall port:** Select the Open Windows Firewall port 1433 for shared access to Microsoft SQL 2008 Express files option. This allows all computers on the local network to connect to the SQL Server. Click **Next**.



## Workstation Install

Each user will need to perform a workstation install to install the files necessary to connect to the Time program on the server.

During the network install a sub-folder called **Netsetup** was created in the Time program directory with the files necessary to run the workstation install.

1. Locate the sub-folder **Netsetup** in the Time program directory. This was created during the Network installation.
2. Double-click the **Setup.exe** file. This starts the installation.
3. Follow the instructions on the screen.

## Remote access

Ensure remote connections are enabled when your Time 2016 is running on a machine different from the database. In the Setup Type screen of the Installation Wizard if you select a **Network** setup type, you may need to enable remote connections on your existing Network Server. If you select **Network with SQL Express** setup type or **Local** setup type, a remote connection is enabled by the Installation Wizard.

If your Network Server is a version of SQL Server from Microsoft, your remote connection may be disabled. The following steps are required to enable remote connection:

1. Start the Microsoft SQL Server Configuration Manager, select **Start | All Programs | Microsoft SQL Server | Configuration Tools | SQL Server Configuration Manager**.
2. Select **SQL Server Network Configuration (32bit)** from the left-hand navigation panel and expand its navigation tree to select **Protocols for MSSQLSERVER**.
  - a. On the right-hand display panel, right-click on **TCP/IP** and select **Enable**.
3. Select **SQL Server Services** from the left-hand navigation panel

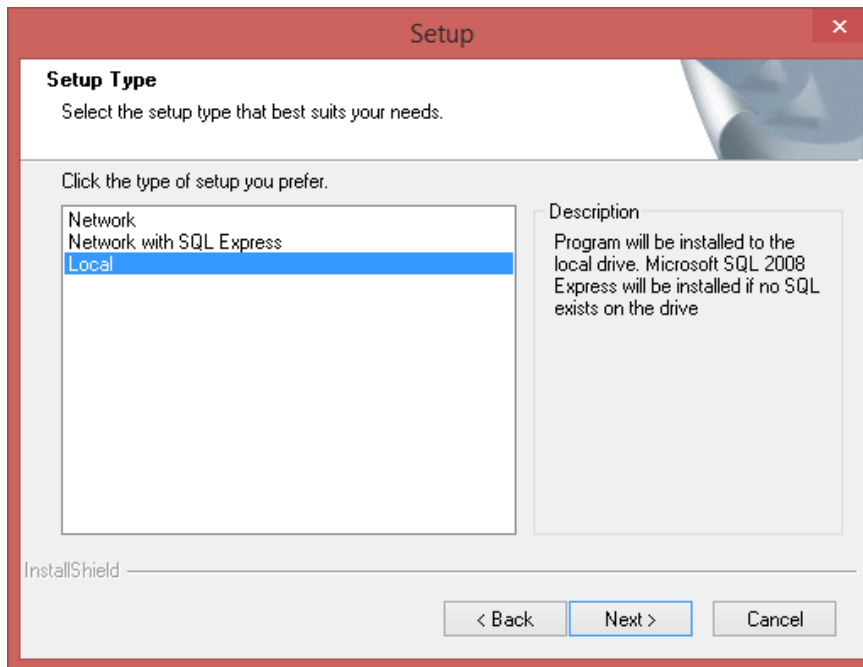
- a. On the right-hand display panel, right-click on **SQL Server (MSSQLSERVER)** and select **Restart**.

Your SQL Server restarts with remote connection enabled.

### 3.3 Installing Time for Single-User Setup

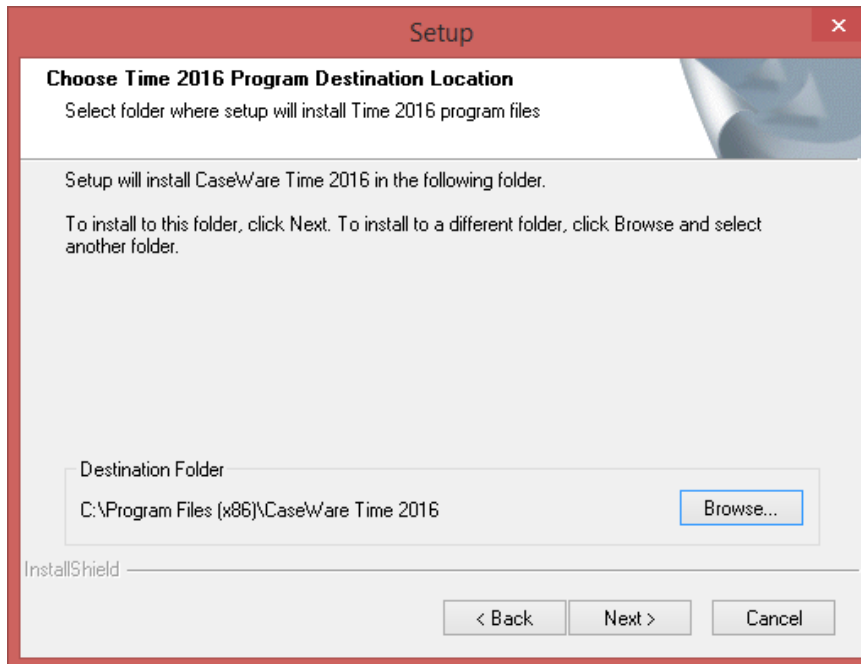
Follow these instructions when you plan to use Time on a stand-alone computer:

1. Launch the Time installer. Double-click the **setup.exe** file provided to you.
2. Follow the instructions on the screen.
3. At the Setup Type screen, select **Local**. If Microsoft SQL 2008 Express is not installed on this machine, it will be installed automatically by the Time application.



