

# Personal TimeSheet for Outlook

## Installation and Configuration

Personal TimeSheet consists of a simple client install and you are required to setup and configure projects and activities, and maintain drop down lists, templates, reporting settings etc. in a Project database. And only then you would be able to prepare timesheets in Outlook and publish to the project database

The downloaded zip file contains 2 files:

*PersonalTimeSheetSetup\_xXX.exe* {where 'xXX' can be either x86 (32-bit Outlook) or x64 (64-bit Outlook)}  
*Trial Key.txt*

Extract these file contents to a file folder.

### Requirements:

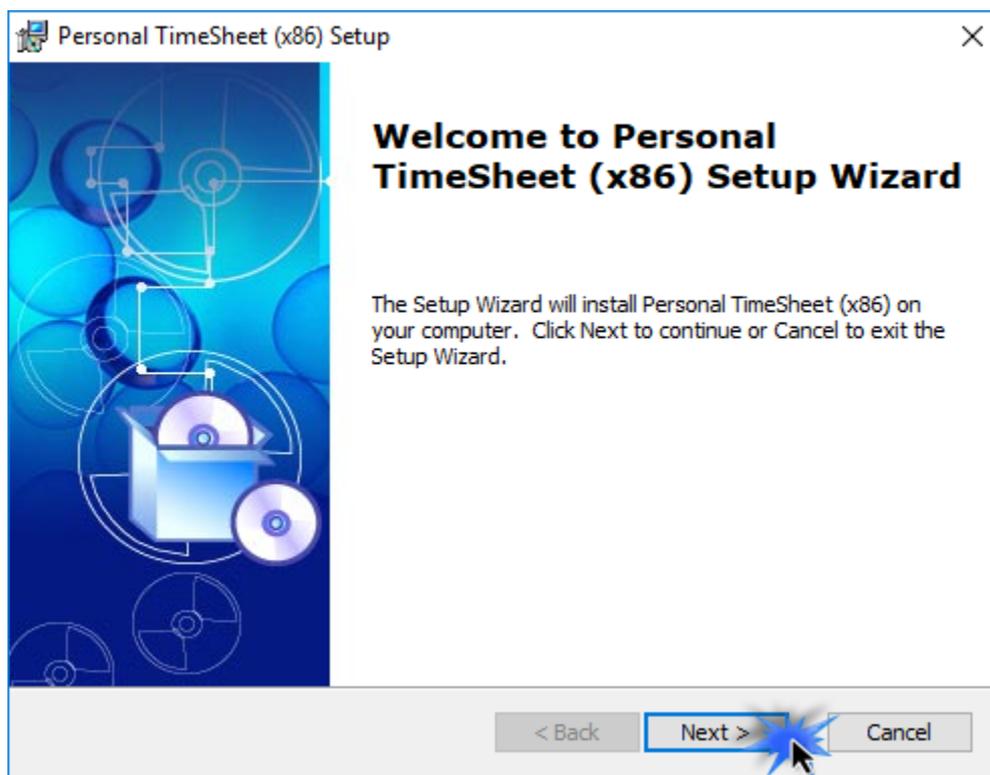
- .NET framework 4.5 or above
- Outlook 2007, 2010, 2013, 2016 and 2019 (both 32-bit and 64-bit).
- Personal TimeSheet requires a dedicated database to save the project metadata and other global settings and configurations. Supported databases are Microsoft SQL Server, Azure SQL Database and Microsoft Access.
  - All SQL Server versions are supported including Express edition. SQL server should be on an accessible local office network.
  - For Microsoft Access database, a dedicated folder, preferably a UNC path is required.

