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Jun. 01, 2009

CaseWare's

Time 2009 is the core time and billing program from CaseWare, offering comprehensive capabilities for these functions, along with integrated contact management, project management and integration with the company's Working Papers and IDEA system for GL and audit functions. The company also offers an add-on Today module for scheduling and integration with Outlook. Time and CaseWare's financial products support IFRS and GAAP standards. The systems are suited to small, mid-sized and larger practices, with pricing starting at \$499 for a single timekeeper license and \$999 for a license of up to five timekeepers. Additional timekeepers can be added to the five-timekeeper license for \$175 each; annual renewals are 50 percent of the license value at the time of renewals.

From the June 2009 Review of [Practice Management Systems](#)

EASE OF USE/FLEXIBILITY:

The CaseWare interface offers a large work screen bordered on the left by an expandable menu and is lined at the top by a collection of toolbars that includes pull-down menus, numerous task icons and pull-down selection lists for looking up information by document, client, staff, project or date. An additional set of panels on the right provides access to function areas, including setup, processing tasks and completion functions, with links to specific tasks under each section.

Users have access only to those clients and documents that they are assigned to, which helps maintain security and also streamlines the program for users. Time's workflow layout guides users through many common tasks and provides explanations of each step in the process, along with links to more detailed

definitions. Time also offers a summary information screen called the Workflow

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on similarly user-friendly screens, with another spreadsheet view that simplifies much of the entry and review processes.

PRODUCTIVITY TOOLS/FEATURES:

As previously noted, the system offers a flexible and productive workflow model, providing assistance, if needed, as well as very intuitive navigation and friendly data-entry features. Among these are timers and the ability to automatically transfer calendar items into the time tracking system. The program also includes a built-in document management system that helps to efficiently store client documents, but also works with reporting functions to improve organization and access.

With the addition of the optional Today module, users can also take advantage of an even more user-focused and customizable interface that includes Outlook integration and centers around a homepage that provides a dashboard overview and quick access to contact information, personal calendar items, tasks, events and company news. It also offers team-oriented functions that enable greater collaboration between work groups.

Time's workflow tools provide good support for engagement and project-based work, providing support for multiple departments and locations, as well as subprojects.

The system supports unlimited work codes and billing rates per employee, with time budgeting functions and tools for managing overtime and billing. The program can handle multiple WIP billing types, and offers an invoice review system.

REPORTING:

Time's reporting functions are organized within the program's document management utility, providing quick access and intelligent storage and retrieval of generated reports. The system offers reporting at various responsibility

levels, including management reports for expenses, productivity, WIPs, budgeting,

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management and time tracking. The system does not integrate with other accounting systems. Time also offers Word and Excel tools, and allows all reports to be exported as PDFs.

SUPPORT/HELP/UPDATES:

Throughout the program, Time offers multiple resources for users, from workflow guidance and process descriptions, to more traditional menu-based Help functions. The company's website offers additional tools, including access to system updates, articles about system features and add-ons (including a Google Gadget), and a searchable knowledgebase. Case-Ware also offers web-based and classroom instruction options. Technical support is included in system pricing.

RELATIVE VALUE:

Time is a mid-priced practice management system that is primarily centered on the time and billing components, but offers excellent project, group and productivity management functions, and good personal time management options through the Today add-on. The system is flexible and customizable to user needs and roles, and offers intuitive workflow and navigation features.

2009 OVERALL RATING:

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

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