4. At the '**Choose Destination Location**' screen, ensure that the **Destination Folder** is a local folder; otherwise, use **Browse** to change the location.

**Note:** Install Time in a different directory than the one used for previous versions of Time.



5. If the Time installer is installing Microsoft SQL Server 2008 Express, the default login will be **sa**. At the Select SQL Express Password screen, select the password for the SQL administrator account. The default password is **time@SQL**. This account is needed to connect to Microsoft SQL Server 2008 Express. Save the login and password to be used to connect to the SQL server to create, convert and restore Time files.
6. Ensure the check box, **Open windows Firewall port 1433 for shared access to Microsoft SQL 2008 Express files**, is left cleared (unchecked). Since you are using Time locally only, you do not need to select this option. Click **Next** to begin the installation.



## 3.4 Installation Troubleshooting

### Did you encounter problems?

- Make sure that you have write privileges for the directories specified in the installation wizard.
- Ensure there is enough free disk space on the hard drive to meet the system requirements listed at the beginning of this guide.
- Ensure your SQL Server has allocated sufficient memory to validate credentials.

## 3.5 Accessing Microsoft SQL Server Management Studio Express

Microsoft SQL Server Management Studio Express is a graphical management tool supplied with Microsoft SQL Server to help manage your SQL database. An IT Administrator can use this tool to change options and manage settings for your SQL Server if needed.

Microsoft SQL Server Management Studio Express can be accessed from the Windows Start Menu under **All Programs | Microsoft SQL Server 2008**.

## 4. Starting Time

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### 4.1 Starting the Time Software

Launch the program through the Windows Start Menu, or by double-clicking the program's desktop shortcut icon.

The **Company File** dialog opens. The **Company File** dialog displays the following choices:

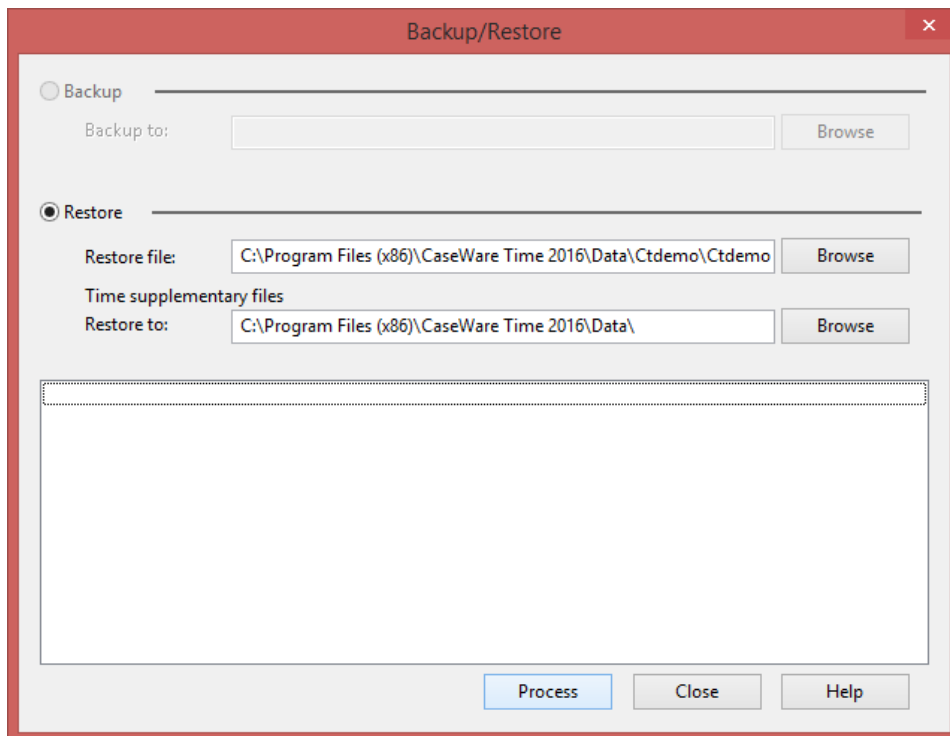
- Creating a new file
- Restoring a file
- Opening an existing file

### 4.2 Restoring the Time Sample File (Ctdemo)

Time 2016 includes a sample file called Ctdemo. This file needs to be restored in order to access the sample data, which is accessible to all users within a firm.

#### To restore the file

1. Open Time 2016. The **Company File** dialog opens.
2. Select **Restore File** and click **OK**. The Backup/Restore dialog appears.
3. In the **Restore** file field, click the **Browse** button and navigate to the Ctdemo.tbk file in the following directory: Time\_Installation\_Folder\Data\Ctdemo, where "Time\_Installation\_Folder" is the name of the folder where you installed Time (e.g. C:\Program Files\CaseWare Time 2016\Data\Ctdemo\Ctdemo.tbk).
4. In the **Restore to** field, select or input the directory where the restored Ctdemo.ar file will be saved.