There are 2 sections in installation:

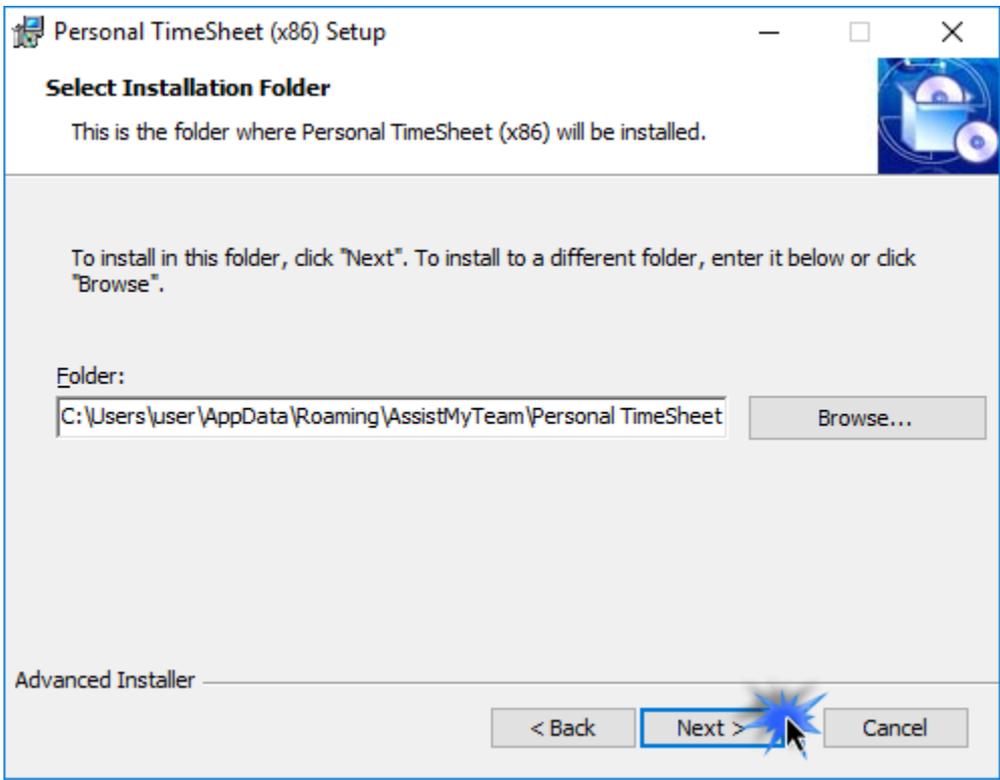
a) **Files Installation**, and b) **Project Database Configuration**

### a) Files Installation

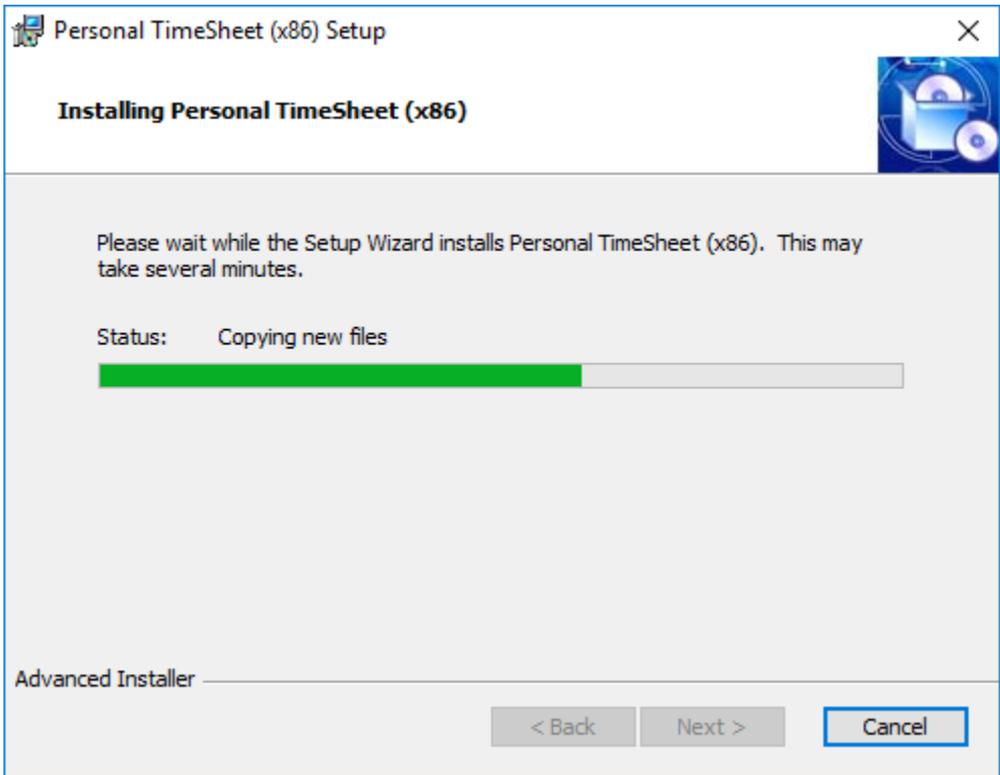
**Step 1.** Run the *PersonalTimeSheetSetup\_xXX.exe* to start the installation. Click 'Next' to Continue. If Outlook 2007 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.



