

Using OneNote to track billable hours

In many program, the formal documentation or help tells how to use each menu item, but there is no proper explanation of how, given a real world business problem, your new, wonderful software can be persuaded to solve it.

To give OneNote its due, it does come with a number of tailored pages and templates to give you some ideas of what to enter to be useful. Even so, I went through the initial free trial period without coming to the conclusion that it could become indispensable. This is all a long prelude to say that some programs need to be played with for an extended period before one finds where it can be used. OneNote was this way for me and only after I had made a commitment to it did I find some really useful ways to use it which have now entered my regular workflow; here's one.

How I use it is still evolving, but I tend to create a separate notebook for each major client, plus a general notebook for the rest of the clients. Within these, I use sections and pages as required. When I'm starting a new task for which I need to track billable time then, somewhere on one of the client pages, I set up a four column table (Table menu | Insert Table). It doesn't need many rows, just enough for any items which need to be recorded immediately, because typing ctrl-Enter creates a new row under the cursor, so it's really easy to add more.

I put the task name (i.e. a short description) in the next empty table row, first column, and then in column two I use the shortcut which makes timekeeping a breeze: alt-shift-F. This puts the current date and time in that column as a start time. When I'm done, or get interrupted, I put the stop time in column three, using the shortcut again. If I restart the same task, I can add a row beneath and put in an extra start and stop time. This way, as long as I remember to punch my time clock in and out, I can come back later and work out all of the time I have spent on each task, even if the task was interrupted multiple times. I work out the calculated task times in the fourth column. One nice by-product of this method is that if I forget to clock out of Task A and clock into task B, at least the total for A and B will be accurate.

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If there are multiple tasks, I pre-plan them in the table, and punch in times or add extra rows for interruptions as I go. For unplanned tasks like a phone call, I might add a row in an existing table, or create a new table.

Finally at invoice time, depending on how complicated it is, I can either copy the table and paste it into Excel, or just do some mental arithmetic. Of course, once in Excel, I can categorise, summarise, sort and sum to my heart's content.

All of which begs the question: why not just have Excel up all the time? That was the conclusion I came to at first. I thought: OneNote doesn't do anything I can't already do in other programs I already own. What I found is that OneNote brings enough of the basics from other programs into one program, which starts almost instantly and doesn't seem to bog down my PC if I leave it running while I do other things. It just makes things so darn convenient!

Next time: documenting "How-To's" from your PC with OneNote.