- Click **Process** to restore the file. The **Restore SQL Database** dialog appears. Follow steps 4-7 described in Creating a New File to connect to the SQL Server.

### 4.3 Opening a File

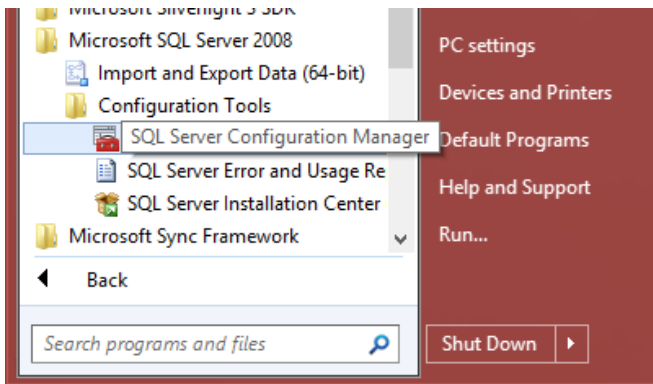
To open an existing file in Time, navigate to the directory using the file browser and select your file.

#### 4.3.1 Troubleshooting login errors

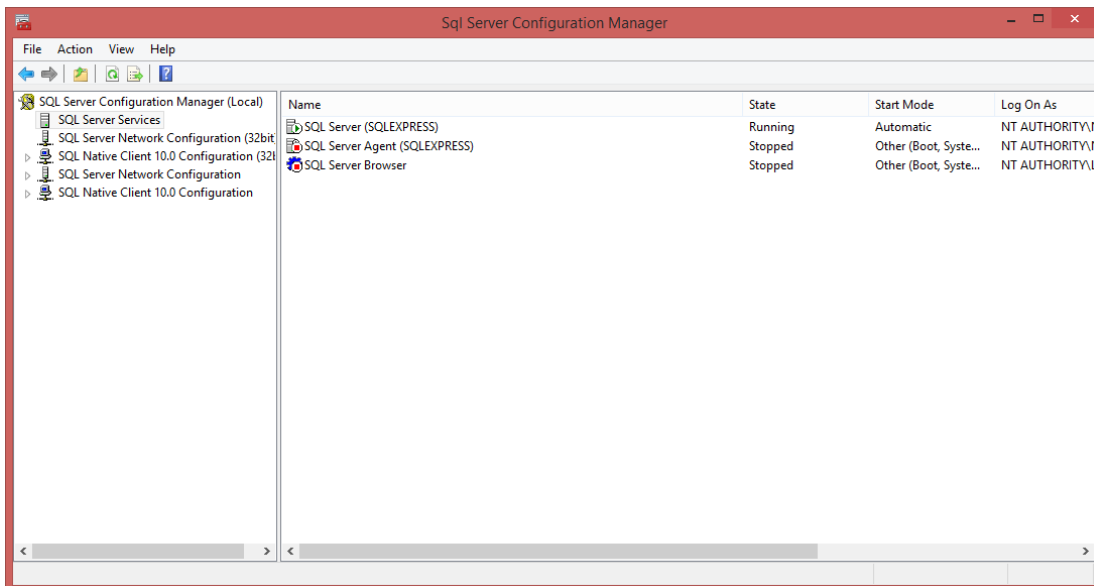
An issue can occur when logging into a file in Time 2016. If you receive an error message that you cannot log in, despite providing the correct supervisor credentials, then your SQL Server may not have sufficient memory to process validation of passwords. In the event memory is not available, the validation process cannot complete and you will receive a failed login message in error.

You can resolve this issue after installation by allocating SQL Server with additional memory to correctly handle validation. To allocate this additional memory for your SQL Server, follow these steps:

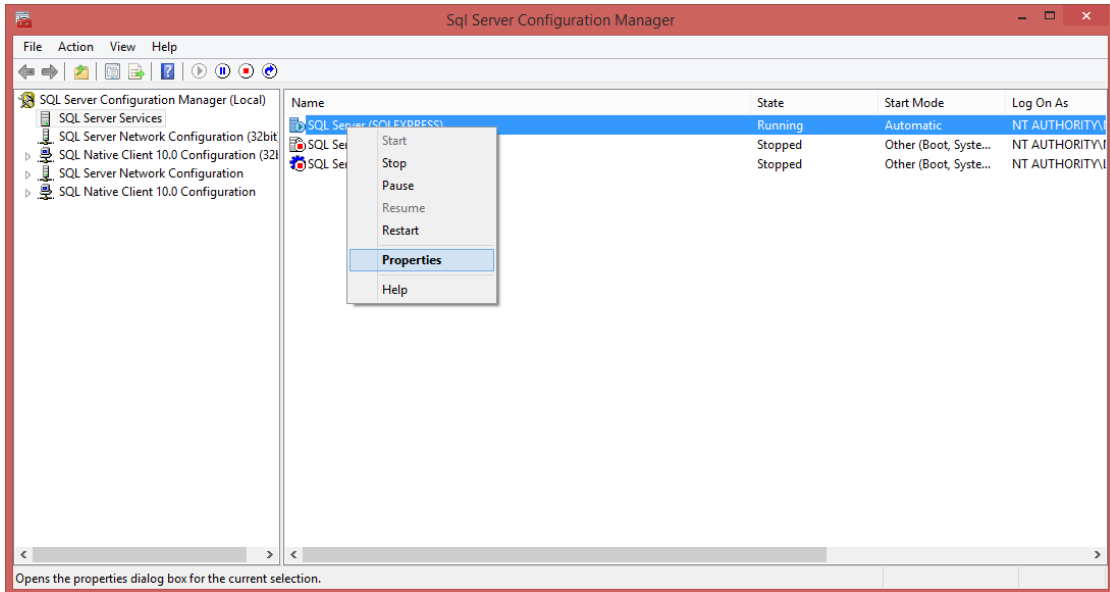
- Open SQL Server Configuration Manager from the Start menu



