Personal TimeSheet for Outlook and SharePoint

Help Manual

Welcome

Track task, time, mileage and expense for project management, billing and payroll purpose with Microsoft Outlook.

This is an elaborate help documentation that will guide you how to work with Personal TimeSheet for Outlook and SharePoint. For a quick overview, refer to our video demonstration available on the product website.

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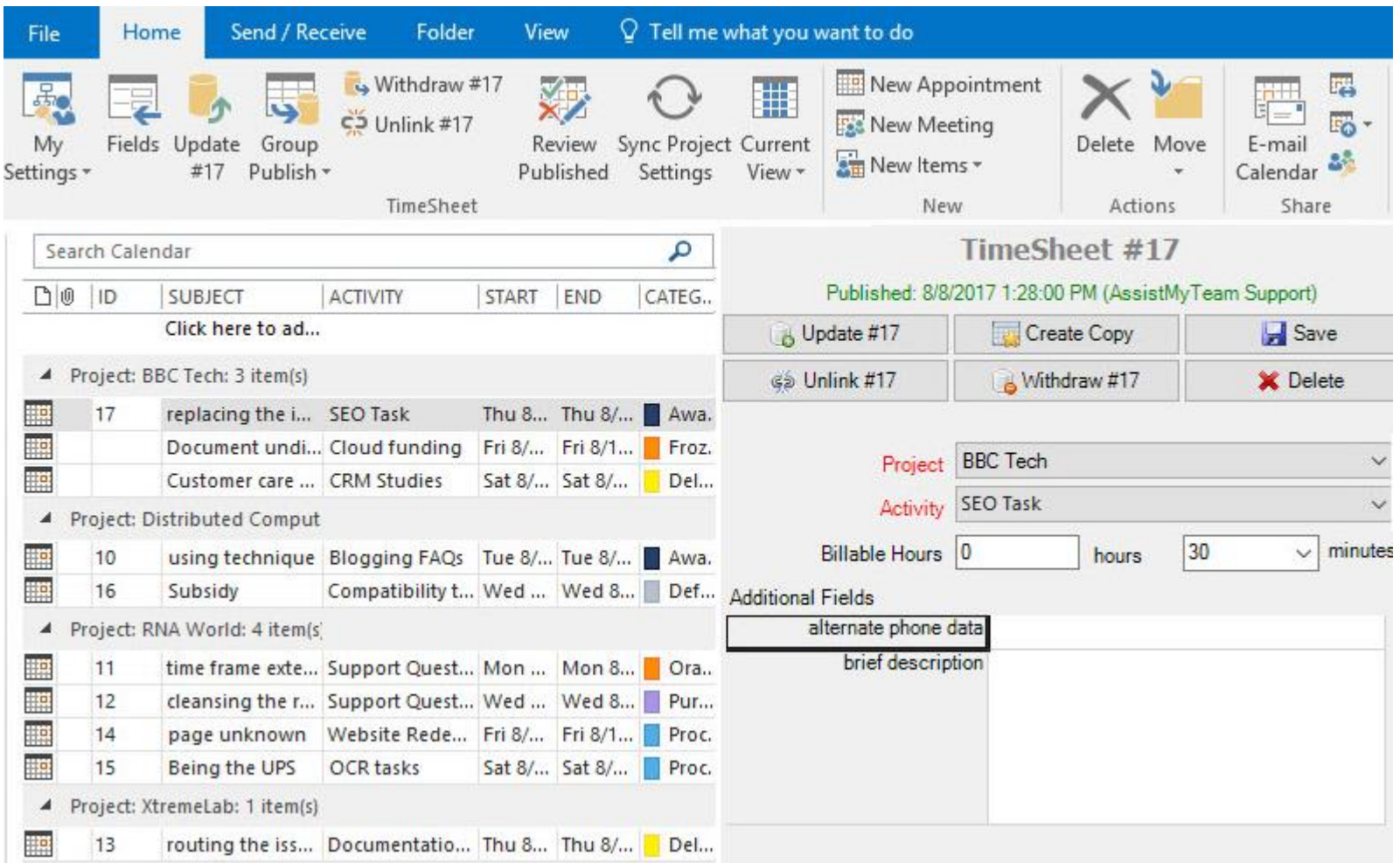
1. Introduction

Personal TimeSheet for Outlook and SharePoint is a **reporting solution** to work, plan and execute project related activities and timesheets in Microsoft Outlook and publish to a SharePoint list. It leverages the familiar Outlook calendar and task interface **to track time** and **expenses** towards projects, clients or any entity your business requires. And let you measure **attendance, payroll, cost estimation** or **billing** for accounting purposes.



Purpose of this add-in

Microsoft Outlook, in its original state, lacks a direct and an efficient solution to track time, expense for payroll and billing purposes. However, there are workers who indulge themselves in some form of timesheet tracking (and often crudely) through capturing the time and other data from appointments and tasks in Outlook and feeding to an external data source manually.

With Personal TimeSheet, these processes are streamlined and automated. You can track, measure work done and prepare timesheets for projects from the comfort of Outlook. Once timesheet in appointments or tasks are prepared in Outlook, you can publish to a SharePoint list. With the inbuilt Summary Reports or OLAP Statistical tools (or with a 3rd party reporting solution), you can then use these submitted timesheets for calculating expenses, payroll or billing on projects, clients and resources among others.

Leverage Outlook for timesheet reporting

Leveraging the familiar workflow of Outlook appointments and tasks, Personal TimeSheet simplifies timesheet creation, submission and tracking. Besides, it also offers greater control throughout the time reporting process. With the assurance that you are reporting through Outlook that promotes accurate, consistent time reporting, you can leverage precise, up-to-date budget and billing reports for project estimation and budgeting.

2. Requirements

Personal TimeSheet is available right inside your Outlook unlike any other standalone application and web-based project and time reporting software. Please make sure that your system meets the following requirements before installing *Personal TimeSheet for Outlook*:

Windows Version	**Windows Vista, 7, 8, 8.1, 10. Both 32-bit and 64-bit OS are supported.**
Outlook Version	Outlook 2019, 2016, 2013, 2010, Outlook 2007. Personal TimeSheet operates directly inside the Microsoft Outlook application (using Microsoft's "COM add-in" technology). Outlook Express is not supported.
SharePoint	SharePoint 2010 or Higher. Cloud based SharePoint such as Office 365 are also supported.
Others	Microsoft .NET Framework 4.5

3. Choosing SharePoint lists to store TimeSheets

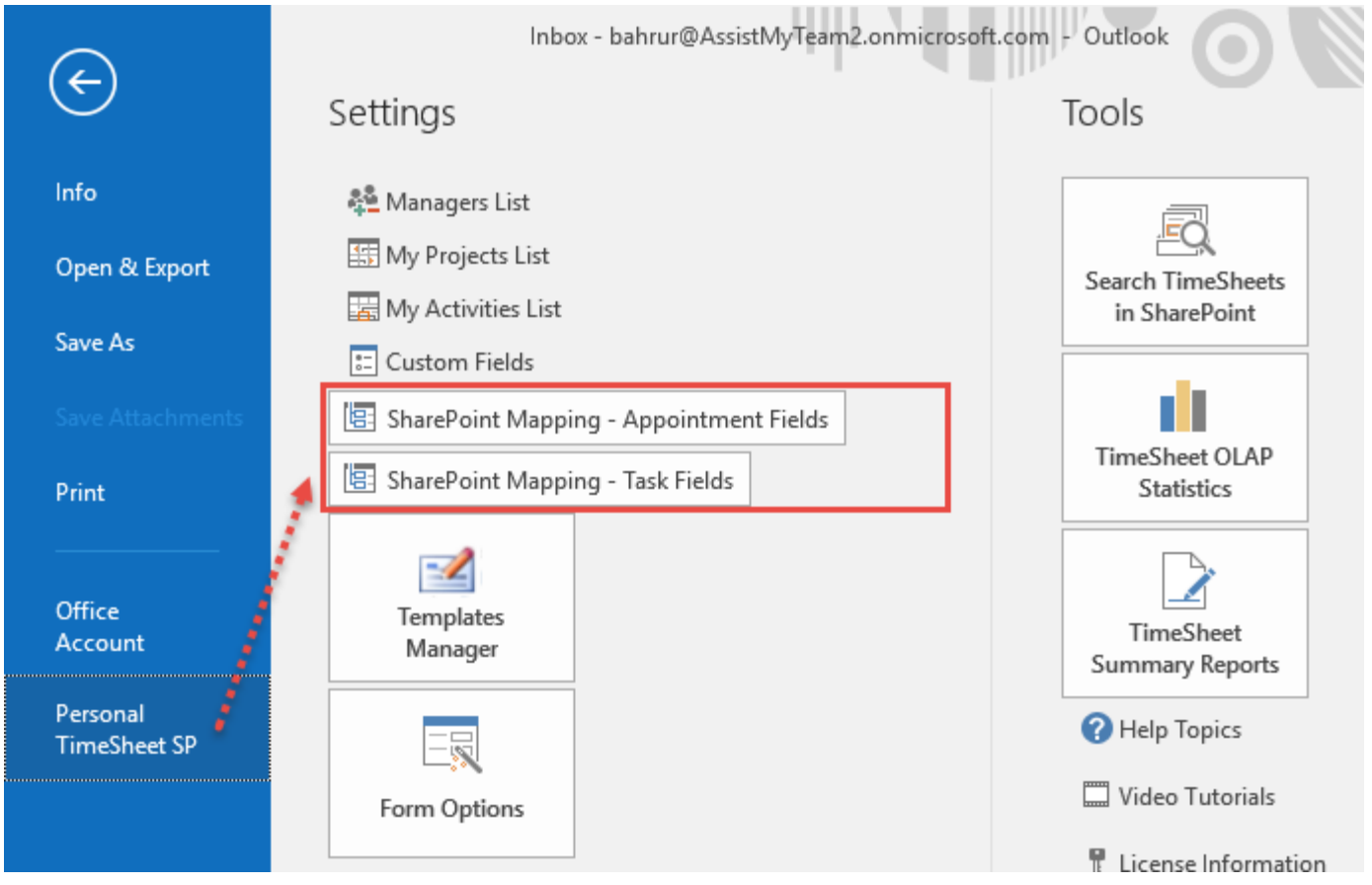
There are two types of Outlook items that can be reported or published to a SharePoint list – Outlook **Appointment** or **Task**. You can choose which Outlook fields and other custom fields get published on the SharePoint list, when you publish timesheet from Outlook to SharePoint. All you need to do is map the Outlook fields with a relevant field of the SharePoint list.

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

Predefined Appointment Fields
All Day Event, Billing Information, Busy Status, Categories, Companies, Duration, End Date, Importance, Is Recurring, Location, Meeting Status, Optional Attendees, Organizer, Recurrence State, Required Attendees, Start Date, Subject, Body

Predefined Task Fields
Actual Work, Billing Information, Categories, Companies, Contact Names, Date Completed, Delegation State, Delegator, Due Date, Importance, Is Recurring, Owner, Ownership, Role, Schedule Priority, Sensitivity, Start Date, Status, Status on Completion Recipients, Status Update Recipients, Subject, Team Task, Total Work, Body

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



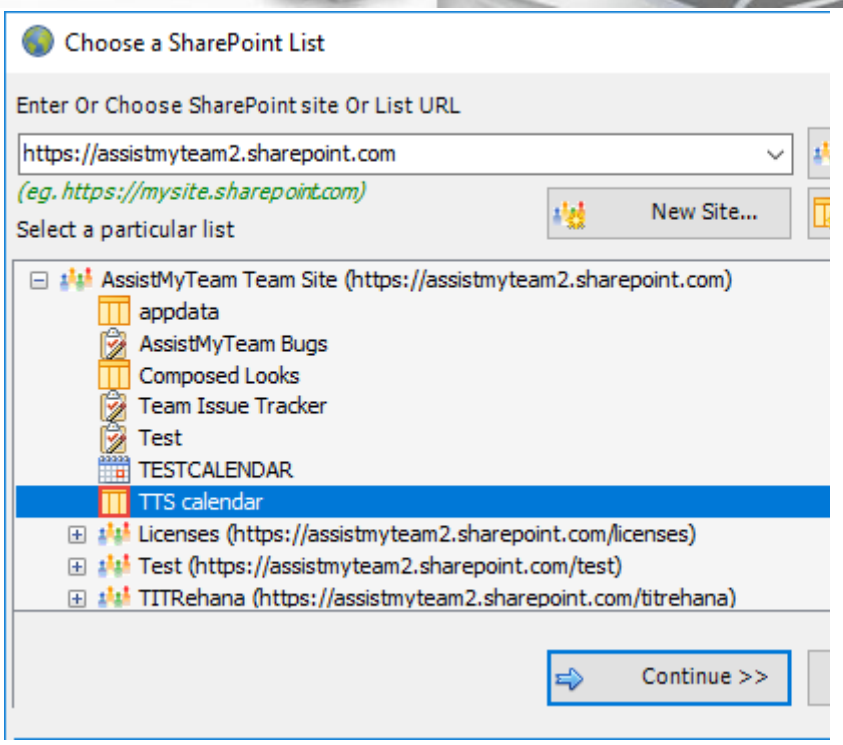
To start mapping the fields, go to **Outlook > File > Personal TimeSheet SP > SharePoint Mappings - Appointments Fields / Tasks Fields.**

This will allow you to choose a destination SharePoint list where the timesheets published from Outlook will be stored.

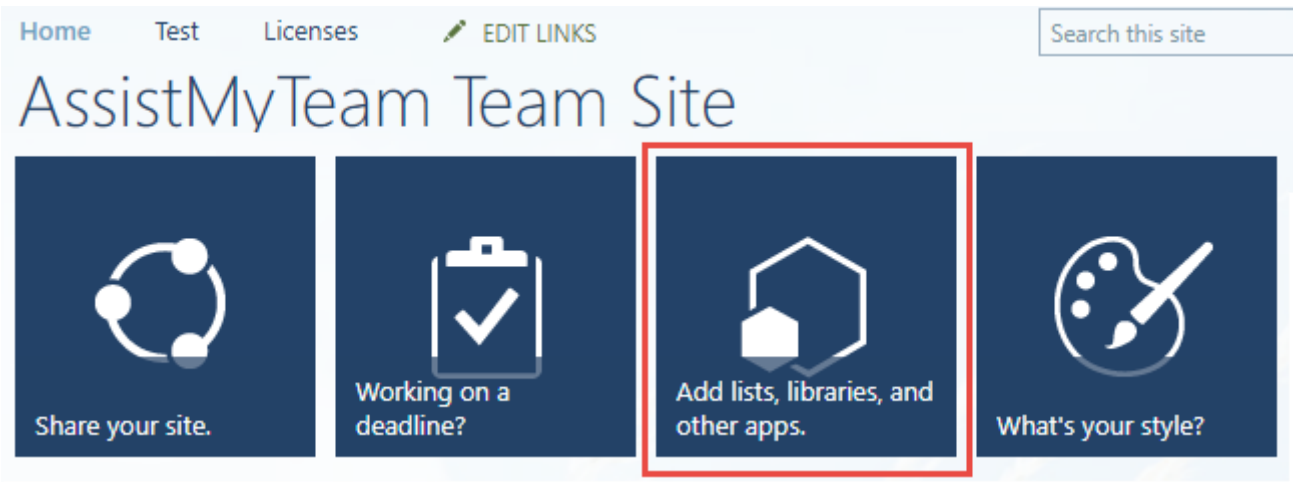
You can choose any existing SharePoint list, Calendar or task lists or a bare bone custom list in which case, you would need to add the required columns.

Ideally, we recommend that the SharePoint lists you will choose for used with TimeSheet add-in were derived from the inbuilt **'Calendar'** template in your SharePoint. This is because such SharePoint list already comes with predefined fields and views which can be directly ported with TimeSheet add-in's functionality.

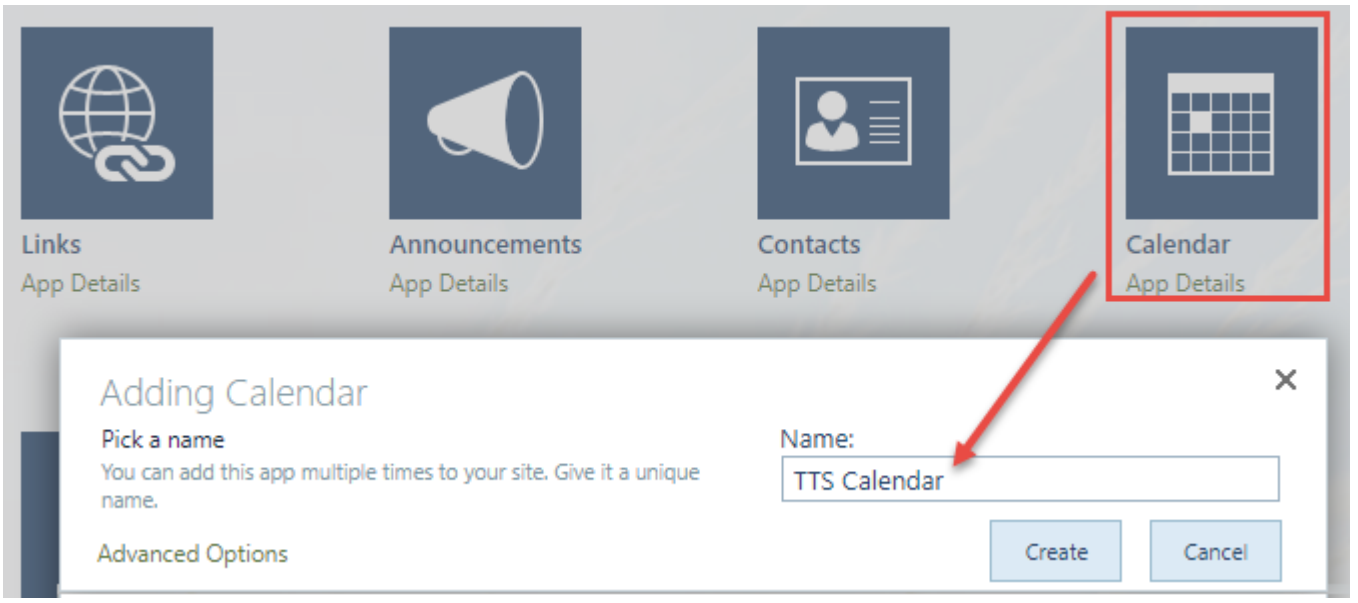
Alternatively, you can choose to create new one for this purpose.



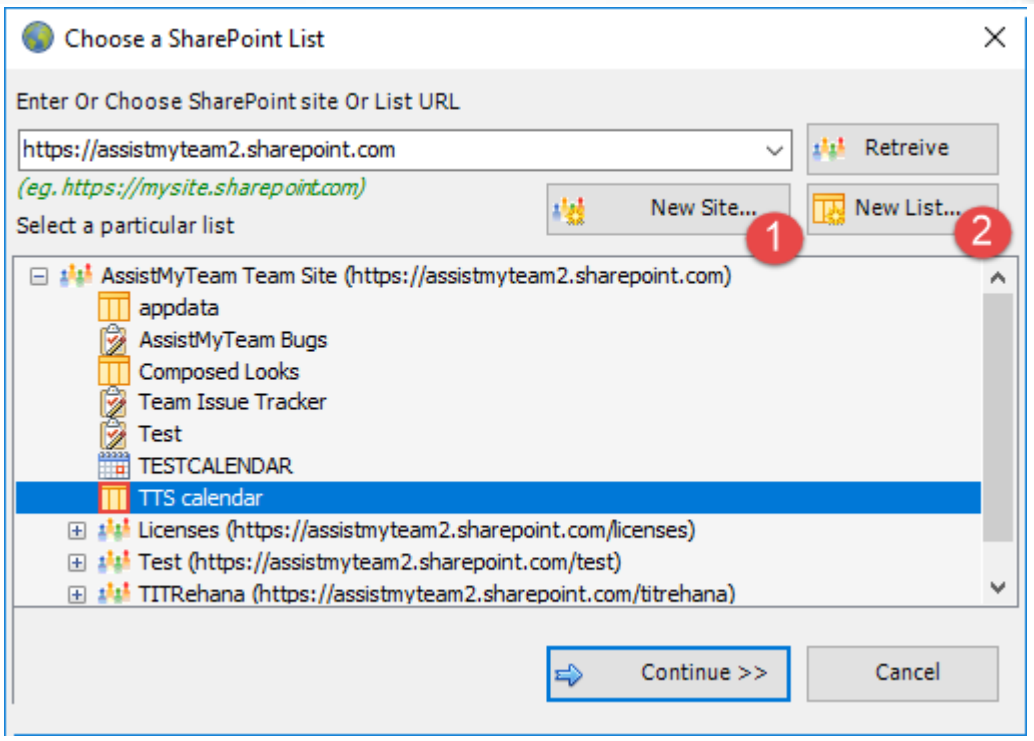
To create a new list, go to your SharePoint site and click 'Add Lists, Libraries or other Apps'.



For instance, you can create a new list (e.g., *TTS Calendar*) based on the 'Calendar' template below:

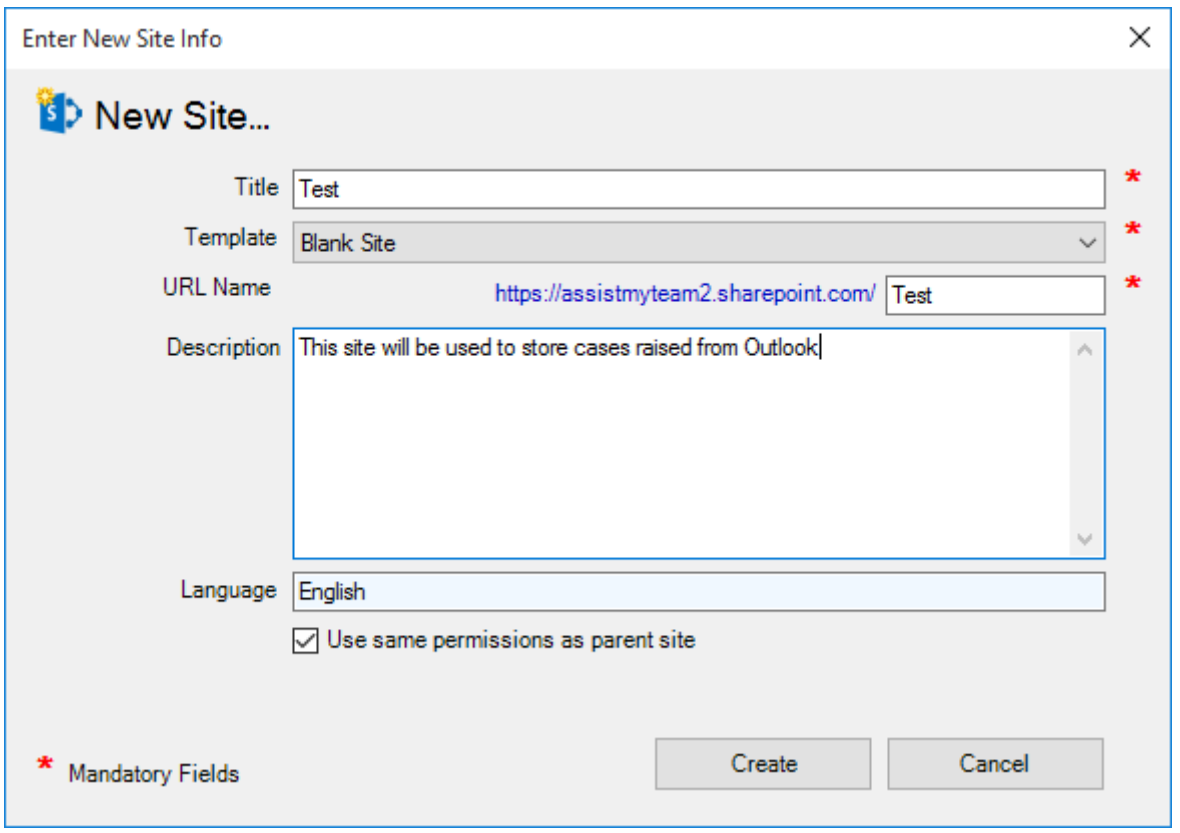


And then choose this newly created SharePoint list (*e.g. TTS Calendar*) or any other existing lists from the mapping tool and click **'Confirm'.**

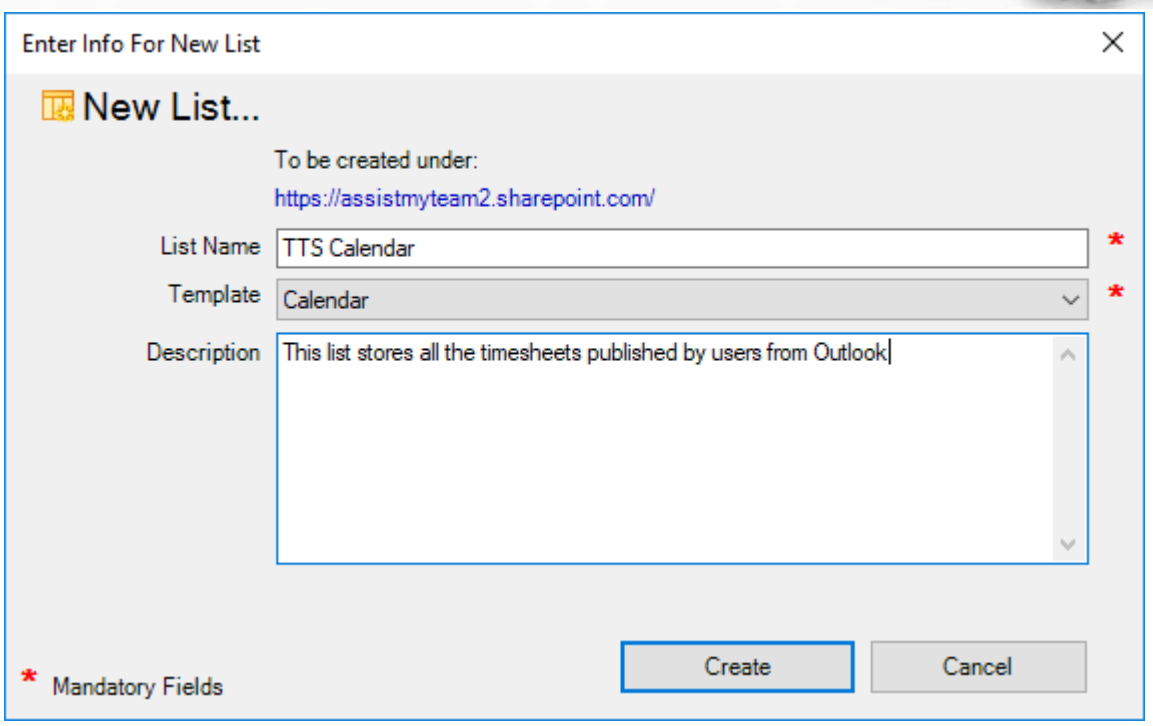


Instead of creating the new site/list in the SharePoint using your web browser, you can also choose to create – new site or list directly from the add-in.

1 **New Site** – Create a new site directly under the chosen parent site to be used exclusively for TimeSheet add-in. By default, the site will be created as a blank site, unless a different site template is specified.

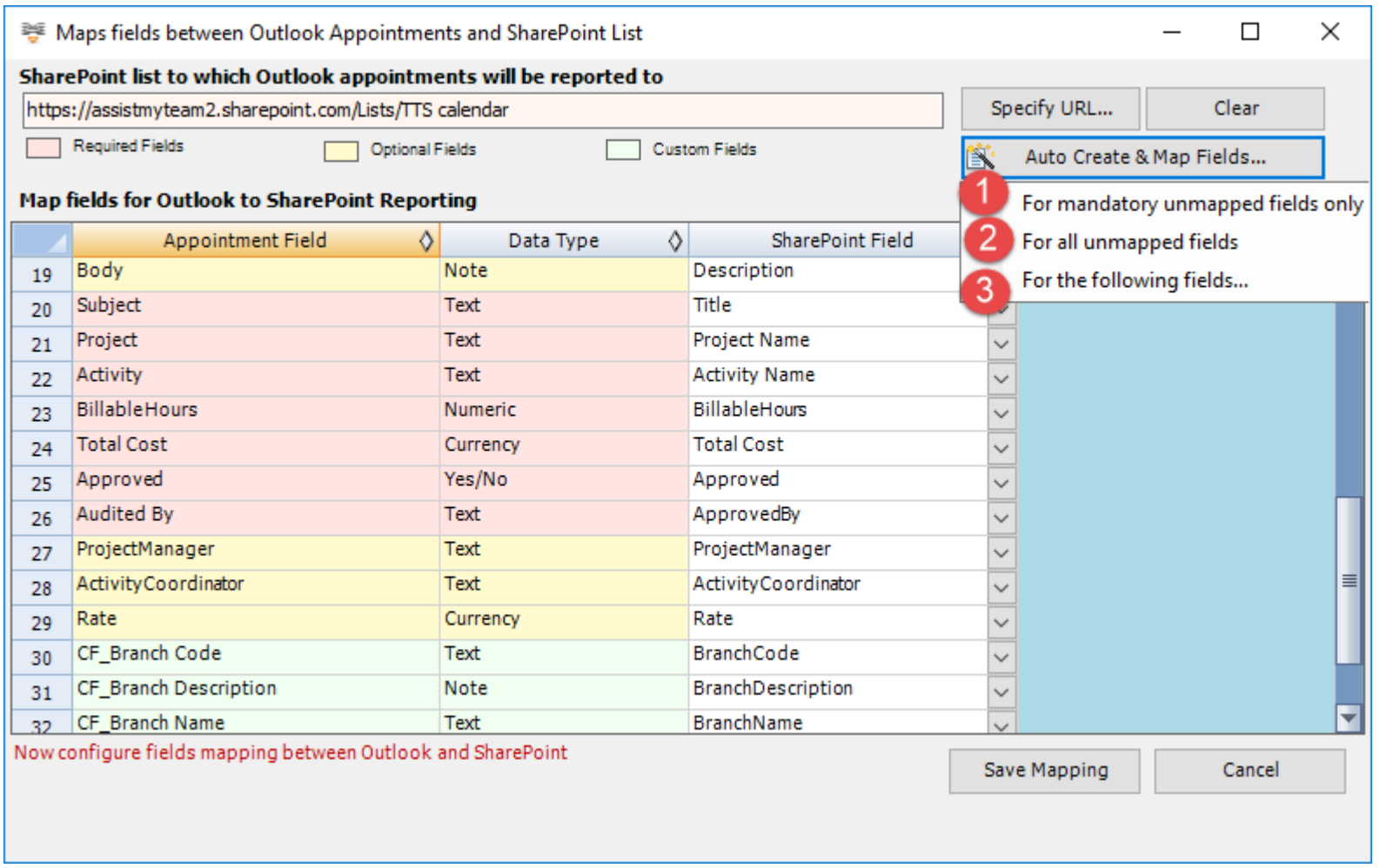


2 **New List** – You can choose to create a new list directly under the chosen site. By default, the list would be created using the 'Calendar' template available in your SharePoint. However, you can change the template from the drop down.



After choosing a destination SharePoint list (either by creating a new one, or by selecting an existing list), you can proceed to start mapping the fields between Outlook and SharePoint.

Through the **mapping tool**, you can choose which fields from the appointment/task items in Outlook are to be extracted and published to the SharePoint list, and perform the mapping between these chosen fields of the Outlook appointment/task to that of the SharePoint list.



A mapping is nothing but an association between an Outlook field *(e.g., subject of the appointment item)* to a specific SharePoint list field *(e.g., Title)*. You have complete control over which data goes to the SharePoint list from Outlook. In the

mapping dialog box (above), the first column lists all the appointment/task fields as available in Outlook. The second column displays the data type of the field. In the last column, there is a drop-down list on each row, consisting of all available SharePoint fields. Simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field.

For example, in the screenshot above, Outlook field *'Body'* is mapped to SharePoint field *'Description*.

You can choose to auto create the required fields in the SharePoint list as well as auto-map the fields between the Outlook and SharePoint.

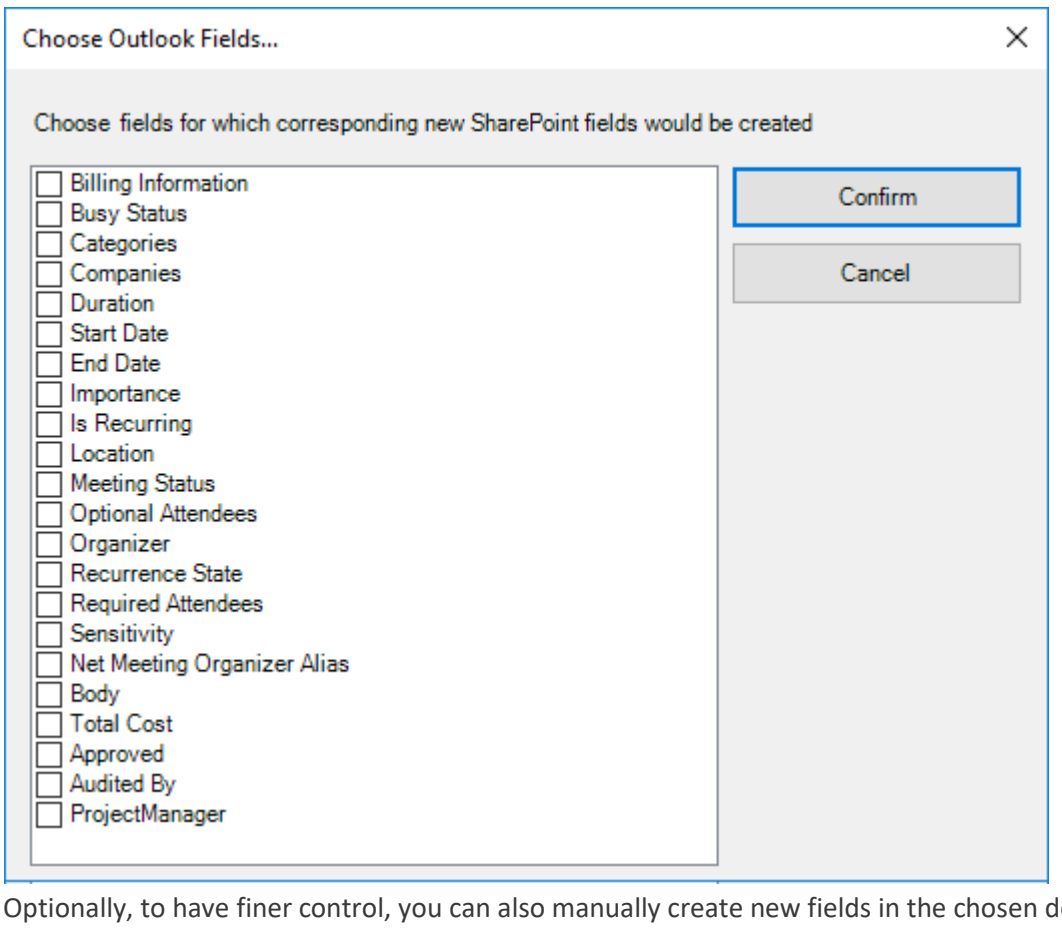
1 **For mandatory unmapped fields** - Click this option under the *'Auto Create & Map fields'* menu to create the mandatory timesheet fields in the chosen SharePoint list on the fly and automatically complete the mapping. Mandatory fields are marked/colored in light red.

For Outlook Appointment mapping, the following fields are mandatory - *Subject, Duration, Start Date, End Date, Project, Activity, Billable Hours, Approved, Audited By, Total Cost.*

For Outlook Task mapping, the following fields are mandatory - *Subject, Total Work, Start Date, Due Date, Project, Activity, Billable Hours, Approved, Audited By, Total Cost.*

2 **For all unmapped fields** – Click this option under the *'Auto Create & Map fields'* menu to create all the helpdesk fields that have not been mapped yet in the chosen SharePoint list and complete the mapping automatically. If the chosen SharePoint list have any matching existing fields, instead of creating new ones, the add-in will try to use them to map with the timesheet fields. For instance, if the chosen SharePoint list was created based on the 'Calendar', the list already contains predefined fields such as Title, Start Date, End Date, Description.

