

# Team TimeSheet for Outlook

## **Client Installation and Configuration** (*'Per User Installation' and 'Per Machine Installation'*)

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This install is meant for normal users who would be preparing timesheets in Outlook before reporting and submitting to the project database. Before you install the Client tool, make sure your administrator has already configured the Project Data Source settings on a network Microsoft Access or SQL Server database with the Team TimeSheet Manager tool. And collect the Project database information from your admin as you will need to feed to the Team TimeSheet Client Add-in once it is installed (for the purpose of linking up the Client tool with the project database).

### **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 to perform a per machine installation.*

### **Requirements:**

- .NET framework 4.5 or above
- Outlook 2010, 2013, 2016, 2019, 2021 and 365 (both 32-bit and 64-bit).

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*)

TeamTimeSheetClientSetup\_x86.exe (*for 32-bit Outlook*)

TeamTimeSheetClientSetup\_x64.exe (*for 64-bit Outlook*)

For 'Per Machine Installation' (*ideal for installing on Citrix and Terminal Servers*)

TeamTimeSheetClientSetup\_x86\_Citrix.exe (*for 32-bit Outlook*)

TeamTimeSheetClientSetup\_x64\_Citrix.exe (*for 64-bit Outlook*)

There are two sections in Client installation:

a) **Files Installation**, b) **Database Connection**

*The Client installation has to be performed by each member of the team before they can start reporting timesheets and other project deliverables from Outlook to the database.*