**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.



**Step 3.** It just takes a few minutes to complete the whole copying process



**Step 4.** Click 'Finish'. This ends the files installation process in your system.



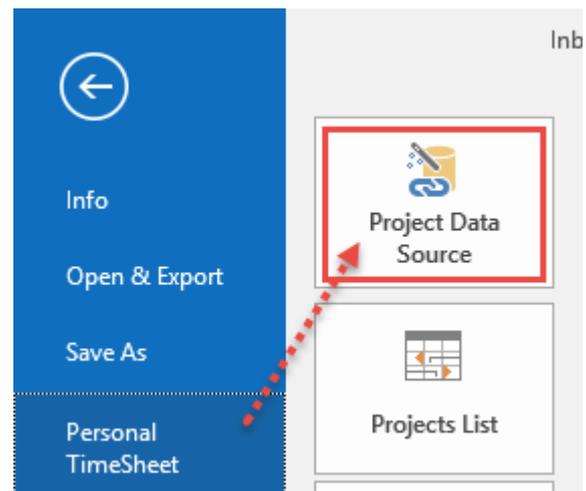
Now start Microsoft Outlook.

### b) Project Database Configuration

The next step is to choose a database option and configure it to store the project metadata such as project/activity lists, notification options, email templates, members list, reporting settings etc. as well as other global settings that streamline the behavior on you work, track and publish their timesheets in Outlook.

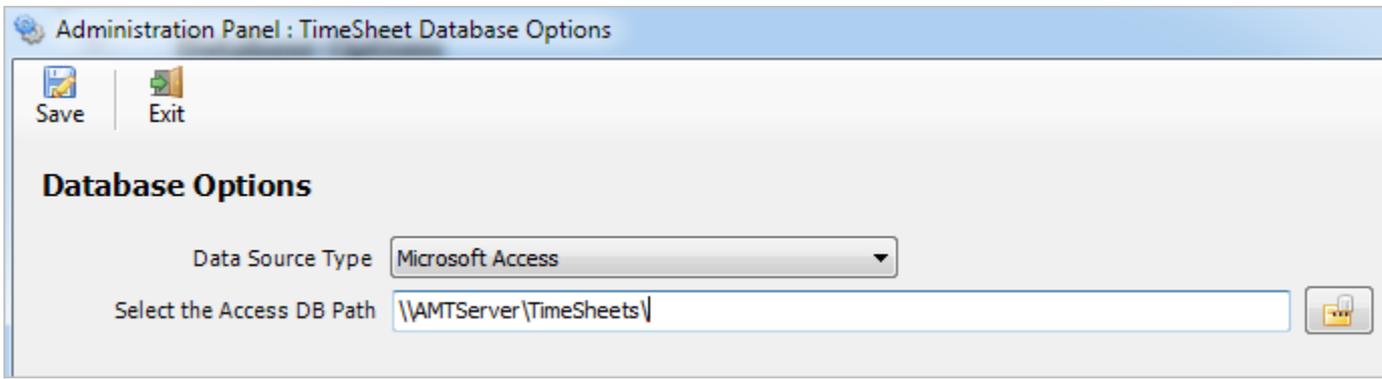
If you have just installed the Personal TimeSheet tool, you will get to see this 'Project Data Source' Settings dialog when you start Outlook.

