

# Team TimeSheet for Outlook

## **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 Project database accessible to all members of the team.

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

For ‘Per User Installation’ *(ideal for standalone single user/workstation)*

TeamTimeSheetSetups\_x86.zip (for 32-bit Outlook 2010, 2013, 2016, 2019, 2021 and 365)

TeamTimeSheetSetups\_x64.zip (for 64-bit Outlook 2010, 2013, 2016, 2019, 2021 and 365)

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

TeamTimeSheetSetups\_x86\_Citrix.zip (for 32-bit Outlook 2010, 2013, 2016, 2019, 2021 and 365)

TeamTimeSheetSetups\_x86\_Citrix.zip (for 64-bit Outlook 2010, 2013, 2016, 2019, 2021 and 365)

The downloaded zip file contains 3 files:

TeamTimeSheetManagerSetup\_xXX.exe

TeamTimeSheetClientSetup\_xXX.exe and

VersionInfo.txt {where ‘xXX’ can be either x86 (32-bit Outlook) or x64 (64-bit 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 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).
- Team TimeSheet Manager 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 the local office network accessible by all users.
  - For Microsoft Access database, a dedicated shared network folder, preferably a UNC path is required accessible to all users of Team TimeSheet.

There are 2 sections in administrative installation:

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

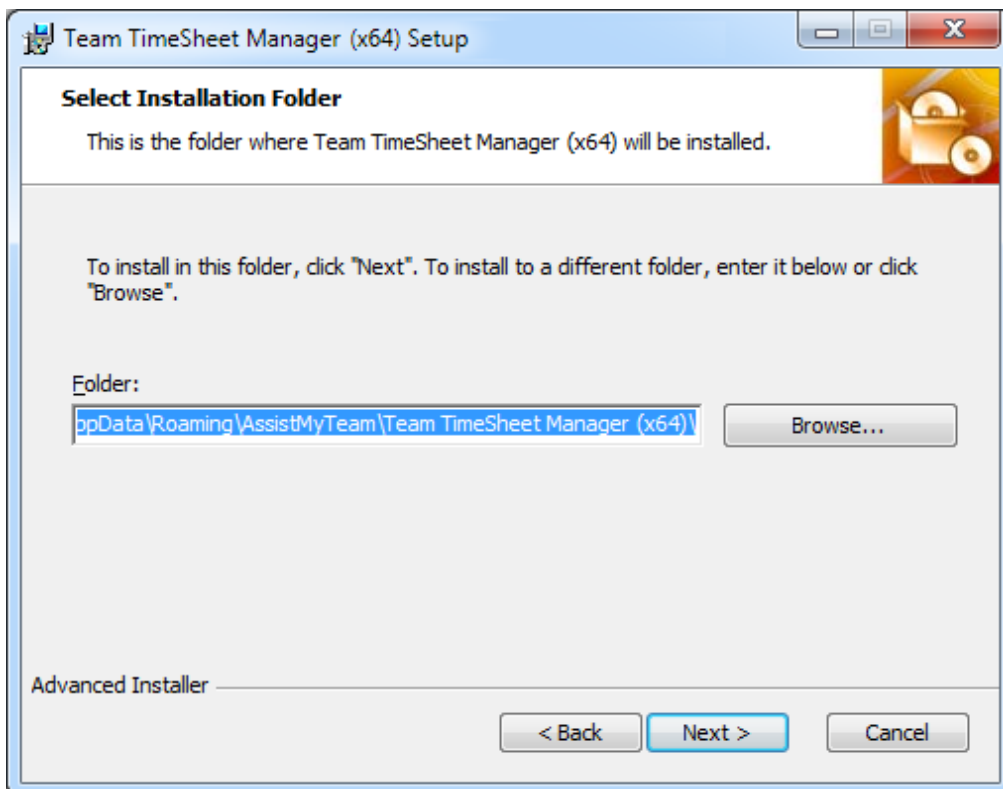
### a) Files Installation

Page | 2

**Step 1.** Run the *TeamTimeSheetManagerSetup\_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.

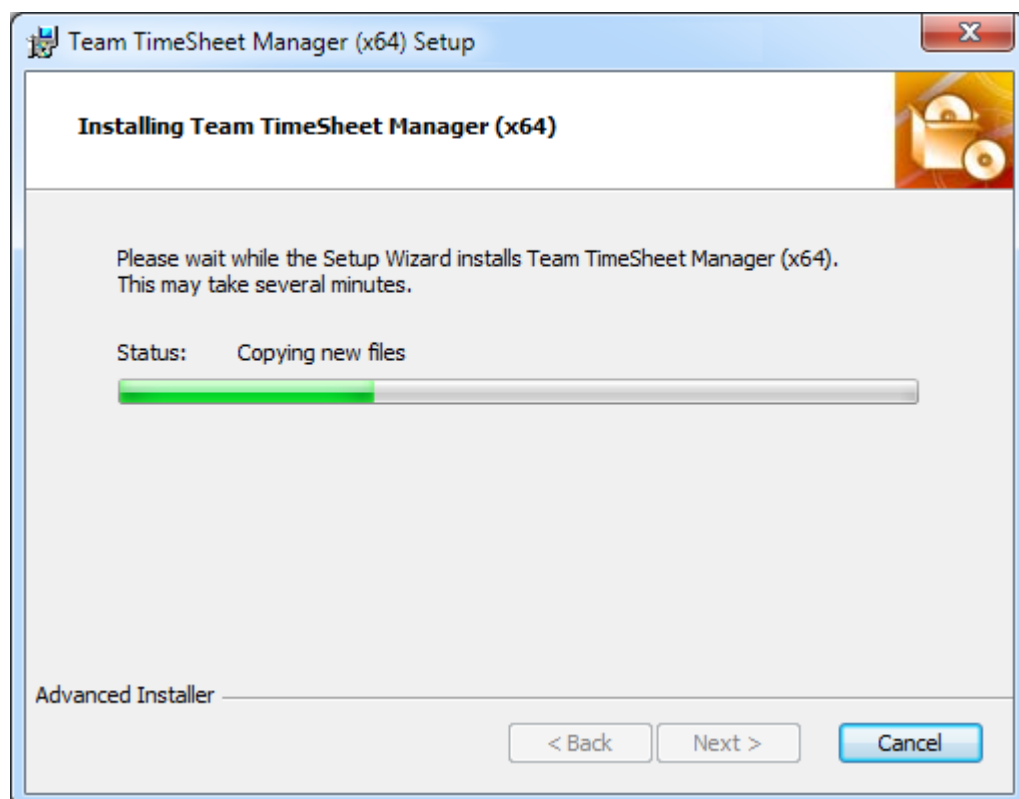


**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.



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

Page | 3



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



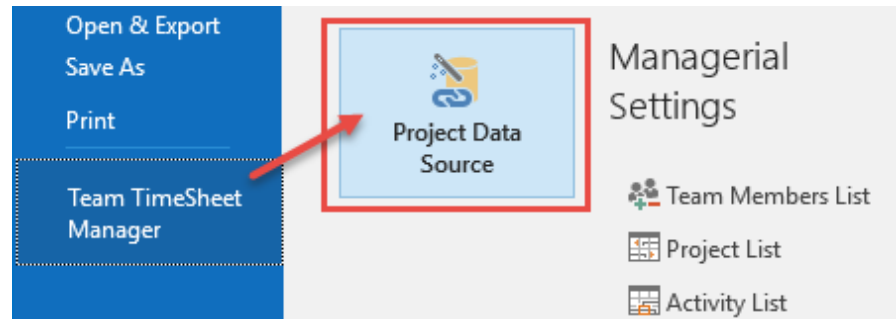
Now start Microsoft Outlook.

## 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 how all members work, track and publish their timesheets in Outlook.

Page | 4 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.

Or you can get to this from Outlook > the backstage File > Team TimeSheet Manager > 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., *TeamTimeSheet.MDB*) will need to be placed on a shared network folder such that all members (that have the Client add-in in their Outlook) have access to the network folder. When you specify the location where the MDB file is to be created, make sure you choose a UNC path (e.g. \\AMTServer\TimeSheets) instead of a mapped one because, a mapped drive might only be accessible to you. 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' for all members on the network, otherwise, they won't be able to publish their timesheets to the database from their respective Outlook.