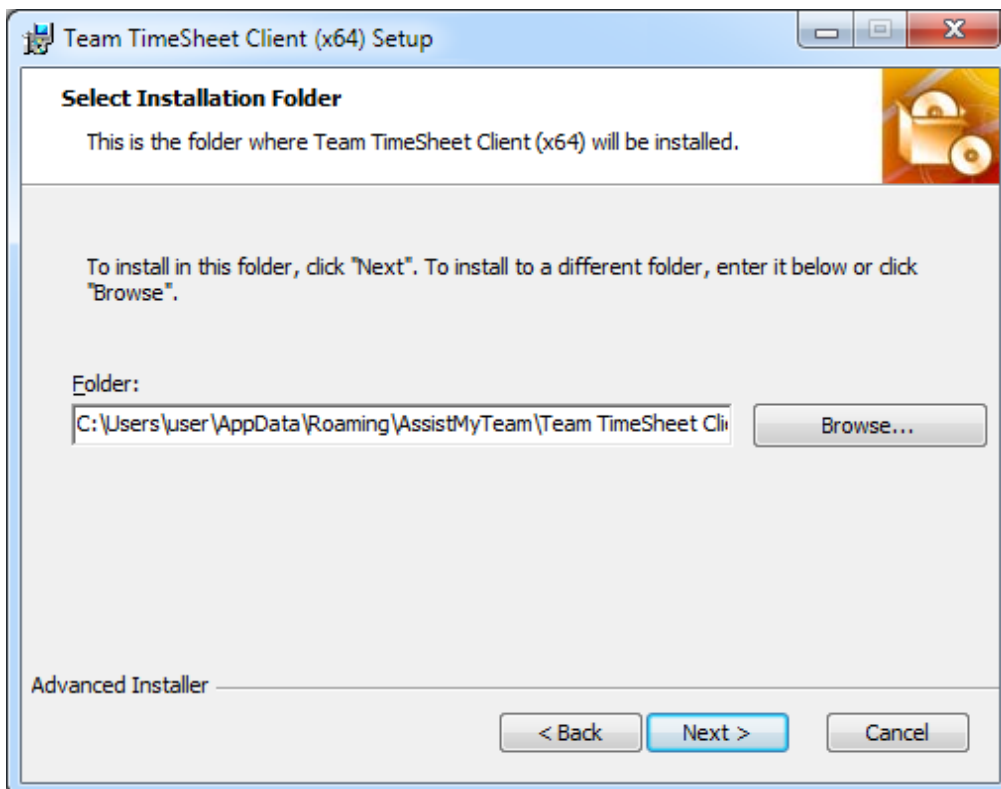
## a) Files Installation

**Step 1.** Run *TeamTimeSheetClientSetup\_xXX.exe* to start the installation. Click 'Next' to Continue. If Outlook 2010 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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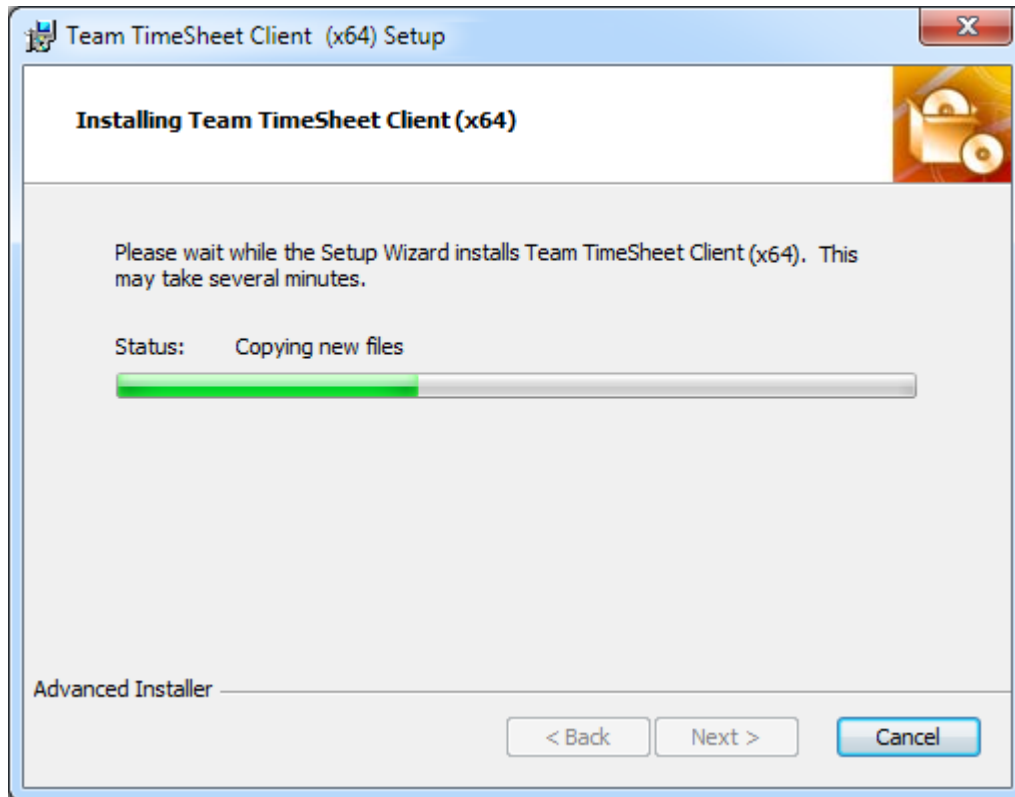


**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.



**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.



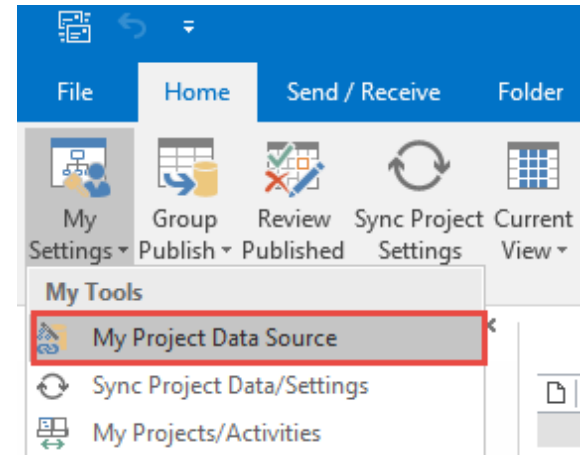
Now start Microsoft Outlook.

## b) Database 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.

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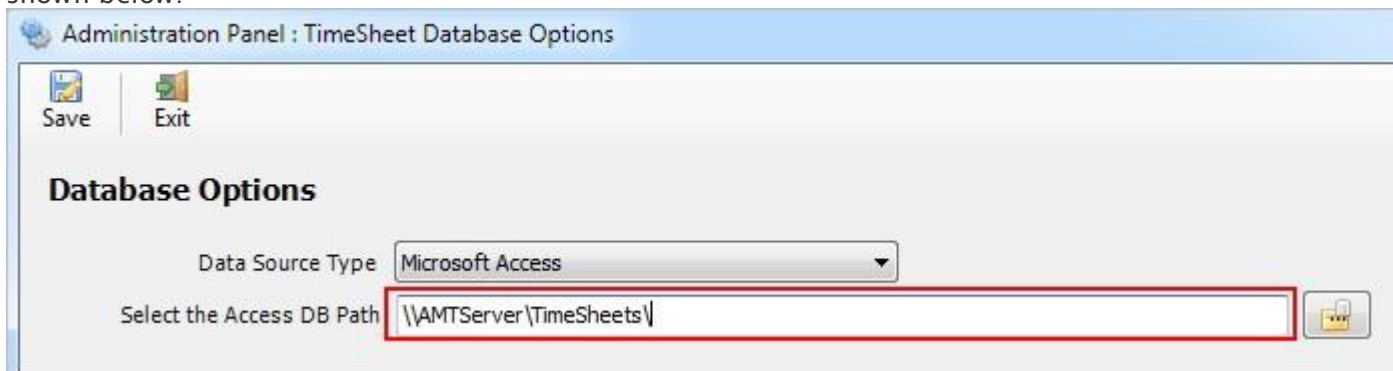
You can also get to this from Outlook > Any Calendar or Task folder > Team TimeSheet toolbar > My Settings > My Project Data Source button.



