Team TimeSheet for Outlook & SharePoint

Admin Installation and Configuration

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

Team TimeSheet consists of two separate installs – **Admin** and **Client**. The managerial install is for project managers and administrators who would setup and configure projects and activities, and maintain drop down lists, templates, reporting settings etc. in a dedicated SharePoint list, which is accessible to all members of the team.

(Note that, if the administrator needs to publish timesheets from Outlook to SharePoint, the client tool also needs to be installed, apart from the managerial portion).

Download link: *http://www.assistmyteam.net/TeamTimeSheetSP/download.asp*

For **'Per User Installation'** *(ideal for standalone single user/workstation)*
TeamTimeSheetSPSetups_x86.zip (for 32 bit Outlook 2003, 2007, 2010, 2013)
TeamTimeSheetSPSetups_x64.zip (for 64 bit Outlook 2010, 2013)

For **'Per Machine Installation'** *(ideal for installing on Citrix and Terminal Servers)*
TeamTimeSheetSPSetups_x86_Citrix.zip (for 32 bit Outlook 2003, 2007, 2010, 2013)
TeamTimeSheetSPSetups_x86_Citrix.zip (for 64 bit Outlook 2010, 2013)

The downloaded zip file contains 3 files:
TeamTimeSheetManagerSPSetup_xXX.exe
TeamTimeSheetClientSPSetup_xXX.exe and
VersionInfo.txt {where '*xXX*' can be either x86 (32bit Outlook) or x64 (64bit Outlook) }

Extract these file contents to a file folder. It is recommended that you place the setup files on a shared network folder, such that all users can have access to it, and ease the installation and upgrade process.

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

***In 'Per User Installation'**, the Team TimeSheet Admin 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 users, each user needs to install Team TimeSheet 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.*

Requirements:

- *.NET framework 3.5 or above*
- *Outlook 2003 SP2 or above. For Outlook 2007, you should have SP3.*
- Any SharePoint version starting with WSS 2.0 to the latest SharePoint 2013.
- Office 365 SharePoint Online is also supported provided you 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.

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There are 3 sections in Administrative installation:
a) **Files Installation,** b) **Project Data Source Configuration,** c) **Fields Mapping between Outlook and SharePoint**

a) Files Installation

Step 1. Run the ***TeamTimeSheetManagerSPSetup_xXX.exe*** to start the installation. Click '**Next**' to Continue. If Outlook 2003 (SP2 or above) 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.

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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.

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b) Project Data Source Configuration

The next step is to choose a SharePoint site, under which, a new list titled ***'TeamTimeSheetSettings'*** would be created, to store the project metadata such as such as project/activity lists, notification options, email templates, members list, reporting settings etc. as performed by the administrator.

Why store the project metadata settings in a special SharePoint list?

Because your users can be scattered in different geographical locations, and might not have access to the company's local network remotely, using a network database or shared folder won't be feasible. Instead, in Team TimeSheet system, the project configuration and settings data are stored in a special SharePoint list (having the name '*TeamTimeSheetSettings*') which is accessible to all users, on the local network, WAN or via the WWW.

In short, these are global settings that streamline the behavior on how all members work, track and publish their timesheets in Outlook.

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

Alternatively, you can invoke this dialog box from '**Team TimeSheet Manager (SP)' > Project Data Source** menu, in case of Outlook 2003 or 2007.

If you are on Outlook 2010, you can get to this from **Outlook > the backstage File > Team TimeSheet Manager (SP) > Project Data Source** button.

To specify a SharePoint site, click the '***Browse...***' button.

This would allow you to enter the URL of the SharePoint. When entering the URL, always use the parent site URL in the format *http://mySharePointsite.* And click '**Retrieve**' to show all available sub-sites and lists.

Select the particular site to which the Settings list would be created, and then click 'Confirm'.

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Very Important! Your permission to the SharePoint site: Make sure that you have ***'Full Control'*** permission over the SharePoint site so that Team TimeSheet Manager add-in can create the '*TeamTimeSheetSettings*' list automatically.

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 technician) 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'*.

Once you click '**Save'**, this Project settings list will be automatically created in the chosen SharePoint site, when the manager configures the admin tool the first time. And then any project settings/drop down lists you defined from Team TimeSheet Manager add-in in Outlook would be saved in this repository.

Next, install the Team TimeSheet Client add-in to the systems of your other staffs. You can install the Team TimeSheet Manager add-in on other systems as well if the particular user have the need to perform administrative tasks.

Make sure that you have provided the chosen SharePoint site URL (e.g. http://bytepad/ in the above example) to all users who have or will install the Client tool. This is required because as when user starts Outlook the Team TimeSheet Client add-in will prompt the user to specify the SharePoint site where the ***'TeamTimeSheetSettings'*** list is located. And only then the add-in would automatically connect to the admin specified SharePoint site and would retrieve the project logic and timesheet settings data to the local system.

What SharePoint permissions are required for other users?