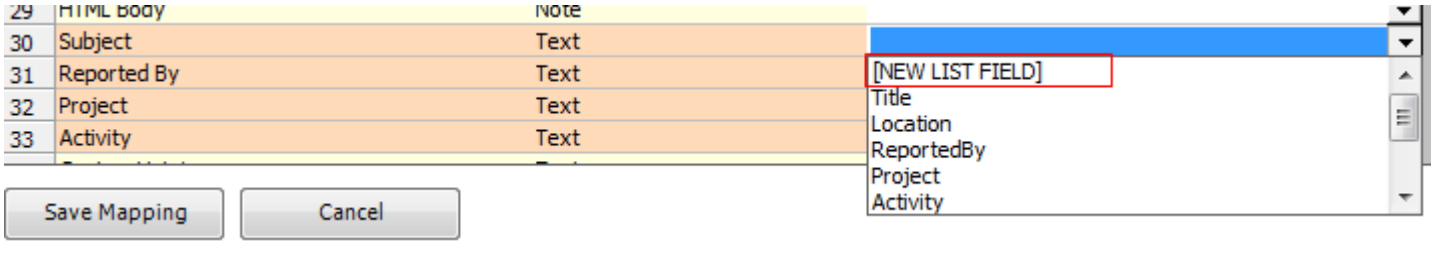
3 **For the following fields** – Click this option under the *'Auto-Create & Map fields'* menu to choose specific timesheet fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.

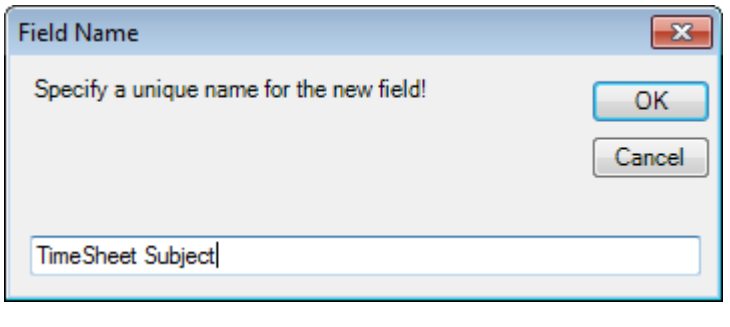


Optionally, to have finer control, you can also manually create new fields in the chosen destination SharePoint list and map with the helpdesk outlook fields.

Create New SharePoint Field - on the fly:

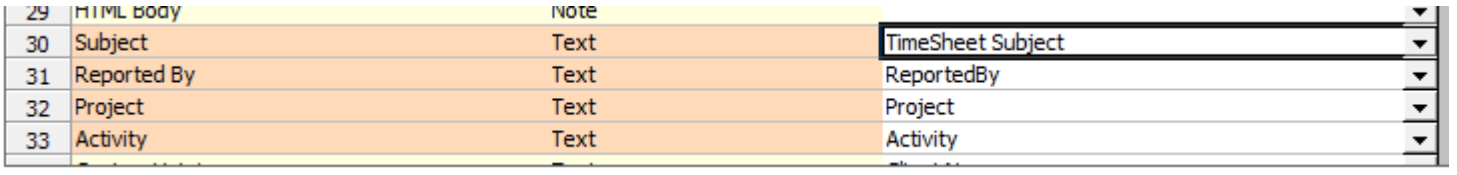
In the drop-down list of the SharePoint field, you will also notice that there is an item '[NEW LIST FIELD]'. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, 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.

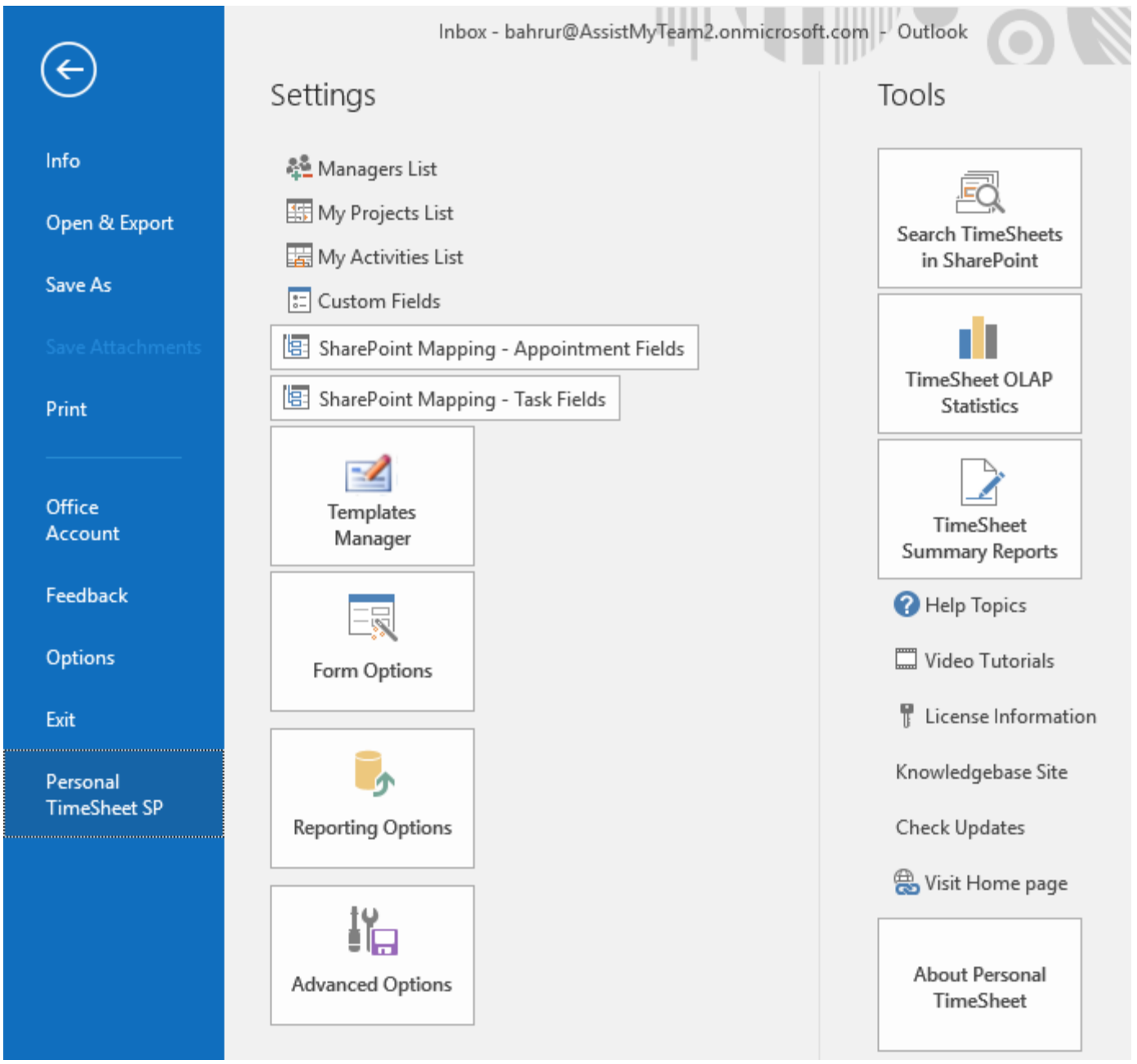


4. Managerial Settings

Personal TimeSheet add-in provides a central panel that allows you to customize the contents of all project drop-down boxes, templates for outgoing emails, notification options, custom fields etc.

The Personal TimeSheet menu serves as the gateway for launching most of the functionalities and tools available in the add-in. In Outlook 2016, you would find the TimeSheet menu in the backstage file button, as shown below.

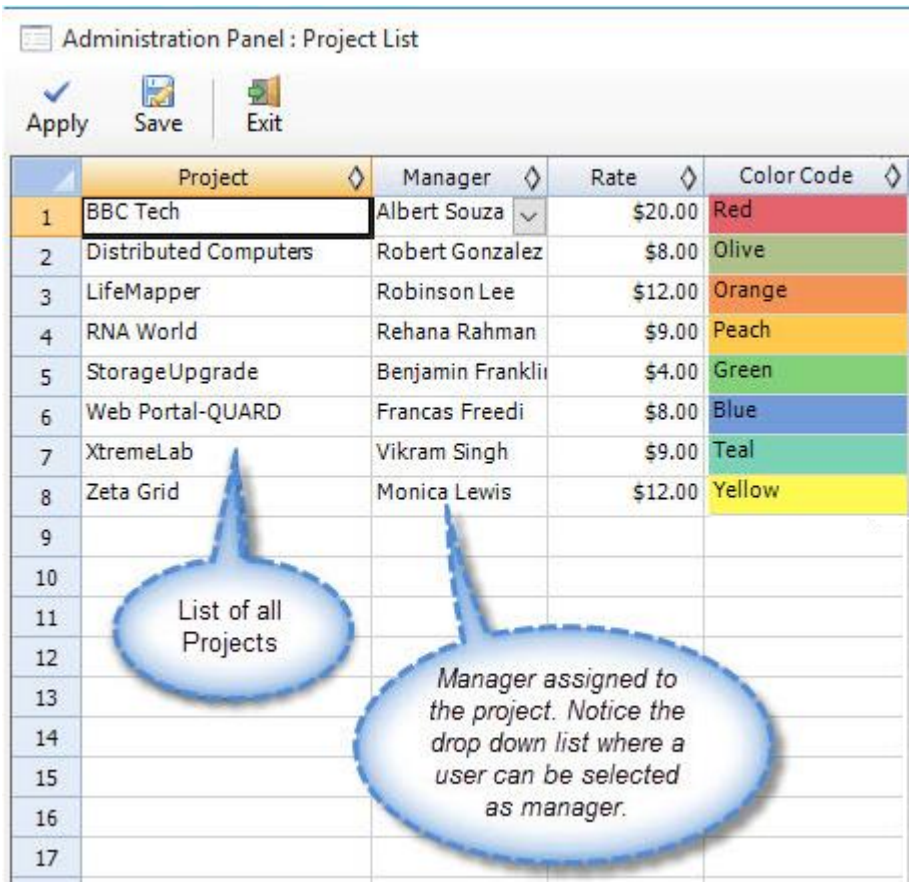
Personal TimeSheet *(backstage view of Outlook 2016)*



4.1 Projects List

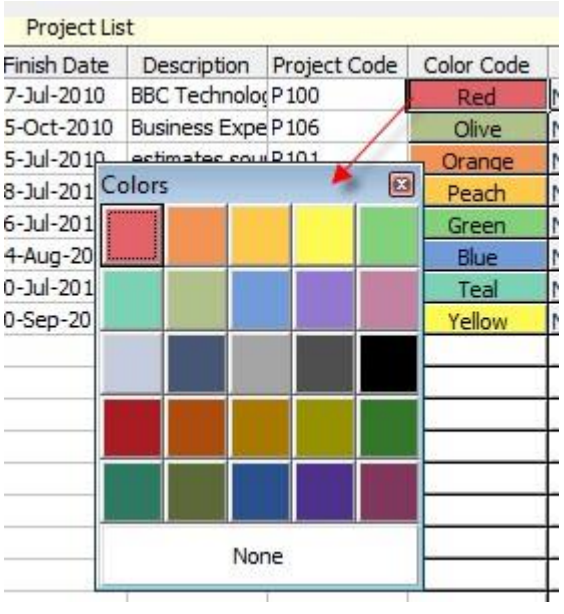
Personal TimeSheet > Projects list

The Projects list panel allows you to add projects and their related information such as manager, hourly rate and Outlook color code. There is no limit as to the number of projects that can be set up in the system.



The project manager is chosen from drop down list of the Managers List that you get when you click the down button.

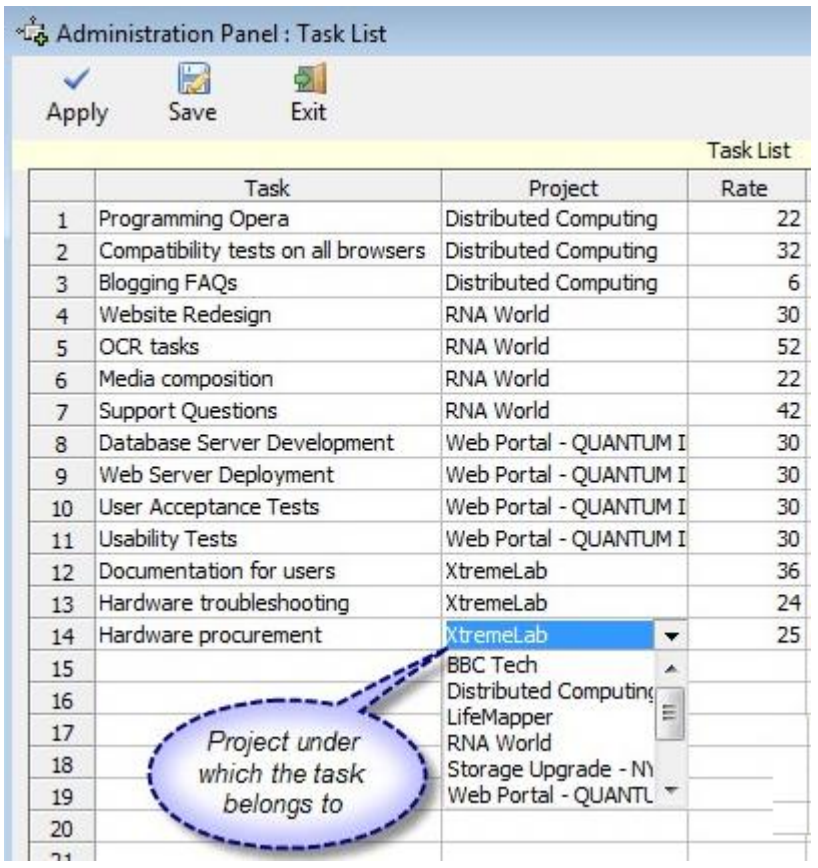
To specify a color code of the particular project, click the corresponding button on the '**Color code**' column of the row to display the color picker. Note that, only 26 colors are supported for color coding Outlook items (such as appointments and tasks).



4.2 Activities List

Personal TimeSheet > Activities list

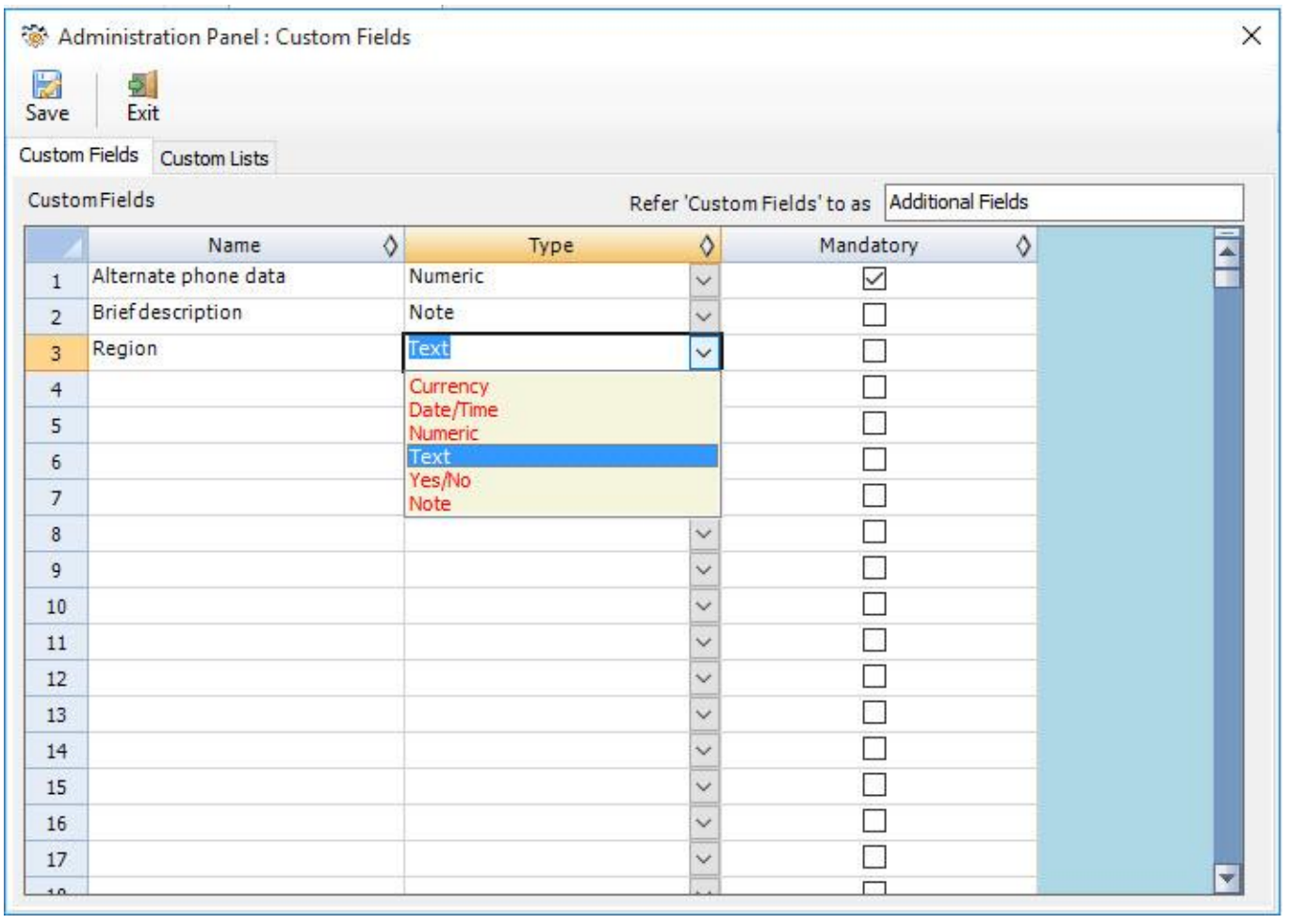
The Activities list panel is the central place where all project activities are added. There is no limit to the number of activities per project.



4.3 Custom Fields

Personal TimeSheet > Custom Fields

You can use Custom fields and Custom list for extracting additional project or activity related data when reporting from within the Outlook task or appointment item.

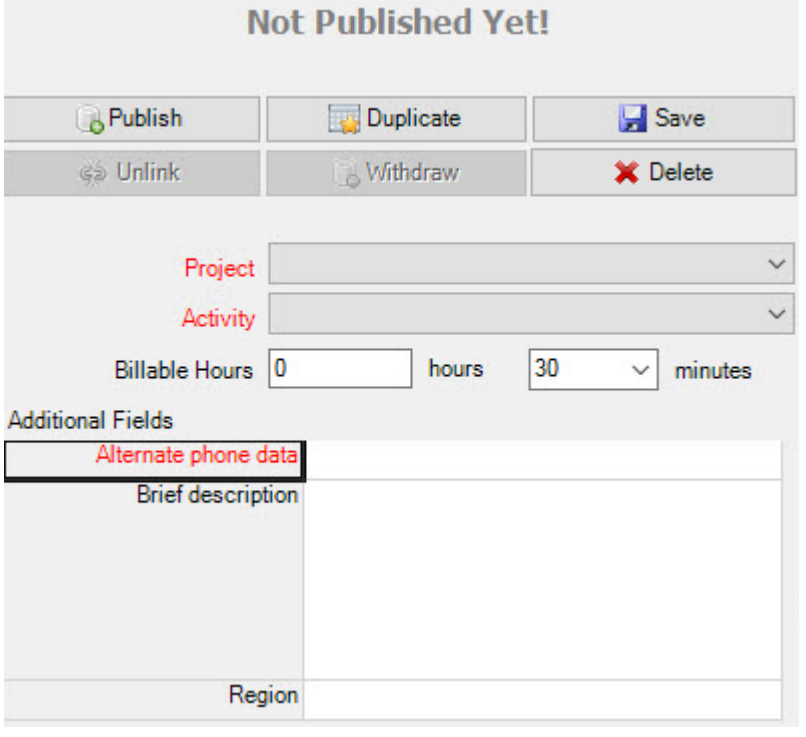


Custom fields can be of 6 different data types as displayed in the image above:
Currency, Date/Time, Numeric, Text, Yes/No, Note.

You can add any number of Custom fields as required and they will all appear in the timesheet form in Outlook.

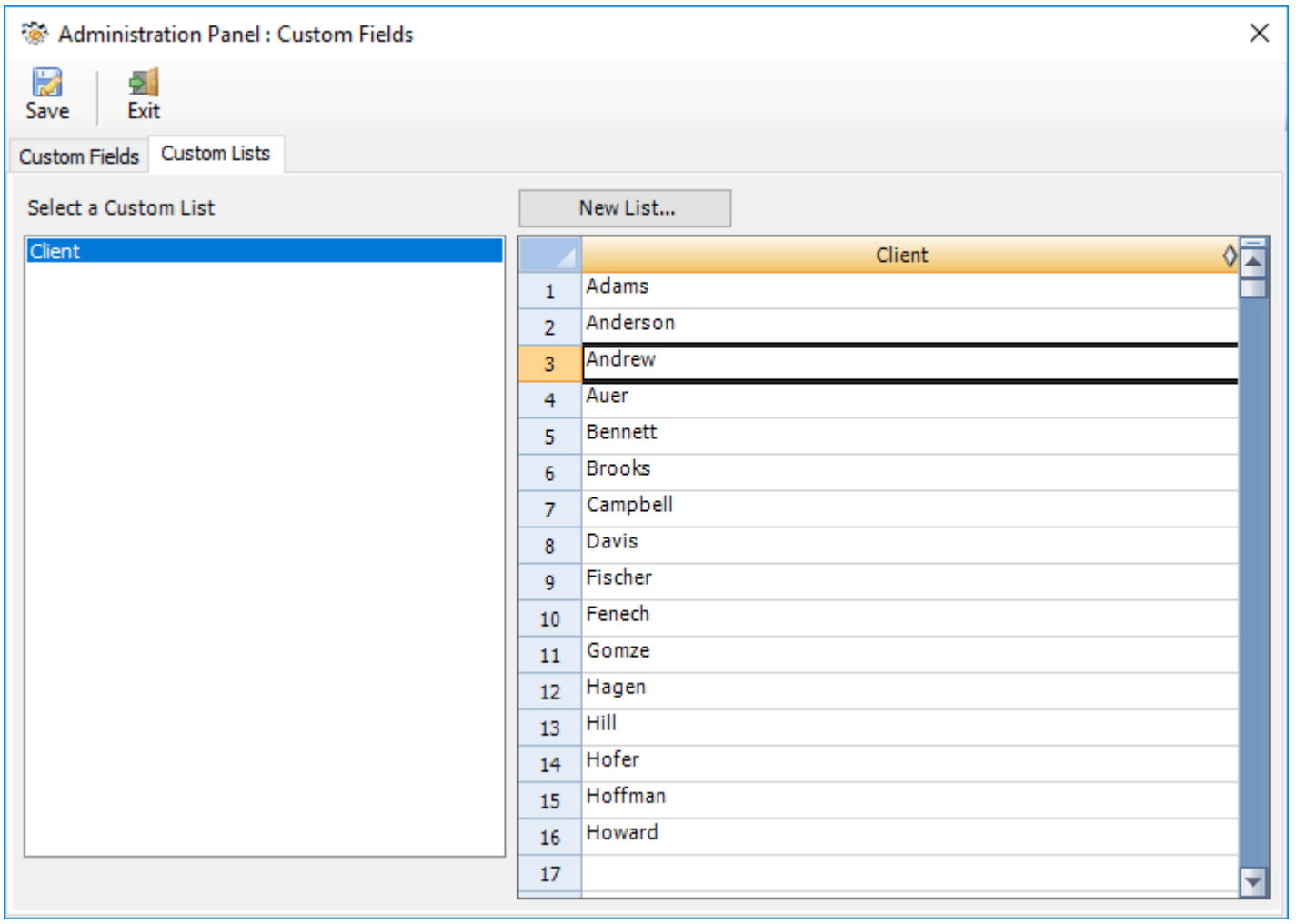
You also have the option to even mark a custom field Mandatory when Reporting, so that without filling the mandatory fields, the Outlook appointment items or task items cannot be reported/published.

Once a field is marked mandatory it would be displayed in red color so that user can identify the mandatory fields.



Custom List

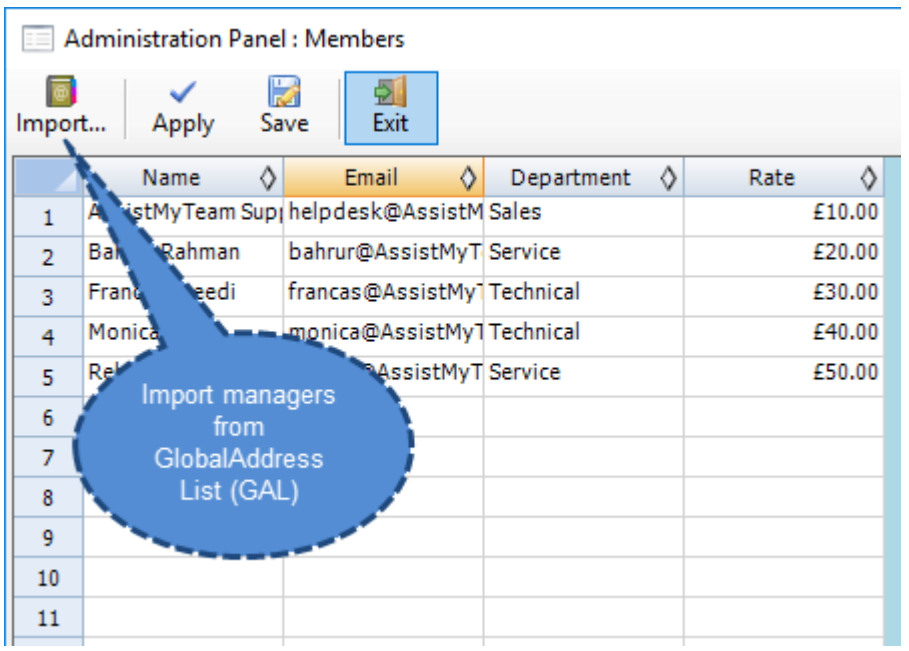
The titles of these custom list can be edited to get the proper meaningful label that signifies the information the field store. *For example, the first drop down field can be titled as 'Client' and the you can fill up the names of all their clients for which projects are contracted for.*



4.4 Managers List

Personal TimeSheet > Managers List

Here, you can maintain the detail of all project managers. The manager name and email address are mandatory fields and should be unique for each member in the list.

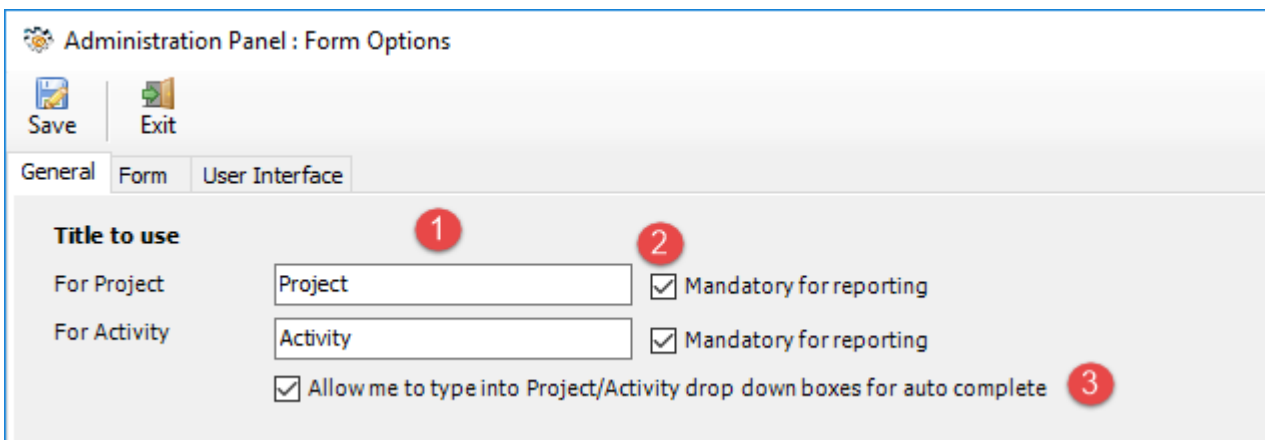


Import managers from Global Address List/Active Directory - Most likely, you might already have contact details of the managers in the exchange global address list. Use the '**Import...**' button to display the address book and select those contacts that you want to import. The contact's name, email, department fields would be then automatically filled in the grid.

4.5 Form Options

Personal TimeSheet > Form Options.

You have the provision to customize the titles of the project and activity. The changes in the titles here are reflected in the timesheet form, toolbars and ribbons in Outlook.

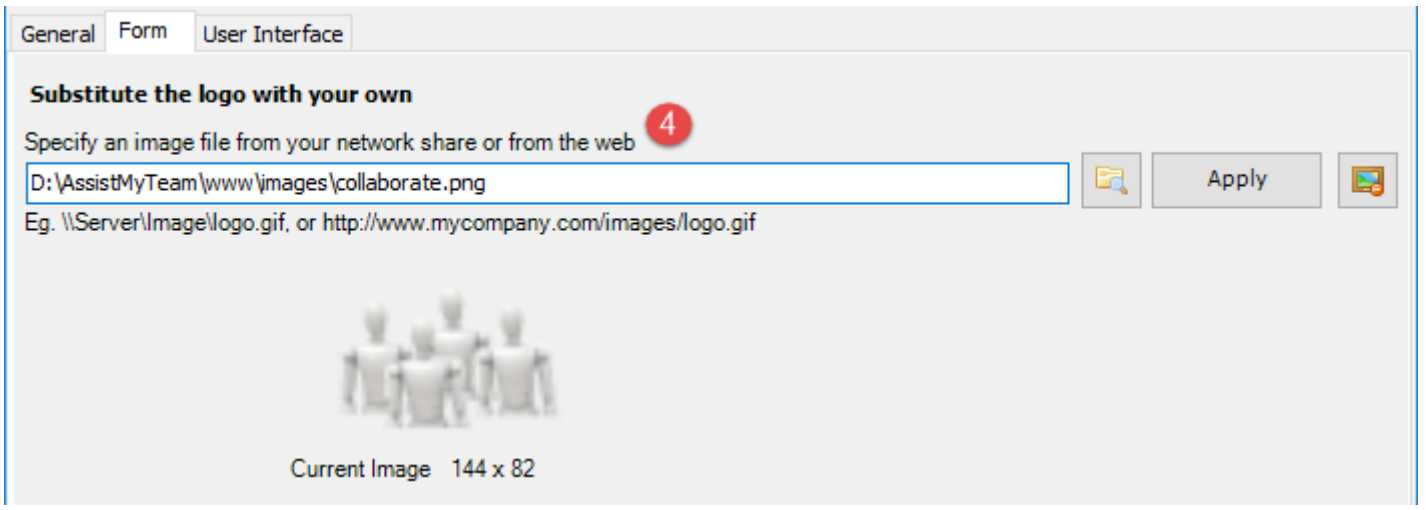


Title to use – Input the meaningful label that best describes the data the Project and Activity fields would store. These labels would be deployed to the timesheet form, toolbars etc. So, best practice would be to use a single word or two, which is easily recognizable to the kind of data it would store. By default, project field uses '**Project'** and for '**Activity'** for the Activity field.

Mandatory for reporting – When you submit time sheets and other data, you can set certain fields as required or mandatory before accepting the reported data (into the SharePoint). When you try to submit timesheet or other reportable data without filling in the mandatory fields, the add-in process would automatically display a warning message.

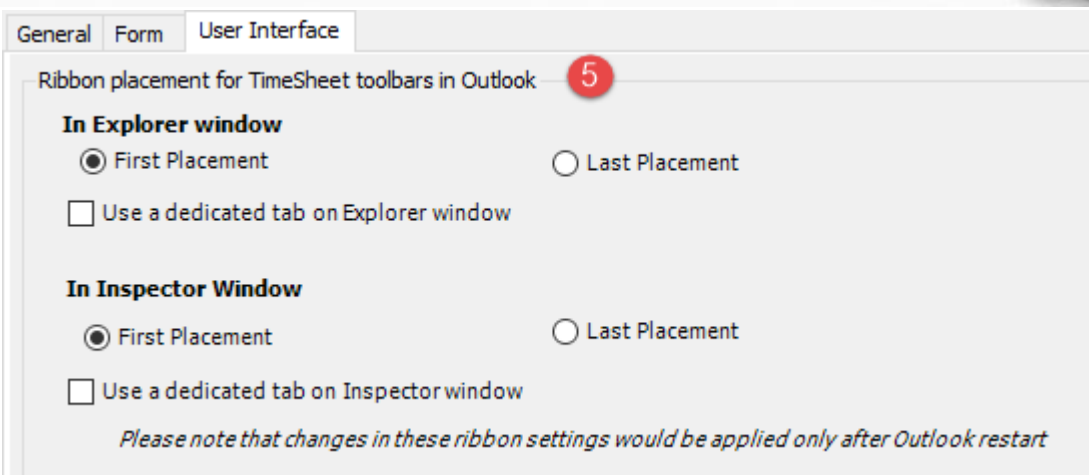
Allow me to type into Project/Activity drop down boxes for auto-complete

When you enable this option, the add-in will allow you to enter or type in the first few characters of the project or activity in the timesheet form and the best matches will only show up in the drop down.

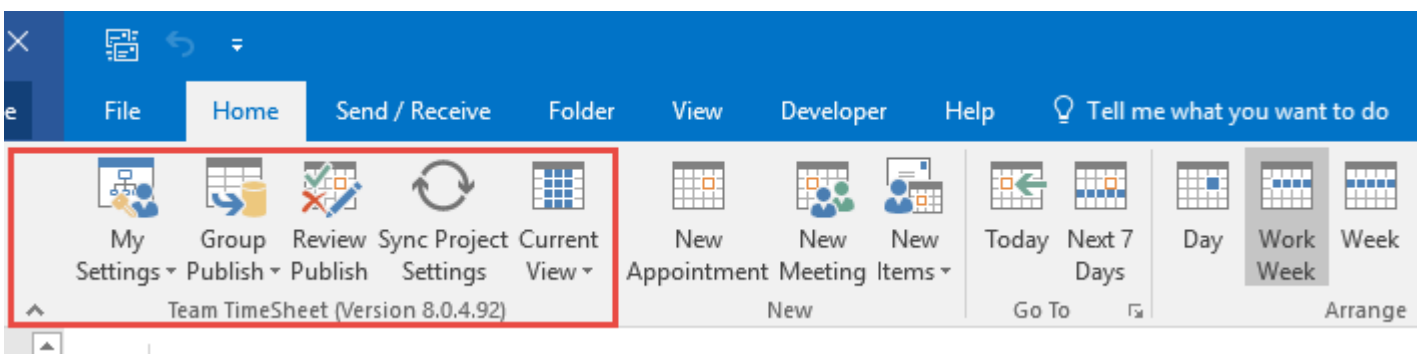


Substitute the logo with your own

You can specify an image of your choice and upload the image file by browsing the image located. This uploaded image would be displayed in TimeSheet form in Outlook.