### So, what is the Project Data Source?

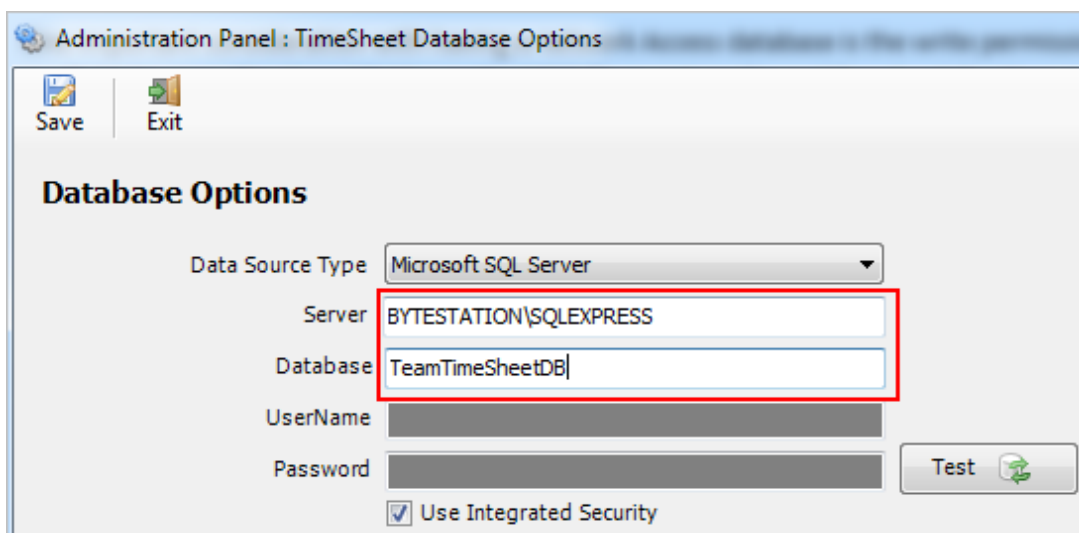
The project data source is nothing but a database that your administrator had created and configured under your company's network with the Team TimeSheet Manager tool (either could be a Microsoft Access MDB file with the name 'TeamTimeSheet.mdb' stored on a network folder or a Microsoft SQL Server database with the name 'TeamTimeSheetDB' located in your office network). The data source 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.

i) **Access database** – If your administrator had chosen a Microsoft Access database, it would be on a shared network path (eg. \\AMTServer\TimeSheets\). All you need to do is enter that URL path in the Access path box as shown below:



One important consideration with having a network Access database is the write permission on the folder and the MDB file itself. Make sure, the shared folder or the MDB file is not configured "read-only", otherwise, you may not be able to report timesheets and other project deliverables successfully to the database.

ii) **SQL Server database** - Another database option is the SQL server. You need to enter the server name where the database for Team TimeSheet resides. The Database name is optional only if your administrator had left it blank when configuring it the first time. If it is left empty, it would assume the default database name is "TeamTimeSheetDB".



If your SQL server is configured to use windows authentication (NTLM), then you can check the “*Use Integrity Security*” option to let Windows manage the credentials to access the resources on the SQL server, otherwise, you need to supply valid credential (username and password).

**Using Cloud based SQL Server database** – If you administrator had configured timesheet database in cloud-based SQL server service such as Amazon RDS cloud service, you need to input the endpoint URL of the online server along with the suffix of the port number after the endpoint as “,1433” so that the full URL in the server name would be ‘XXXXXXXXXXXXXXXXXXXXXXX.rds.amazonaws.com,1433’.

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The screenshot shows a configuration window for a Microsoft SQL Server database. The 'Database Type' is set to 'Microsoft SQL Server'. The 'Server' field contains 'ctiyvwckp9sa.us-west-2.rds.amazonaws.com,1433'. The 'Database' field is empty and marked as '(Optional)'. The 'Username' and 'Password' fields are present but their contents are obscured by yellow boxes. There is a 'Test' button with a green circular arrow icon and an unchecked checkbox for 'Use Integrated Security'.