Or you can get to this from **Outlook > the backstage File > Personal TimeSheet > Project Data Source** button.

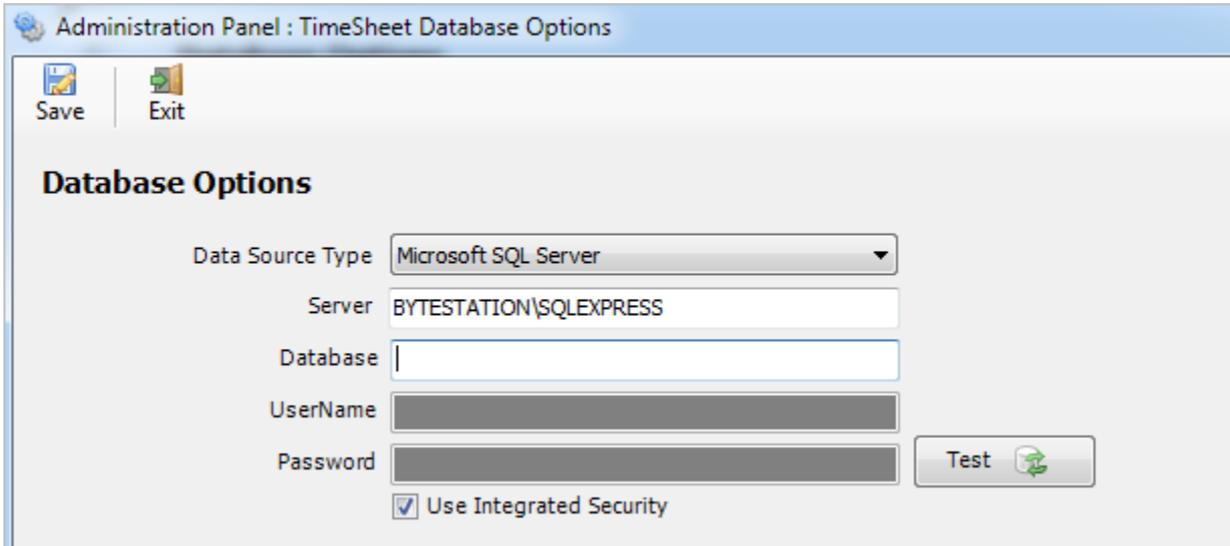


You can choose a project database between a **Microsoft Access** (MDB file) to a **Microsoft SQL Server**, or **Azure SQL Database** (cloud db).

**i) Using Microsoft Access** - If you choose 'Microsoft Access', the database file (e.g., *PersonalTimeSheet.MDB*) will need to be placed on a file folder. When you specify the location where the MDB file is to be created, make sure you choose a valid folder from your computer or from another computer (shared folder). Note that it is recommended to use a UNC path if it is a network path e.g. `\\AMTServer\TimeSheets` instead of a mapped one because, a mapped drive might only be accessible to you.