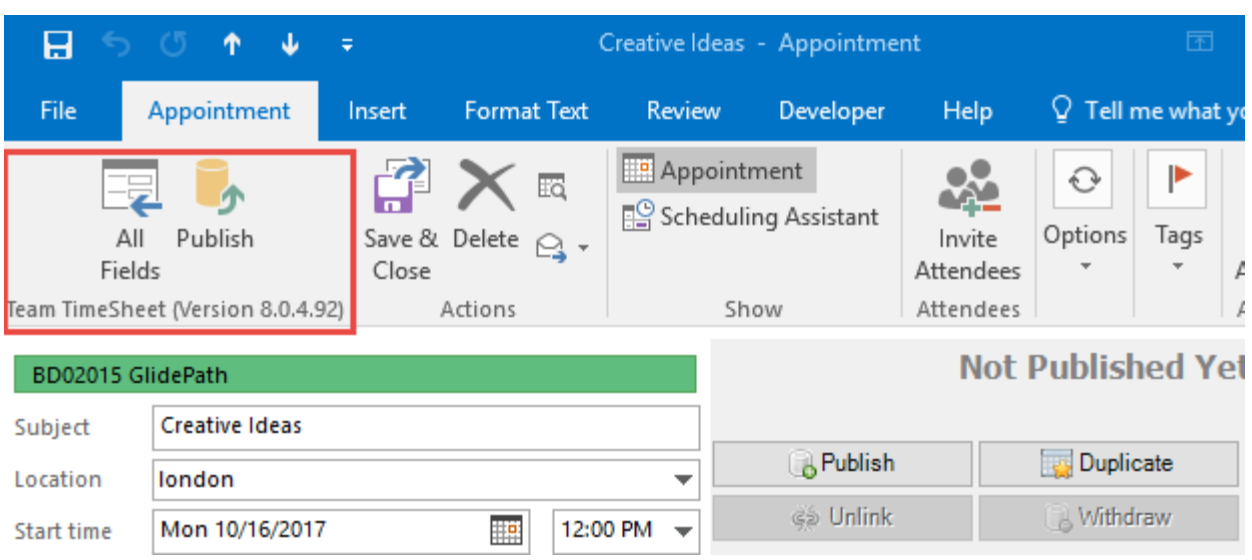


You have a choice where the timesheet toolbar should be placed in your Outlook main explorer window. By default, the timesheet toolbar is placed under Outlook predefined tabs such as 'Home' or 'Appointment'. And that too, the first in the sequence of groups.



You can change this option to place the timesheet toolbar in its dedicated tab, or to place in the last sequence of the groups.

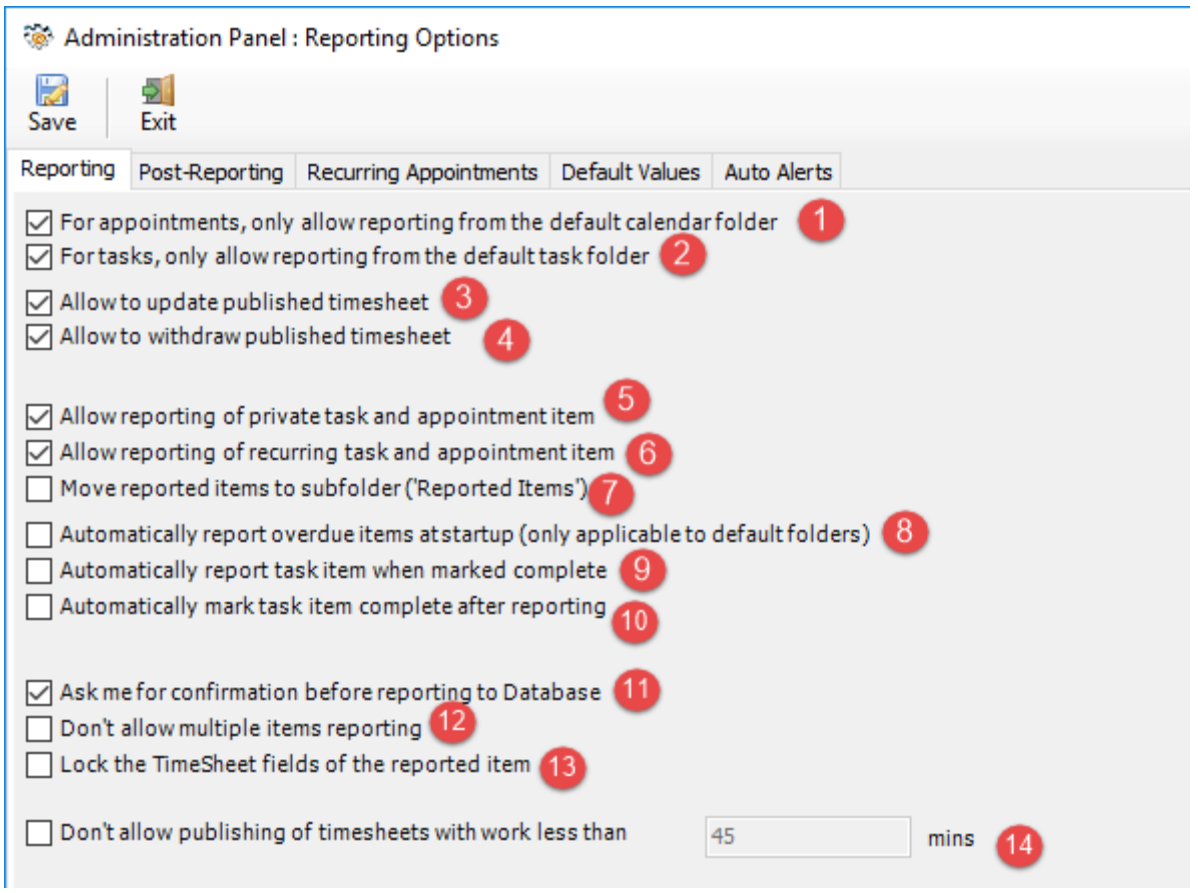
Similarly, when you open an appointment or task item in Outlook, you can choose the placement of the timesheet toolbar in the inspector window of the item. By default, the toolbar is placed under Outlook predefined 'Appointment' tab and first in the sequence. You can change this to use a dedicated tab, or to place in the last sequence.



4.6 Reporting Options

Personal TimeSheet > Reporting Options

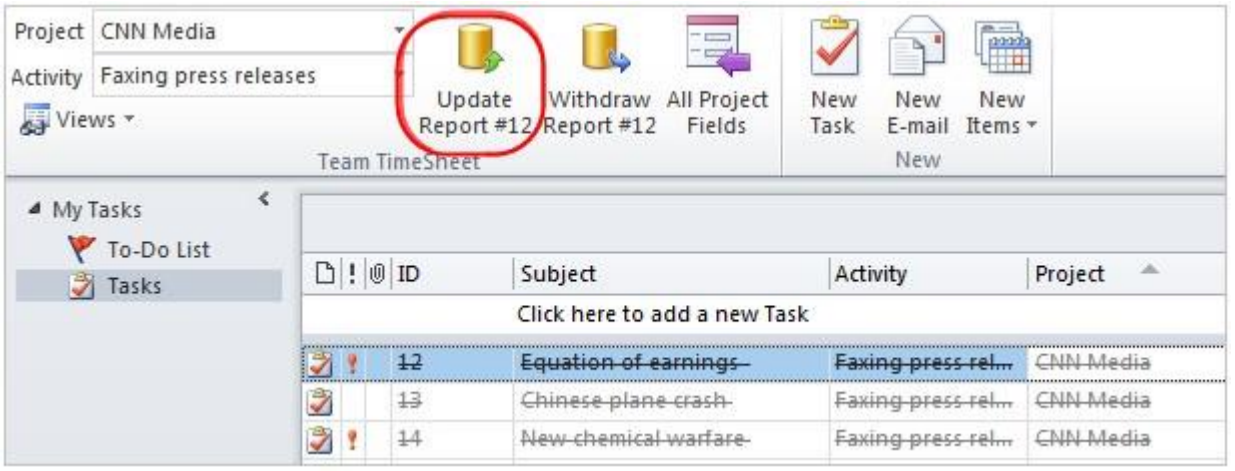
With the reporting options, you can control and streamline how you publishes project deliverables from the Outlook to the project data repository.



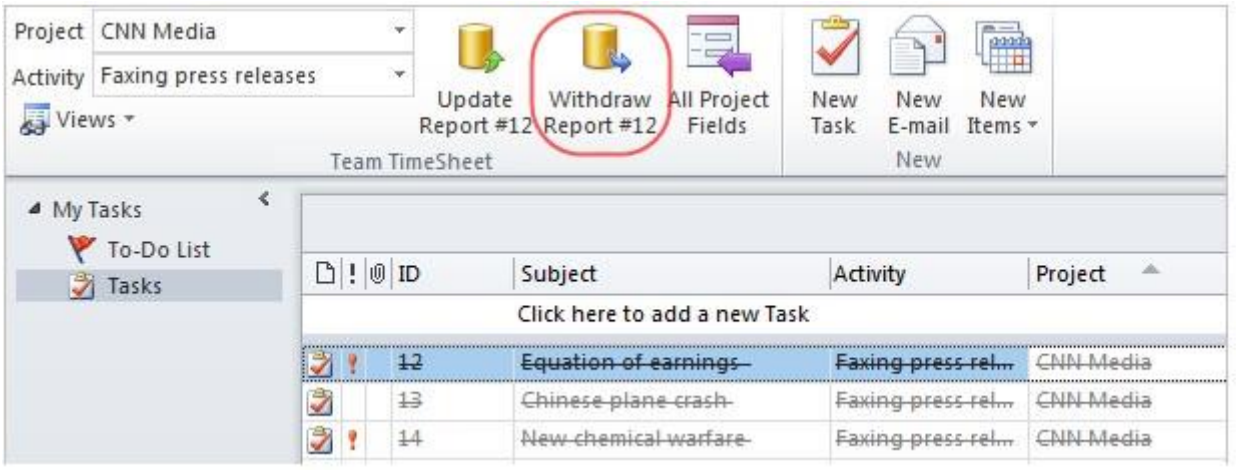
1 **For appointments, only allow reporting from the default calendar folder** – If this option is enabled, TimeSheet add-in in Outlook will only function from the default calendar folder of the primary mailbox. This can be useful to limit the reporting of project deliverable and timesheets from a single calendar in Outlook.

2 **For tasks, only allow reporting from the default task folder** – If this option is enabled, TimeSheet add-in in Outlook will only function from the default task folder of the primary mailbox. This can be useful to limit the reporting of project deliverable and work done from a single task in Outlook.

3 **Allows to update published timesheet data**– If this option is enabled, it would allow members to resubmit reported timesheets or deliverables and overwrite existing data on the SharePoint. A new UI ribbon button with the caption '**Update Report #12'** for example, would appear in the TimeSheet Outlook toolbar or ribbon. This feature helps members to report their incomplete timesheet or task deliverables, while at the same time, giving them flexibility to re-submit or update the same reported timesheet in due course of time.



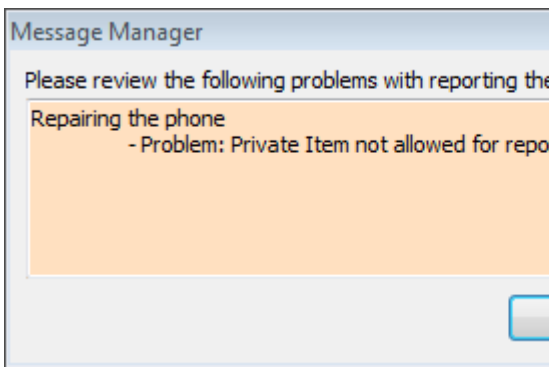
4 **Allow to withdraw published timesheet** - If this option is enabled, it would allow members to withdraw (remove) reported timesheets or deliverables from the SharePoint. A new UI ribbon button with the caption **'Withdraw Report'** would be available in the TimeSheet toolbar or ribbon in Outlook. This withdrawal feature comes handy when members want to start-over their timesheet or work done which were already submitted.



5 **Allow reporting of private task and appointment item**

By default, Outlook items that marked private are enabled for reporting, just like normal items. You can prevent private items from being reported by disabling (un-checking) this particular option. Preventing private items might be useful to separate personal outlook items from those used for project reporting.

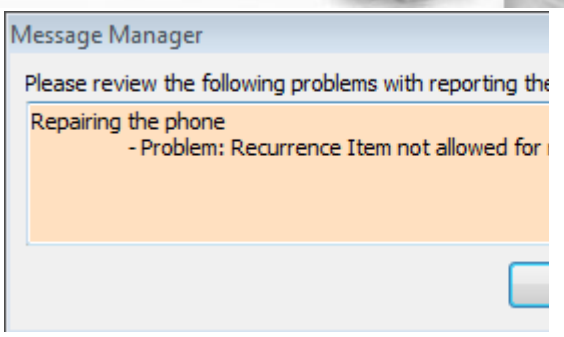
When reporting of private item is not enabled, when you try to report it, you would see a message box on why it can't be reported successfully.



6 **Allow reporting of recurring task and appointment item**

By default, recurring items are enabled for reporting. You can prevent recurring items from being reported by disabling (un-checking) this particular option. This might be useful, if you don't use recurring items for project reporting.

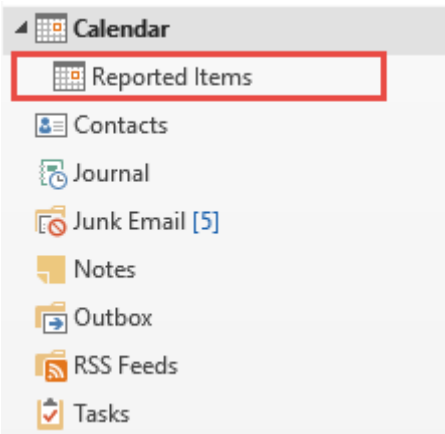
When reporting of recurring item is not enabled, when you try to report it, you would see a message box on why it can't be reported successfully.



7 **Move reported items to subfolder**

If this is enabled, all reported items will be moved to a subfolder named 'Reported tasks' or 'Reported Appointments' (depending on the folder content type) under the parent folder. This subfolder will be created on every folder where reporting is performed.

Reported Items from any Tasks folders are moved automatically to the corresponding **'Reported Items'** subfolder. If this folder is not present (true if it is reporting for the first time on the parent folder), it will be created automatically. The same is true for reported appointment items in any calendar folders.



8 **Automatically report overdue items at startup**

If this is enabled, items that are overdue will be reported to the SharePoint automatically on Outlook startup.

*For Outlook task item, the **due date** is checked against the current date and if it occurred before that, it is reported automatically to the SharePoint.*

*For appointment item, the **end time** is checked against the current date/time and if it occurred before that, it is reported automatically to the SharePoint.*

In both cases, if the overdue item is already reported, it is ignored.

Note:

This automatic reporting of overdue items is applicable to the default calendar and task folders only.

9 **Automatically report task item when marked complete**

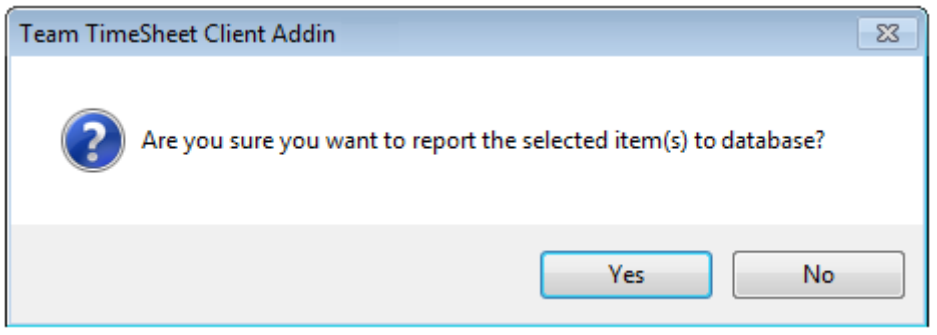
This option is only applicable to Outlook task item. If enabled, TimeSheet add-in would automatically report that particular task item when it is marked completed, provided, it has not been reported before (i.e., it does not yet have a report ID).

10 **Automatically mark task item complete after successful reporting**

This option is also only applicable to Outlook task item. If enabled, TimeSheet add-in would automatically mark a reported task item as complete.

11 **Ask me for confirmation before reporting to the SharePoint**

By default, when you report any Outlook task or appointment items, either one a time or in multiple mode, TimeSheet add-in does not ask for confirmation. You can change that by enabling this option.



Asking for confirmation can be useful to avoid hasty or unintentional reporting of items.

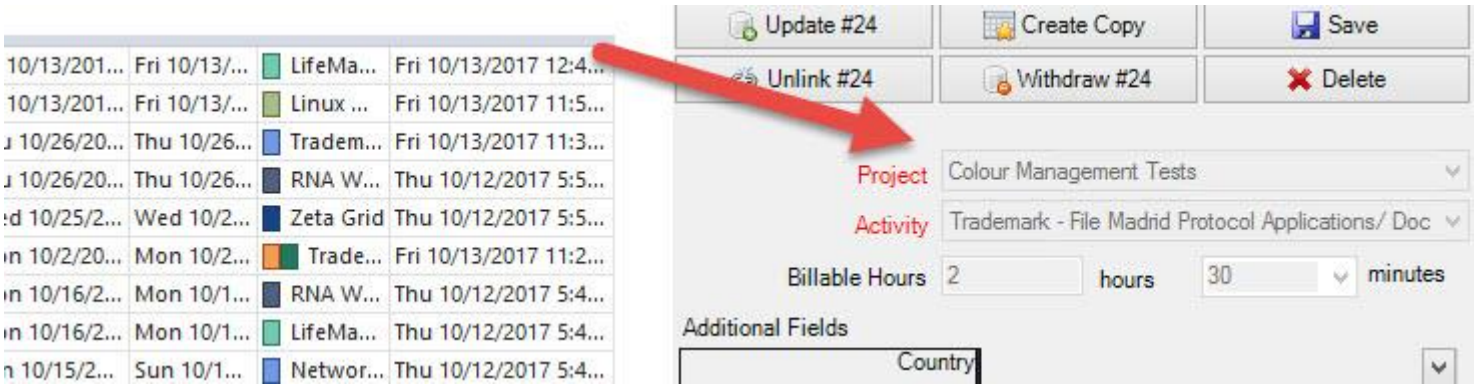
12 **Don't allow multiple items reporting**

By default, you can select multiple Outlook task or appointment items and report at once, to the SharePoint in a single click. But you can change this behavior by enabling this particular option. Doing so, only the first selected item (among the selected items) will only be reported.

13 **Lock the TimeSheet fields of the published item**

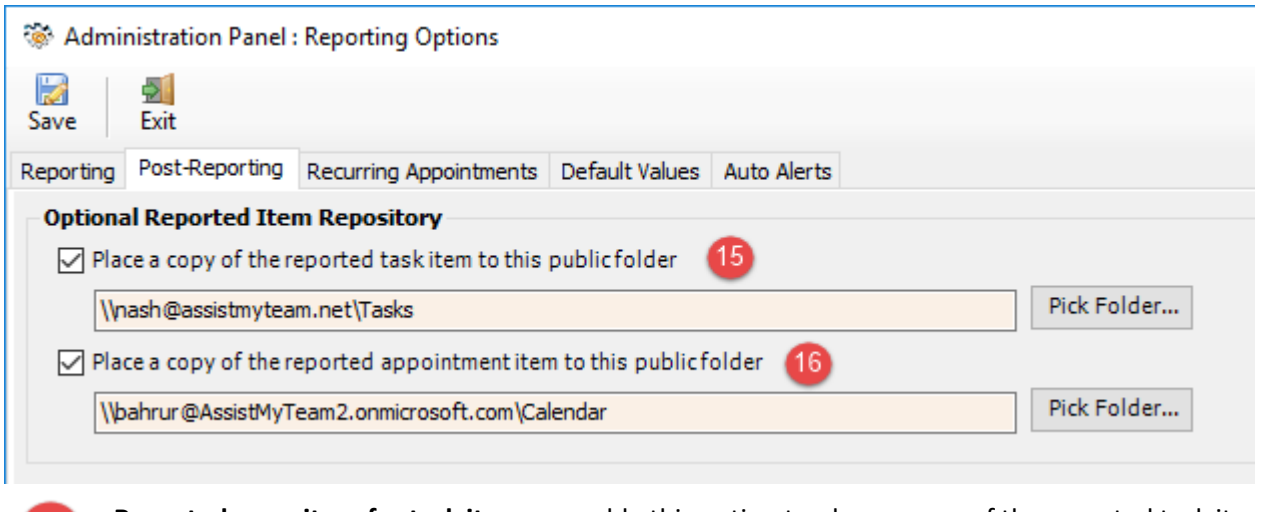
By default, the tagged fields of the reported item are enabled, which mean, you can edit and change the value even after successful reporting. But if you don't have the need for editing or changing project related fields once it is reported, you can have it disabled to make it read-only.

***Screenshot**: Locked state of the project and custom fields drop downs in the timesheet form*



14 **Don't allow posting of items with work less than X mins** – If you have a minimum work time required for accepting timesheet and other project deliverables, you can set it in minutes. When you publish a timesheet to SharePoint, if the work duration (i.e., duration of the appointment item or total work hours for task item) is less than the minimum required time, the reporting would stop and a friendly message is displayed.

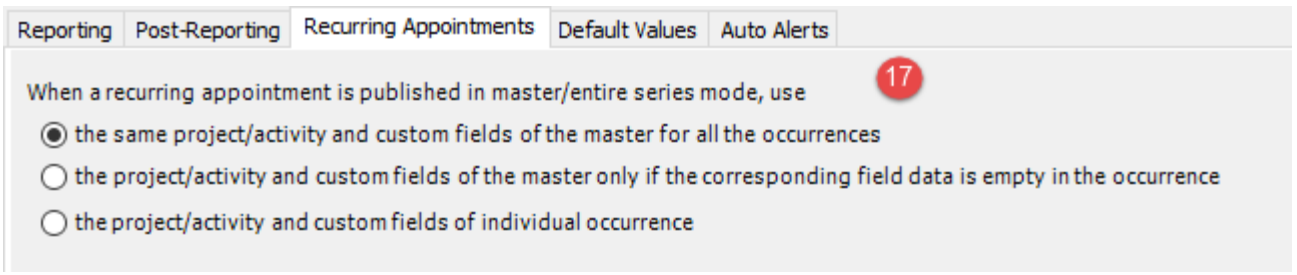
Post Reporting



15 **Reported repository for task items** – enable this option to place a copy of the reported task item to a public task folder.

16 **Reported repository for appointment items** – enable this option to place a copy of the reported appointment item to a public calendar folder.

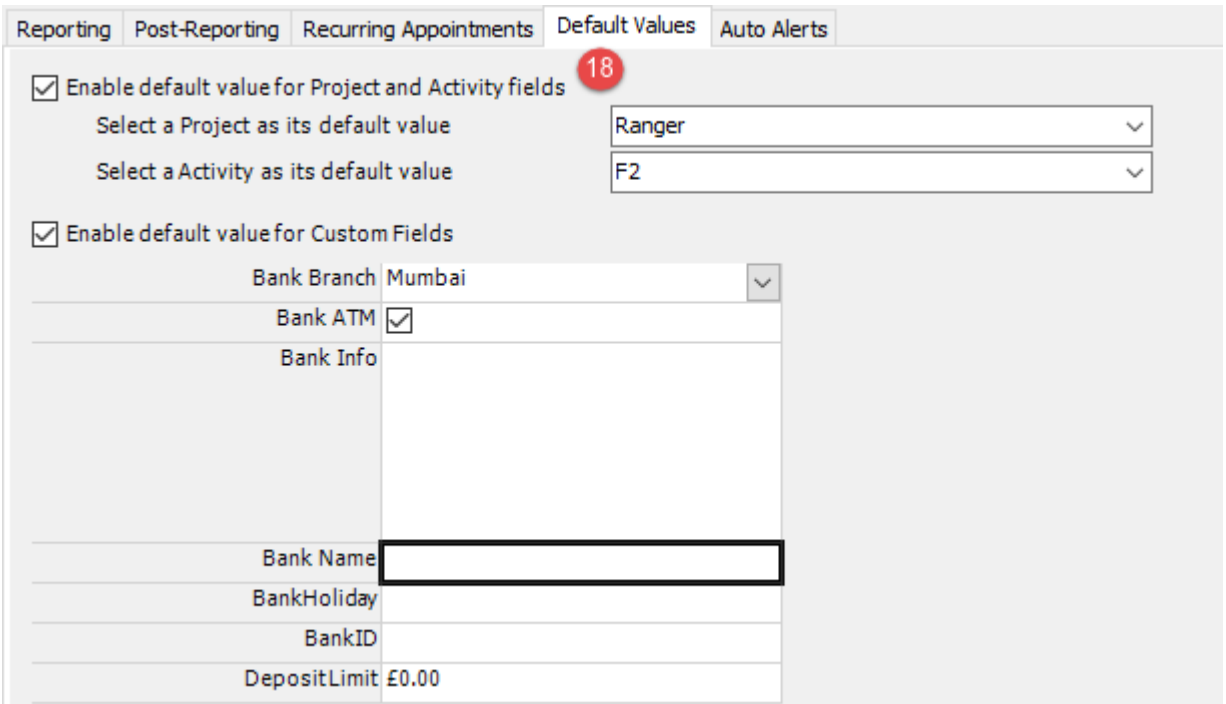
Recurring Appointments



17 **When a recurring appointment is published in master/entire series mode, use**
If recurring appointment is published, you can choose 3 different modes to be used:

- *the same Project/activity and custom fields of the master for all the occurrences*
- *the project/activity and custom fields of the master only if the corresponding field data is empty in the occurrence*
- *the project/activity and custom fields of individual occurrence*

Default Values



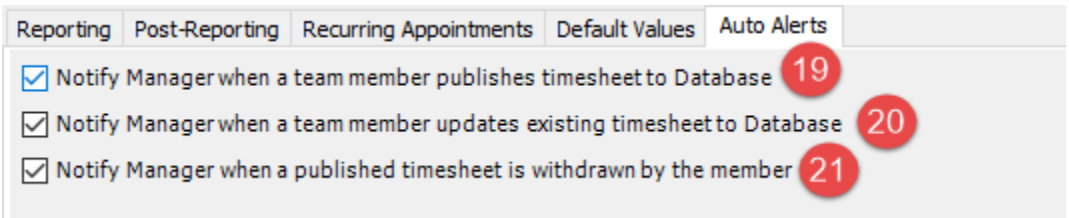
18 **Default values for empty fields when reporting**

You can set a default value for each of the project field (including the custom drop-down fields) such that when you report any Outlook task or appointment item, if one or more of the project fields including the custom fields are empty, Personal TimeSheet add-in would automatically fill in the default value of the corresponding field to the particular Outlook item, before reporting it to the SharePoint.

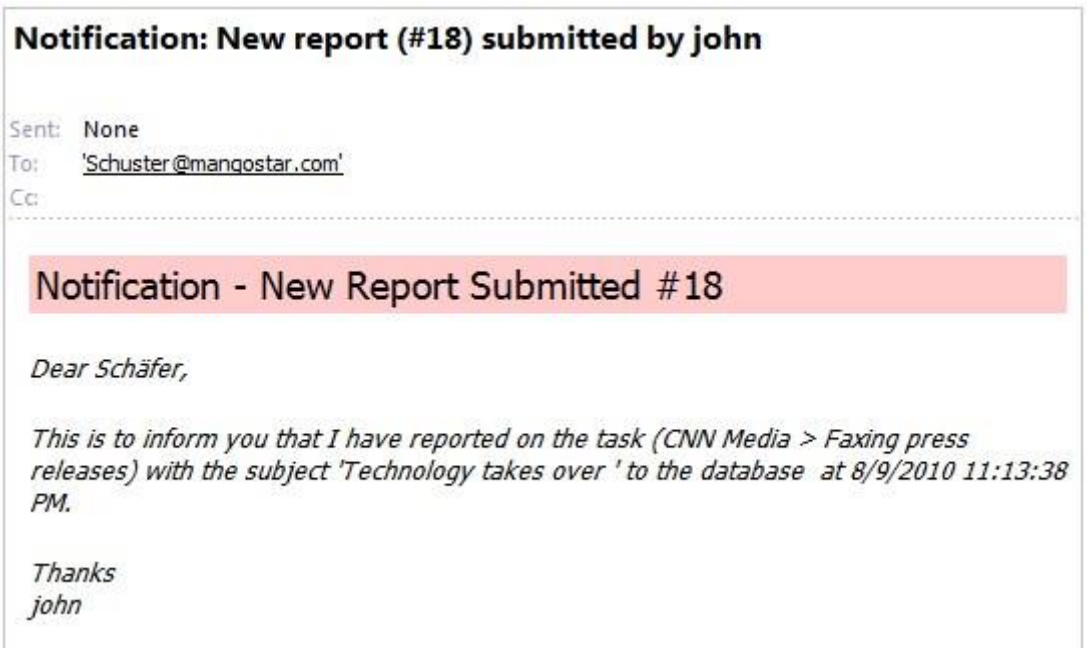
This automatic assignment of default values might be particularly useful if you had marked project and other custom fields mandatory for reporting.

Automatic Email Notifications

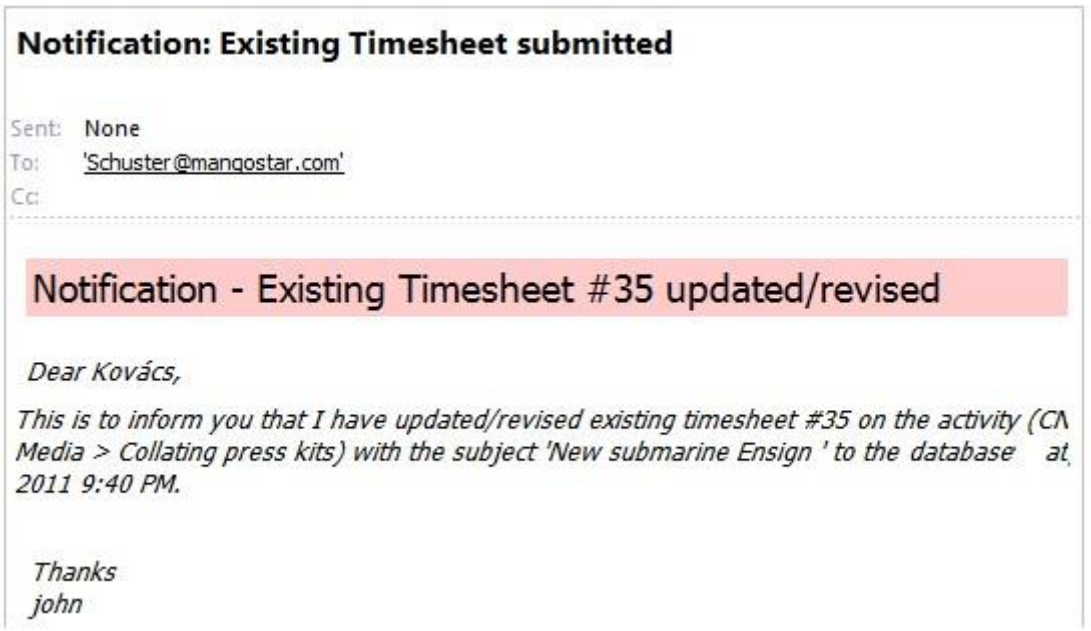
Personal TimeSheet offers a 3 notification options for different events of project management and tracking. These email templates can be altered using the 'Templates Manager'. Automatic emails are sent out directly when a relevant event occurs and the whole exercise is transparent to the users.



19 Notify manager when you submit a timesheet to the SharePoint - this notification email is sent out to the concerned manager in-charge of the particular project on which you had published a timesheet.



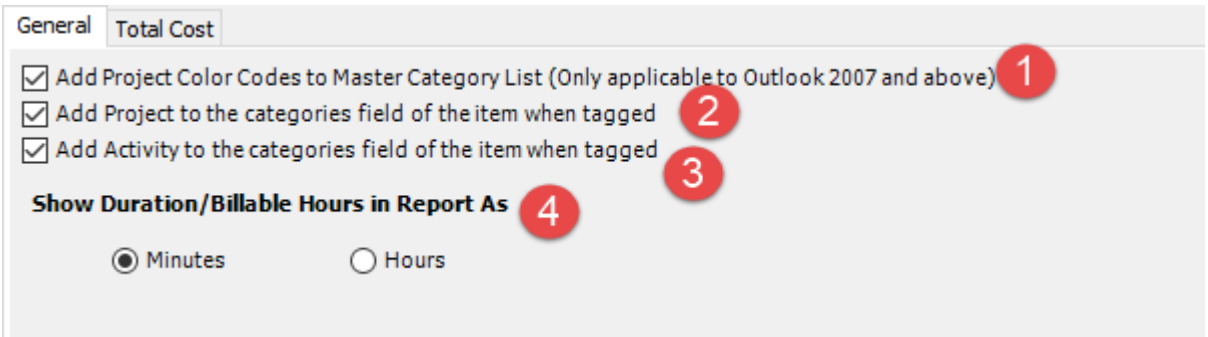
20 Notify Manager when you update existing timesheet to SharePoint – This notification email is sent out to the concerned manager in-charge of the particular project when a member updates and revises an existing timesheet in SharePoint.



21 Notify Manager when you withdraw a timesheet from the SharePoint – If withdrawal of reported timesheet is allowed, this notification email would be sent out to the concerned project manager when member withdraws the reported timesheet from the SharePoint through Outlook.

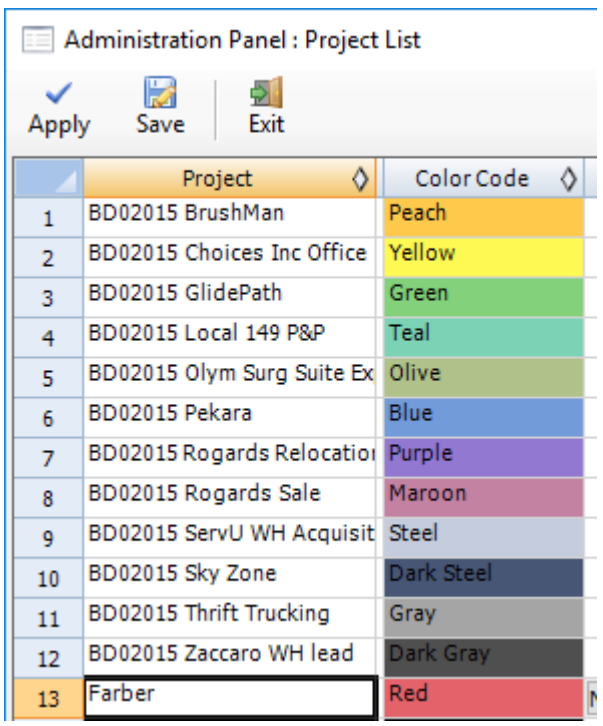
4.7 Advanced Options

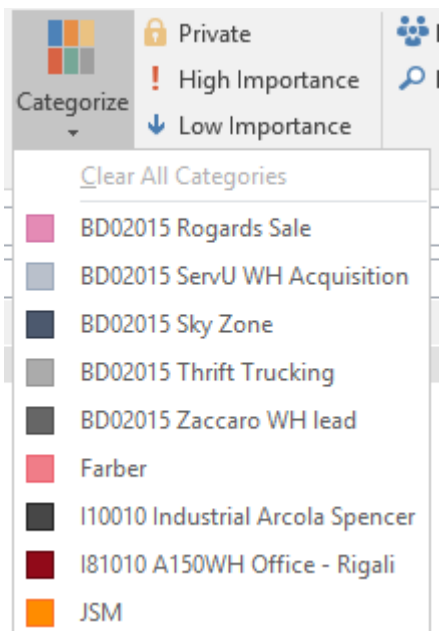
Personal TimeSheet > Advanced Options



1 **Add Project Color Codes to Outlook Master Category List**

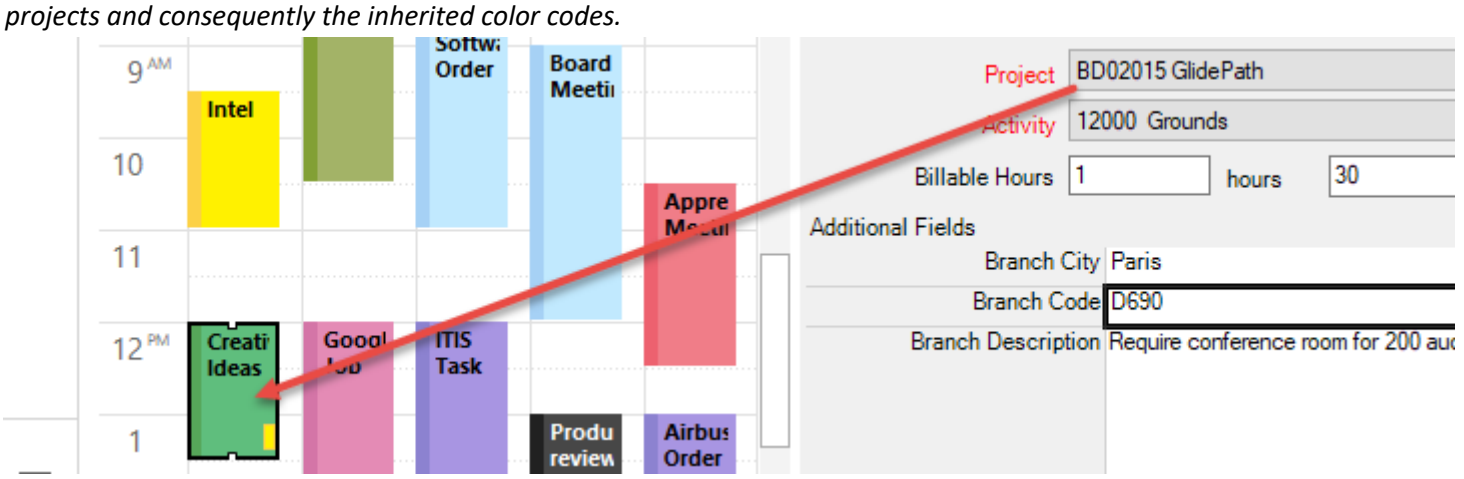
From TimeSheet add-in tool, each project can be assigned a unique color code from the supported 25 colors in Outlook. If you enable this option, all the projects with color codes will be added to the 'Master Category List' of your Outlook.