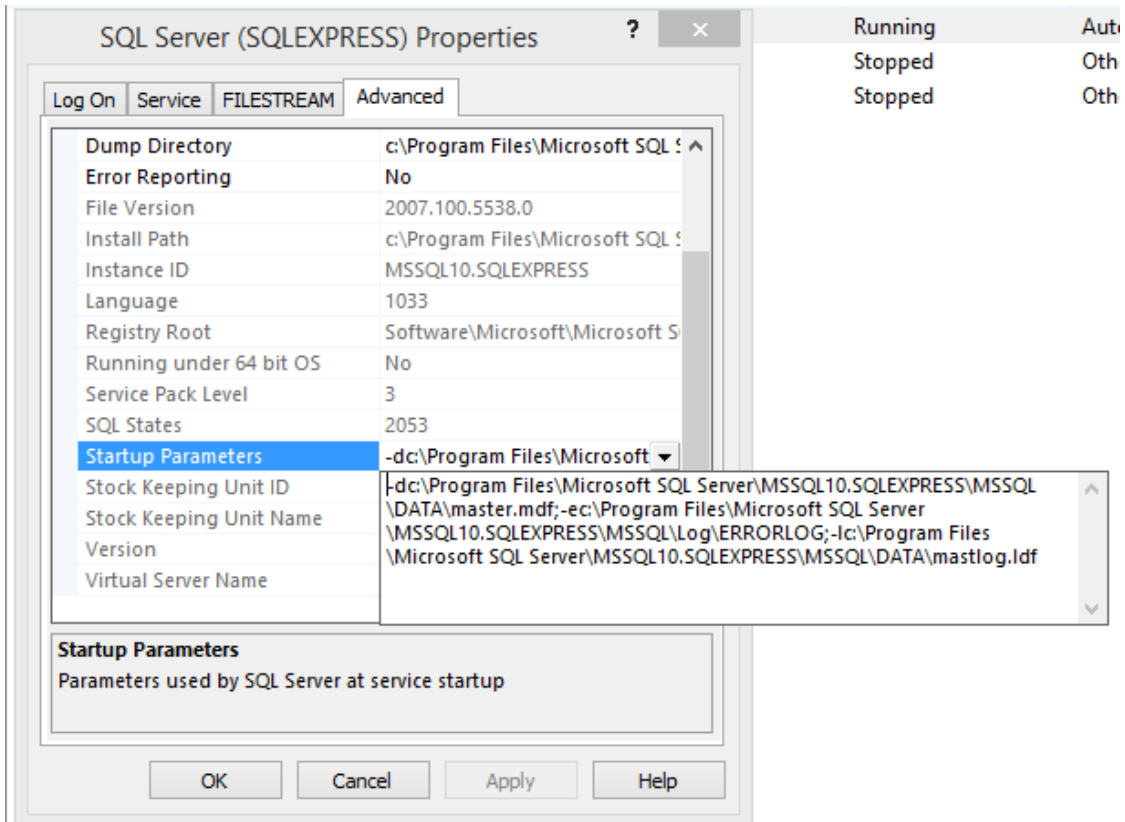
- Select SQL Server Services from the left pane. A list of SQL Servers appears on the right pane.



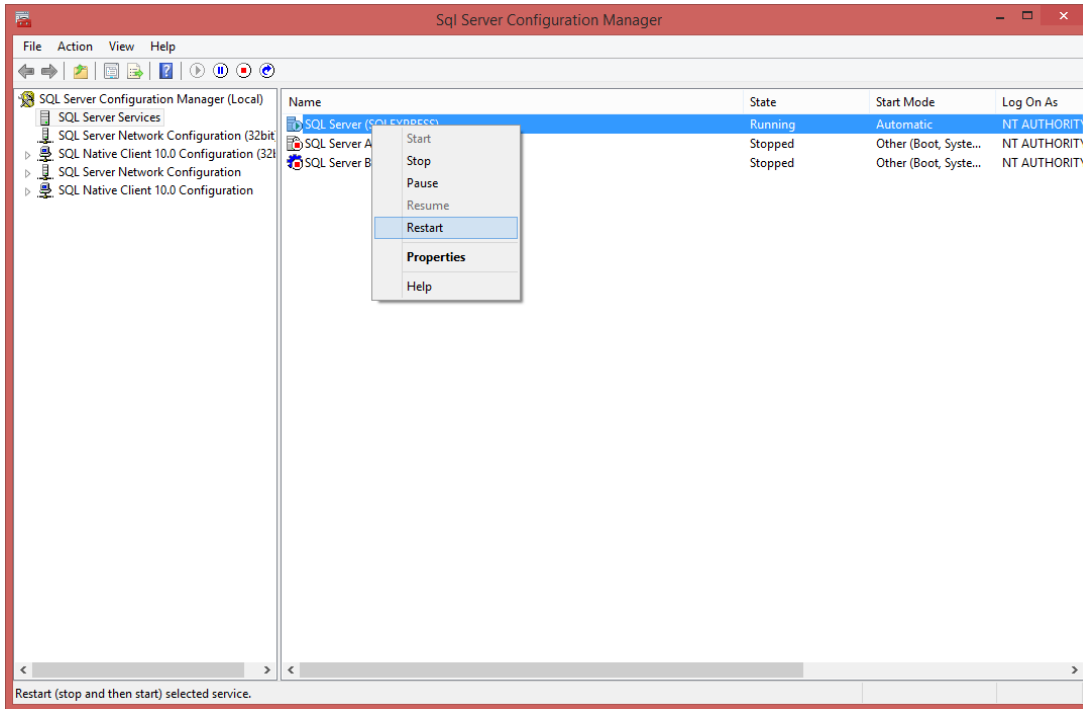
- Select the appropriate database from the right pane – for instance, SQL Server (*instance name*).
- Open the **SQL Server Properties** dialog by double-clicking the selected database or by selecting Properties from the context menu.



