Team TimeSheet for Outlook & SharePoint

Client Installation and Configuration

*(**'Per User Installation'** and **'Per Machine Installation'**)*

This install is meant for normal users who would be preparing timesheets in Outlook before reporting and submitting to admin specified SharePoint lists. Before you install the Client tool, make sure your administrator has already configured the Project Data Source settings on a SharePoint site with the Team TimeSheet Manager tool. And take note of the SharePoint parent site URL which you will need to feed to the Team TimeSheet Client Add-in once it is installed. This is required because you will be asked to specify the SharePoint site URL once you start Outlook (for the purpose of linking up the Client tool with the '*TeamTimeSheetSettings*' SharePoint list).

NOTE: 'Per User Installation' and 'Per Machine Installation'

***In 'Per User Installation'**, the Team TimeSheet Client install is performed 100% on the local system and nothing is installed on your Exchange or Windows Server. Further, this install is intended to serve only the current logged on user of the system/workstation and will be installed under the user's application data folder (instead of Programs Files folder) and no elevated permission is required. So, there won't be a prompt from UAC to allow this install unless you change the install directory to say, Programs Files which will warrant an elevated permission/UAC prompt. If the same system is used by multiple members, each user needs to install Client add-in on their profile with the default installation folder location.*

***'Per Machine Installation':** If you have the need to have a single install that serves all users of the system (i.e., the files will be installed under Program files folder and the add-in will be registered under HKEY_LOCAL_MACHINE registry hive rather than HKEY_CURRENT_USER), download the Citrix/Terminal Server version of the setups from http://www.assistmyteam.net/TeamTimeSheetSP/Download.asp to perform a per machine installation.*

The Team TimeSheet Client setup is of two different types - one each for 32 bit Outlook and 64 bit Outlook:

For **'Per User Installation'** *(ideal for standalone single user/workstation)*
TeamTimeSheetClientSPSetup_x86.exe *(for 32 bit Outlook 2003, 2007, 2010, 2013)*
TeamTimeSheetClientSPSetup_x64.exe *(for 64 bit Outlook 2010, 2013)*

For **'Per Machine Installation'** *(ideal for installing on Citrix and Terminal Servers)*
TeamTimeSheetClientSPSetup_x86_Citrix.exe *(for 32 bit Outlook 2003, 2007, 2010, 2013)*
TeamTimeSheetClientSPSetup_x64_Citrix.exe *(for 64 bit Outlook 2010, 2013)*

There are two sections in Client installation:
a) **Files Installation,** b) **SharePoint Connection**

a) Files Installation

Step 1. Run ***TeamTimeSheetClientSPSetup_xXX.exe*** to start the installation. Click '**Next**' to Continue. If Outlook 2003 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.

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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 may take a few minutes to complete the whole copying and registration process.

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Step 4. Click 'Finish' to end the installation wizard. Now start Microsoft Outlook.

b) SharePoint Connection.

Once you have just installed the Team TimeSheet client tool, you will get to see this **'My Project Data Source'** panel when you start Outlook.

Alternatively, you can invoke this dialog box from ***'Team TimeSheet Client SP' > My Project Data Source*** menu, in Outlook 2003 or 2007.

If you are on Outlook 2010 and above, you can get to this from ***Outlook > backstage File > Team TimeSheet Client SP > My Project Data Source*** button.

So, what is the Project Data Source?
The project data source is nothing but a simple SharePoint list (with the name ***'TeamTimeSheetSettings'***) that your administrator had created and configured under your company's SharePoint site with the Team TimeSheet Manager tool. This list stores the projects and activities, email templates, notification and reporting settings. In short, these are global settings that streamline the behavior on how all members work, track and publish their timesheets in Outlook.

Click **'Browse...'** to specify the SharePoint site where the ***'TeamTimeSheetSettings'*** list is located.

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Enter the SharePoint URL site to show all available sub-sites and lists. If your administrator had already configured the Project Data Source with the Team TimeSheet Manager tool earlier, there would be a list ***'TeamTimeSheetSettings'*** that stores the project metadata and other configurations including destination timesheet SharePoint lists and their corresponding mapping settings. Select that list to maintain a permanent link between the Team TimeSheet Client add-in and the SharePoint Project data source on your system.

In the screenshot below, the root 'Team Site' has the '***TeamTimeSheetSettings'*** list, and that is what you need to select to continue. If this list is not available in the root or sub-sites, then contact your administrator for the correct SharePoint site URL.

Now, click the Save button, to confirm the connection. Team TimeSheet Client add-in is now ready to connect to the Project Data Source to synchronize projects and other settings metadata from SharePoint to your system

Additional Steps that might be required

i) Office 365 SharePoint Online - If your administrator had configured Team TimeSheet to store the settings and other configurations to an Office 365 SharePoint Online site, make sure to install *the Windows Identity Foundation* Component (WIF) specific to your Windows OS. You can download and install this component from below:

- For **Vista 32 bit / Windows Server 2008 SP2 32 bit** (Windows6.0-KB974405-x86.msu)
- For **Vista 64 bit / Windows Server 2008 SP2 64 bit** (Windows6.0-KB974405-x64.msu)
- For **Windows 7 32 bit** (Windows6.1-KB974405-x86.msu)
- For **Windows 7 64 bit / Windows Server 2008 R2 64 bit** (Windows6.1-KB974405-x64.msu)

- For **Windows 8**, the WIF component is already installed by default. However, it needs to be enabled. Refer to http://assistmyteam.net/TeamTimeSheetSP/Requirements.asp#Windows8 on the required steps.

- For **Windows Server 2012**, the Windows Identity Foundation (WIF) is built into Windows Server 2012 as an additional Feature that you can add via Server Manage. Refer to http://assistmyteam.net/TeamTimeSheetSP/Requirements.asp#Windows2012 on the required steps.

ii) Your permission to the SharePoint site - Make sure that you have at least '*Contribute*' (or '*Full Control*') permission over the SharePoint list ***'TeamTimeSheetSettings'*** as well as to all other SharePoint lists that are chosen as the timesheet repositories.

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iii) Login Credential - When you run Outlook after installing the Team TimeSheet Client tool, it may prompt you to enter your credential to connect to the SharePoint site.

If the SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint. However, for form based or claimed based authentication (*for example, Office 365 SharePoint online*), it may prompts you (and other individual user) to enter their credential.

In the username, exclude any domain information. For instance, do not enter in the format **DOMAIN\UserName**. Only enter **UserName**. Check 'Remember' so that Team TimeSheet add-in can use the same credential to logon to the SharePoint site in subsequent connection.

You can also specify the authentication mode that is used by your SharePoint to allow connection to it. For instance, if your SharePoint is configured for Windows authentication, choose '*NTLM'*. If it used a form based authentication, then choose '*Forms'* whereas if it used a claimed based authentication (for Office 365 SharePoint Online), choose '*Office 365*'. If you are unsure, just choose '*Auto'*.

NOTE: For more references and help with preparing timesheets in Outlook, refer to the PDF Help Manual, which can be invoked from ***Outlook > Team TimeSheet Client SP > Help Topics****.*

You can also download the full PDF help manual directly from this link:
http://www.assistmyteam.net/downloads/Manuals/TeamTimeSheetClientSP.pdf

---- End of Client Install Guide

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