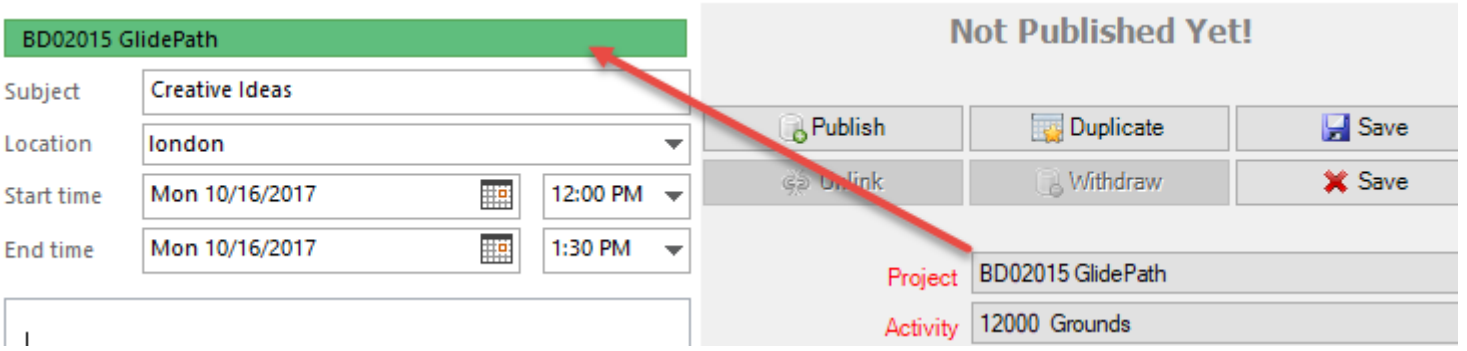


Once the projects with color codes are imported to your Outlook, when you tag an Outlook appointment or task item with a project, the corresponding color code would be applied automatically. This is very helpful to give a quick visual cognition as well as to organize your items in Outlook in a more obvious way.

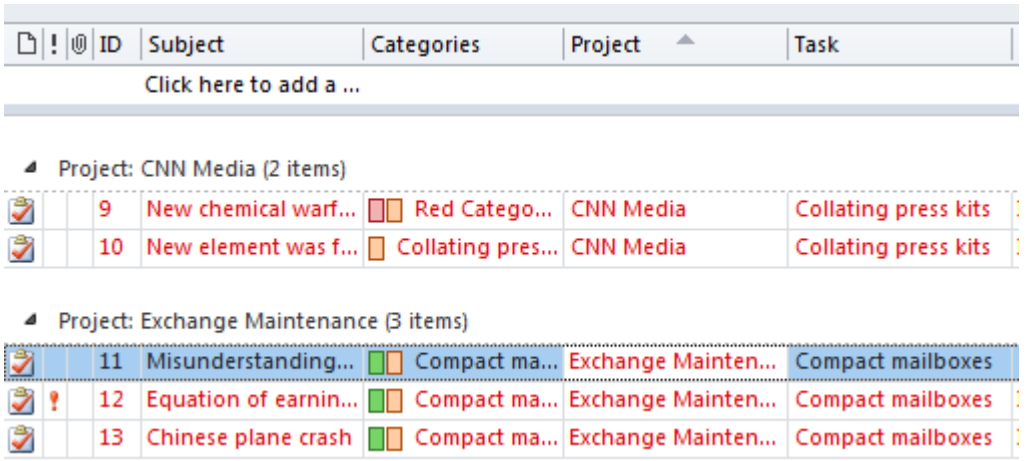
Screenshot below: *Explorer view of calendar month in Outlook 2016 with appointments tagged with different projects and consequently the inherited color codes.*



Screenshot below: *Inspector view of a particular appointment item in Outlook 2016 tagged with project and the inherited green color code.*



Likewise, in Outlook task folder, the items tagged with projects appears color coded in small rectangle as seen in the screenshot below:

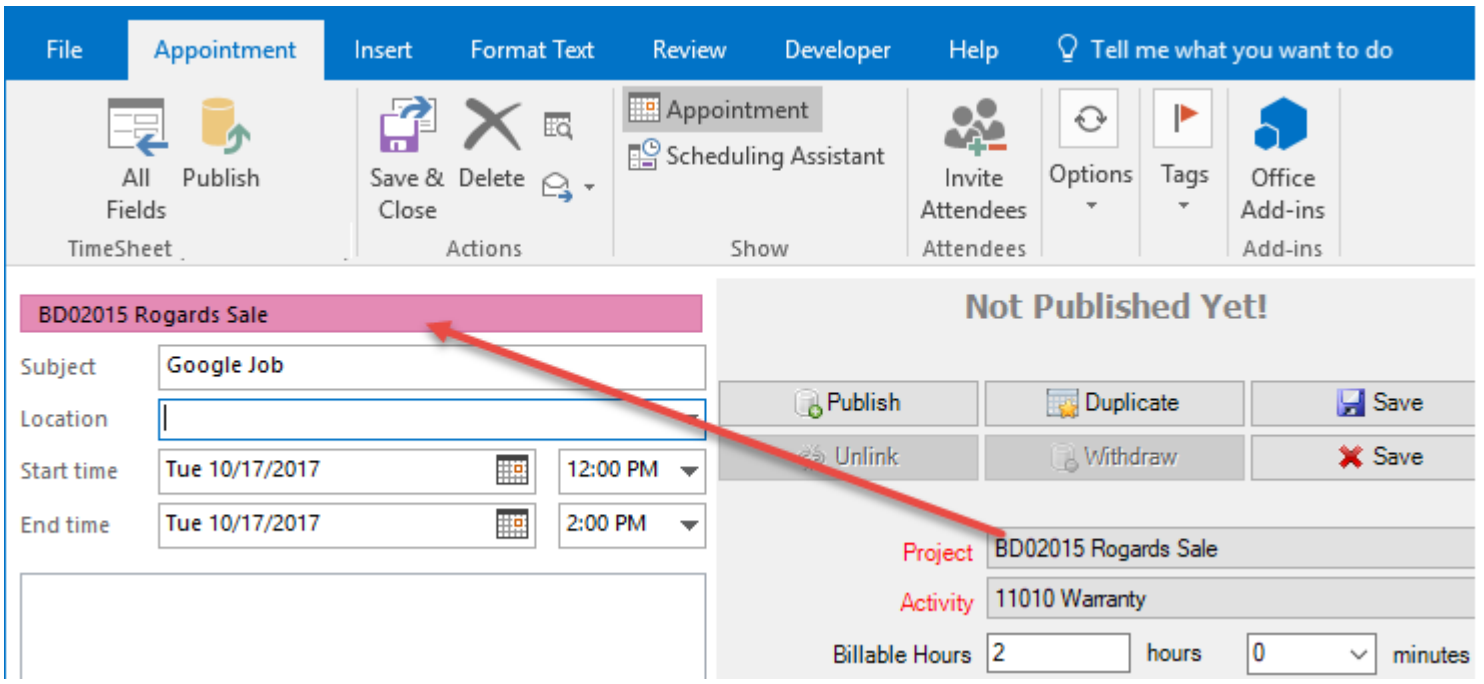


Note: *Color coding of tagged Outlook item requires that you enable 'Add Project to the Categories field of the item when tagged' option (3).*

2 **Add Project to the categories field of the item when tagged**

This allows for the tagged project value to be added to the categories field of the particular Outlook item. This option needs to be enabled if you want to enable color coding of tagged project items in Outlook.

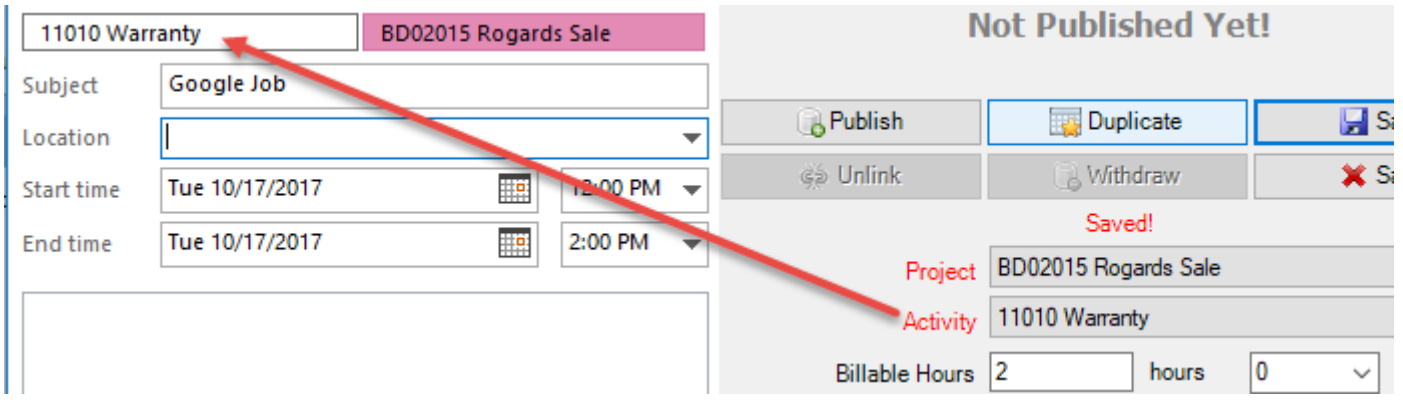
Tagged project value added to the categories field of the particular appointment item.



3 **Add Activity to the categories field of the item when tagged**

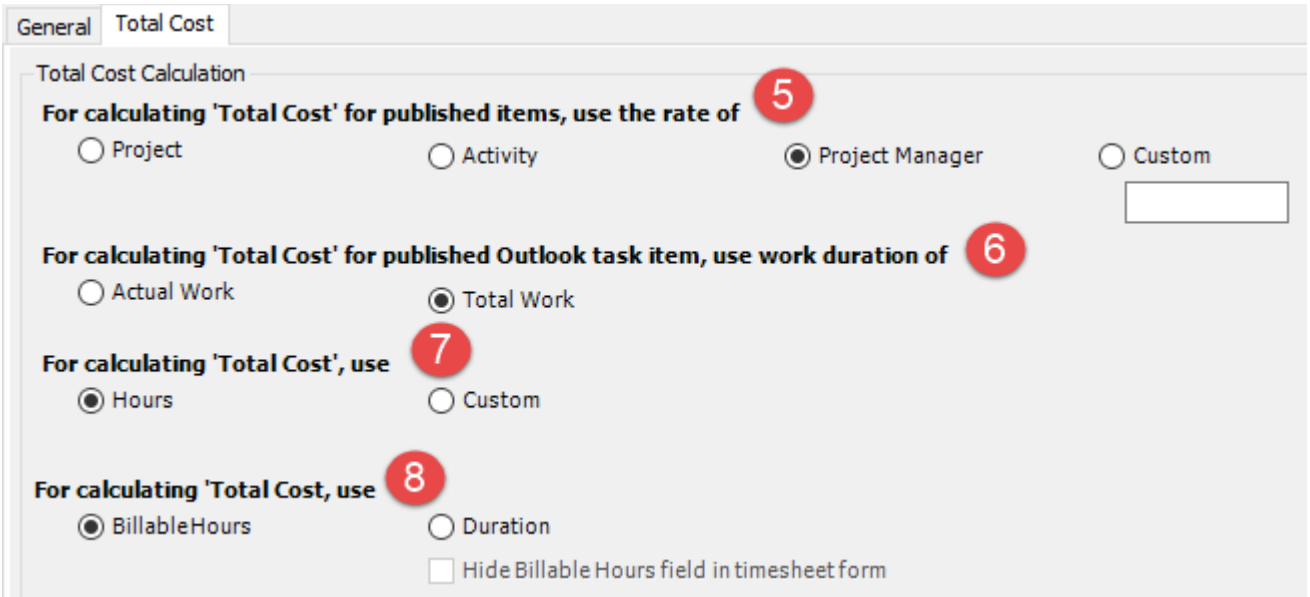
This allows for the tagged activity value (of a particular project) to be added to the categories field of the particular Outlook item.

Tagged activity value added to the categories field of the particular appointment item.



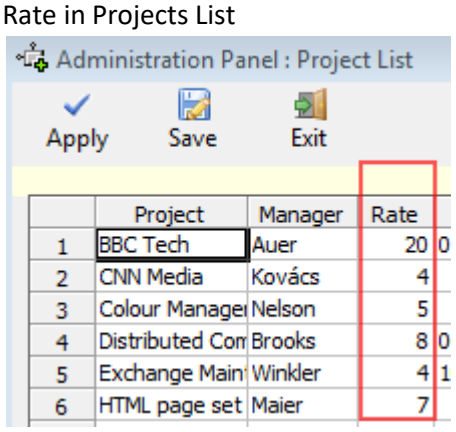
4 **Show Duration/Billable Hours in Reports as** – Duration and Billable Hours of timesheet published from Outlook to SharePoint is always in Minutes format. And by default, when you run any reports on published timesheets, the default format will be too, in minutes. However, if you want in hours, you can change here.

Total Cost Calculation

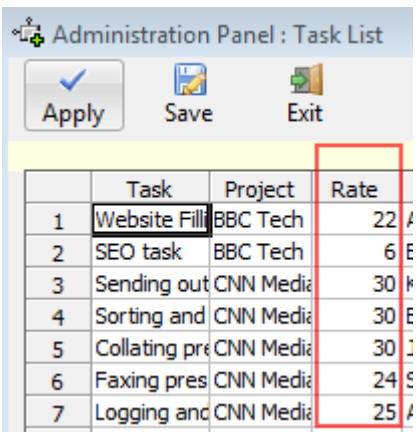


5 **To calculate 'Total Cost' for reported timesheet**, you can use the rate from one of the three –Project, Activity or Member. The total cost is calculated automatically when you publish timesheets to SharePoint. By default, the rate for project is used.

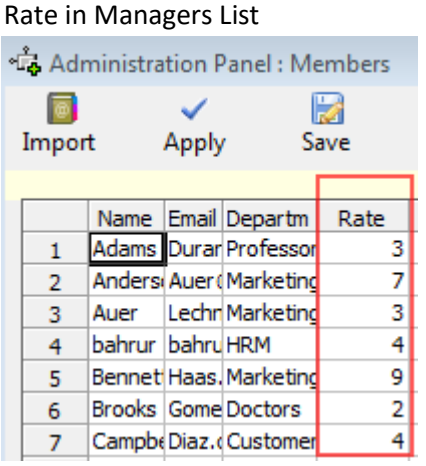
Rate in Projects List



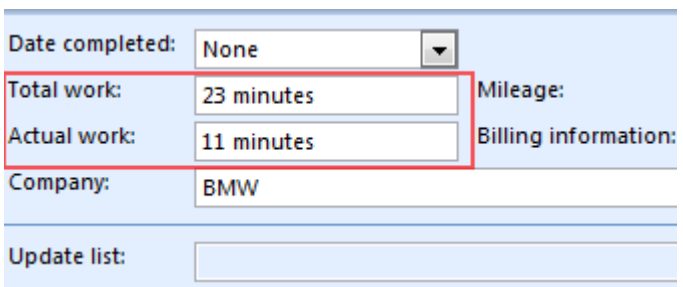
Rate in Activities List



Rate in Managers List



6 **For calculating 'Total Cost' for Outlook task items**, you can use one of these two works done field of the item – '**Actual Work'** or the '**Total Work**'.



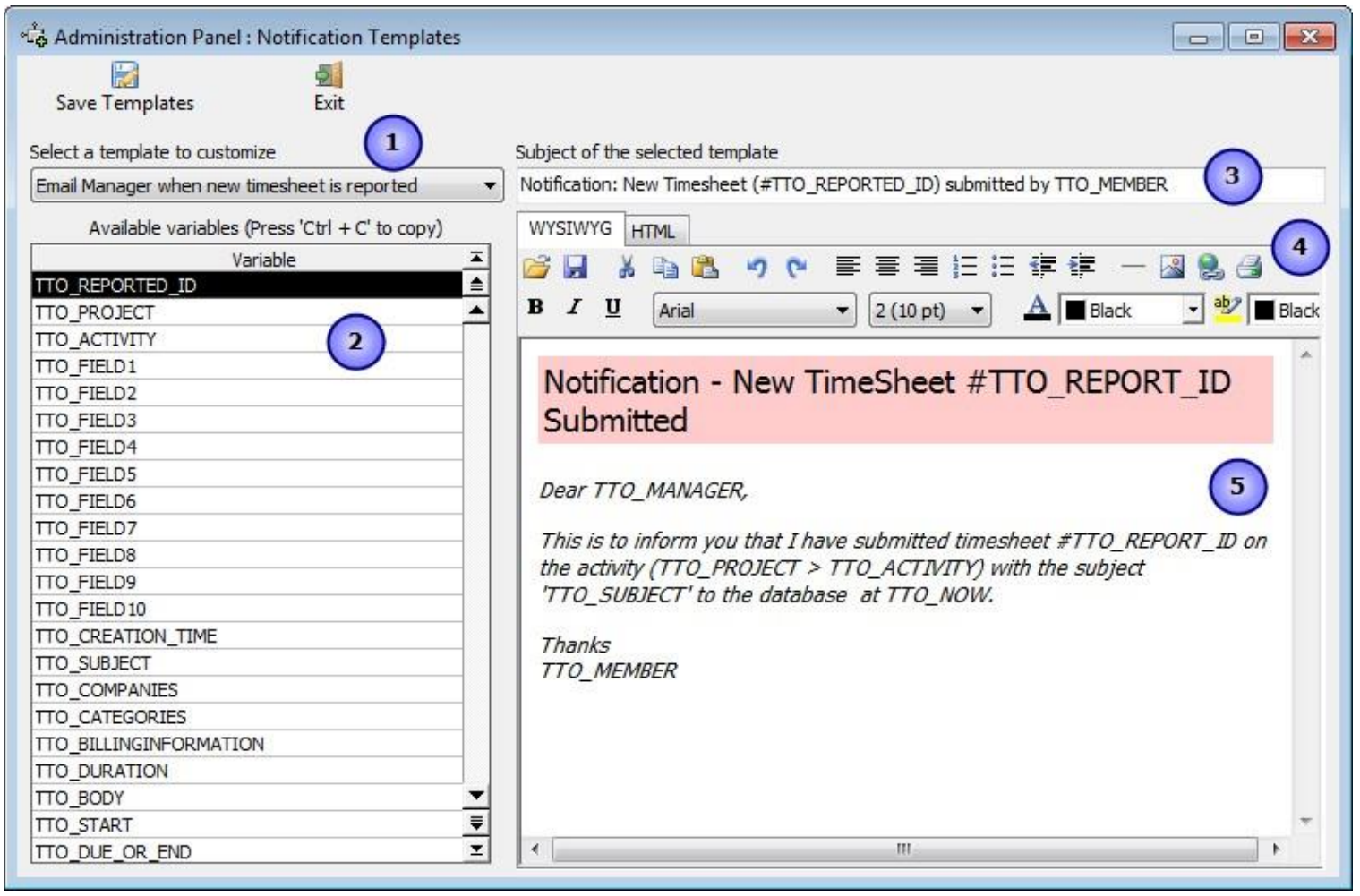
7 **For calculating 'Total Cost'**, you can set the rate to be either hourly or your specified hours. By default, rate is calculated on hourly basis.

8 **For Calculating 'Total Cost'** of a published timesheet, you can either choose **Billable Hours** or **Duration** of the appointment or task item, that is being published. Default is Billable Hours field. Additionally, if Duration is chosen, you can hide the 'Billable hours' field in the timesheet form

4.8 Templates Manager

Personal TimeSheet > Templates Manager

Here, you can customize the templates used for printing timesheets or sending auto alert to managers when timesheets are published, edited or withdrawn. A template takes HTML format.



Automated emails are sent out directly when a relevant event occurs and the whole exercise is transparent to the users.

1 A list of all templates used for printing and email notifications:

Template	*Purpose*
Email Manager when you publish a timesheet	HTML template of the notification email that is sent automatically to the project manager when a user submits timesheet and other deliverables from Outlook to SharePoint.
Email Manager on withdrawal of published timesheet	HTML template of the notification email that is sent to the project manager when a member withdraws a published timesheet from SharePoint.
Email Manager when you update (revise) a timesheet	HTML template of the notification email that is send automatically to the project manager when a user updates or revises existing timesheet and other deliverables from Outlook to SharePoint.
Print	HTML Template that is used when printing a timesheet.

2 A list of all **placeholder variables** available for inserting into a particular template. In runtime (that is, when the actual email is generated from the template), the enclosed variables will be substituted by their corresponding values. The followings list all the supported variables:

Variable	*Purpose*
TTO_REPORTED_ID	Unique ID that is automatically generated when a report is submitted to the SharePoint.
TTO_PROJECT	Project name of the reported item
TTO_ ACTIVITY	Activity name for a project of the reported timesheet
TTO_CREATION_TIME	Creation time of Outlook item that is being reported
TTO_SUBJECT	Subject of the Outlook item that is bring reported
TTO_COMPANIES	Companies field of the Outlook item that is being reported
TTO_CATEGORIES	Categories field of the Outlook item that is being reported
TTO_BILLINGINFORMATION	Billing Information field of the Outlook item that is being reported
TTO_DURATION	Duration of the Outlook item that is being reported
TTO_BODY	Body description of the reported Outlook item
TTO_START	Start date of the Outlook item
TTO_DUE_OR_END	Due date (in case of task item) or End date (in case of appointment item)
TTO_REPORTED_DATE	Date/time the Outlook item was reported to the SharePoint
TTO_MEMBER	Name of a particular member
TTO_TOTALCOST	Total cost that is computed after the item is reported successfully
TTO_MANAGER	The manager of the particular project
TTO_NOW	Current date/time stamp
TTO_REPORTED_BY	Name of the member who submitted the item to the SharePoint
TTO_HOURS	Billable Hours

Note: Some of the variables might not be available for embedding on certain templates when not applicable.

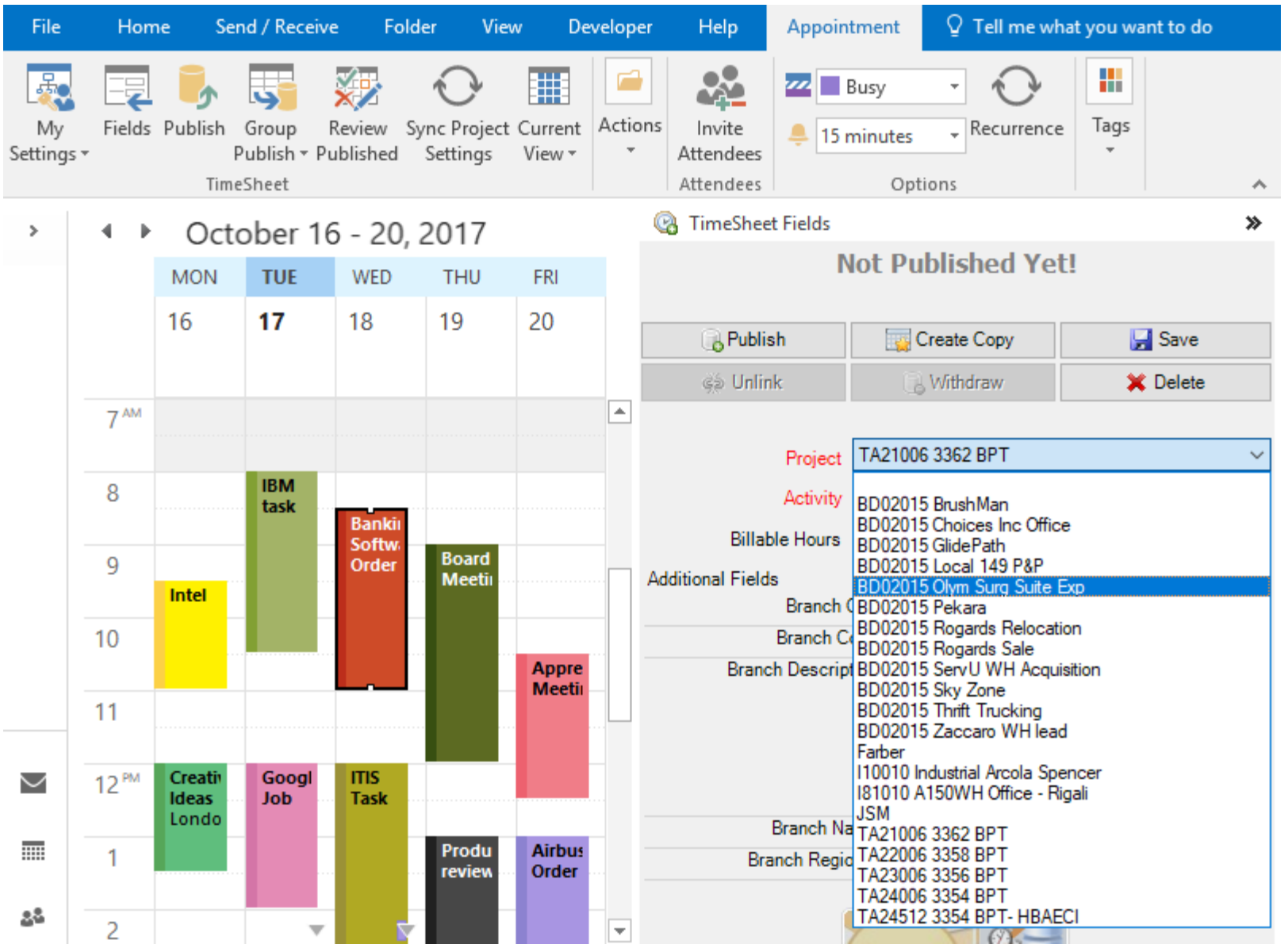
3 **Subject** of the active template. This can be customized and can take placeholder variables.

4 A **WYSIWYG** HTML editor with which you can customize the contents, apply HTML formatting as well as insert the placeholder variables. The look and feel as well as the buttons and functionalities are similar to Microsoft FrontPage authoring tool.

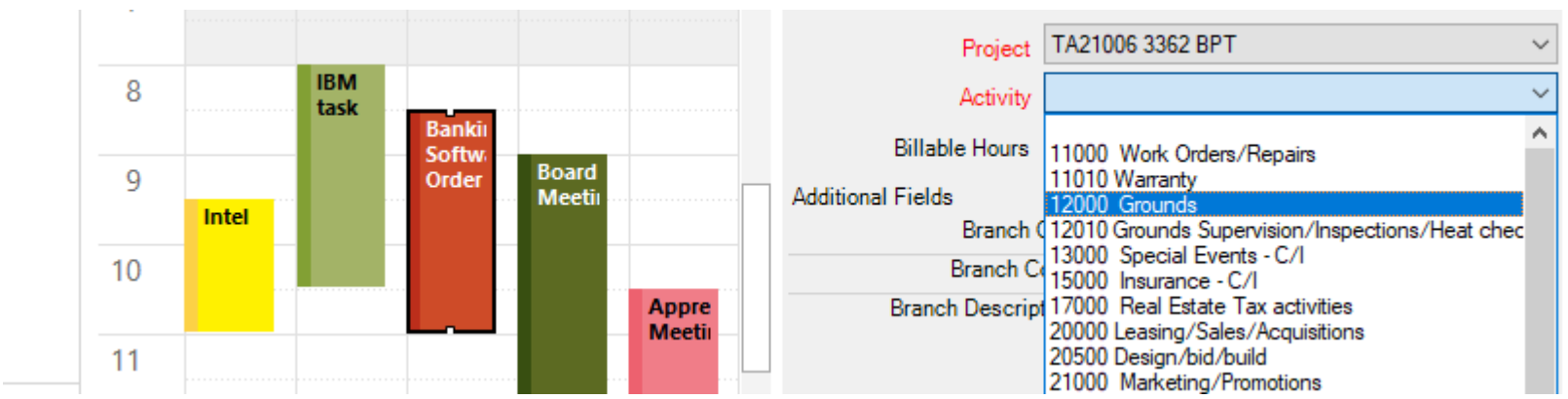
5 The actual template in its raw state.

5. Preparing timesheets with Outlook appointments or task

Once you have chosen your own list of projects and activities and other custom lists (if any), you will notice that under the calendar or task Outlook folder, the selected projects and activities are being populated as drop downs fields under the TimeSheet form in Outlook.



To tag a selected appointment or task item, click the drop-down control of the project or any of the custom fields and specify a value from the list. When you select a project, the corresponding activities for that project will be loaded into the drop-down list of the activity control, thereby allowing you to specify a valid activity.

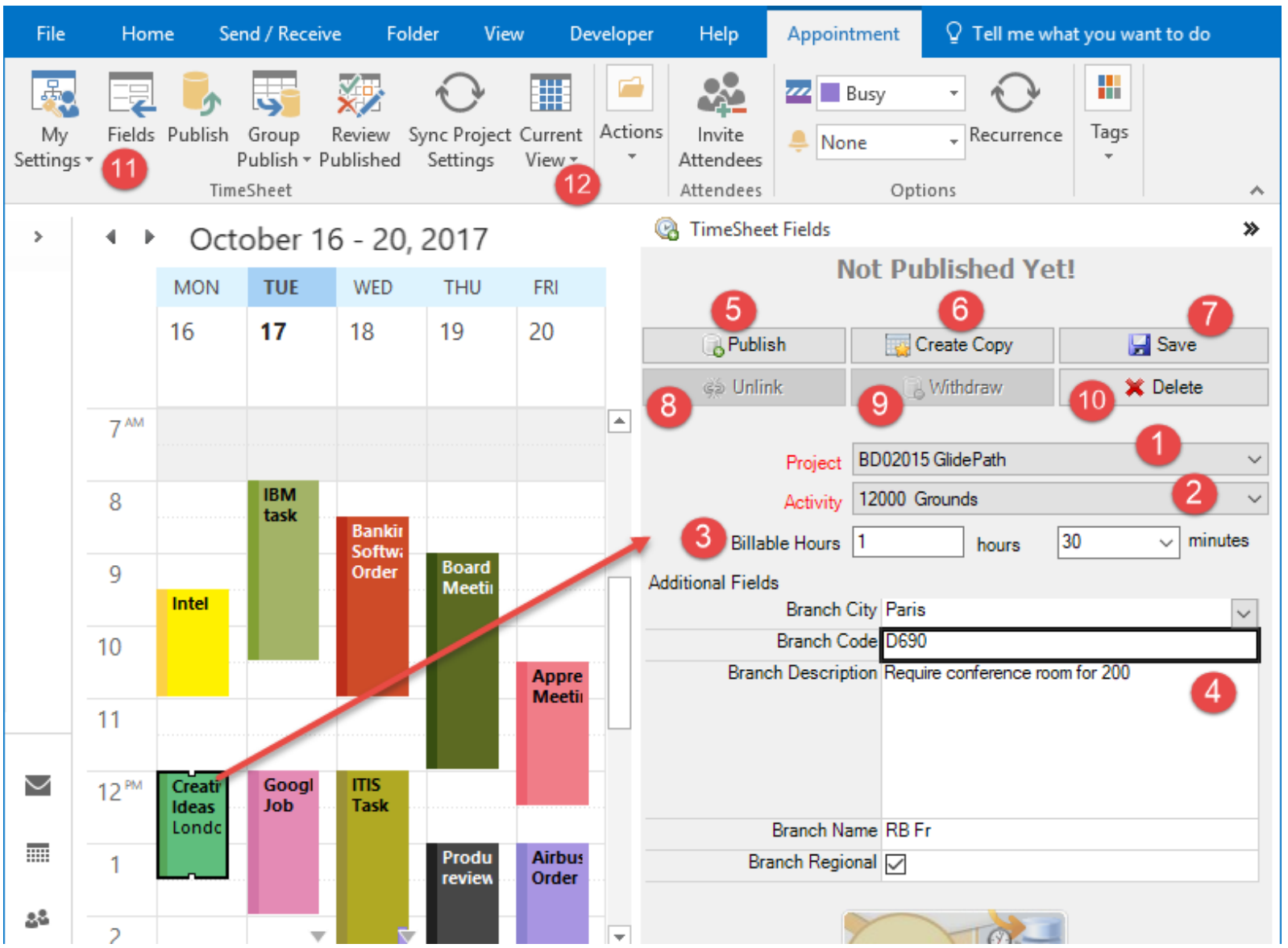


5.1 Tagging Outlook items with project data

Recording time is as simple as creating a calendar or task item and setting a few properties. You can use TimeSheet add-in in Outlook to tag and publish it to SharePoint. There are two modes of working with Outlook items – **Explorer** or **Inspector.**

Explorer window mode

You will find a side bar timesheet form in the Outlook calendar/task folder explorer and inspector window to show the project/activity, billable hours and all the custom fields.



With this form, you can have quick access to the Project/Activity and other custom fields and any changes/editing on the fields are instantly saved to the appointment/task item. You don't even need to open the appointment item in its inspector window. However, if you use the inspector window to open the appointment/task item, the same form is available.

1. **Project** drop down control – lists all the available projects that you have selected.
2. **Activity** drop down control – lists all the available activities for the particular project selected.
3. **Billable Hours** – is the time interval that will be used for billing or payroll purpose. It differs from duration of the appointment in that, duration is dictated by the actual interval of the Outlook appointment, whereas, Billable Hours is a user specific field that can be overridden to specify user's own interval time.

The 'Total Cost' of the published timesheet in the SharePoint is computed either by using the 'Duration' or

the 'Billable Hours' value, depending on what you had chosen in the settings (*i.e., under Advanced Options > Total Cost tab > For Calculating Total Cost, use*).