5. Click the **Advanced** tab in the properties dialog.
6. Under **Startup Parameters** open the pop-up list. Append the following flag to the end of the list: **;-g 1000**



7. Click **Apply** to save the modification. Your SQL Server now has enough memory to process validation during login.
8. Click **OK** to save and exit the properties dialog.
9. Restart the database.



### 4.4 Creating a new file

- Do one of the following:
  - If the Company File dialog is visible, click **New File**, and then click **OK**.
  - On the **File** menu, click **New**.
- Enter the name for the file: An appropriate naming convention should be used when naming your Time data file. Also, ensure the file name contains only valid characters.

- File naming conventions**

File names for files used with Microsoft SQL can be up to 100 characters in length.

- Invalid Characters**

Avoiding the use of invalid characters in a file name ensures a smooth operation during cross-program interactions and file sharing across different operating systems. It is good practice not use spaces or special characters in file names to avoid any issues.

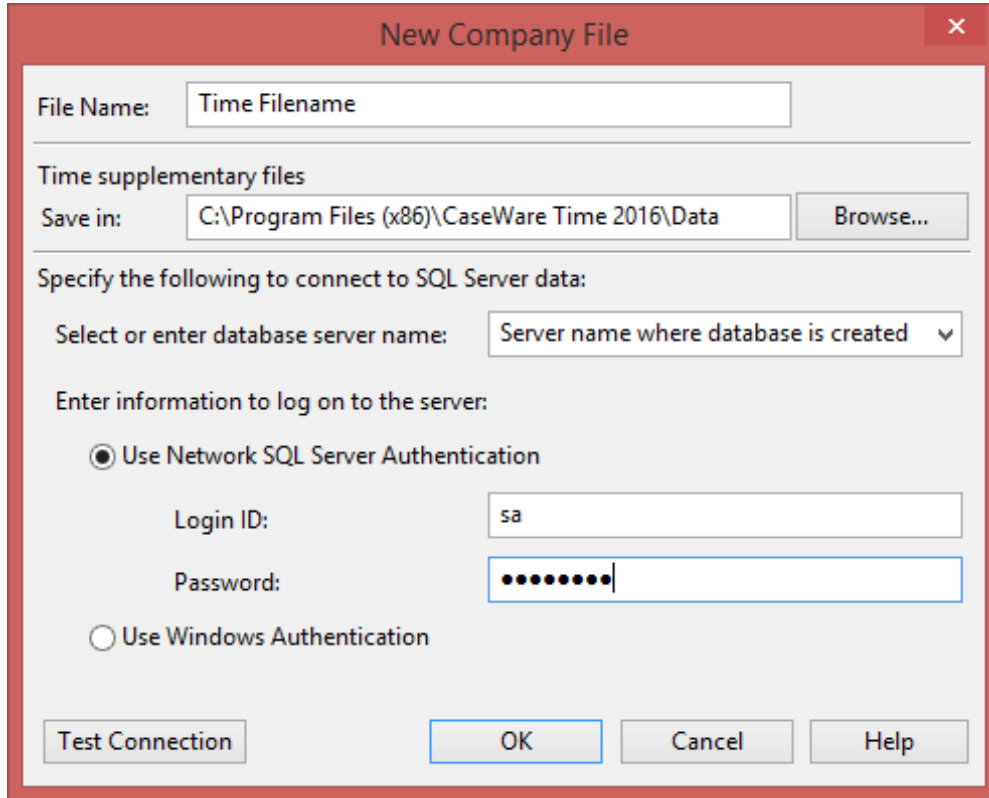
Ensure the file name contains no spaces, punctuation, or any invalid characters listed below:

.	*	~	/	\	
`	'	!	@	#	\$
%	^	&	(	)	,
+	=	-	{	}	;
[	]	:	?	<	>

- Select the path of the directory where supplementary files are saved.

The Time supplementary files are the \*.ar file, CaseView files, image files, etc. Essentially, any files not directly related to SQL database are considered a Time supplementary file.