All users should have at least '**Contribute**' permission the SharePoint list '*TeamTimeSheetSettings'* as well as to all other SharePoint lists that are chosen as the timesheet repositories.

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C) Fields Mapping between Outlook and SharePoint

There are two types of Outlook items that can be reported or published to an administrator specified SharePoint list, namely **Appointment** or **Task** items. As an administrator, you can choose which Outlook fields and other custom fields get published on the SharePoint list, when individual team member reports their timesheet from Outlook to SharePoint. All you need to do is map the Outlook fields with a relevant field of the SharePoint list.

Team TimeSheet supports publishing almost all of the predefined fields of the Outlook appointment or task, plus project, activity and other custom fields. The following fields are available for publishing to a SharePoint calendar or list.

Predefined Appointment Fields
All Day Event, Billing Information, Busy Status, Categories, Companies, Creation Time, Duration, End Date, Entry ID, Importance, IS Recurring, Last Modification Time, Location, Meeting Status, Mileage, No Aging, Optional Attendees, Organizer, Recurrence State, Reply Time, Required Attendees, Resources, Response Requested, Response Status, Sensitivity, Start Date, Net meeting Organizer Alias, Subject, Body, HTML Body

Predefined Task Fields
Actual Work, Billing Information, Categories, Companies, Contact Names, Creation Time, Date Completed, Delegation State, Delegator, Due Date, Entry ID, Importance, Is Recurring, Last Modification Time, Mileage, No Aging, Ordinal, Owner, Ownership, Role, Schedule Priority, Sensitivity, Start Date, Status, Status on Completion Recipients, Status Update Recipients, Subject, Team Task, Total Work, Body, HTML Body

TimeSheet specific Fields
Project, Activity, Reported Date, Reported By, Total Cost, BillableHours and any custom fields (that you had defined).

To start mapping the fields, go to **Team TimeSheet Manager SP > Appointments Fields Mapping/ Tasks Fields Mapping.**

This will allow you to choose a destination SharePoint list where the timesheets published from Outlook (by users) will be stored. You can choose any existing SharePoint list, Calendar or task lists or a bare bone custom list in which case, you would need to add the required columns.

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	Appointment Field	Data Type	SharePoint Field
1	Activity	Text	Activity
2	Custom List 1	Text	Client Name
3	End Date	Date/Time	End Time
4	Food Expense	Currency	Food Expense
5	Project	Text	Project
6	Custom List 2	Text	Region
7	Reported By	Text	ReportedBy
8	Custom List 3	Text	Service Level
9	Start Date	Date/Time	Start Time
10	Subject	Text	Title
11	Total Cost	Currency	TotalCost
12	Travel Expense	Currency	Travel Expense
13	Last Modification Time	Date/Time	
14	Location	Text	
15	Meeting Status	Text	
16	Mileage	Text	Description
17	No Aging	Yes/No	
18	Optional Attendees	Text	
19	Organizer	Text	Description
20	Recurrence State	Text	Description
21	Reply Time	Date/Time	

In the mapping dialog box (above), the first column lists all predefined Outlook fields as well as TimeSheet specific fields and custom fields. In the third column, there is a drop down list on each row, consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop down to map it to the corresponding Outlook field.
For example, in the screenshot above, Outlook Appointment field 'Subject' is mapped to SharePoint field 'Title' or Outlook appointment field 'Start Date' to SharePoint field 'Start Time' etc.

Create New SharePoint Field - on the fly:
In the drop down list of the SharePoint field, you will also notice that there is an item '[NEW LIST FIELD]'. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, without requiring you to create it in your SharePoint site.

Specify a field name that you would like to appear in the SharePoint list. Only input valid characters and avoid using special characters such as symbols.

The new SharePoint field will have the same data type as that of the corresponding Outlook field.

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29	HTML Body	Note	
30	Subject	Text	TimeSheet Subject
31	Reported By	Text	ReportedBy
32	Project	Text	Project
33	Activity	Text	Activity

Mandatory Fields for Mapping:
Note that the following Outlook fields are mandatory when you perform mapping:
Subject, Reported By, Project, Activity, Total Cost.
If any of these mandatory field(s) are not mapped, you will get a 'mandatory fields not mapped' warning message and the settings won't be saved.

Mapping multiple Outlook fields to the same SharePoint Field:
You can map multiple Outlook fields to the same SharePoint field having a '**Note'** data type.
For example, in the above screenshot of appointment fields mapping to SharePoint calendar list, you can see that the Outlook fields 'Mileage', 'Organizer', 'Recurrence State' and 'Body' are all mapped to the single SharePoint field 'Description' (which is a note field).

When multiple Outlook fields are mapped to the same single SharePoint field, that value of the Outlook fields will be appended in next line.

One limitation of using a single SharePoint field to store multiple Outlook fields is the absence of these Outlook fields in reports and OLAP statistics.

NOTE*: There are other administrative configurations that you would need to undertake. These options are available in the 'Team TimeSheet Manager SP' 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 Team TimeSheet Manager SP > Help Topics****.*

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

---- End of Admin Install Guide

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