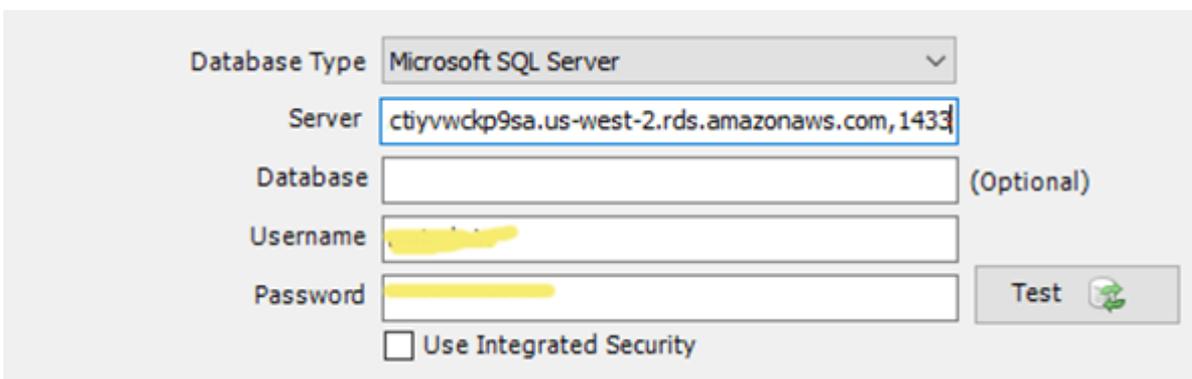
ii) Using Microsoft SQL Server – You can also use a dedicated SQL Server database option.



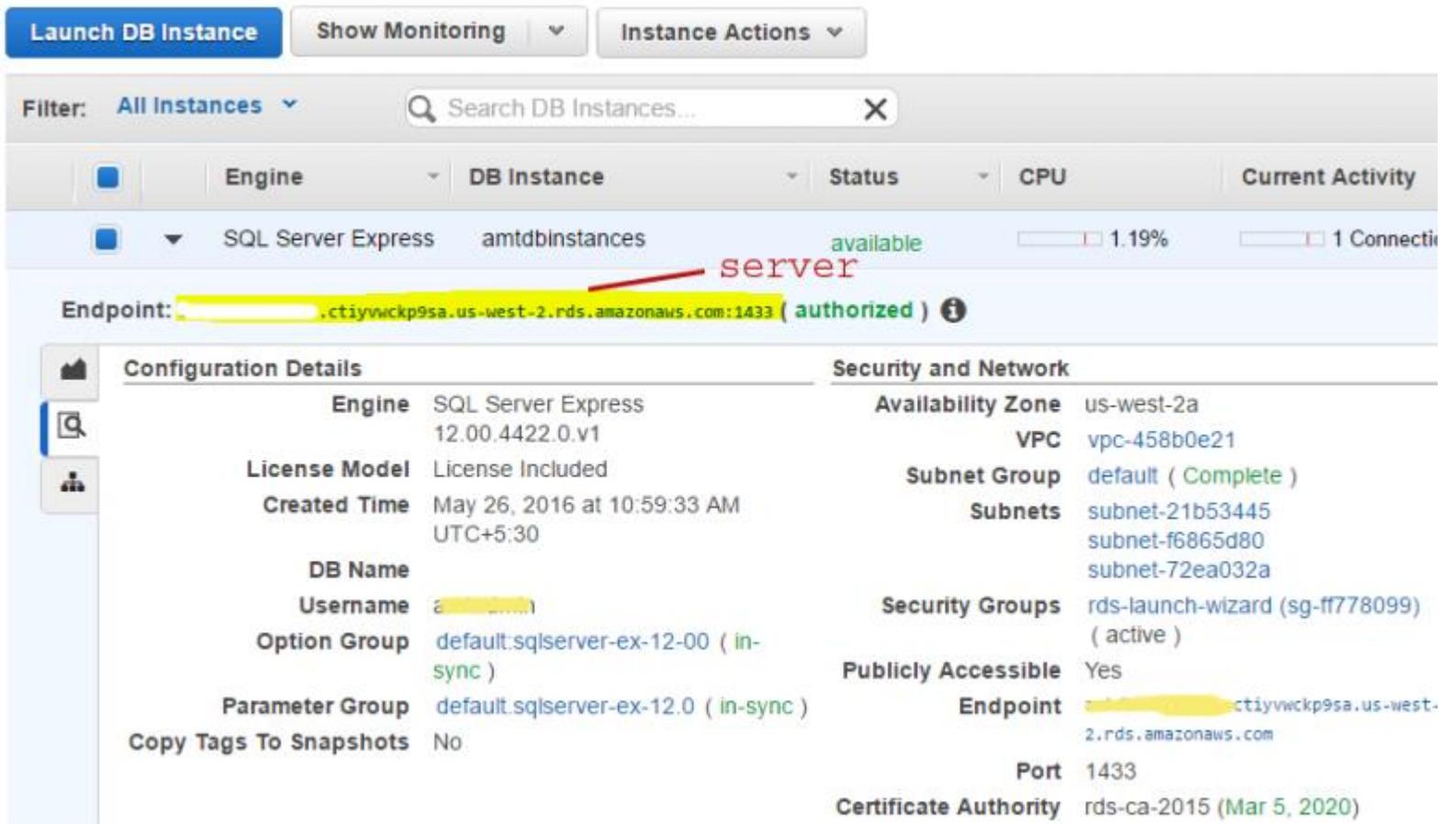
For SQL server, the server name is mandatory. The Database name is optional. If it is left empty, a new database with the name '*PersonalTimeSheetDB*' would be created. If your SQL server is configured to use windows authentication (NTLM), then you can check the '**Use Integrity Security**' option to let Windows manager the credentials to access the resources on the SQL server.