 The screenshot shows the 'Administration Panel : TimeSheet Database Options' dialog box. It has 'Save' and 'Exit' buttons at the top left. Under 'Database Options', the 'Data Source Type' is set to 'Microsoft Access' in a dropdown menu. Below it, the 'Select the Access DB Path' text box contains the UNC path '\\AMTServer\TimeSheets\'. A folder icon button is to the right of the text box.

ii) **Using Microsoft SQL Server** - It is recommended to use a dedicated SQL Server database option, if you have a high number of users (> 25) publishing their timesheets from their Outlook to the database, as it gives a better performance and is easily scalable.

 The screenshot shows the 'Administration Panel : TimeSheet Database Options' dialog box with 'Microsoft SQL Server' selected in the 'Data Source Type' dropdown. The 'Server' text box contains 'BYTESTATION\SQLEXPRESS'. The 'Database' text box is empty. The 'UserName' and 'Password' text boxes are also empty. There is a 'Test' button with a green checkmark icon to the right of the password box. At the bottom, the 'Use Integrated Security' checkbox is checked.

For SQL server, the server name is mandatory. The Database name is optional. If it is left empty, a new database with the name '*TeamTimeSheetDB*' 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.amazonaws.com,1433’.

Page | 5

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

Permission for users on the SQL database - Each member should have both db\_datareader and db\_datawriter permission on the Team 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. This option is ideal for team that have users scattered or working remotely in different locations but have access to the web.

Page | 6

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

Once you click 'Save', the manager tool 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 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 has the need to perform administrative tasks.

Make sure that you have provided the chosen database location information to all users who have or will install the Client tool (such as the network shared folder where the MDB file is located for Access database e.g.

[\\AMTServer\TeamTimeSheets](#) or the Server name in the case of SQL server database e.g.

[BYTESTATION\SQLEXPRESS](#)). This is required because when user starts Outlook after installing Team TimeSheet Client add-in, it will prompt to specify the project database location. And only then the add-in would automatically connect to the admin specified database to retrieve the project logic and timesheet settings data to the local system.

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

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