4. Enter your SQL server information to connect to your database. The following information is needed:



- a. **Select or enter database server name:** Select the server name where your database was created.
  - b. **Enter information to log on to the server:** Specify whether SQL Server authentication or Windows authentication is used to log on to the SQL server. Select the one that applies. Network SQL Server Authentication is normally used for the Network install; Windows Authentication is normally used for a local install.
    - **Network SQL Server Authentication:** Enter the login ID and password for the SQL administrator account ('sa' account for Microsoft SQL Express edition), which was set up during the installation of the SQL server. If the Time program installed Microsoft SQL Server 2008 Express the login is 'sa' and the password will be what was created during the Time install.
    - **Use Windows Authentication:** This option requires that the SQL Server is on a network that uses Windows Authentication. This requires a database administrator to grant access for all Windows domain users that use this file.
5. After the above selections are made, click **Test Connection**. If the test fails, check that your settings are correct or contact your database administrator for assistance.
  6. Click **OK**. This will create the 'filename'.ar file in the supplementary directory and the corresponding SQL tables.
  7. To log into the Time 2016 data file for the first time, use the default user name **sup** and click **OK**.

#### 4.4.1 First Steps after creating a new file

1. **Setting Up the Company Profile Options**

When opening a new file for the very first time, you need to set up your company profile options. Time requires that the fields for **Receivables** and **Bank general ledger accounts** are specified in order to access the rest of the file. These can be entered under the **Receivables** tab in the company profile.

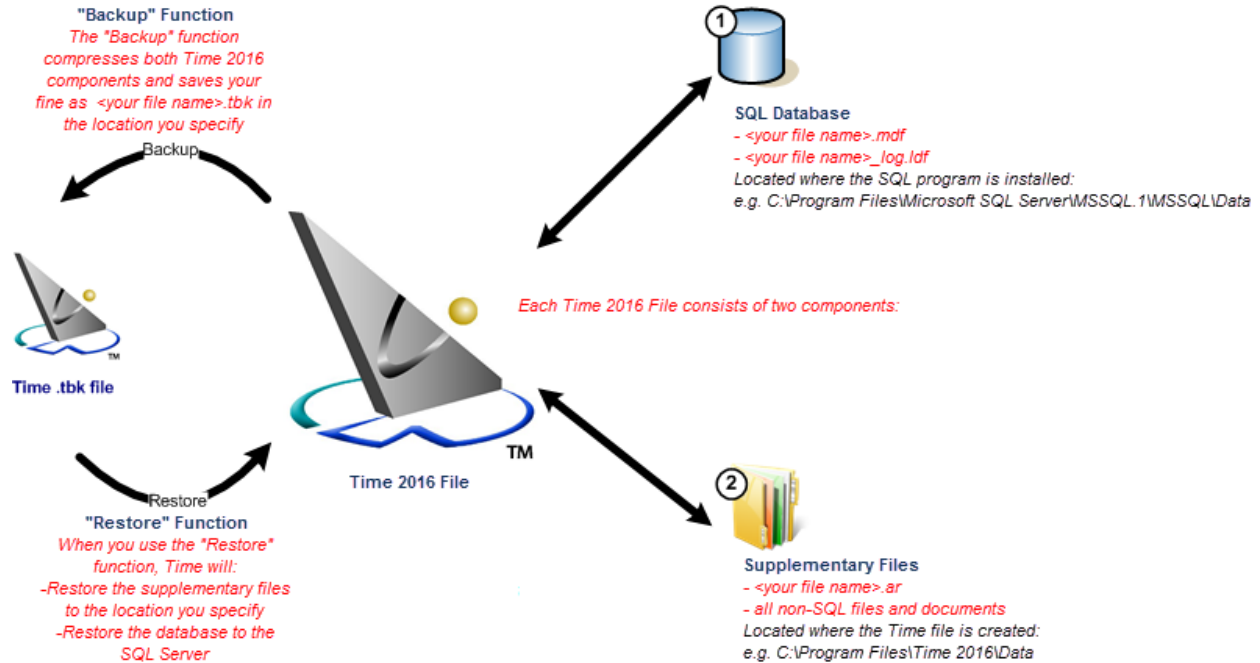
2. **The Time Workflow**

The Time Workflow guides you through your tasks using the workflow layout. Use this tool to give you step-by-step instructions on how to set up your file and process data. The Navigation panel on the right side of the screen will step you through the areas to help you learn the Time program.

## 5. Backup and Restore

### 5.1 Backup a File

Time has backup and restore functionality. Under **Tools | Maintenance | Backup/Restore** you can back up your Time database including all supplementary files to a .tbk file.



### 5.2 Net Share

Ensure net share is enabled if you want to back up a file in Time. If you installed SQL 2008 Express from the Time Installation Wizard the settings are properly configured to "Local System account". If you installed SQL Server from a different source (such as Microsoft's website), your SQL Server settings may be configured for "NT Authority\Network Service"; this configuration does not enable net share.

#### Enabling Net Share

1. Select **Start | Control Panel**.
2. Select **Administrative Tools** and double-click on **Services** to open the Services list.
3. Select and right-click **SQL Server (MSSQLSERVER)** from the Services list and select **Properties** from the menu options.
4. Select the **Log On** tab:
  - a. If the **Local System account** radio button is selected then click **Cancel** and return to Time to process your backup (your server settings are configured to enable net share).
  - b. If the **This account** radio button is selected then select the **Local System account** radio button and continue to Step 5.
5. Click **Apply** to change the setting.
6. Return to the Services list and right-click **SQL Server (MSSQLSERVER)** and select **Restart** to restart your SQL Server.