Note:

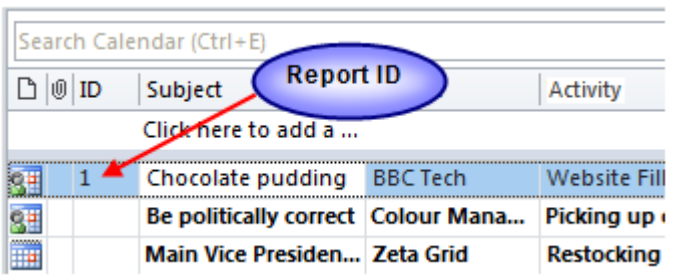
When preparing a new timesheet in Outlook, by default, the Billable Hours field have the same value as the 'Duration' field of the appointment/task item.

The user can change the hours/minutes part of the Billable Hours from the timesheet form independent of the Duration field.

If you had chosen 'Duration' field for computing 'Total Cost' of the published timesheet, you could hide the 'Billable Hours' field from appearing in the timesheet form. This is done from the add-in (*i.e., Advanced Options > Total Cost tab > For Calculating Total Cost, use:*)

4 **Custom Fields** – are additional fields that are deployed to collect further data on the project. A custom field can take the following data types: **Text, Number, Currency, Yes/No, Date/Time, Note, List**. If a custom field is marked red, it is mandatory to be filled before the appointment can be published to SharePoint.

5 **Publish Item** – After finishing tagging project related data on the Outlook item(s), clicking this button would report to SharePoint. If the reporting was successful, the report ID that was generated in the SharePoint will be assigned to the particular Outlook item for reference.



6 **Create Copy -** Create a clone of the current selected or opened appointment/task item with the same properties and along with the project/activity and custom fields data that might have been tagged previously.

This could be handy if you have to submit multiple timesheets of the same properties and project.

7 **Save –** Save any changes made to the current timesheet form in Outlook, without closing the form or navigating away to another appointment.

8 **Unlink** – Remove and reset any references of published timesheet from the current Outlook appointment or task item. Once unlinked, the appointment or task item will be eligible to be published to SharePoint and would get a new timesheet ID.

9 **Withdraw –** remove the published timesheet record entry that was published in the SharePoint from the current Outlook appointment or task item. Once timesheet record is removed from SharePoint, the appointment or task item in Outlook will be unlinked and reset (by default).

10 **Delete –** remove the current appointment or task item permanently from Outlook.

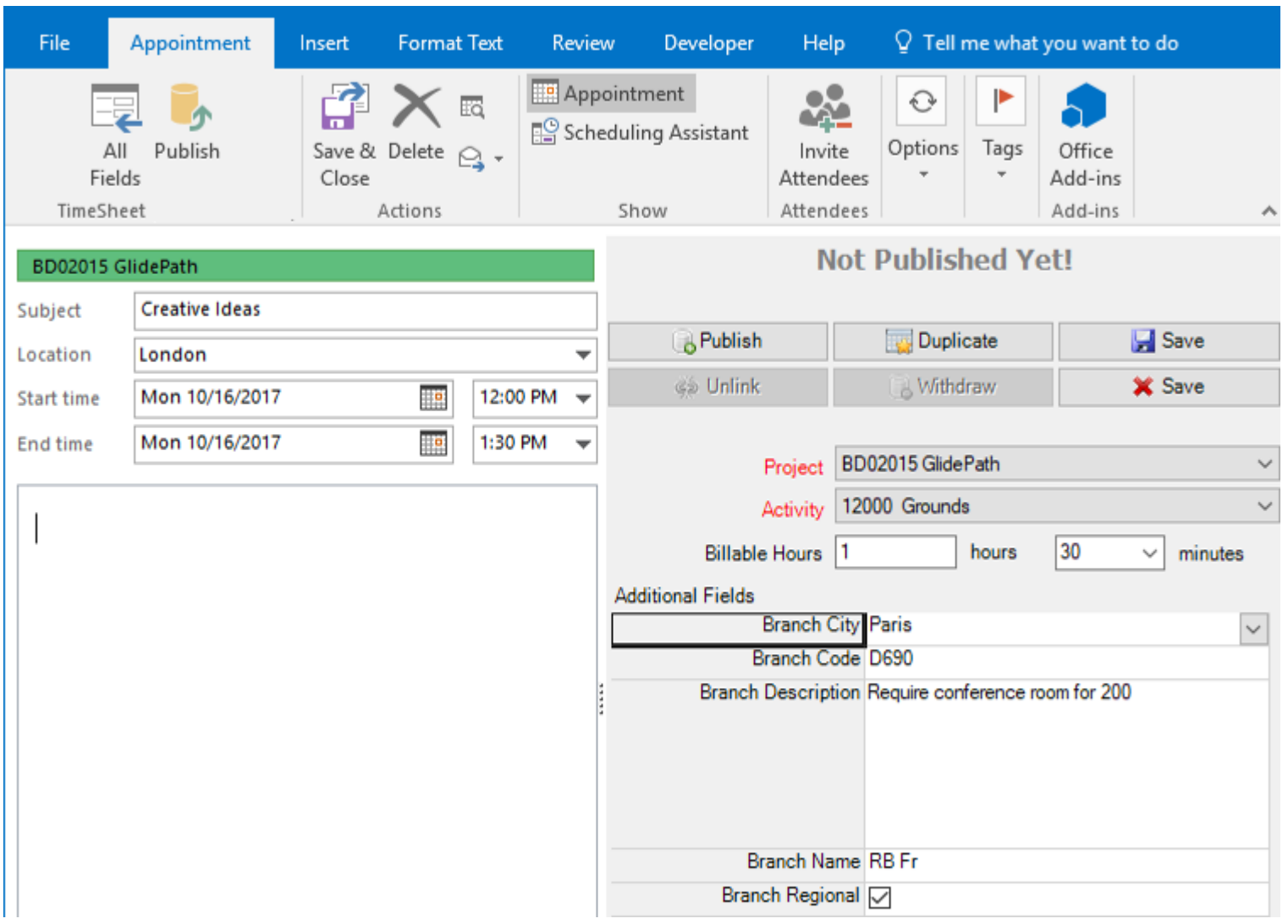
11 **All Project Fields** – Clicking this button will pop-up a form that contains all the TimeSheet fields that are deployed. This provides you a central place to manipulate the fields.

Perhaps, the most important use of this form is the ability to replicate the same tagged values to all the selected Outlook items at once, something which, you can't do with the timesheet form sidebar option.

12 **Views** – This drop-down menu contains the 13 TimeSheet specific views as well as the normal Outlook views.

Inspector window mode

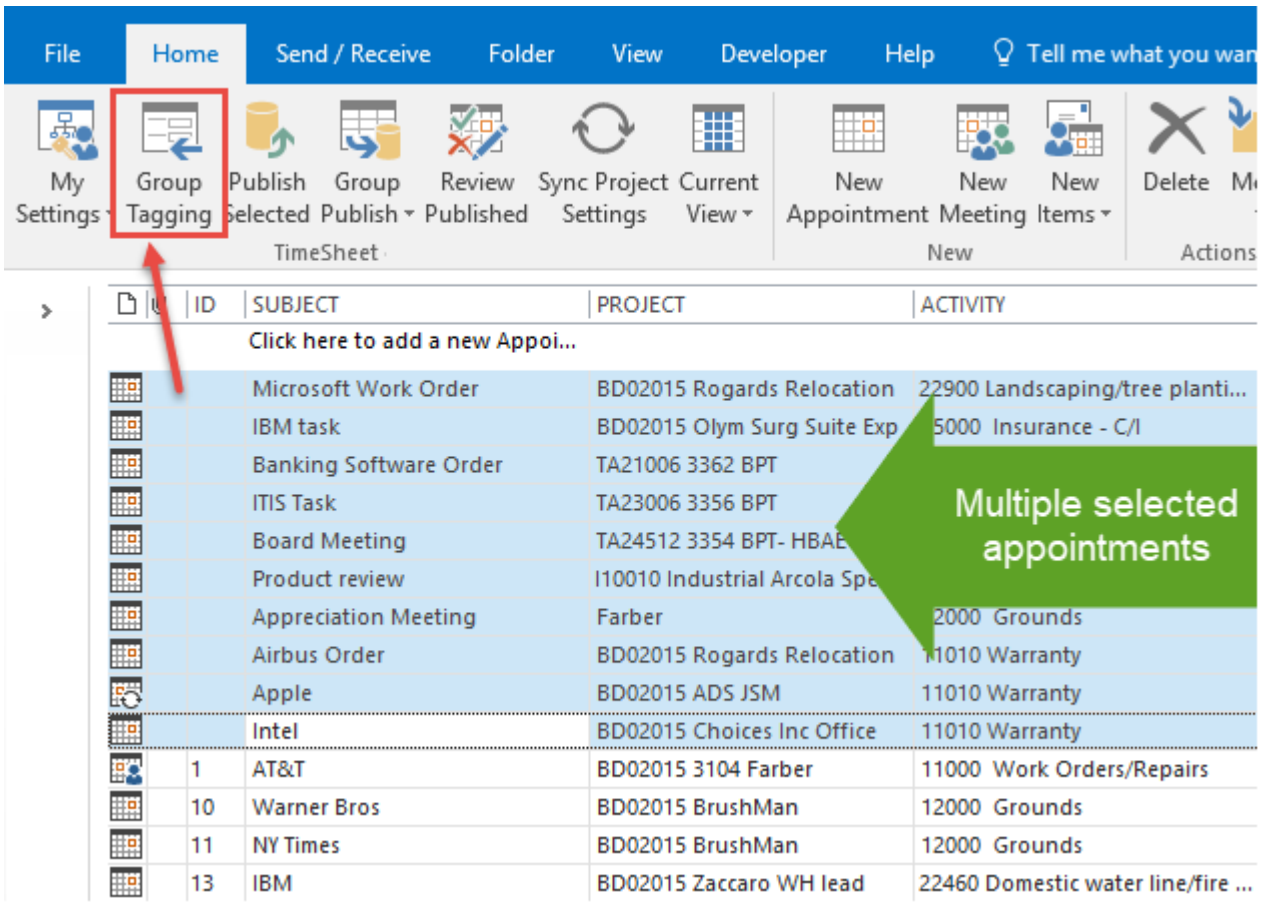
When you open an Outlook task or appointment item, the inspector window pop-ups and it shows all the project information on that item under the timesheet form that is available at sidebar location of Outlook.



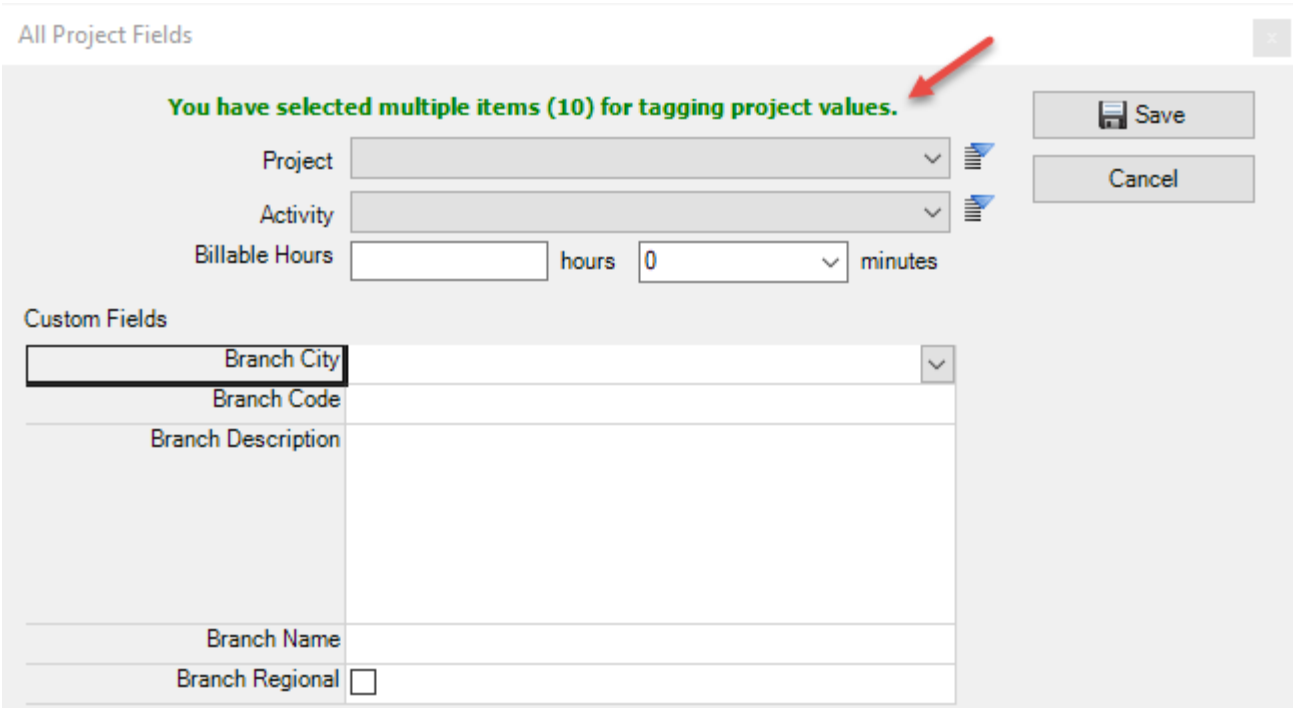
The project fields, buttons etc. under the timesheet form of the inspector window remains the same as discussed previously in the Outlook explorer mode.

5.2 Group Tagging – Setting project data to multiple appointments/tasks

Multiple items tagging (batch tagging) - if you select 2 or more appointment/task items in Outlook, you could make use of the **'Group Tagging'** button (available in the TimeSheet ribbon toolbar) to tag the same project or activity or billable hours or custom field value to all the selected appointment/task items in one go.



And from the project fields, you can then set the common value for all the selected appointment/task items.



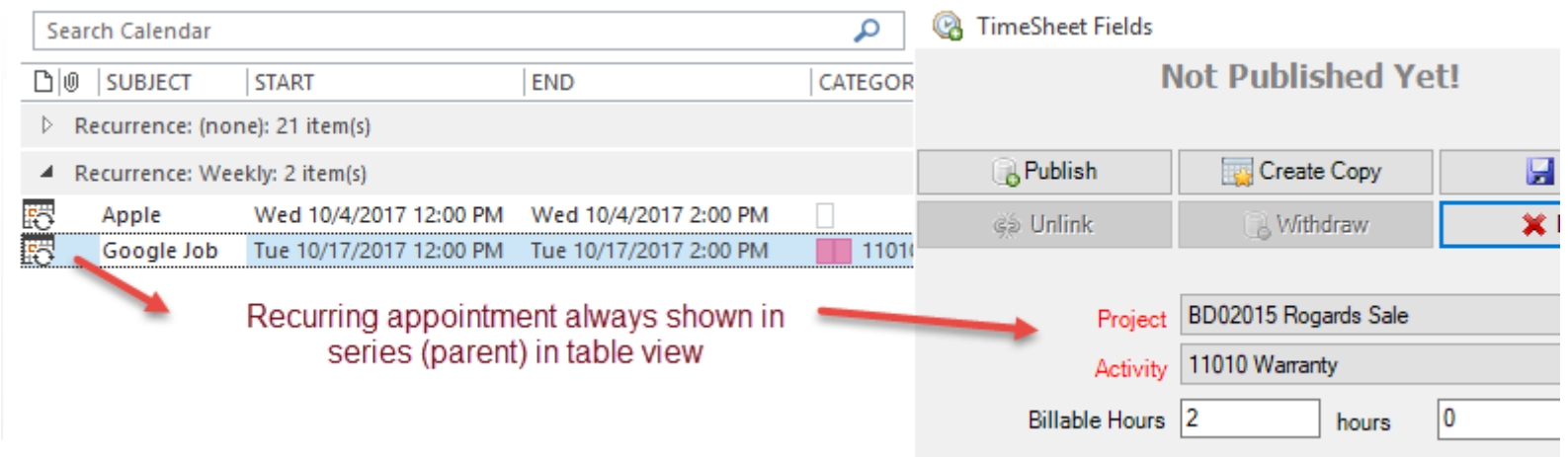
5.3 Tagging Recurring appointments

There are some differences in the way you would tag recurring appointments from normal appointments. A recurring appointment automatically repeats at fixed intervals *e.g. every Friday or the second Monday of every month*. In Outlook, a recurring appointment consists of two portions – the parent **series**, and the individual **occurrence**.

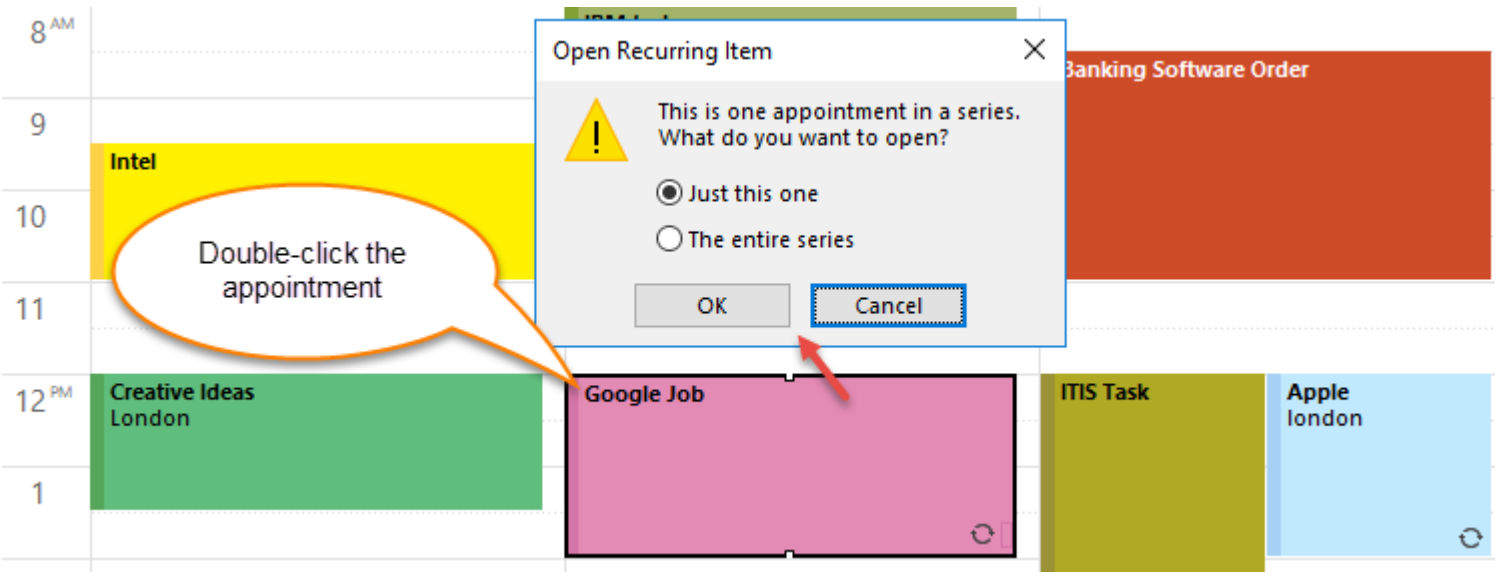
In recurring appointment, you can
- tag the parent series item
- tag individual occurrence item

In table view, a recurring appointment is shown in series, which means, if you tag it with a project or custom field value, it would be applied to the parent series item. In table view, there is no way to open a recurring appointment in occurrence mode.

Project and custom field values for the parent series item in table view



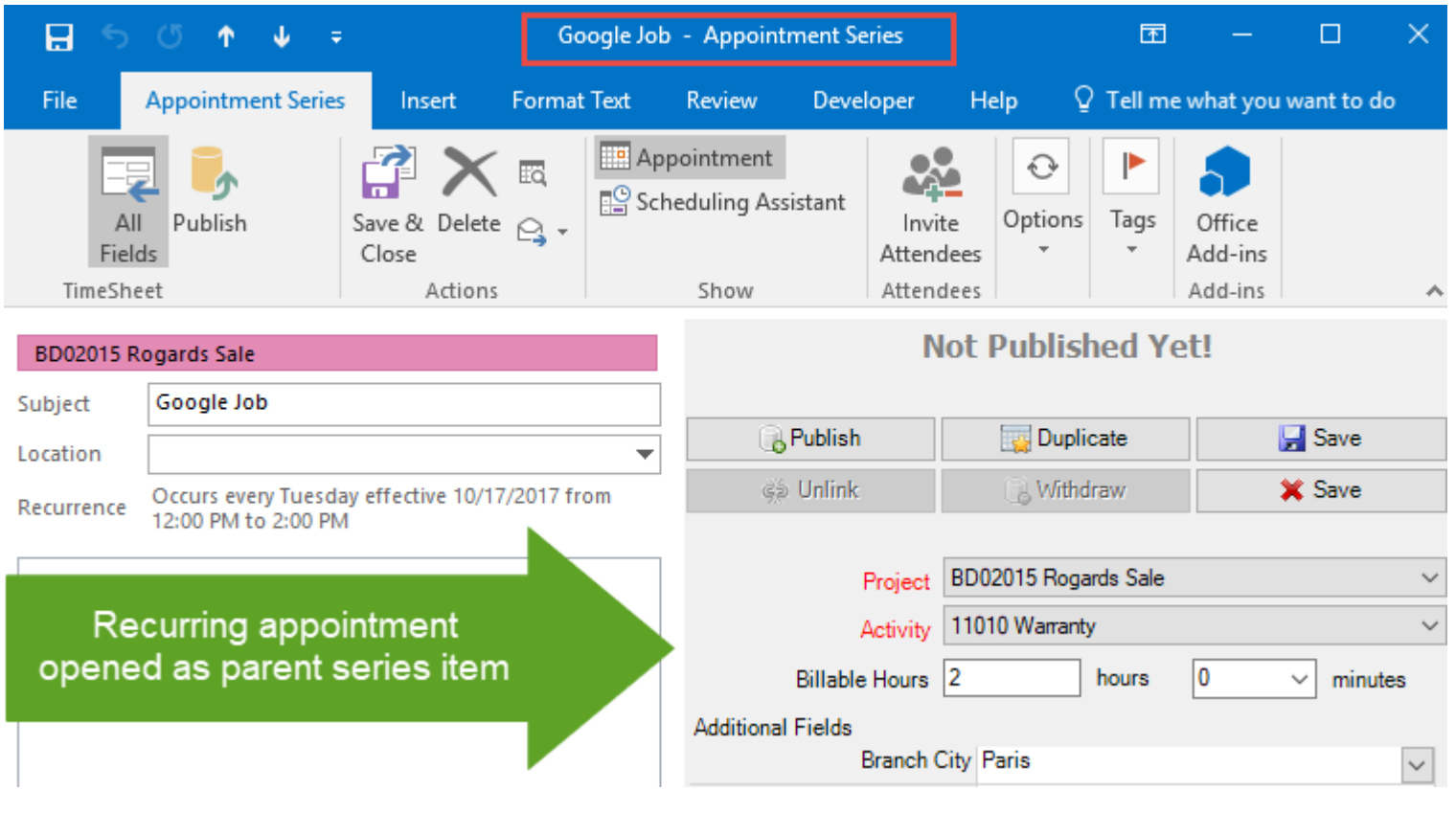
However, in calendar (Day/Month/Year) view, a recurring appointment is shown by occurrence, i.e., an item for each occurrence. This means, if you tag an occurrence item with a project or custom field value, it would be applied to that particular occurrence only. In Calendar view, you can open it in both series and occurrence mode. When you double-click a recurring item, Outlook would automatically prompt you if you would want to open it in series or occurrence version.



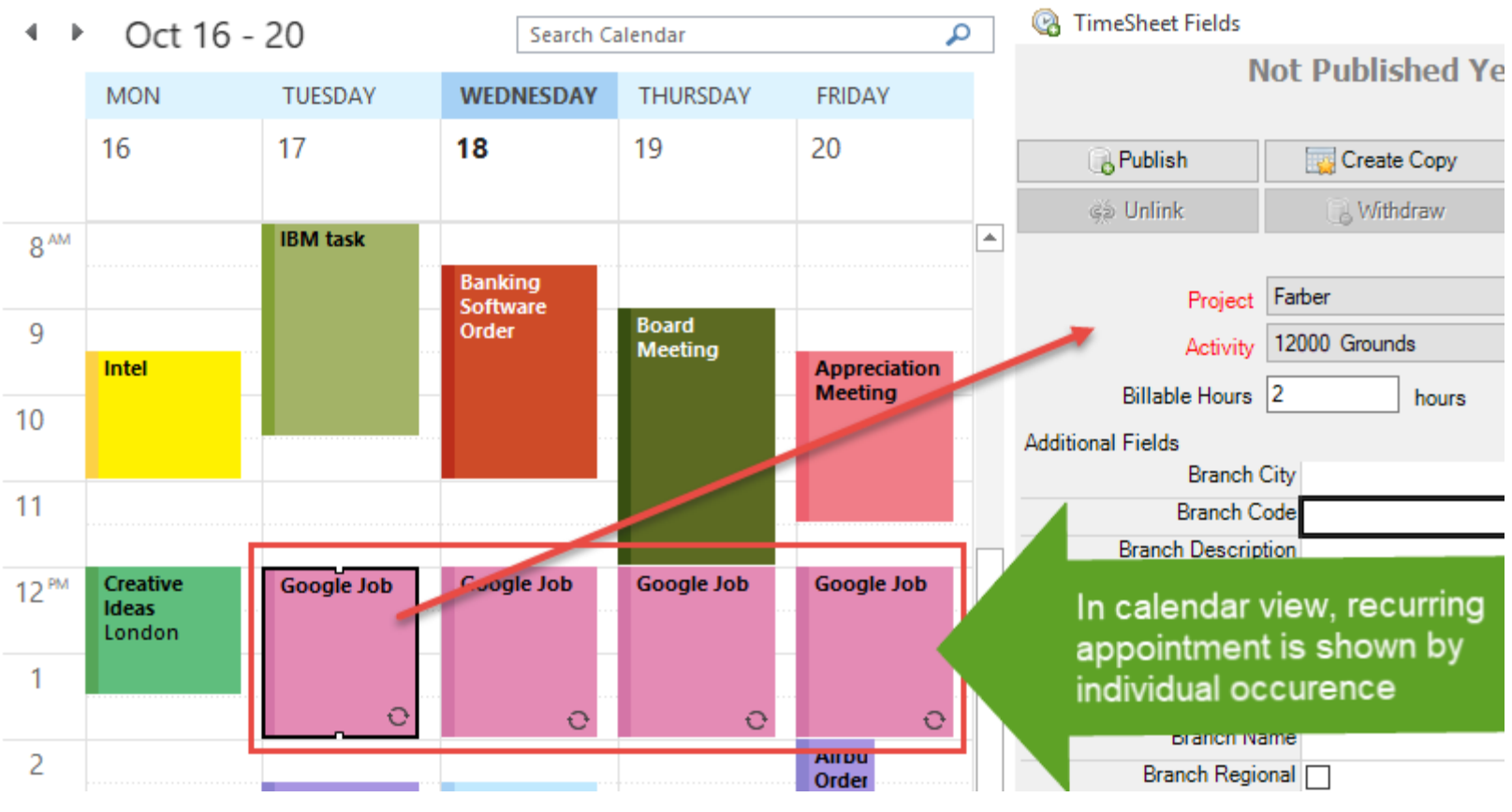
Personal TimeSheet add-in supports tagging individual occurrence item as well as the parent series item. Likewise, you can report both individual occurrence and the parent series item as well. The add-in will treat them as if they were multiple standard appointments.

You can open the recurring appointment in series mode, to tag project and custom field values differently than those of individual occurrence item.

Project and custom field values for the parent series item



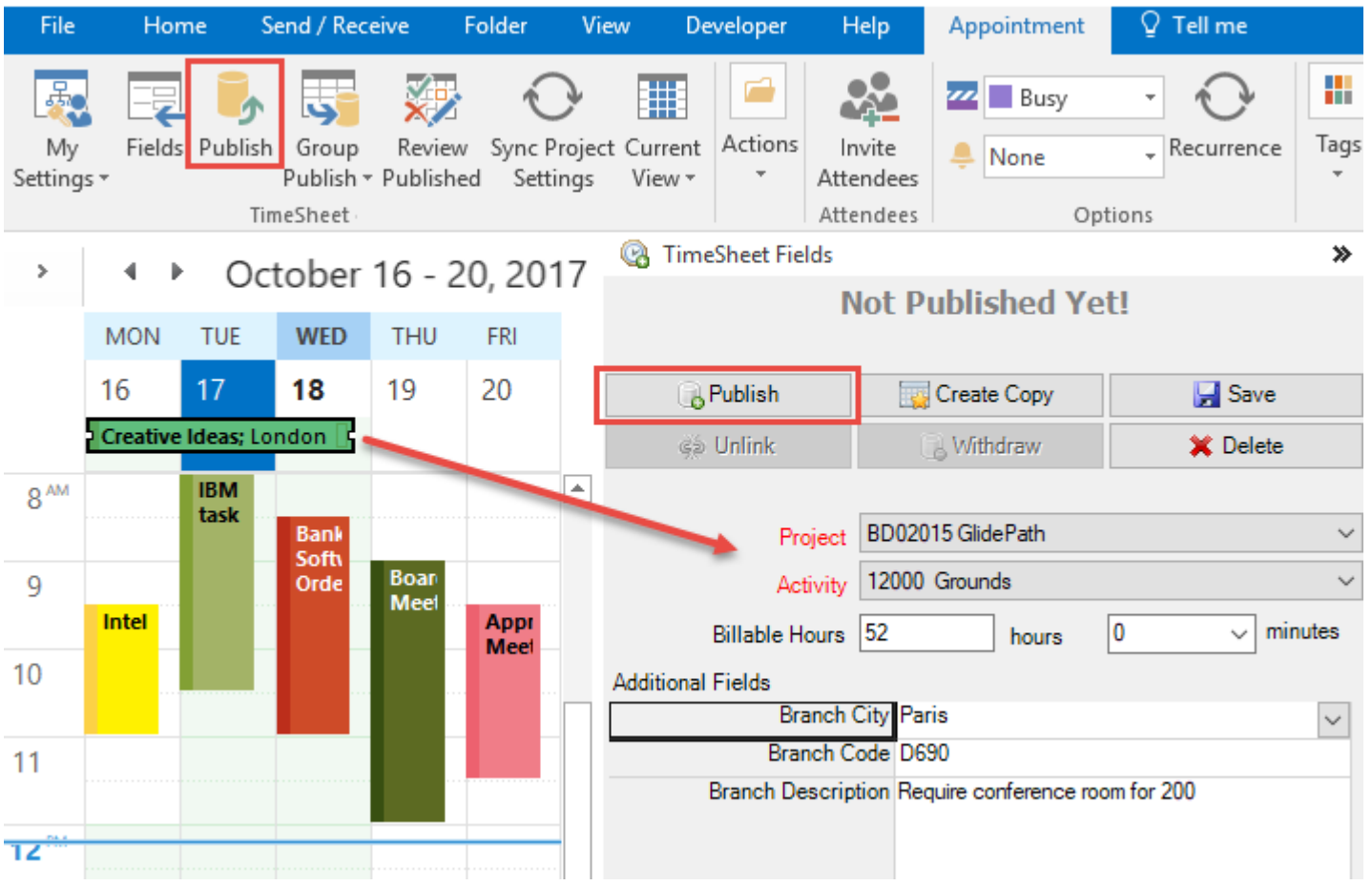
Project and custom field values for the first occurrence



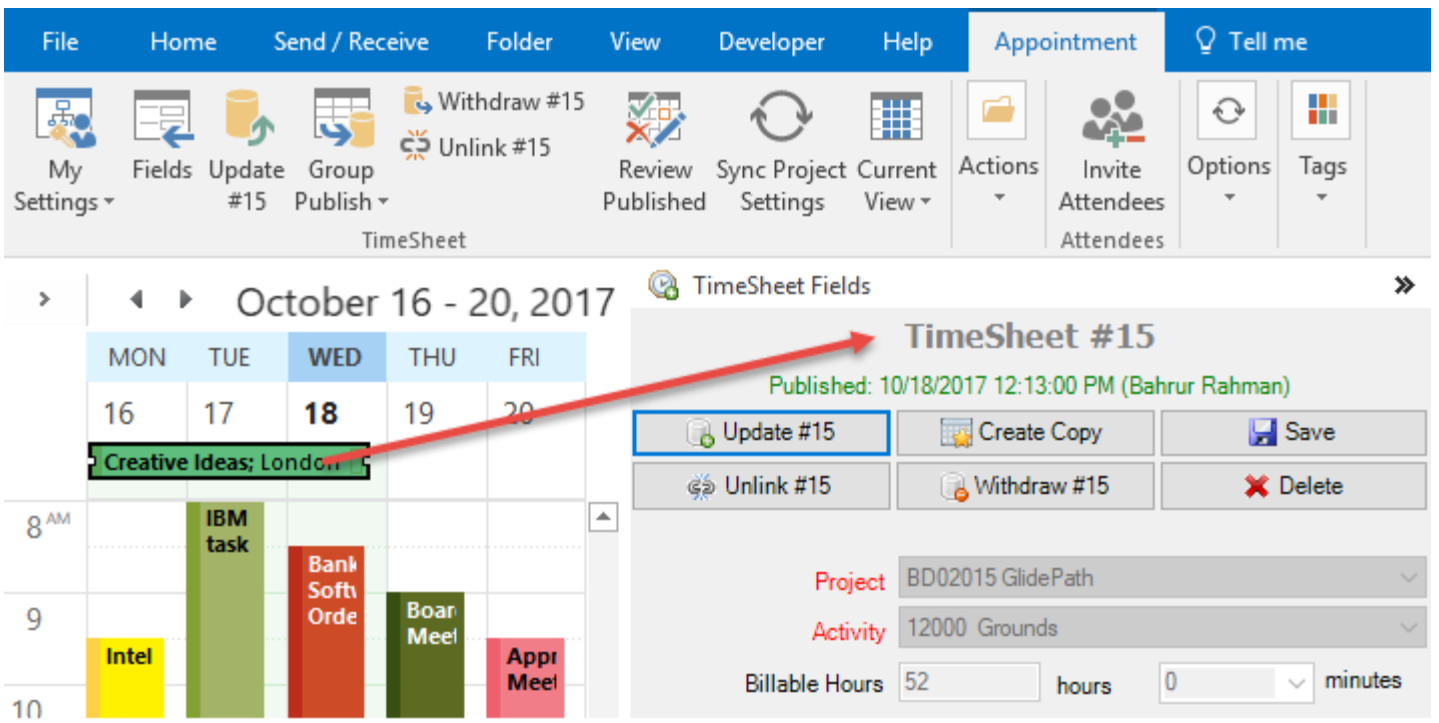
If you have enabled project color coding of tagged Outlook items, the color code of the recurring appointment is applied across the series. So, if you tag a different project to individual occurrence (than that of the series item), it won't overwrite the series color code.

5.4 Reporting and Publishing timesheets to SharePoint

If you have finished preparing timesheet and other project deliverables in Outlook appointment or task items, you are all set to publish to SharePoint. Make sure you have connectivity to the SharePoint site and then simply click **'Publish'** button in the TimeSheet Outlook toolbar or from the timesheet sidebar form.



If the reporting was successful, you will notice that the '**Publish**' button is no longer available, instead there are new buttons to update or withdraw the timesheet.



If you change the Outlook views to list view, you will notice that the Outlook item is being tagged with the '**Report ID**' of the corresponding published timesheet ID in the SharePoint.

Search Calendar

ID	SUBJECT	PROJECT	ACTIVITY	START	END	CATEGO...
	Click here to a...					
15	Creative Ideas	BD02015 Glide...	12000 Grounds	Mon 10/16/...	Wed 10/18/...	120...
14	CNET	BD02015 ADS J...	11010 Warranty	Wed 10/4/2...	Wed 10/4/2...	
13	IBM	BD02015 Zaccar...	22460 Domesti...	Mon 10/2/2...	Mon 10/2/2...	
11	NY Times	BD02015 Brush...	12000 Grounds	Tue 10/10/2...	Tue 10/10/2...	
10	Warner Bros	BD02015 Brush...	12000 Grounds	Tue 10/10/2...	Tue 10/10/2...	

