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CaseWare Time and Today 2007 is an extensive workflow management package that can be easily implemented by small and midsize firms while providing enterprise-like
tools for office productivity and firm administration.

Ease of Use/Flexibility – 5 Stars
Time is entirely focused on a positive firm and end-user experience. Setting
up a firm (initially) is a clean and comfortable process, and applying user
security and permissions dictate what components are accessible when employees
login. Screens can be customized to show documents, setup guides and workflows,
and the application makes good use of dock windows. Work codes can be tied directly
to classifications and GL accounts during setup. Classifications are useful
for code bands, such as audit code and tax code groupings. Staff can easily
enter their time and view their current productivity status, broken out by day,
active period and YTD. As well, time entries provide project details.

Billing is based on available WIP, with options to bill per client or available
projects. Firms can choose if they wish to make use of the time approval process
when setting up their company profile, and developing firms that anticipate
the need can grow into this process post-implementation. The Document Manager
gives access to built-in reports and user-defined (and created) documents with
a tree-view navigation bar. Robust database environments such as SQL Server
are not available until 2008 to support the application; rather, it uses a number
of database files to maintain different types of information. Larger firms,

particularly those where users are regularly creating entries throughout the

The installation and setup process for new firms is like creamy butter is to fresh bread — extremely easy to work with and very satisfying. Firms looking to upgrade from other applications will need to investigate if they can make use of the ASCII file import process. One noteworthy item is that CaseWare states that it supports a direct import from ProSystem fx Practice and can take work codes, staff, clients, projects and balances. Test databases in use for this review have upgraded cleanly, and there are plenty of tools for small firms to anticipate using when they "grow up." The application appears to be intended for those firms that are actively managing midsize projects that require collaboration and department-level monitoring. Sole practitioners might still find the package to be effective for cleaning up projects and centralizing their processes. To help ensure a clean installation and reduce database errors, a diagnostic tool can be run with results that provide details of potential errors, duplicate entries, missing information, and even invoice and receipt analysis.

Productivity Tools/Features – 5 Stars
Staff members working remotely can make use of the checkout option in Time, which allows for remote entry of time and expenses (for synchronization/check-in purposes). While working remotely, users do not have access to live company data. Several features in both applications can improve productivity. One such feature is the ability to generate documents in the Document Manager, organize them, and then save or e-mail the file as a PDF. Other productivity boosters include a status panel to answer management's question of, "How is the firm doing today?" as well as workflow processes for reconciliation, month-end and year-end on the main navigation bar.

Web pages can be accessed directly from the Time application, which gives access to the built-in timer bar and URL entry using the Document Link option for

document

interface. Dates are user selectable or for the current period, which appears to resolve the standing issue regarding available reporting periods. Automatic Documents allows for the creation of custom reports based on document types (an extensive list), formats, dBase filter strings, and selection fields for each type. When combined with the status panel, diagnostic reporting tool and history manager for looking up past year's information, this is a strong reporting package. One item of caution is that years are closed out and separated with Time and Today. If your firm is dependent on comparative reporting across multiple years, then you may have some process difficulties and frustrations. The company noted that its Client batch e-mail feature enables firms to go paperless by allowing them to send their correspondence (letters, invoices, statements) in batch to a client via e-mail.

Support/Help/Updates – 5 Stars
CaseWare continues to provide a stable product, and it should be noted that this review is based on an incremental upgrade to the application provided for review last year. The company is based in Canada, and both the application and the technicians support installations in the United States and Canada. Help documentation is extensive, the supplied User Guide is more than comprehensive, and both the website and manuals provide troubleshooting and tips. Looking quickly
through the online tips, four new posts were provided during the course of this review, and nearly 60 in the past year! CaseWare's suite of audit and analysis tools help to ensure product longevity.

Integration – 5 Stars
Direct supported integration includes MS Outlook and CaseWare Working Papers. Options within Outlook can extend Today's functionality with contact management, mobile device support, and an additional application for new entry creation.

Working Papers has bi-directional update capability for project information

(total of $1,874). Today is included with the purchase of Time 2007.

2007 Overall Rating: 5 Stars

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