7. Your server properties are now configured to enable net share. Return to Time to process your backup.

## 6. Converting to Time 2016

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Follow these instructions when converting the company file from lower versions to the latest version of Time.

### 6.1 Before Installation

We recommend you take the following actions before converting to Time 2016. These actions can ensure a seamless conversion process.

1. **Run Diagnostics**

Run the diagnostics reports in all available areas of Time. Diagnostics can identify critical and warning error messages to alert you of areas in your file that are incomplete or that are not functioning properly. For more information on correcting diagnostic errors refer to the Help by pressing F1 while viewing a diagnostic document.

2. **Check Balances**

Before converting your file, print or view the detailed reports for WIP and Accounts Receivable to verify the balances.

3. **Prepare Contacts for conversion**

**Note:** This is for users converting from **Time 2009** only.

If you have set up Contacts in your file, review the list to identify all contact people and contact companies. You will require this information when performing the Contact Conversion when you open your file in the latest version of Time.

The following changes have been made to contacts:

- *Each Contact now has a mandatory **Last Name** (surname) field.*

Prior to conversion, ensure each contact person has this field specified in either the **Last Name** field under the Attention tab of the Client setup dialog (**Setup | Clients**) or the **Name** field in the Contacts setup dialog (**Setup | Contacts**).

- If the contact's full name was entered in the Name field in the Contacts setup dialog, then ensure each name follows a common pattern; for example, *Last Name, First Name*. During the Contact Conversion, you can configure the wizard to search for specific patterns.

- *You can now set up **Contact Companies** separately and associate them to contact people*

Prior to conversion, ensure all contact company information is specified in a common area in the file; for example, under the Address 1 field of the Contact setup area. During the Contact Conversion, you can specify this location to extract all contact company information.

**Note:** You can only specify one (1) location to the wizard.

Also, ensure each contact company has a **Name** specified.

In the latest version of Time, the following rules apply:

- You can assign many contacts to a contact company, but a contact can only be assigned to one contact company.



- You cannot directly assign contact companies to clients. This relationship must be defined through a contact person; that is, assign a contact person to both the client and contact company.

#### 4. Back up the file

Back up your Time file prior to conversion. The Backup command is available from:

- For Time 2009, Time 2011, and Time 2013 users: Go to **Tools | Maintenance | Backup/Restore**.
- For Time 2008 users: Go to **File | Save compressed**

Save your backup file to a location (folder) that is accessible in the event conversion fails. We recommend you take regular backups of your Time file.

## 6.2 Installation

Read the section, [Installing Time for multi-user setup](#), in this guide for instruction on installing Time 2016. Select **Network** setup type for your install and ensure to install Time in a new folder. All Time users must have full access rights to the Time program and Time data file folders.

## 6.3 Conversion

After you install Time 2016 and configure your SQL Server for use, you can begin the file conversion.

**Note:** Running a diagnostic on your file prior to conversion minimizes the likelihood of conversion errors, but does not entirely eliminate them. During conversion, if an error is detected by the program, the conversion process is stopped and an error log is generated to report any issues.

1. Open a copy of the previous version's file (\*.ar file) in Time 2016.
2. The start-up screen asks if you want to create a backup of the file. We **highly recommend** you create a backup. Backup files should be created on a regular basis and stored in a separate location from your active files.
3. After performing a backup, the conversion loading dialog appears. This begins the file conversion process. This may take a few minutes depending on the size of the file being converted.
4. After conversion completes, a dialog appears to provide you a brief summary on the results of your file conversion.

**Note:** For **Time 2009** users, you will not be able to access the Contacts area until you perform a Contact Conversion. You can access the Contact Conversion wizard from the menu **Tools | Contact Conversion**. Click the Help button on each wizard screen for more detailed information about the contact conversion process. Refer to the What's New topic in the Help for a detailed list of improvements and changes in this version.

5. Click **OK** to finish the conversion.

### Warnings in Conversion

During the conversion, a warning log is generated under *ITime\_Program\_Directory/Data/Conversion Log/Warnings.htm* for any non-critical errors in the file. Warnings can indicate records in the file that cannot be converted because of missing information.

- **Duplicate Email Address**

Email addresses in Time 2016 must be unique. During conversion, if duplicate email addresses are detected a log file, 'Warnings.htm', is generated in a ConversionLog folder under your CaseWare Time Data directory. After conversion you can modify duplicate email addresses.

### Troubleshooting – Errors in Conversion

If an error occurs during the conversion, the conversion process is stopped and an error log is generated under *ITime\_Progam\_Directory/Data/Conversion Log/Errors.htm*. These errors must be corrected before you can perform a successful conversion. You may run into the following errors:

- *There is not enough system memory in the internal pool*  
Please perform the steps in the section [Troubleshooting Login Errors](#) to increase the available memory for SQL Server. After you complete these steps try the conversion again.
- *There are records with duplicate keys in your file*  
Ensure all fields that require a unique value are corrected in your file and then perform the conversion again.
- *There are inconsistencies in the data*  
Mismatching information or invalid records in the database can cause an error. All database tables are checked together to ensure data integrity. Ensure all business rules for transactions and staff are met.