**Using Cloud based SQL Server database**

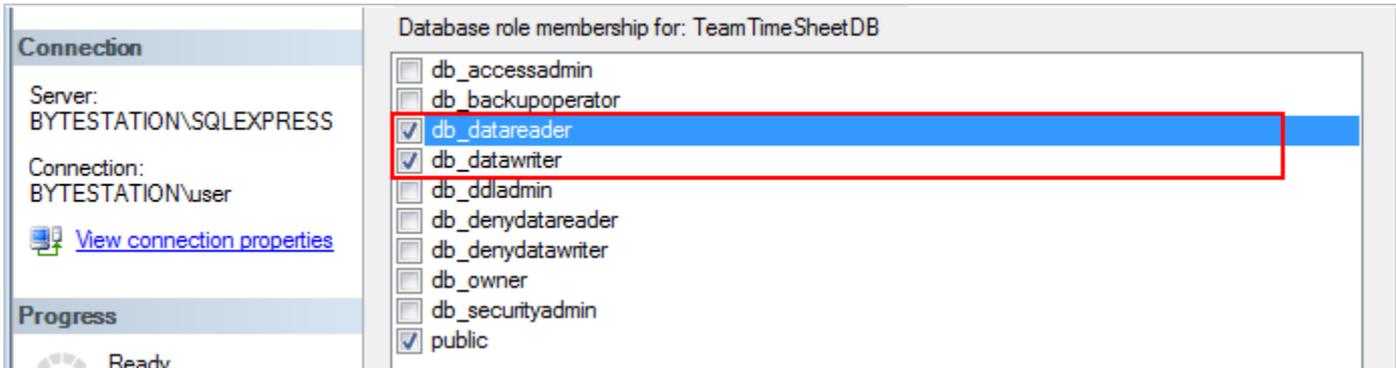
You can also use cloud based SQL server service instead of on-premise such as Amazon RDS cloud service (They offer both free and paid accounts. For more, refer to <https://aws.amazon.com/rds/>). For instance, below is our test MS SQL account with Amazon RDS. Once you have signed up and created a MS SQL database, input the endpoint URL as server in our app. Make sure, you suffix the port number after the endpoint as “,1433” so that the full URL in the server name would be '*XXXXXXXXXXXXXXXXXXXXXXXXXXXXX.rds.amazon.com,1433*'.