This is how the published timesheet #15 looks like in the SharePoint. Notice that Outlook predefined fields and project fields are included in the timesheet. The total cost of the timesheet is also automatically calculated during the reporting process.

Results | Messages

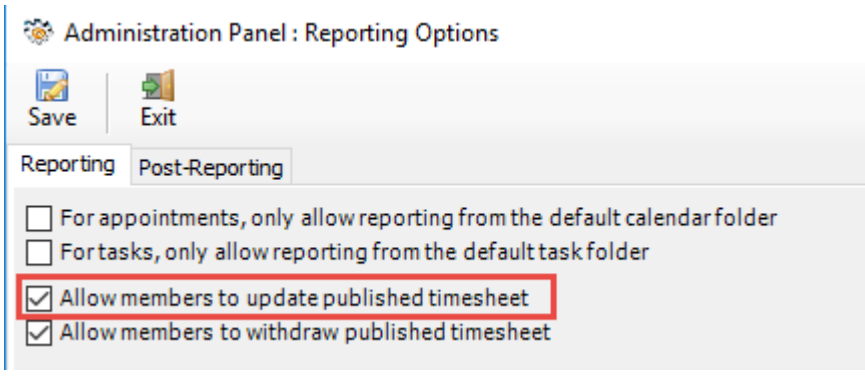
ID	ProjectValue	ActivityValue	Duration	Branch Code	Branch Name	Branch Description
1	BD02015 3104 Far...	11000 Work Orders/Rep...	30	NULL	NULL	NULL
2	BD02015 GlidePath	21000 Marketing/Promoti...	150	NULL	NULL	NULL
4	BD02015 3104 Far...	11000 Work Orders/Rep...	90	NULL	NULL	NULL
5	BD02015 3104 Far...	11000 Work Orders/Rep...	120	NULL	NULL	NULL
6	BD02015 3104 Far...	11000 Work Orders/Rep...	150	NULL	NULL	NULL
7	BD02015 ADS JSM	11010 Warranty	120	NULL	NULL	NULL
8	BD02015 ADS JSM	11010 Warranty	120	NULL	NULL	NULL
10	BD02015 BrushMan	12000 Grounds	180	NULL	NULL	NULL
11	BD02015 BrushMan	12000 Grounds	180	NULL	NULL	NULL
12	BD02015 BrushMan	12000 Grounds	90	NULL	NULL	NULL
13	BD02015 Zaccaro ...	22460 Domestic water lin...	150	NULL	NULL	NULL
14	BD02015 ADS JSM	11010 Warranty	120	NULL	NULL	NULL
15	BD02015 GlidePath	12000 Grounds	3120	D690	RB Fr	Require conference room for 200

5.5 Updating and withdrawing reported timesheets

Once you have reported project deliverables and timesheets via appointment or task items from Outlook to SharePoint, often there might be requirement for amending some changes to the reported data over time. Or simply, you might need to withdraw the reported timesheet altogether from the SharePoint. The availability of updating and withdrawing of published timesheet in Outlook depends on the administrative settings.

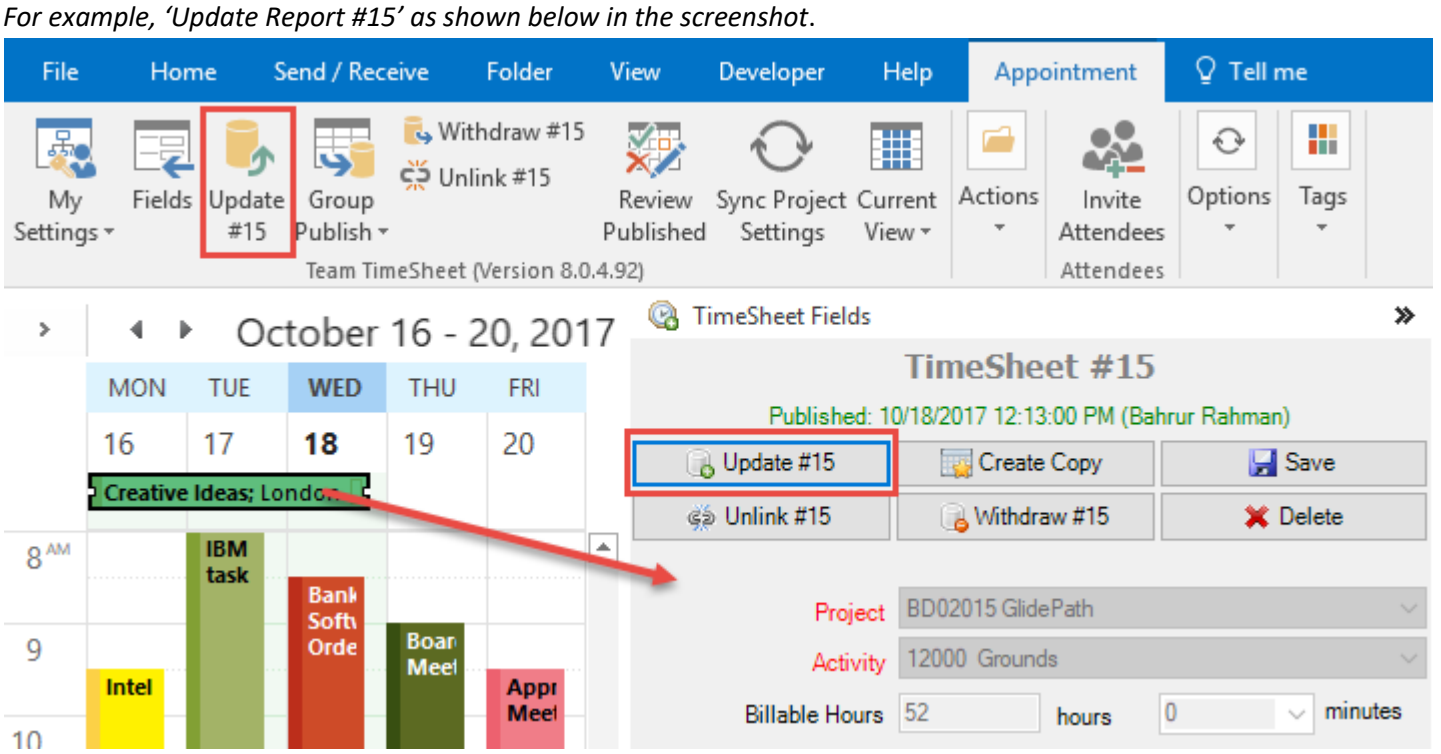
Updating reported data via Outlook

You can update or modify reported data directly from Outlook only if you had enabled *'Allow to update reported timesheet'* option in the **Personal TimeSheet > Reporting Options** panel.



Supposing, the above option is enabled, when you select a published item in explorer window or open in inspector window, you will see that there is a new button.

For example, 'Update Report #15' as shown below in the screenshot.

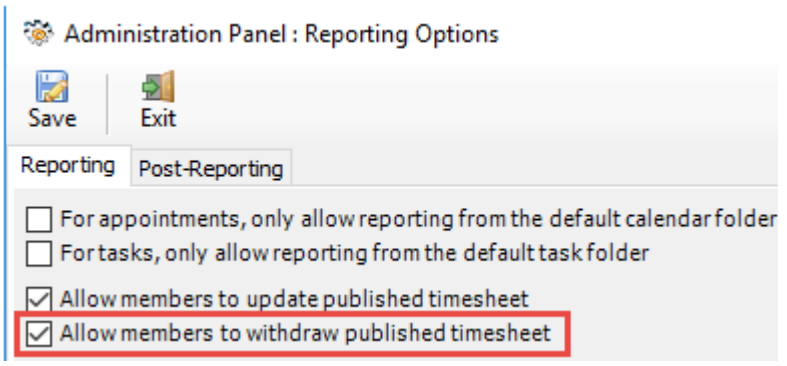


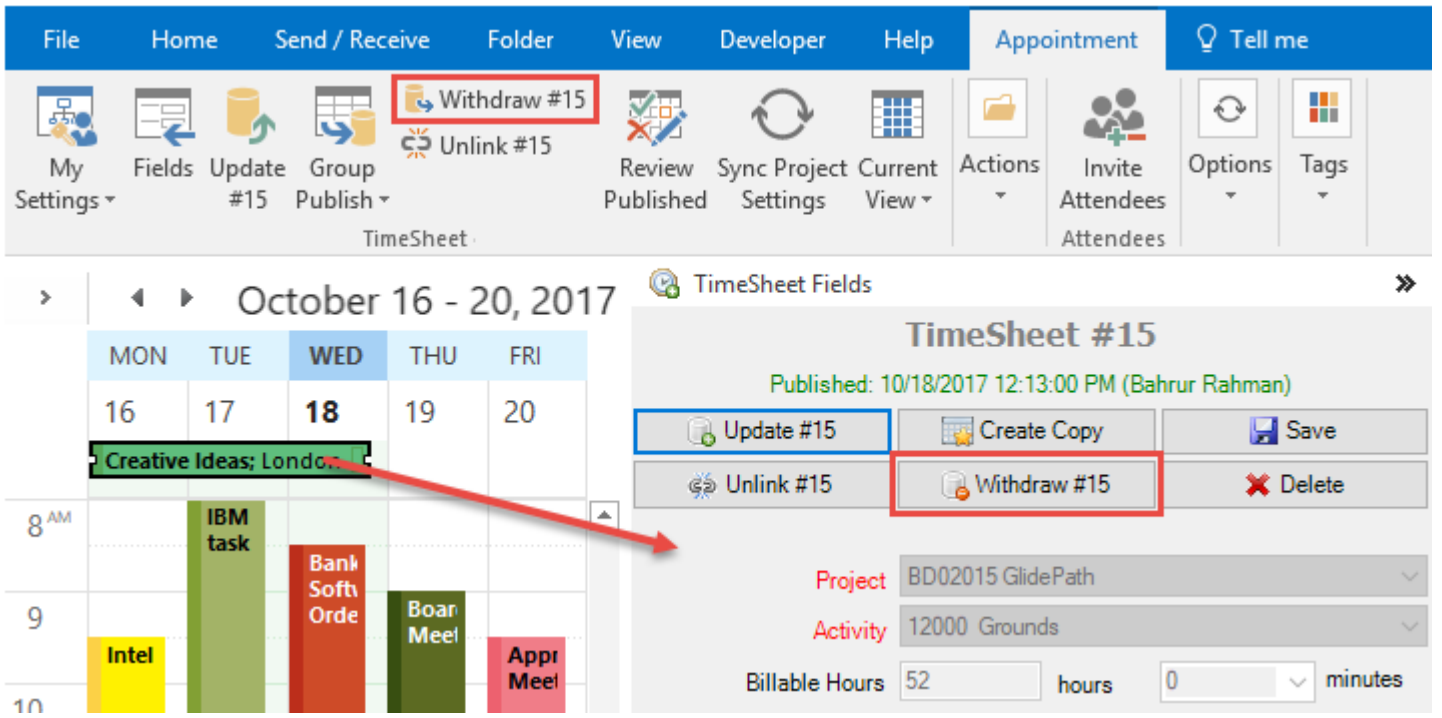
This way, you can change the project or custom field drop down values as well as update any other Outlook fields such as subject, location, mileage, body etc. and then re-submit again to update the existing report on the SharePoint.

Withdrawing reported data via Outlook

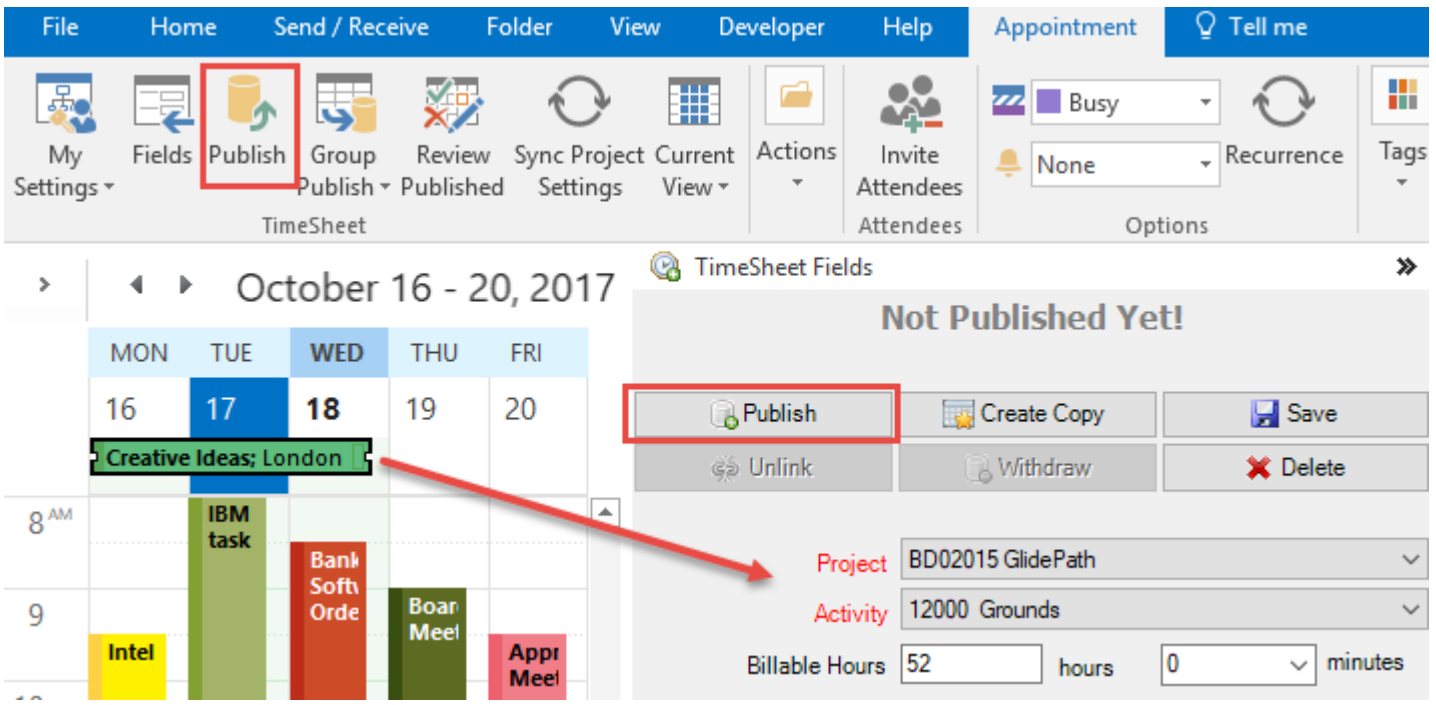
Likewise, if you had enabled '*Allow to withdraw reported timesheet*' option in the **Personal TimeSheet > Reporting Options** panel, you would be able to cancel a particular reported timesheet and withdraw it from SharePoint via Outlook.

If withdrawal is allowed, once you have reported an Outlook item, a new button is available in the TimeSheet toolbar or in the sidebar timesheet form. For example, below in the screenshot, you can withdraw the submitted timesheet for this appointment by clicking the '*Withdraw #15*' button.





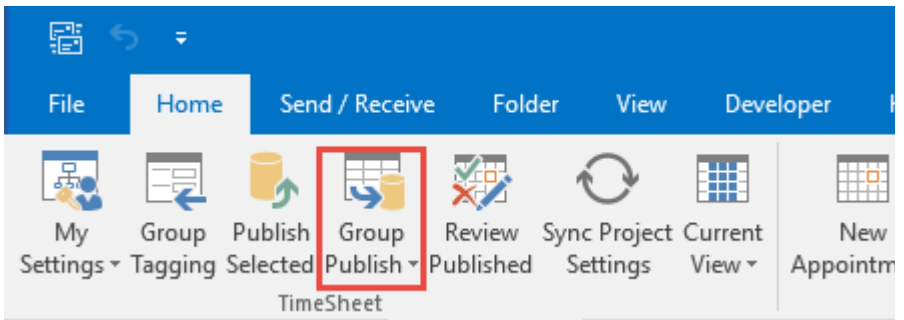
If withdrawal was successful, the reported timesheet is removed from SharePoint, and the particular Outlook item will be again available for reporting. Notice the update and withdraw buttons are substituted by the **'Publish'** button.

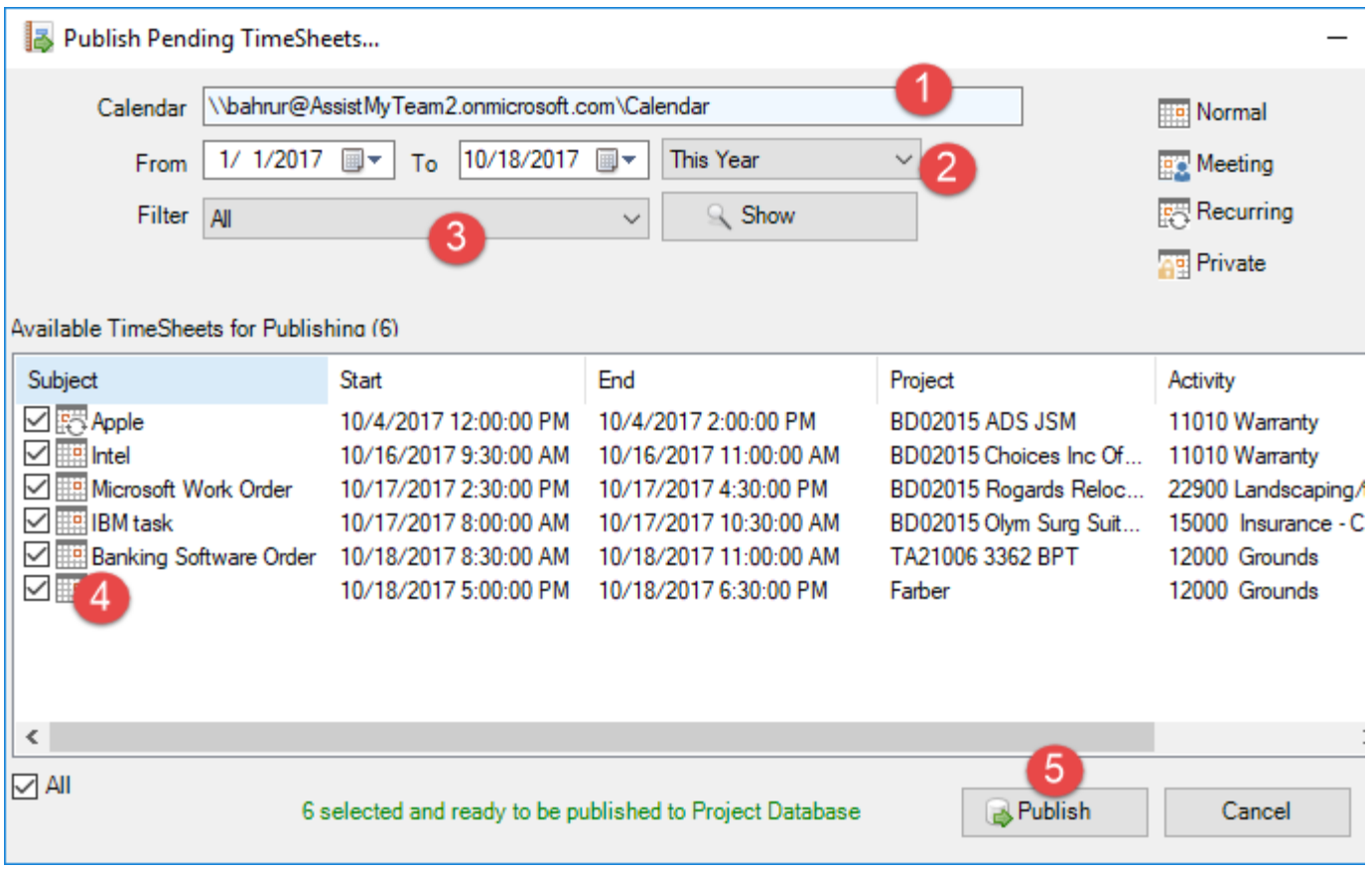


6. Group publish – Publish multiple timesheets to SharePoint

Allows for showing all non-reported (non-published) appointments/items of the current calendar/task folder based on specified timer period.

Supports a filter search option. And then publish items in batch.

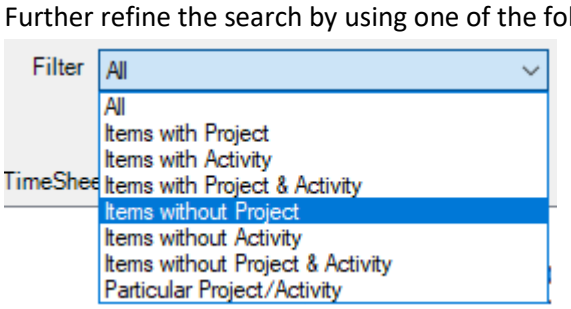




1. The current calendar or task folder path in Outlook

2. **Time Period:** Choose a time period from the followings under which the search will be confined: *Today, Yesterday, This week, Last Week, This Month, Last Month, This Year, Last Year, Custom*

3. Further refine the search by using one of the following filter:



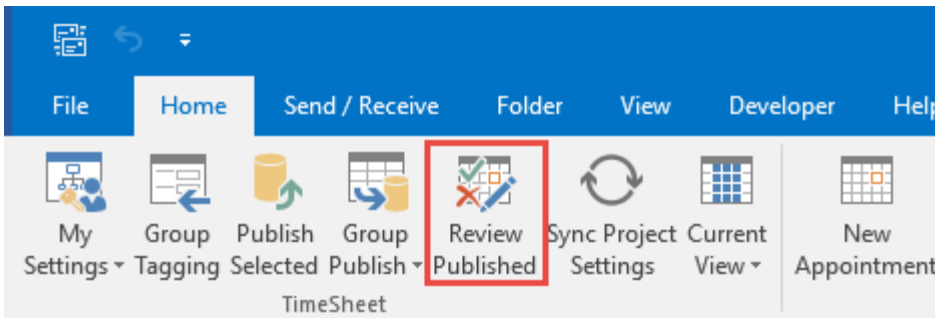
4. The unpublished outlook appointment or task items that meet the search criteria. To publish to SharePoint, check the boxes and click 'Publish'

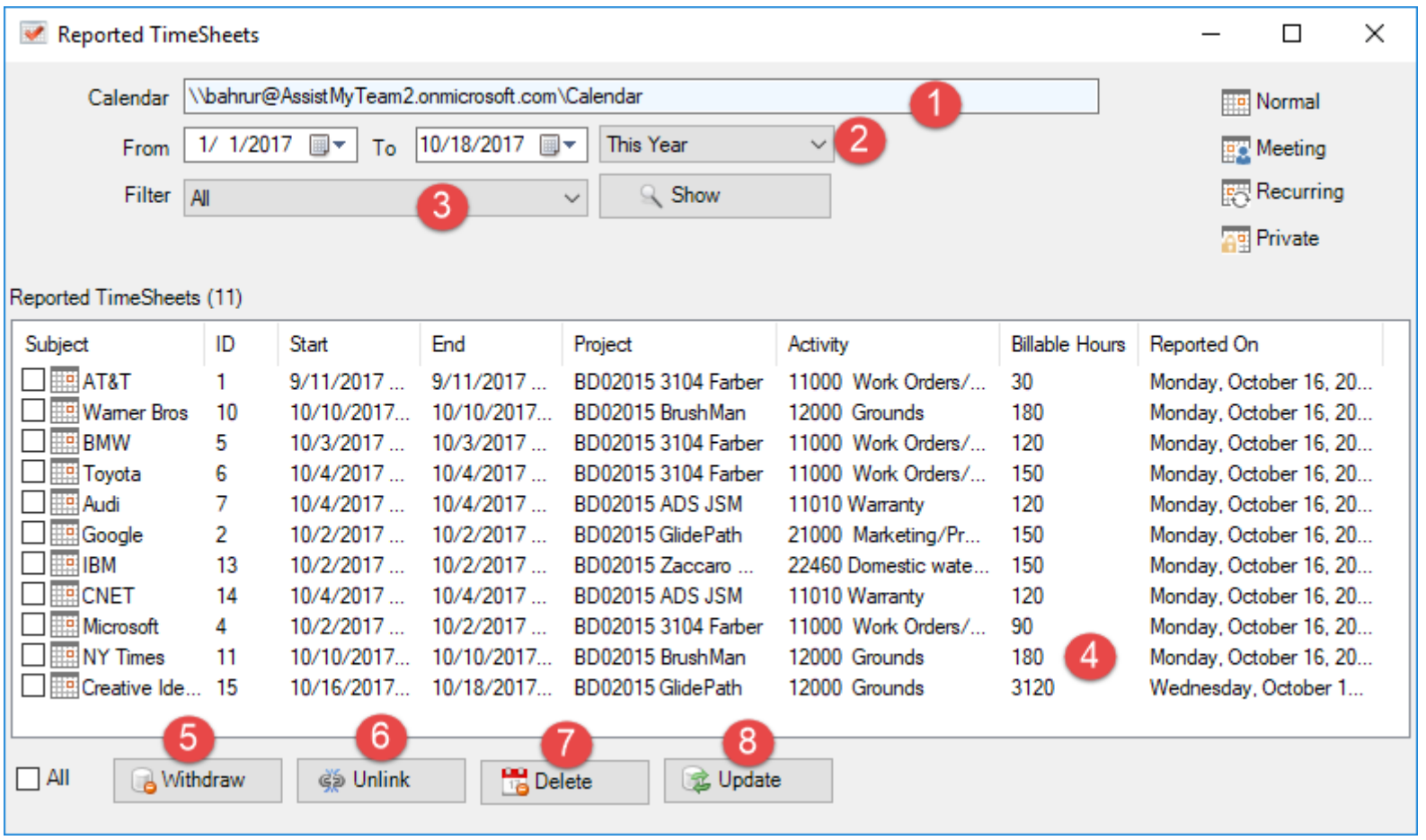
5. Publish the checked items to SharePoint.

7. Review Published – Review appointment/task items that were published

Run this tool to quickly review published appointment/task items of a particular calendar/task folder in Outlook.

You can make changes if required before updating back to the SharePoint, or if the project has been cancelled, you can withdraw the timesheets from the SharePoint.

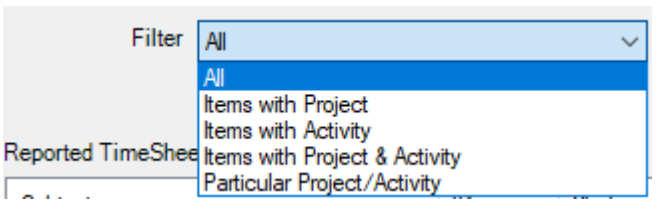




1. The current calendar or task folder path in Outlook

2. **Time Period:** Choose a time period from the followings under which the search will be confined:
Today, Yesterday, This week, Last Week, This Month, Last Month, This Year, Last Year, Custom

3. Further refine the search by using one of the following predefined filter:



4. The published outlook appointment or task items that meet the searched criteria. To update, withdraw, unlink or delete the corresponding timesheet entries from the SharePoint, check the boxes and click the appropriate button

accordingly.

5. **Withdraw** – remove the published timesheet record entry from SharePoint for the Outlook appointment or task items that are selected in the list (above). Once timesheet records are removed from SharePoint, the appointment or task items in Outlook will be also unlinked and reset (by default) from the SharePoint record.

6. **Unlink** – Remove and reset any references of SharePoint record from the Outlook appointment or task items that are selected in the list (above). Once unlinked, the appointment or task items will be eligible to be published to SharePoint again to get a new timesheet ID.

7. **Delete** – remove the Outlook appointment or task items that are selected in the list (above) permanently from Outlook.

8. **Update** – If you have made changes to the published appointment/task items, you can update the changes back to the timesheet records in the SharePoint.

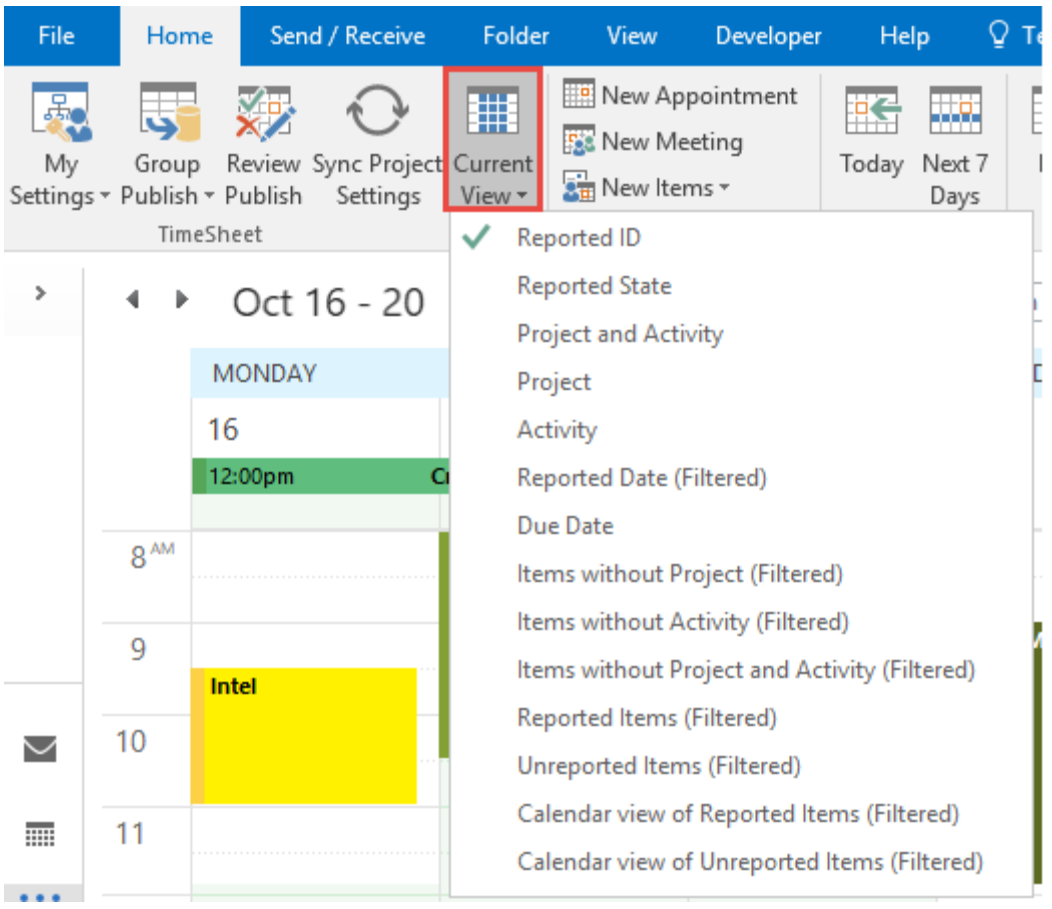
8. Work with Outlook Views

Outlook views are a wonderful tool to automatically sort, quickly find information and rapidly re-arrange Outlook items in any folder. Views can also be organized to group and filter items to make a particular feature of your information obvious at first glance.

Personal TimeSheet provides 13 special Outlook views to help you to work with your projects and deliverables in a simpler and sensible way.

These views can be accessed through the 'Views' drop-down menu, available in the TimeSheet toolbar or ribbon.

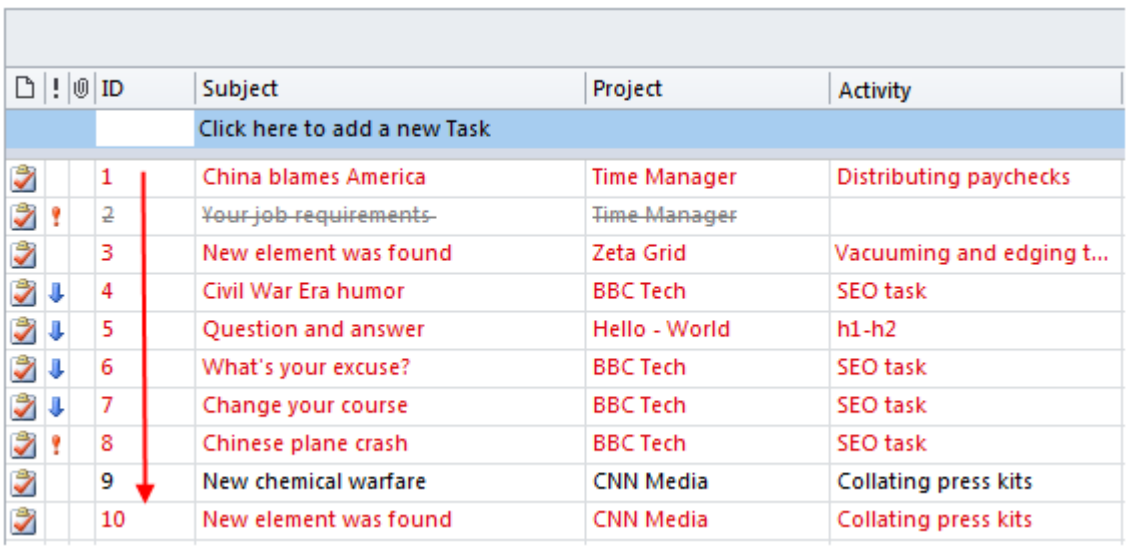
These views are common to both appointment and task items in your Outlook.



Let us discuss some of the TimeSheet specific views.

View 1 – Reported ID

This a table view, where all the reported Outlook items are arranged by unique 'Report ID' field in ascending order. The Project and Activity fields are also available in the view.



!	ID	Subject	Project	Activity
		Click here to add a new Task		
	1	China blames America	Time Manager	Distributing paychecks
!	2	~~Your job requirements~~	~~Time Manager~~	
	3	New element was found	Zeta Grid	Vacuuming and edging t...
↓	4	Civil War Era humor	BBC Tech	SEO task
↓	5	Question and answer	Hello - World	h1-h2
↓	6	What's your excuse?	BBC Tech	SEO task
↓	7	Change your course	BBC Tech	SEO task
!	8	Chinese plane crash	BBC Tech	SEO task
	9	New chemical warfare	CNN Media	Collating press kits
	10	New element was found	CNN Media	Collating press kits

View 2 – Reported State

This is a table view, where all the Outlook items are grouped by the reported state i.e., if the item has been submitted to SharePoint. Reported items will be group under 'Yes' and unreported items under 'No' or 'None'. You can easily differentiate reported items from the unique ID value.

ID	Subject	Project	Activity	Location	Categories	Start
	Click here to add ...					
Reported: Yes (8 items, 5 unread)						
3	Be politically corr...	Colour Manage...	Picking up or deli...	Milan	Pickin...	Thu 7/15/20...
5	Main Vice Preside...	Zeta Grid	Restocking	Hague	Rest...	Sat 7/17/201...
6	Humor relating to...	Distributed Com...	Bloggin FAQs	Sun Micro ...	Bloggi...	Sat 7/17/201...
4	Speak more preci...	CNN Media	Collating press kits	Milan	Collati...	Sat 7/17/201...
7	Hidden military b...	Unix Revamp	Patent - Check St...	Hague	Patent...	Sat 7/17/201...
8	Be politically corr...	Zeta Grid	Cleaning and sto...	Moscow	Cleani...	Sun 7/18/201...
9	Reward these sol...	Time Manager	Responding to re...	Frankfurt	Respo...	Sun 7/18/20...
10	Reasons to work ...	CNN Media	Faxing press rele...	Istanbul	Faxing...	Sun 7/18/201...
Reported: (none) (43 items, 10 unread)						
	Choose a punish...	Storage upgrade		Belgrade	Storag...	Mon 7/19/20...
	Fake two dollar bi...	Exchange Mainte...		Madrid	Excha...	Mon 7/19/20...
	Strange new battl...	Zeta Grid		Frankfurt	Zeta ...	Tue 7/20/201...
	Physical training j...	CNN Media	Collating press kits	Berlin	Micha...	Tue 7/20/201...