If conversion continues to fail, please contact [support@caseware.com](mailto:support@caseware.com) for additional assistance.

## 6.4 After Conversion

After a successful conversion, verify the data in your file is correct.

- **File Balances**  
Confirm WIP and Accounts Receivable balances are correct from their detailed reports.
- **Diagnostics**  
Run diagnostics to ensure no errors were introduced during conversion. Press F1 for detailed information on the diagnostics.
- **Contact Conversion**
  - Run the contact conversion tool under **Tools | Contact Conversion**.

**Note:** This is for users converting from **Time 2009** only.

  - Check that client attentions were added to your list of Contacts under **Setup | Contacts | Contacts**.
- **Protection**  
There is a new protection right for the diagnostics area, called “Repair diagnostics”. You need to select this right for the users you wish to be able to repair the diagnostics in the program. It is found under the protection rights for the group, Category – Tools, Command – Repair diagnostics.
- **Project Management**  
**Note:** This is for users converting from **Time 2009** only.  
Projects are automatically converted when you open your file in Time 2016. Review the project management area to ensure your project structure is preserved.  
Note that client project numbers can now be automatically generated. During file conversion, the client project numbers defined under project codes is converted to use the following project mask *Project Template No. + ‘hyphen’ + Client No.*

For example, in Time 2009, if you had a client project **AUD2009** for some client **ABC**, then a project template will be created in Time 2016 with the name, **AUD2009**, with a client project with the number **AUD2009-ABC**.

**Note:** All client projects are created from a project template.

- **New Documents**

New documents added appear at the top of the Document Manager.

- **CaseView Documents**

Verify your CaseView documents – statements, invoices and credit notes – have successfully converted to the new version.

- **Document Manager**

- **Copy Document Manager**

Introduced in Time 2009, the Copy Document Manager under **Tools | Maintenance | Copy Document Manager** enables you to overwrite or edit your document manager if it has become cluttered and inefficient. The following options are available:

- Overwrite Document Manager with default.
    - Add document items from default to current Document Manager.
    - Replace Document Manager with default plus items from current Document Manager.

## **Time 2016 Enhancements**

For a full list of enhancements and new features in the latest version of Time, visit:

[www.caseware.com/support/time#\\_enhancements](http://www.caseware.com/support/time#_enhancements).

### **Restoring the Documents**

The CaseView documents (credit note, miscellaneous invoice and statements) have been restyled. If you want to take advantage of new features you can restore the new documents from the Company Profile.

**Note:** Your customization to your CaseView templates will be removed at this point if you choose to restore.

1. Go to the **Invoice** tab.
  - a. Click **Restore Invoice**
  - b. Restore Miscellaneous invoices.
2. Go to the **Statements** tab.
  - a. Click **Restore Statement**.
  - b. Restore the Client Statement.
  - c. Restore the Group Statement.
3. Go to the **Credit Notes** tab.
  - a. Click **Restore Credit Note**.

### **Edit CaseView Documents**

Follow steps 1-3 above but click the **Edit** button.

## 7. Time Support

### 7.1 Getting Help

Time comes equipped with a complete online help that includes both reference and step-by-step information. There are several ways of getting the information you need.

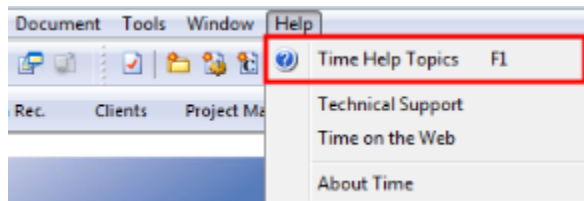
#### Context Sensitive Help

F1

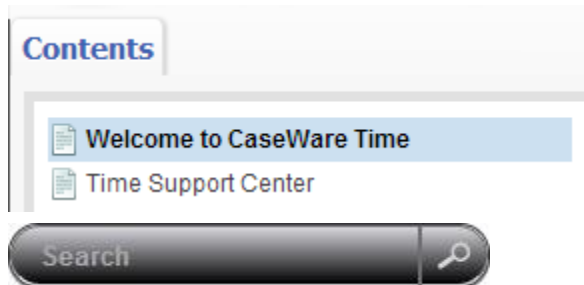
Help

Information to guide you as you use Time is a button click away. Press the **F1** key while on a particular menu item, in a dialog box, or any of the browse windows to pop up an explanation of the function performed by that function or dialog. The **Help** button accesses the same information.

#### Procedures and Reference Information



When you select **Time Help Topics** from the **Help** menu, you can access a complete online reference guide for your application. This is where to head for detailed information to guide you through a particular task or dialog box.



Click the **Contents** tab to see the Help system arranged into chapters and sections of related topics. Chapters and section heads appear as book icons and the topics are represented by page icons. Click a topic page to see the procedure referenced. To Print the page, select the **Print** icon (🖨)

The **Search** provides full-text searching through the Help system for a particular word or phrase.

#### Resources on the website

The website is rich with additional information to help you use Time as effectively and efficiently as possible at [www.caseware.com/support/time](http://www.caseware.com/support/time).

#### User Guides

Printed user guides are no longer available for CaseWare Time; however, you can refer to the online help for all reference material.