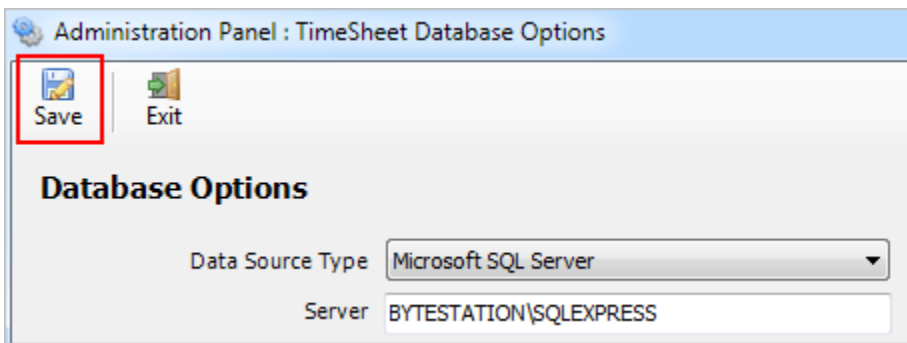
And here is screenshot of the RDS server to use from the RDS member panel.

The screenshot shows the Amazon RDS console. At the top, there's a filter set to 'All Instances' and a search bar. Below, a table lists database instances. One instance is highlighted: 'amtdbinstances' with engine 'SQL Server Express', status 'available', CPU usage '1.19%', and '1 Connections'. Below the table, the 'Configuration Details' and 'Security and Network' tabs are visible. The 'Endpoint' is shown as 'ctiyvwckp9sa.us-west-2.rds.amazonaws.com:1433 (authorized)'. A red arrow points from the word 'server' in the text above to the endpoint field. The 'Configuration Details' section shows 'Engine: SQL Server Express', 'Version: 12.00.4422.0.v1', and 'License Model: License Included'. The 'Security and Network' section shows 'Availability Zone: us-west-2a', 'VPC: vpc-458b0e21', and 'Subnet Group: default (Complete)'.

iii) **Using Microsoft Azure SQL** – Azure SQL Database is a cloud-based relational database service from Microsoft, which is based on SQL Server database. This option is ideal for team that have users scattered or working remotely in different locations but have access to the web.

The screenshot shows a 'Database Options' window. At the top are 'Save' and 'Exit' buttons. The 'Database Type' is set to 'Microsoft Azure'. The 'Server' field contains 'assistmyteam' followed by '.database.windows.net'. There is a 'Test' button with a green circular arrow icon and a 'Choose...' button with a folder icon, marked as '(Optional)'. The 'Database' field is empty. The 'Username' field contains 'francas' and the 'Password' field contains a series of asterisks '\*\*\*\*\*'.

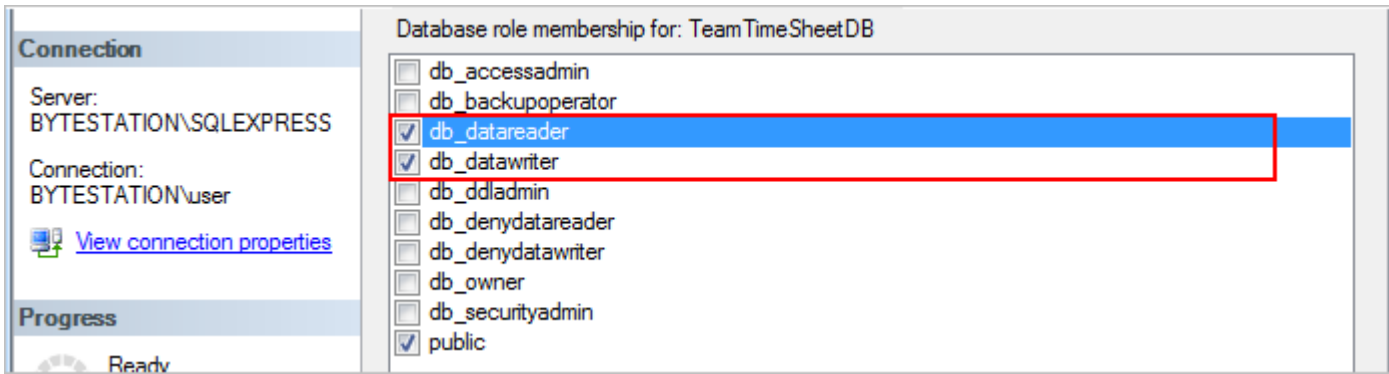
NOTE: If the database name is left empty, it would assume the default database name is “TeamTimeSheetDB”.



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 step on the SQL database.

If your administrator had configured Team TimeSheet Manager to store the settings and other configurations in a SQL server database, then please make sure that you have adequate permission to access and update the tables in that database i.e., **db\_datareader** and **db\_datawriter** permission on the Team TimeSheet SQL database.



**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 > Help Topics**.

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

---- End of Client Install Guide