View 3 – Project and Activity

This is a table view, where all the Outlook items are first grouped by project, and then sub-grouped by activity value. This gives you a hierarchy tree representation of all Outlook items and may prove useful to track and pinpoint a specific project or activity, or to get the number of items belonging to a specific project or activity, or simply just to have a listing that is better organized and summarized.

ID	Subject	Project	Activity	Categories	Start	End
	Click here to add a new ...					
Project: XtremeLab (7 items, 1 unread)						
Task: Hardware procurement (2 items, 1 unread)						
	Hidden military base	XtremeLab	Hardware proc...	Hardwa...	Sun 7/25/2...	Mon 7/26/...
	Painting shows it all	XtremeLab	Hardware proc...	Hardwa...	Wed 7/28/2...	Thu 7/29/2...
Task: Trademark - Check Status (3 items)						
8	Be politically correct	XtremeLab	Trademark - Ch...	Cleanin...	Sun 7/18/2...	Wed 7/21/...
	Strange new battles	XtremeLab	Trademark - Ch...	Zeta G...	Tue 7/20/20...	Fri 7/23/20...
	Nerds versus jocks	XtremeLab	Trademark - Ch...	Tradema...	Thu 7/29/2...	Fri 7/30/20...
Task: Trademark - Order & Pay for Copies (2 items)						
	Commanding dumb	XtremeLab	Trademark - Or...	Tradema...	Fri 7/23/20...	Sat 7/24/20...
	Bad Japanese economy	XtremeLab	Trademark - Or...	Tradema...	Wed 7/28/2...	Mon 8/2/2...

Notice that, you can easily swap or change project or activity by dragging an item from one group or subgroup to another.

View 3 – Due Date

This is a table view where the Outlook task items are grouped by the due date.

!	ID	Subject	Project	Activity	Due Date	% Com...	Categories
		Click here to add a ne...					
Due Date: March 26, 2010 (4 items)							
		~~Nerds versus jocks~~	~~Time Manager~~	~~Distributing p...~~	~~Fri 3/26/2010~~	~~100%~~	~~Distributir~~
	1	China blames America	Time Manager	Distributing p...	Fri 3/26/2010	0%	Distribut
		~~Travel in a sailboat~~	~~Unix Revamp~~	~~Patent - File Bi...~~	~~Fri 3/26/2010~~	~~100%~~	~~Patent - Fi~~
		Give us new missiles	Time Manager	Distributing p...	Fri 3/26/2010	0%	Distribut
Due Date: March 30, 2010 (1 item)							
!		Equation of earnings	CNN Media	Mailing billing...	Tue 3/30/2010	0%	Red Cate
Due Date: April 08, 2010 (3 items)							
!		~~Give us new missiles~~	~~Unix Revamp~~	~~Patent - File Bi...~~	~~Thu 4/8/2010~~	~~100%~~	~~Patent - Fi~~
		~~How far to the town?~~	~~Unix Revamp~~	~~Patent - File Bi...~~	~~Thu 4/8/2010~~	~~100%~~	~~Patent - Fi~~
!		Military Christmas	Time Manager	Distributing p...	Thu 4/8/2010	0%	Distribut

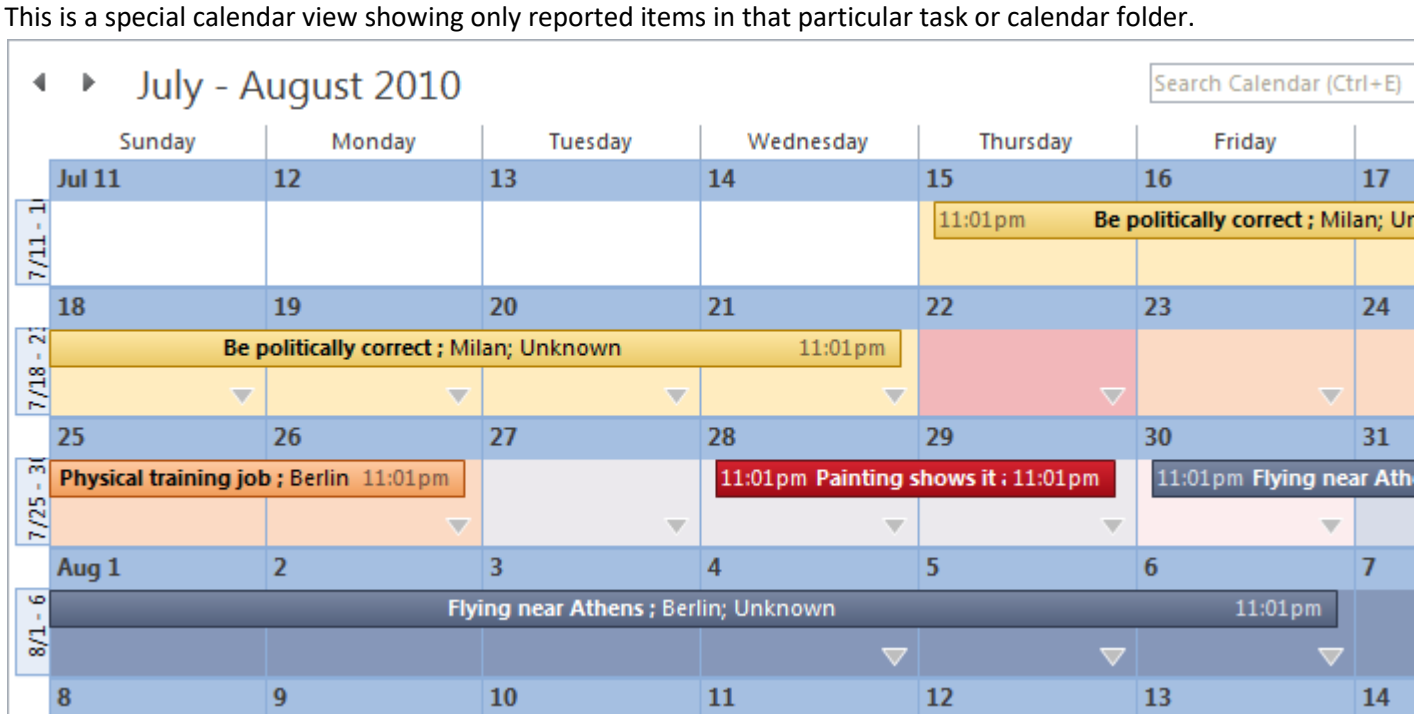
View 4 – Items without Project (Filtered)

This is a table view showing only those items that are not tagged with a project.

!	Subject	Project...	Activi	Status	Due Date	% Complete
	Click here to add a new ...					
	Reward these soldiers			Not Started	Fri 4/9/2010	0%
!	A walking economy			Not Started	Mon 5/3/2010	0%
	Accident report details			Not Started	Mon 6/14/2010	0%
	Speak more precisely			Not Started	Fri 8/20/2010	0%
	Indian chief's signal			Not Started	Fri 8/27/2010	0%
	What's your excuse?			Not Started	Wed 9/8/2010	0%

View 5 – Calendar view of reported items (Filtered)

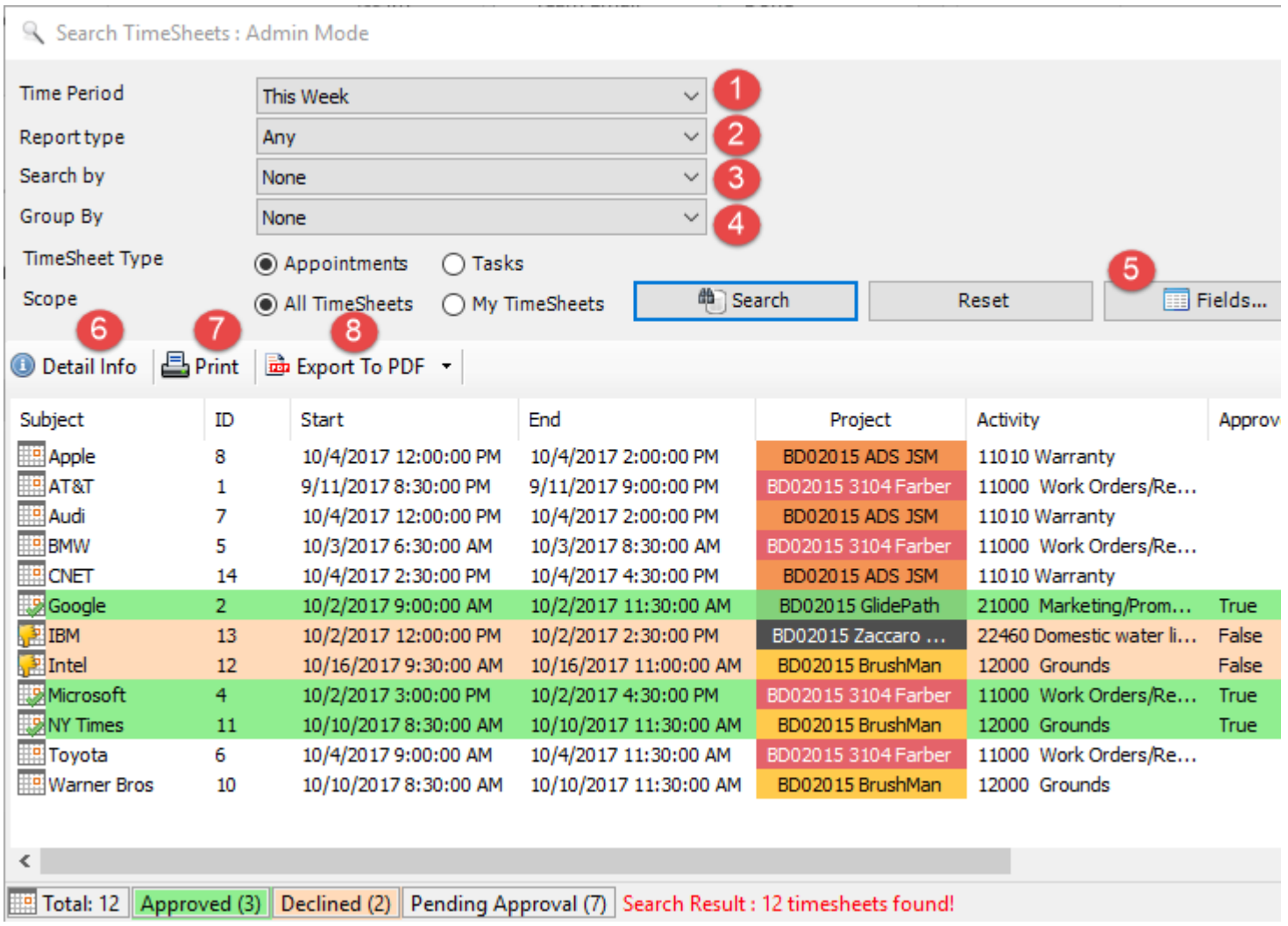
This is a special calendar view showing only reported items in that particular task or calendar folder.



9. Search TimeSheets in SharePoint

Personal TimeSheet > Search TimeSheet Data in SharePoint

With the *Search* utility, you can run queries on the published timesheets. A variety of search parameters are predefined to help you find your published timesheets easily and quickly.



1 **Time Period:** Choose a time period from the followings under which the search will be confined:

Any
Today
Yesterday
Tomorrow
This week
Last Week
Next Week
This Month
Last Month
Next Month
This Year
Last Year
Date Range...
On

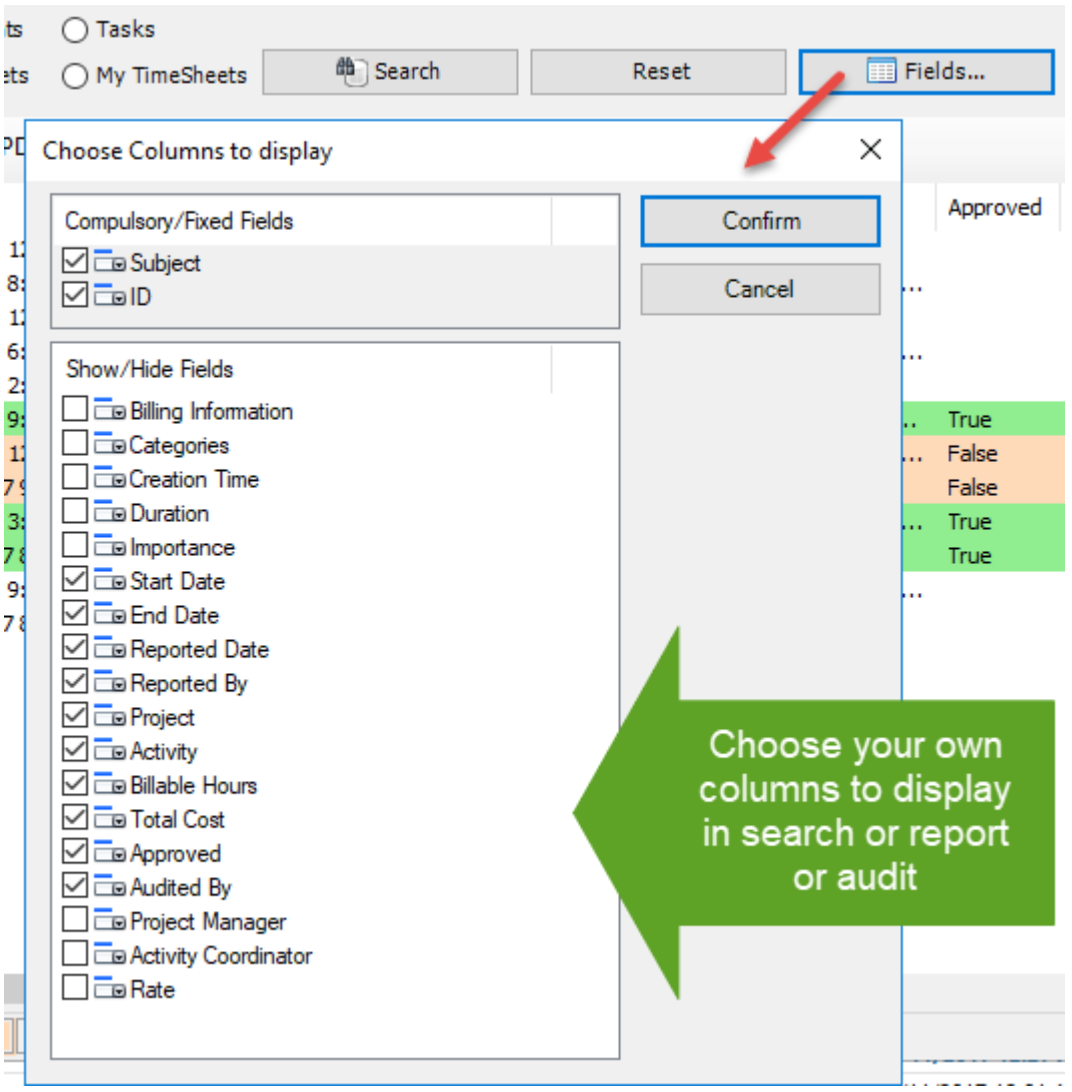
2 **Report Type:** Choose a report type from the predefined ones below:

Any
TimeSheets Starting
TimeSheets Ending
TimeSheets Reported
TimeSheets Ongoing
TimeSheets Completed
TimeSheets with Empty Project
TimeSheets with Empty Activity

3 **Search By:** Further refine the search by filtering through keywords or using one of the following timesheet fields: *Project/Activity, Reported By, Duration, Billable Hours, Importance, Custom Lists*.

4 **Group By:** You can choose to group the timesheets either with: *Project, Activity, Reported By, Importance, Categories.*

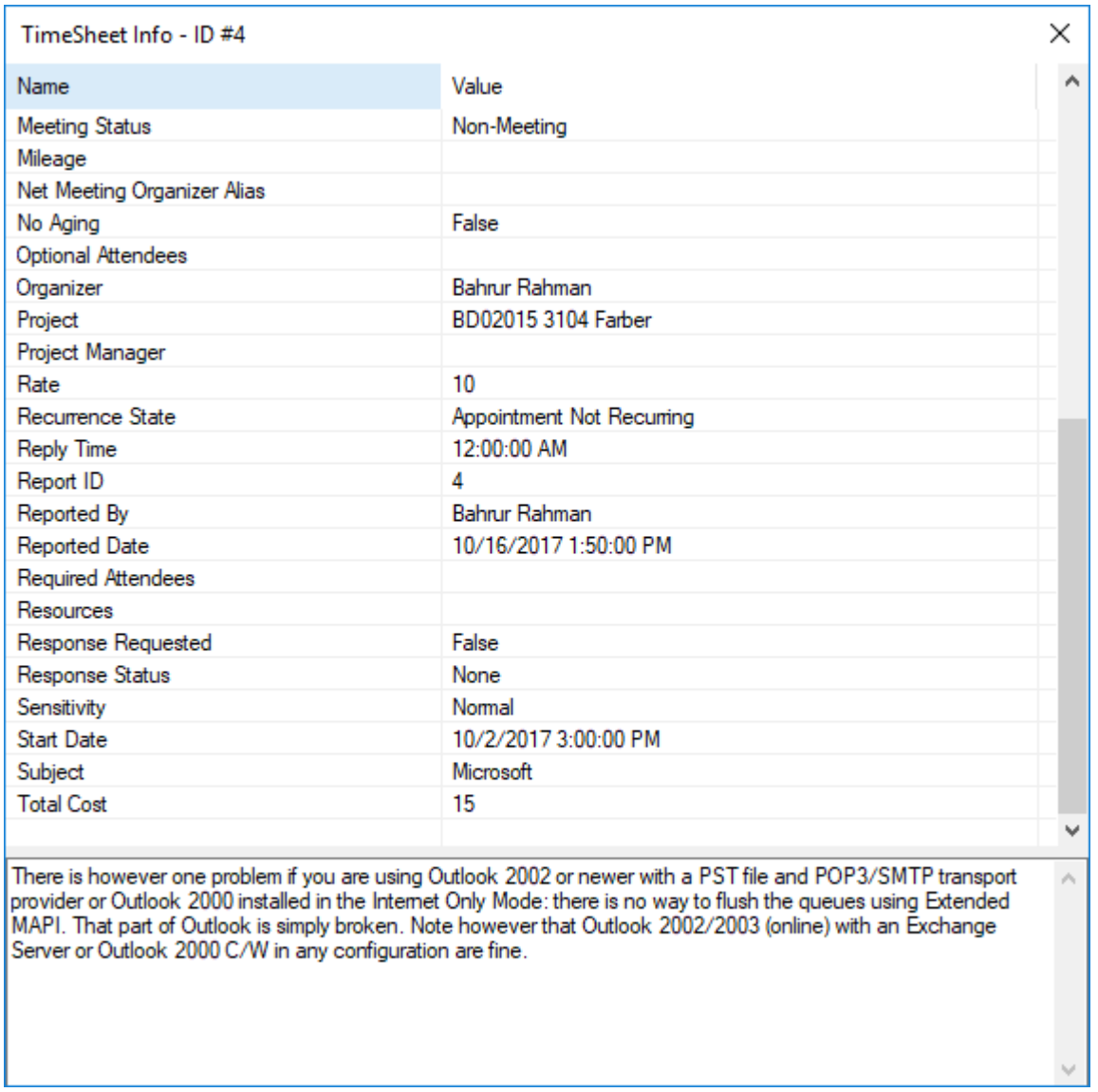
5 **Fields** – you are free to choose which particular timesheet fields/columns that will show up in the search result and report. Just click the 'Fields' button and choose the wanted columns to include.



The tool will remember your ch subsequent runs.

You can re-arrange the column drag-and-drop to get the kind c you want. And the display orde columns will be retained in subsequent sessions.

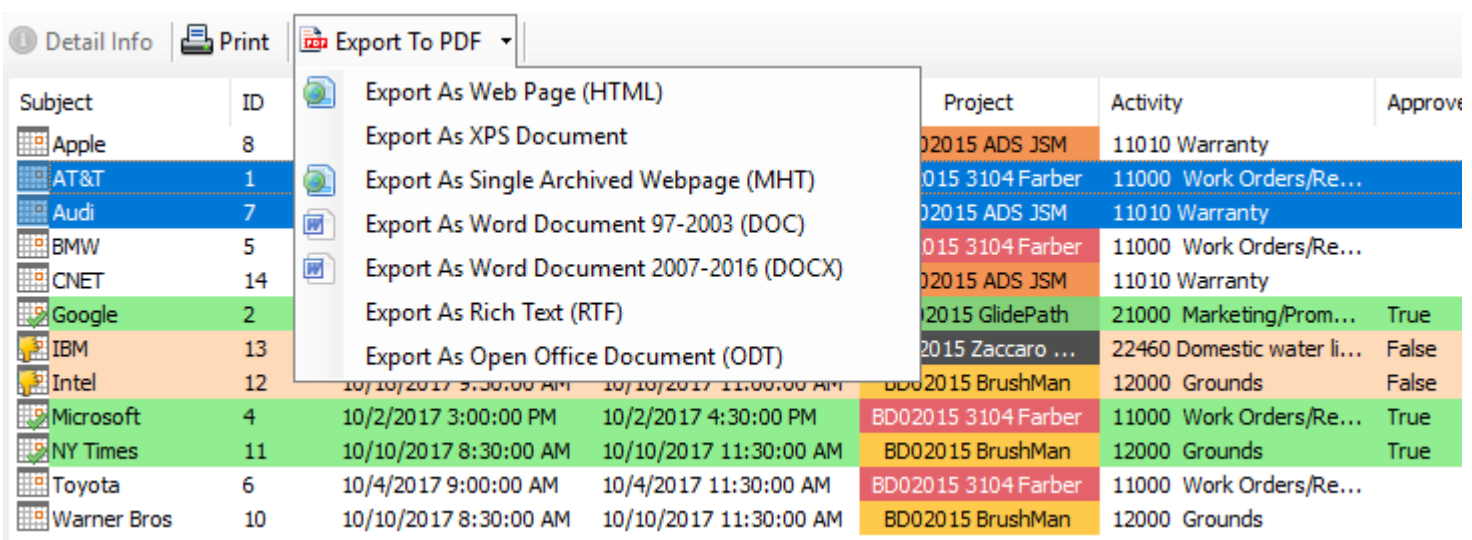
6 **Detail Info button:** Click this to view finer detail information of the selected timesheet (as available in SharePoint) in a new window.



Name	Value
Meeting Status	Non-Meeting
Mileage	
Net Meeting Organizer Alias	
No Aging	False
Optional Attendees	
Organizer	Bahrur Rahman
Project	BD02015 3104 Farber
Project Manager	
Rate	10
Recurrence State	Appointment Not Recurring
Reply Time	12:00:00 AM
Report ID	4
Reported By	Bahrur Rahman
Reported Date	10/16/2017 1:50:00 PM
Required Attendees	
Resources	
Response Requested	False
Response Status	None
Sensitivity	Normal
Start Date	10/2/2017 3:00:00 PM
Subject	Microsoft
Total Cost	15

7 **Print:** Click this to print the selected timesheets using the **'Print'** template (as defined under **Personal TimeSheet > Templates Manager**). If you select a single timesheet to print, it will show you the print dialog option, where you can customize the layout, paper size etc. However, if you choose multiple timesheets, it will print directly using the default settings without displaying any 'Print' options.

8 **Export to PDF:** Click this to export the selected timesheets to PDF document files. You can also export to Word Documents, HTML, plain text etc.



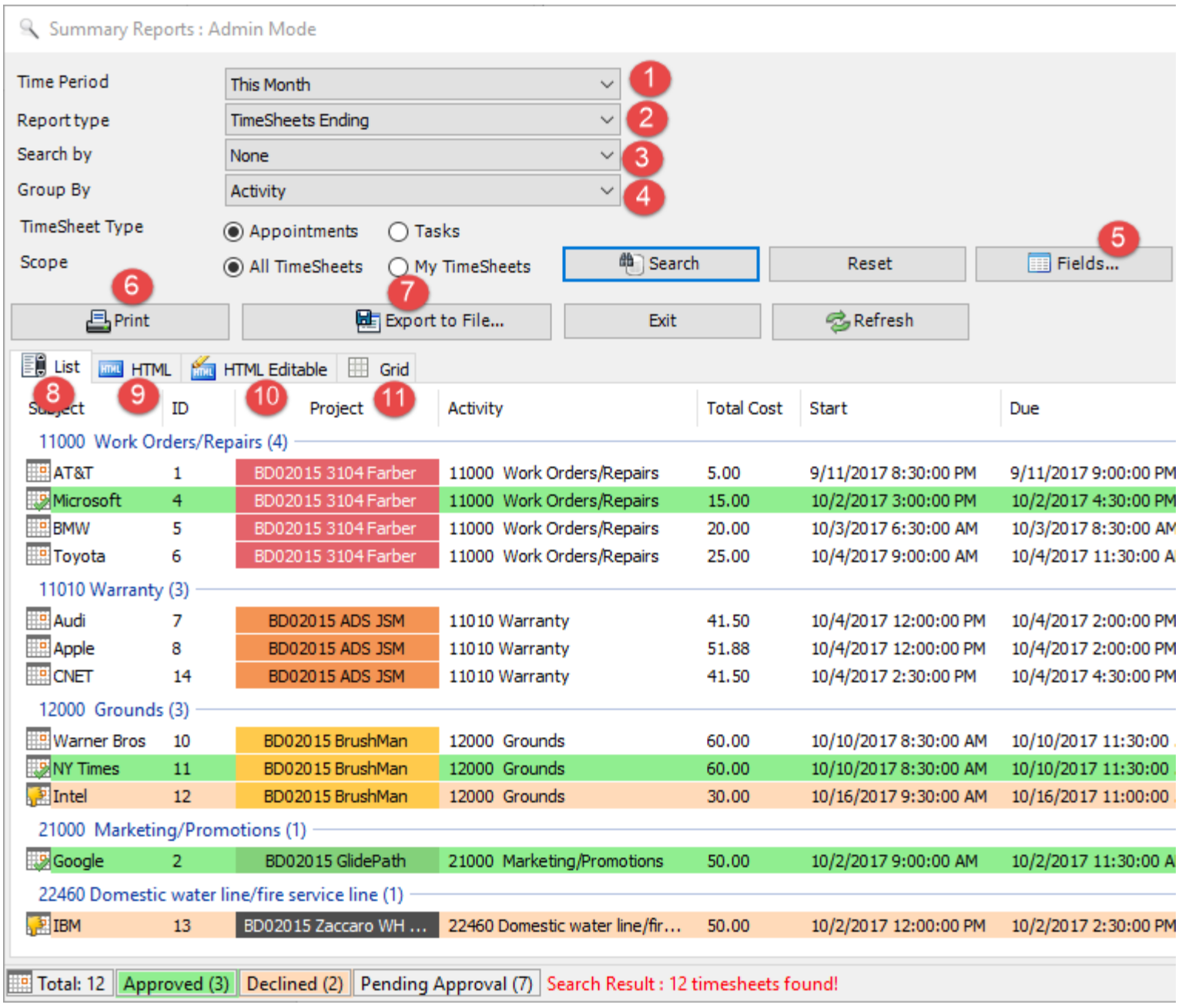
10. TimeSheet Summary Reports

Personal TimeSheet > TimeSheet Summary Reports

Reports summary reports play a vital role in keeping you informed about submitted deliverables, timesheets and aggregate hours and expenses for the selected period. You would find it handy to keep track of current budget deficit and work done, and plan and forecast requirements for resources and man power for remaining part of the projects etc.

It can be used to generate summarized and aggregate reports on submitted timesheets based on different time intervals such *as today, this week, this month, last month etc*. Any predefined Outlook, user-defined and project specific fields can be chosen for inclusion into the reports. Aggregated and summarized reports can then be exported to Excel, Text, XML or HTML web page or printed for sharing and easy distribution.

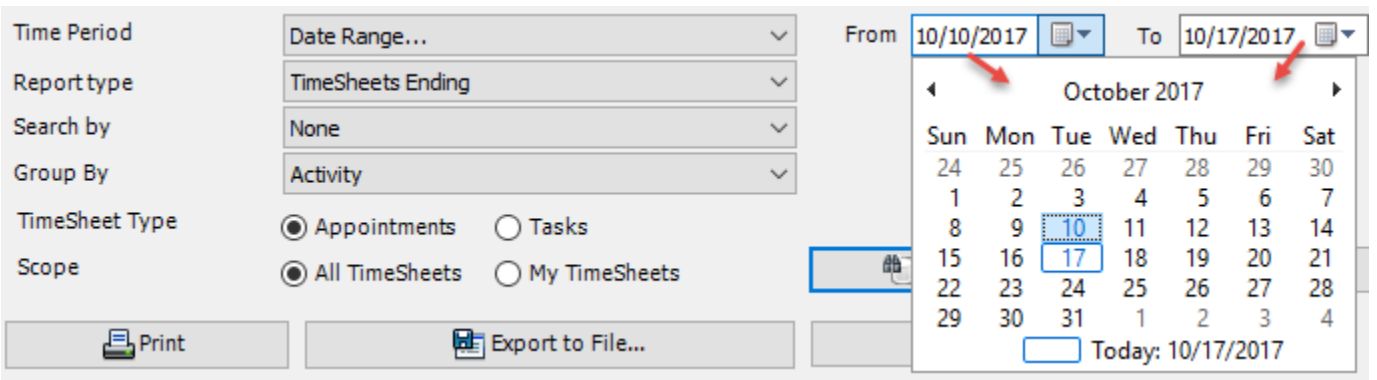
There are four report view modes **- List, HTML, HTML Editable** and **Grid**. Noticed that this report tool also uses the same sets of search filters discussed in the last section.



Each timesheet in the search result is color coded to reflect the current state of the timesheet such as if it is ongoing or completed. Now, you can easily recognize which timesheets require the attention or review, and plan actions accordingly.

1 **Time Period:** Choose a time period from the followings under which the search will be confined:
Any, Today, Yesterday, Tomorrow, This week, Last Week, Next Week, This Month, Last Month, Next Month, This Year, Last Year, Date Range, On

The option **'Date Range…'** allows for user selection of start and end date.

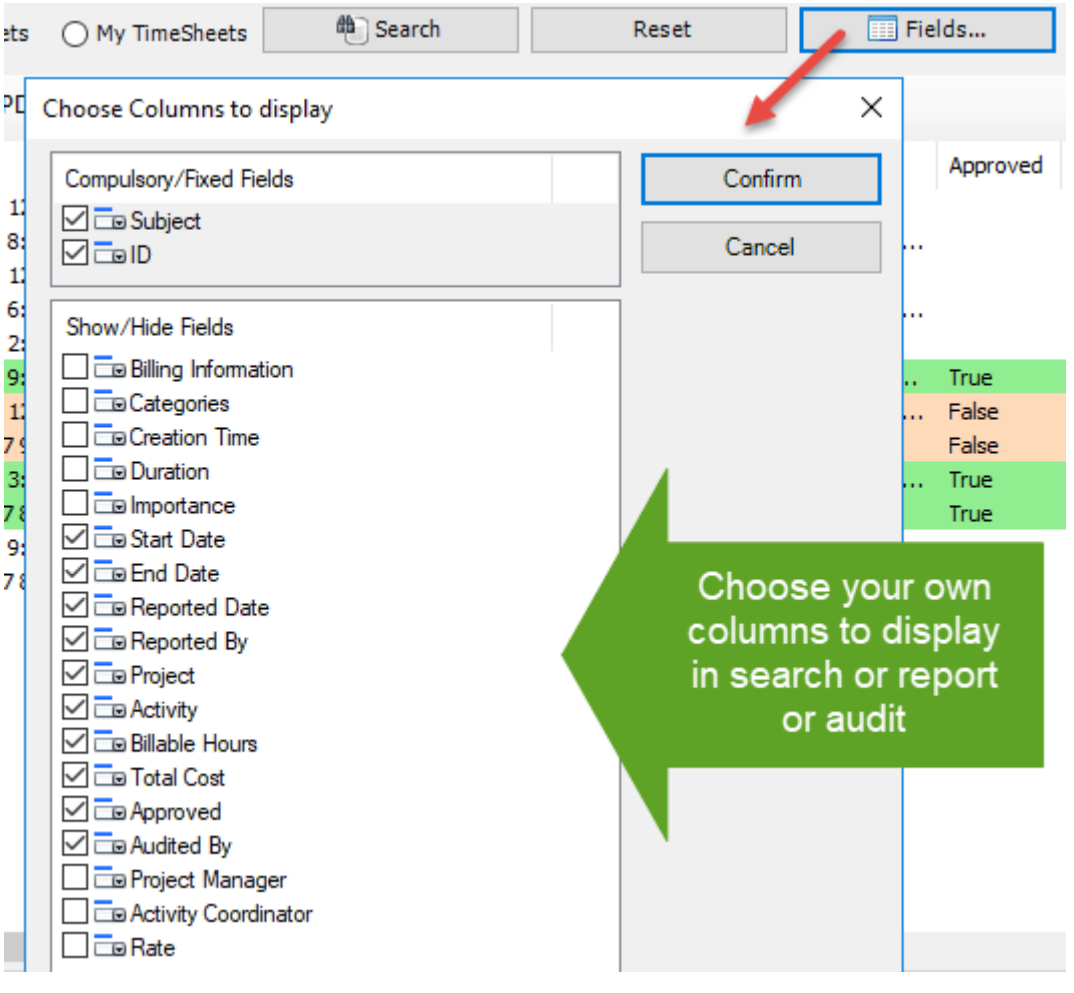


2 **Report Type:** Choose a report type from the predefined ones below:
Any, TimeSheets Starting, TimeSheets Ending, TimeSheets Reported, TimeSheets Ongoing, TimeSheets Completed, TimeSheets with Empty Project, TimeSheets with Empty Activity

3 **Search By:** Further refine the search by filtering through keywords or using one of the following timesheet fields:
Project/Activity, Reported By, Duration, Billable Hours, Importance, Custom Lists.

4 **Group By:** You can choose to group the timesheets either with:
Project, Activity, Importance, Categories.

5 **Fields:** Click the 'Field' option to choose which particular timesheet fields/columns will show up in the search result and report.

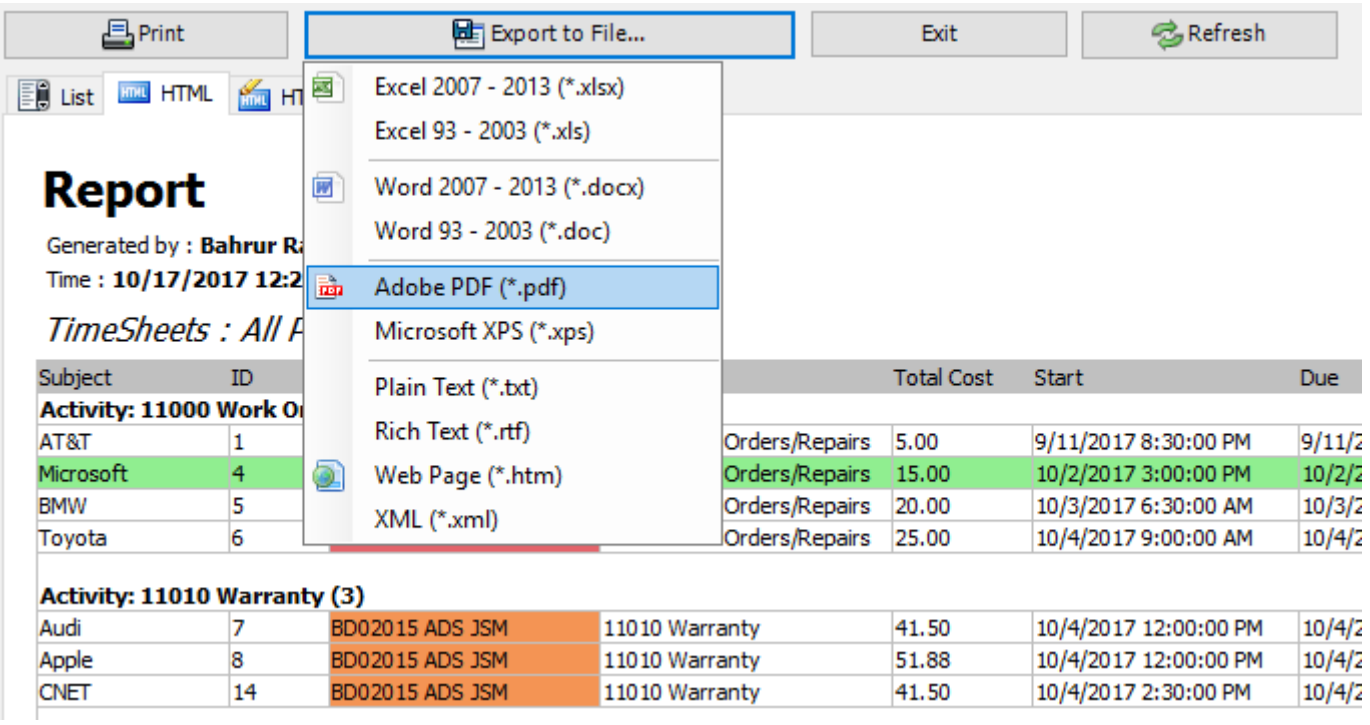


The tool will remember your choice in subsequent runs.