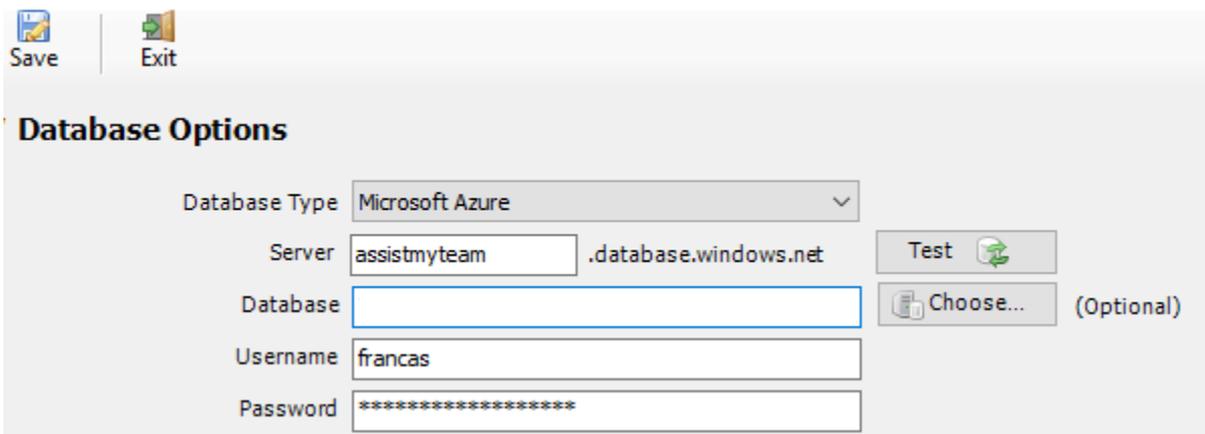
And here is screenshot of the RDS server to use from the RDS member panel.



Permission for users on the SQL database - You should have both **db\_datareader** and **db\_datawriter** permission on the Personal TimeSheet SQL database.

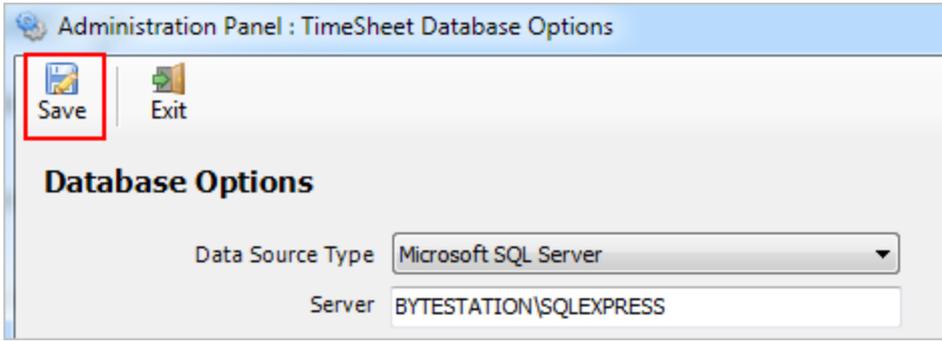


iii) Using Microsoft Azure SQL – Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database.



NOTE: If no database name is mentioned, the add-in will create a new database in your Azure SQL server, by the name of 'PersonalTimeSheetDB'.

Once you click **'Save'**, the add-in will automatically create the chosen database (if it does not exist already). And then any project metadata and other settings/drop down lists you defined from Personal TimeSheet add-in in Outlook would be saved in this repository.



**NOTE:** There are other administrative configurations that you would need to undertake. These options are available in the 'Personal TimeSheet' menu in Outlook.

For more references and helps on performing these administrative configurations, refer to the PDF Help Manual, which can be invoke from the **Personal TimeSheet > Help Topics**.

You can also download the full PDF help manual directly from [this link](#).

---- End of Install Guide