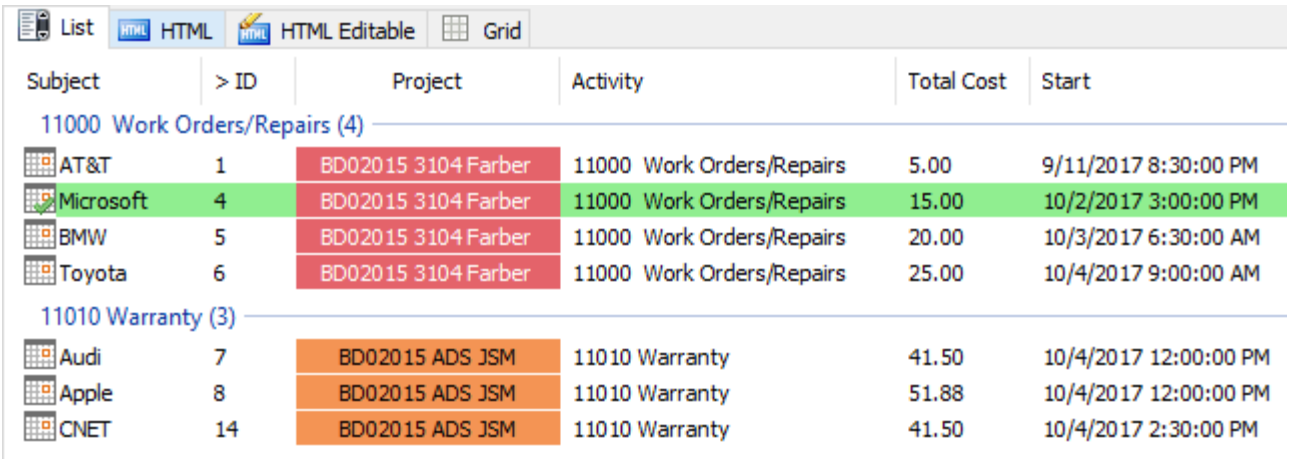
You can re-arrange the columns by drag-and-drop to get the kind of view you want. And the display order of the columns will be retained in subsequent sessions.

6 **Print the current report** - When you click 'Print', you would be presented with the print dialog (similar to one used by Internet Explorer browser). Within that dialog, you would be able to customize the print settings. Note that, as there are multiple report modes (namely, list, HTML, Grid), the printed report will be sourced from the current mode (tab) that you are in.

7 **Save the current report to file** – Once you get the look and feel of your report, you can then export the report to one of the many popular document formats supported such as Microsoft Excel sheets, Word documents, Adobe PDF, Rich Text or web page etc. for sharing with others users, or for future reference.



8 **List report view mode –** This acts like a template to the other three report modes. For finer control over the output of report, you can choose which fields (including custom fields) are to be included in the report. You can sort the timesheets by clicking at the column headers, as well as also re-arrange the columns in the list view according to certain sequence of your choice, and even set the width of the columns. These formatting from the List view panel will be inherited on other tabs - HTML, editable HTML and Grids.



9 **HTML report view mode –** This report view presents the timesheets in web HTML format with color coding, group, and summary information retained. You can export this report to .htm format for your further use.

List | HTML | HTML Editable | Grid

Report

Generated by : **Bahrur Rahman**
Time : **10/17/2017 12:21:45 AM**

*TimeSheets : All Periods - **12 TimeSheets***

Subject	ID	Project	Activity	Total Cost	Start
Activity: 11000 Work Orders/Repairs (4)					
AT&T	1	BD02015 3104 Farber	11000 Work Orders/Repairs	5.00	9/11/2017 8:30:00 PM
Microsoft	4	BD02015 3104 Farber	11000 Work Orders/Repairs	15.00	10/2/2017 3:00:00 PM
BMW	5	BD02015 3104 Farber	11000 Work Orders/Repairs	20.00	10/3/2017 6:30:00 AM
Toyota	6	BD02015 3104 Farber	11000 Work Orders/Repairs	25.00	10/4/2017 9:00:00 AM
Activity: 11010 Warranty (3)					
Audi	7	BD02015 ADS JSM	11010 Warranty	41.50	10/4/2017 12:00:00 PM
Apple	8	BD02015 ADS JSM	11010 Warranty	51.88	10/4/2017 12:00:00 PM
CNET	14	BD02015 ADS JSM	11010 Warranty	41.50	10/4/2017 2:30:00 PM
Activity: 12000 Grounds (3)					
Warner Bros	10	BD02015 BrushMan	12000 Grounds	60.00	10/10/2017 8:30:00 AM
NY Times	11	BD02015 BrushMan	12000 Grounds	60.00	10/10/2017 8:30:00 AM
Intel	12	BD02015 BrushMan	12000 Grounds	30.00	10/16/2017 9:30:00 AM
Activity: 21000 Marketing/Promotions (1)					
Google	2	BD02015 GlidePath	21000 Marketing/Promotions	50.00	10/2/2017 9:00:00 AM
Activity: 22460 Domestic water line/fire service line (1)					
IBM	13	BD02015 Zaccaro WH lead	22460 Domestic water line/fire service line	50.00	10/2/2017 12:00:00 PM

Summary	Count
Approved	3
Declined	2
TimeSheets Pending Approval	7

10 **HTML Editable report view mode –** This report view is exactly the same as the previous HTML mode, but with the flexibility to edit the HTML content in a WYSIWYG editor. For instance, you can customize the font, add image, change the color, layout or add any further information you require so that you can compile your own report.

List | HTML | HTML Editable | Grid

B I U | Font Courier New | Size 7 (36 pt) | IndianRe | MediumTu

Hi Maurice,
Attaching below is my timesheets for this month.

Report

Generated by : **Bahrur Rahman**
Time : **10/17/2017 10:43:42 AM**

*TimeSheets : All Periods - **12 TimeSheets***

Subject	> ID	Project	Activity	Total Cost	Start
Activity: 11000 Work Orders/Repairs (4)					
AT&T	1	BD02015 3104 Farber	11000 Work Orders/Repairs	5.00	9/11/2017 8:30:00 PM
Microsoft	4	BD02015 3104 Farber	11000 Work Orders/Repairs	15.00	10/2/2017 3:00:00 PM
BMW	5	BD02015 3104 Farber	11000 Work Orders/Repairs	20.00	10/3/2017 6:30:00 AM
Toyota	6	BD02015 3104 Farber	11000 Work Orders/Repairs	25.00	10/4/2017 9:00:00 AM
Activity: 11010 Warranty (3)					
Audi	7	BD02015 ADS JSM	11010 Warranty	41.50	10/4/2017 12:00:00 PM
Apple	8	BD02015 ADS JSM	11010 Warranty	51.88	10/4/2017 12:00:00 PM
CNET	14	BD02015 ADS JSM	11010 Warranty	41.50	10/4/2017 2:30:00 PM

11 **The Grid report view mode –** This presents the timesheets in excel spreadsheet like format with rows and columns, preserving color codes, summarized information etc. You can also re-edit and tweak the report. You can also copy data from this grid to Microsoft Excel or vice versa. And you can of course export the report as Excel spreadsheet file (in XLXS, XLS format).

List | HTML | HTML Editable | Grid

	Subject	ID	Project	Activity	Cost	Start	Due
1	**Activity: 11000 Work Orders/Repairs (4)**						
2	AT&T	1	BD02015 3104 Farber	11000 Work Orders/Repairs	5	9/11/2017 8:30:00 PM	9/11/2017 9:
3	Microsoft	4	BD02015 3104 Farber	11000 Work Orders/Repairs	15	10/2/2017 3:00:00 PM	10/2/2017 4:
4	BMW	5	BD02015 3104 Farber	11000 Work Orders/Repairs	20	10/3/2017 6:30:00 AM	10/3/2017 8:
5	Toyota	6	BD02015 3104 Farber	11000 Work Orders/Repairs	25	10/4/2017 9:00:00 AM	10/4/2017 11:
6							
7	**Activity: 11010 Warranty (3)**						
8	Audi	7	BD02015 ADS JSM	11010 Warranty	41.5	10/4/2017 12:00:00 PM	10/4/2017 2:
9	Apple	8	BD02015 ADS JSM	11010 Warranty	51.88	10/4/2017 12:00:00 PM	10/4/2017 2:
10	CNET	14	BD02015 ADS JSM	11010 Warranty	41.5	10/4/2017 2:30:00 PM	10/4/2017 4:
11							
12	**Activity: 12000 Grounds (3)**						
13	Warner Bros	10	BD02015 BrushMan	12000 Grounds	60	10/10/2017 8:30:00 AM	10/10/2017 11:
14	NY Times	11	BD02015 BrushMan	12000 Grounds	60	10/10/2017 8:30:00 AM	10/10/2017 11:
15	Intel	12	BD02015 BrushMan	12000 Grounds	30	10/16/2017 9:30:00 AM	10/16/2017 11:
16							
17	**Activity: 21000 Marketing/Promotions (1)**						
18	Google	2	BD02015 GlidePath	21000 Marketing/Promotions	50	10/2/2017 9:00:00 AM	10/2/2017 11:
19							
20	**Activity: 22460 Domestic water line/fire service line (1)**						
21	IBM	13	BD02015 Zaccaro WH	22460 Domestic water line/fire	50	10/2/2017 12:00:00 PM	10/2/2017 2:
22							
23	**Summary - Count**						
24	Approved - 3						
25	Declined - 2						
26	TimeSheets Pending Approval - 7						
27	Total TimeSheets - 12						

Total: 12 | Approved (3) | Declined (2) | Pending Approval (7) | Search Result : 12 timesheets found!

11. TimeSheet OLAP Statistics and Reporting

Personal TimeSheet > TimeSheet OLAP Statistics

With the integrated Online Line Analytical Processing (OLAP) tool, you can analyze submitted timesheets and other project deliverables in multidimensional view to extract critical information and intelligence that will enable them to take better decisions in business. The tool will allow you to explore large complex data sets and allows displaying in grids, charts and graphs and support most common operations such as pivoting, drill down/slice and dice, filtering etc.

Advantage of OLAP
Real strength of OLAP is its ability to examine and view data in ways not ordinarily possible. By allowing varying levels of granularity during data inspection and visualization a lot of information can be revealed that would otherwise be hard to attain. Given that most business models are constrained by more than three dimensions, it is hard to fully evaluate a business without the ability to inspect each dimension in detail while preserving context eliminating all guesswork. OLAP is perfectly suited for this purpose. Now it's easier than ever to spot new trends and discover unknown problems in your data flow. The statistical tool will help you gain an insight into your data and make new discoveries. It comes with various inbuilt reports specific to Personal TimeSheet.

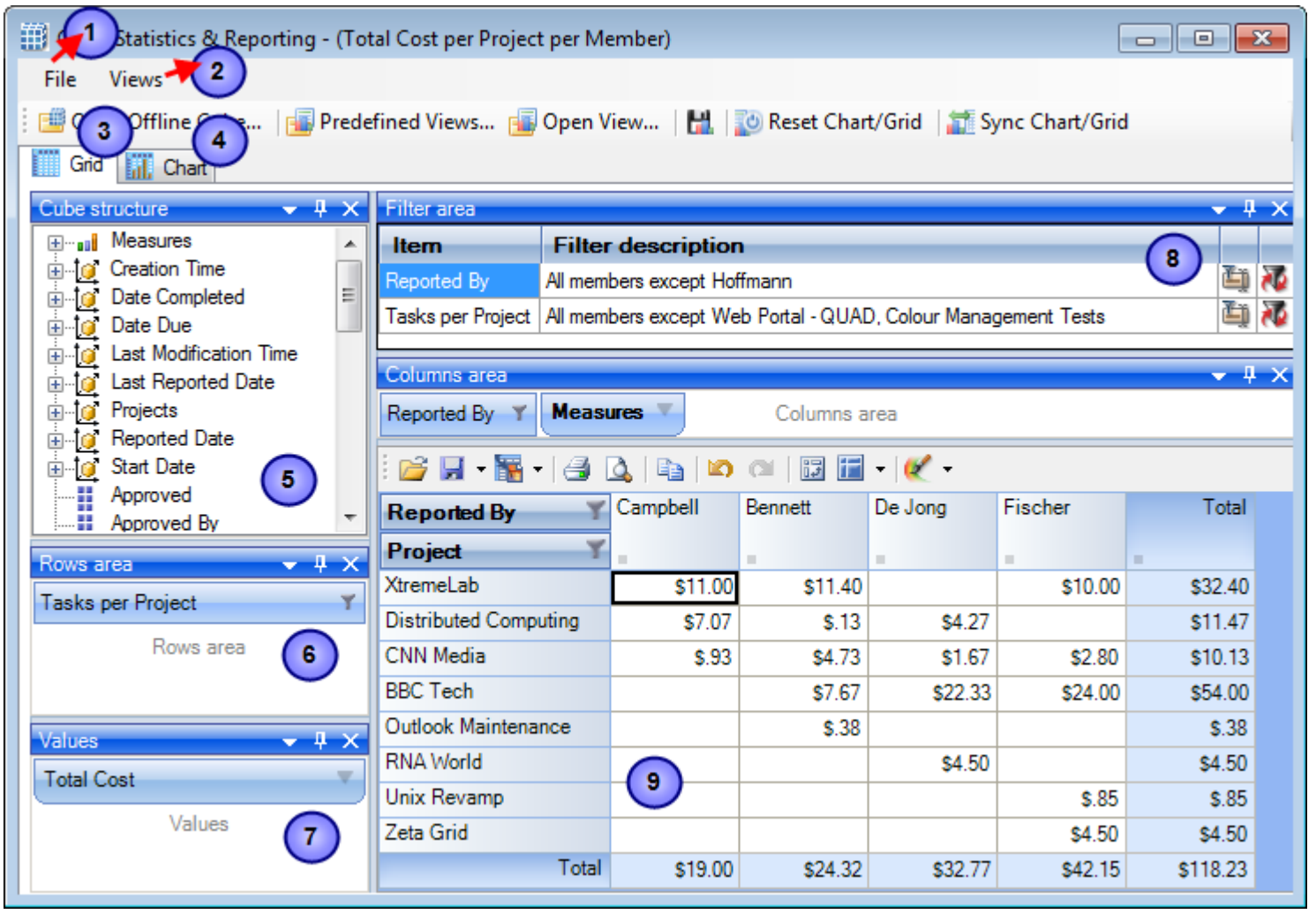
Reporting made easier - The statistical tool's simplistic point-and-click interface will ensure you can easily achieve the high-level views of information they require. Additionally, the OLAP client makes creating reports destined for different management levels a simple task - eliminating your dependence on IT personnel. By unifying data analysis needs on a single platform, it provides an unparalleled array of reporting tools for web portals, intranet applications, websites, and other data-rich applications.

Printing capabilities - You can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you want to share the report through the net or by email you can easily export it to a wide range of formats including PDF, XLS, CSV, JPG, etc.

Copy to Clipboard - Select any data range in Chart/Grid and copy to clipboard. Then you'll be able to paste it in an Office program for further analysis. You can also paste the chart like a picture to illustrate your investigations. This greatly simplifies the task of creating detailed, data-rich documents.

Save Reports in file - At any stage you can save the report and distribute it to another person for analysis by network or email, so when the recipient gets the file he can open it and see the same OLAP slice.

11.1 The User Interface

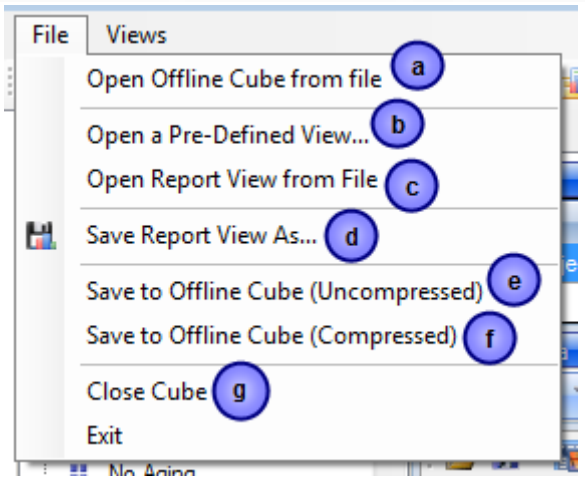


This statistical tool presents an easy-to-use interface for operating an OLAP-slice. The basic data is displayed in the working area. The environment tools for managing the content and characteristics of the slice are placed on the pivot panels. You can set the panels' layout the way you like. To drag a panel to a different location, you need to capture and drag its header with the mouse. This will highlight all the possible locations where it can be dropped. You can detach a panel from the component; it will be displayed as a float window. Instrumental panels can be:

- Attached to any side of the component;
- Placed into any existing panel;
- Displayed as bookmarks on any panel;
- Set as auto-hidden panels;
- Used as float windows.

1 **The File menu**

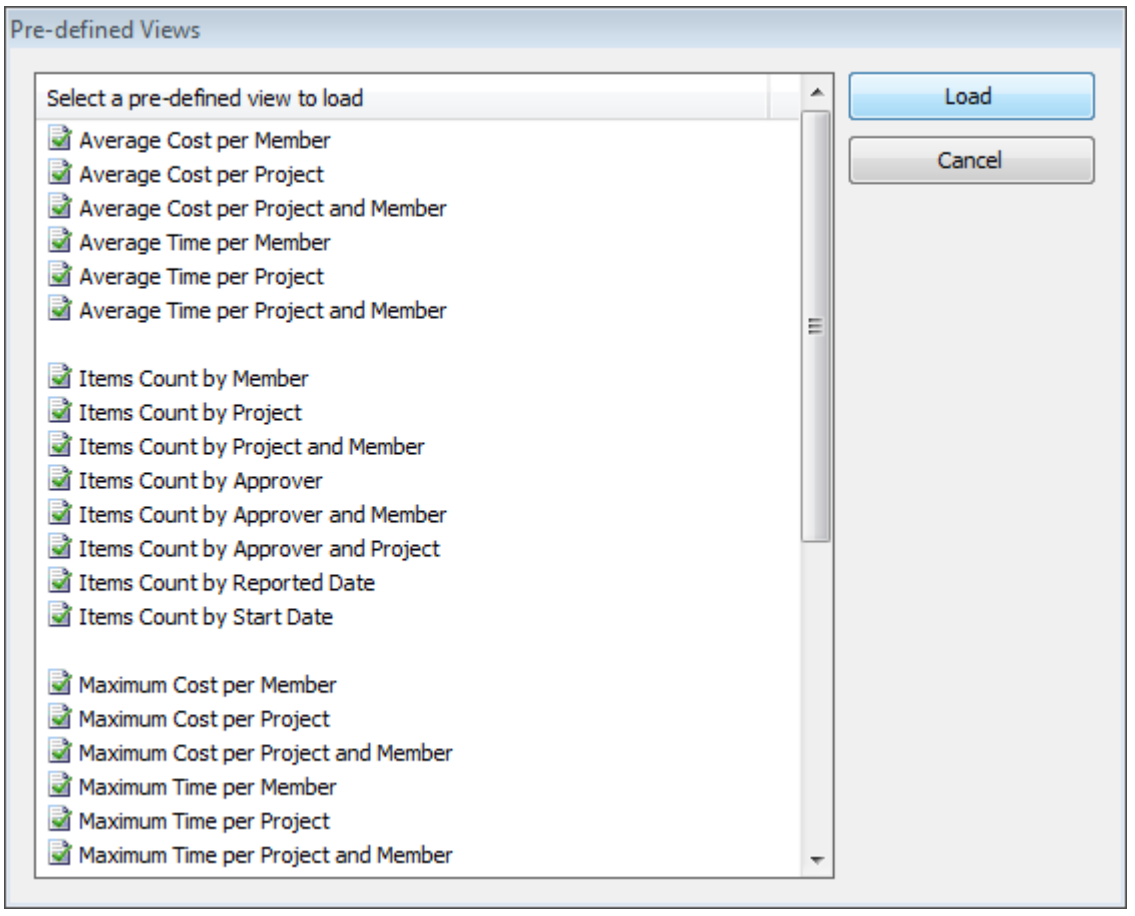
The file menu consists of the following commands:



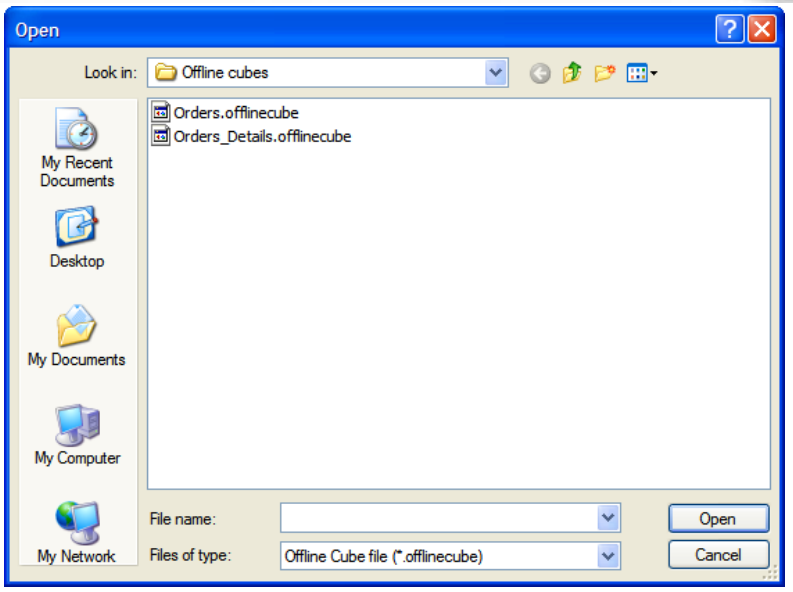
a) **Open Offline Cube from file** - While generating a live cube from the timesheets data from SharePoint provides the advantage of analyzing live data, often, you might be away or disconnected from the network.

In such scenario, you have the option of connecting to an offline cube, which was previously generated and saved to your local folder using this utility. An offline cube file has the extension – '*.offlinecube*' and can be either in compressed or uncompressed format. An offline cube gives the same functionality as that of a live cube (which is generated from SharePoint at real time), except that the data in the offline cube is only current to the time the cube was saved to file. This provides the flexibility to continue analyzing the cube and writing reports etc., while you are on the move.

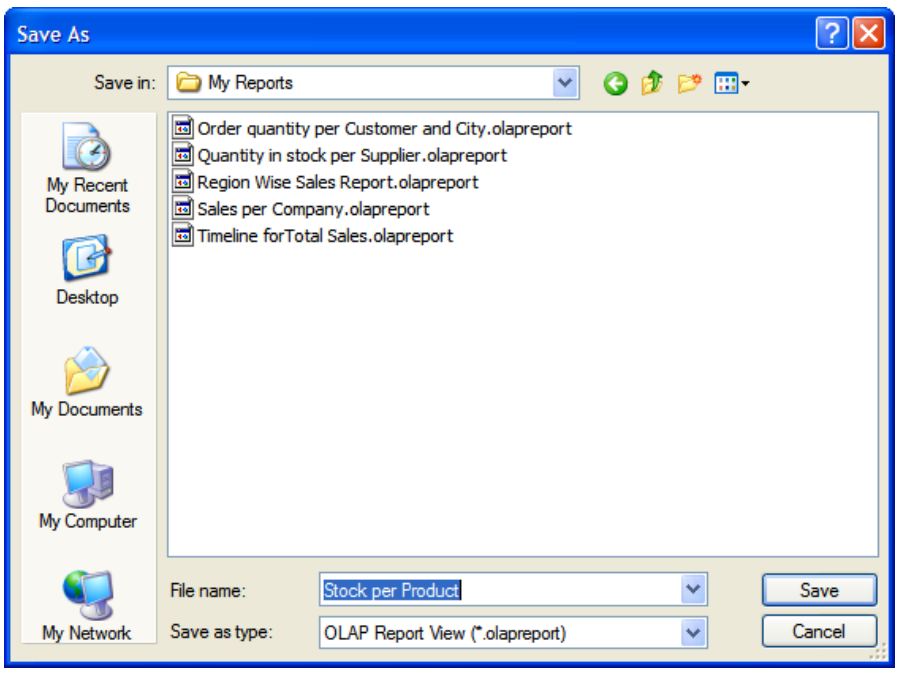
b) **Open a Predefined View** - More than 30 views specifically designed for Personal TimeSheet are included. Simply select a view and click 'Load' or double-click to load the statistical analysis of that report, the result will be displayed in the Grid or Chart (depending on the current active view).



c) **Open report view from file** - Once a particular snapshot of the statistics is achieved, you may want to save it for future reference or share it among your team members. A report view is the current state of the statistics in the Grid/Chart working area, with specific member fields on the pivot panels (Rows and Column areas) and measure fields in the values area. It has a file extension '*.olapreport*'.



d) **Save report view as** - If you want to share a report view with others, you can simply save the current report (state of the statistics along with the pivot details) to a file folder of your choice - could be a network folder also.



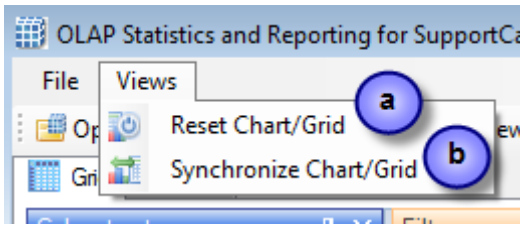
e) **Save to offline Cube** – Once you have loaded a live cube from the timesheets data from SharePoint, you have the option to save the entire cube data to a file (with the extension. offlinecube) for offline use, when you are disconnected from the network. Offline cube can be saved in compressed or uncompressed format, the former option will enable you to reduce the file size considerably.

f) Same as **e**. (above)

g) **Close the cube** - This option closes the cube from the OLAP Statistics and free up the memory for loading another cube.

2 **View Menu**

Contains actions that you can perform on the current report view.



a) **Reset Chart/Grid** - Empty all the member fields from the pivot as well as the data from the working area of the chart/grid. This is useful if you want to start over on a new report view.

b) **Synchronize Chart/Grid** - This option allows you to reflect the state of the statistics between Grid and chart. It is particularly useful, for example, when you have built up a grid with aggregated data, but with a more visual representation of the statistics in the form of graphs and bars. Also note that, the synchronization will be done to the other part (grid or chart) based on the current interface.

For example, if you are in the grid view, and if you press 'Synchronize Chart/Grid' it would read the state of the Grid view and impart the same state (same members and measures) to the Chart view and vice versa. Each of the Grid and Chart views can be worked independently as long as you don't press this synchronize option.

3 **OLAP Grid panel**

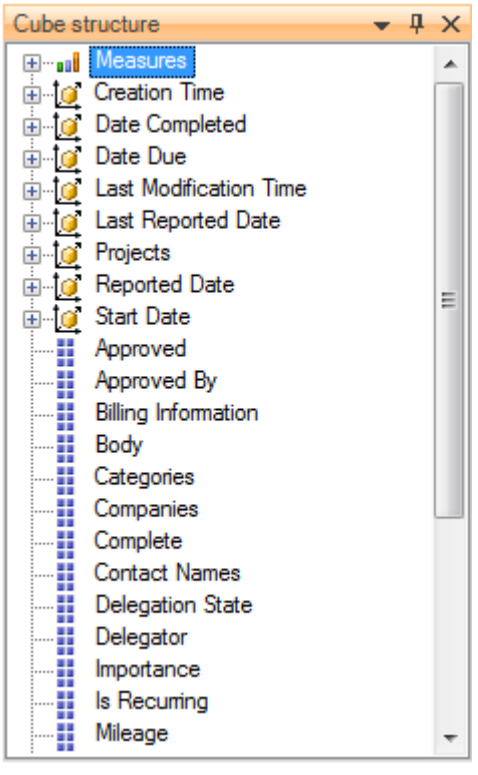
The OLAP Grid control comprises of a multi-dimensional table with expandable nodes. These nodes group and display data according to the hierarchies used to define the measures and dimensions upon which the underlying data has been organized. A unique feature of control allows for building the OLAP-reports of the exceptional level of complexity. In tandem with the OLAP Chart, the OLAP Grid provides an ideal means of clearly conveying data to the user.

4 **OLAP Chart panel**

While OLAP Grid allows working with numbers, the OLAP Chart allows representing the project data graphically. This gives you a unique opportunity to analyze their project data visually, dealing with charts rather than numbers, which is much easier to perceive.

5 **Cube structure panel**

The panel contains the Cube structure - measures and hierarchies as a tree. The measures are grouped in the set, displayed in a branch. Rest of the tree nodes are the dimensions that contain hierarchies.



– Measure
– Dimension
– Attribute hierarchy
– Multilevel hierarchy

To select a measure for display you need to drag-n-drop it to the Measures panel or the data area.

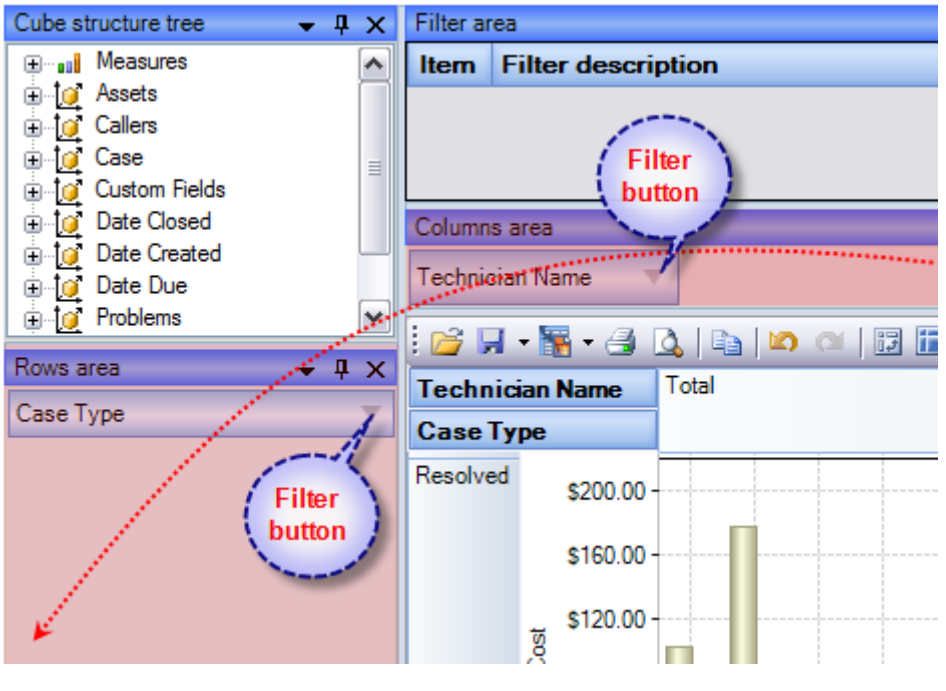
To select a hierarchy for display – drag-n-drop it to the hierarchy area or the pivot panel (rows or columns area).

- Measures are grouped in the Measures category.
- Hierarchies are sorted into folders - dimensions. If there's only one dimension in a hierarchy, it will be displayed in the tree root.

Both hierarchies and measures have their own menus. Right click will call the context menu that gives you an option to place the element where you like. You can also filter the selected element (see Filtering hierarchies and measures) or place it to the selected panel.

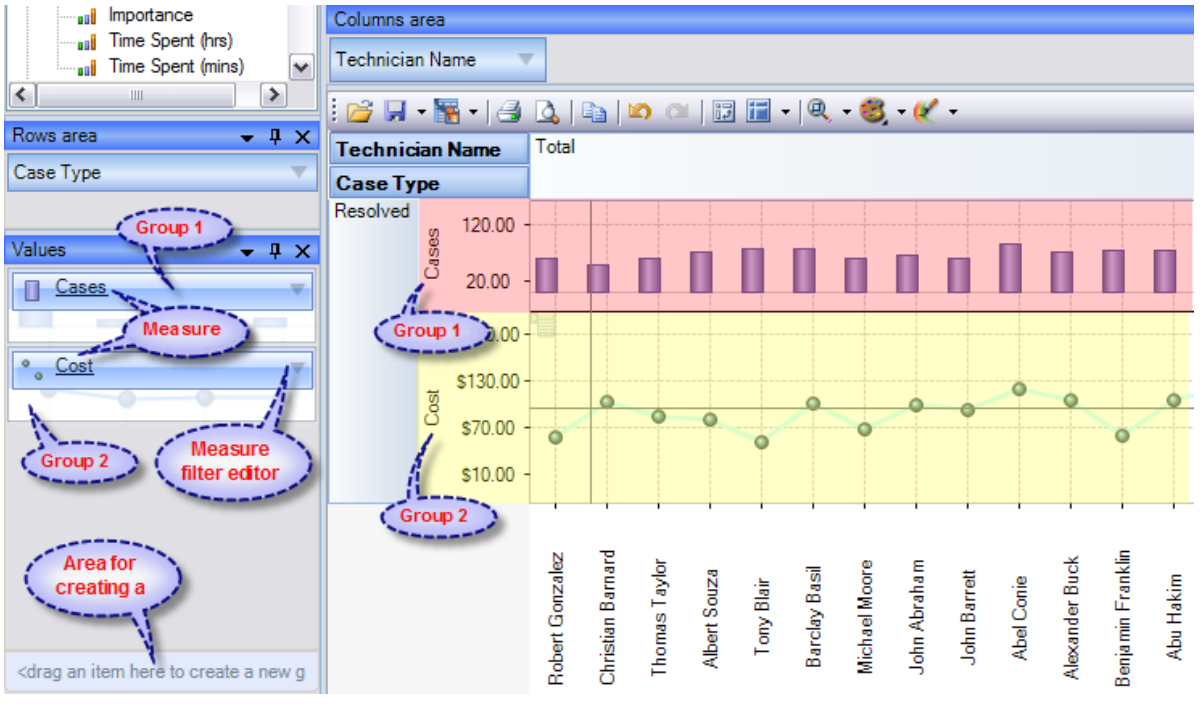
6 **Pivoting panels**

A pivot table lets user design the report online by dragging and dropping measures, dimensions and levels into the pivoting panels. Note that the column panel may contain no more than one (!) measure. Panel elements can be dragged with the mouse to other panels. To filter elements, press the Filter button (see Pivot panel view) or use the appropriate items from the context menu.



7 **Measure panel**

Measure panel consists of groups of measures that make up the charts' vertical axes (see Measure panel components). Each group of measures corresponds to a set of charts in the data area. Groups of measures are situated in the main part of the panel.



You can drag measures from one group to another, or extract measures from groups to delete them. To create a new group, you need to drag a measure to a place on the panel not occupied by another group or to the <drop an item to create a new group> panel.

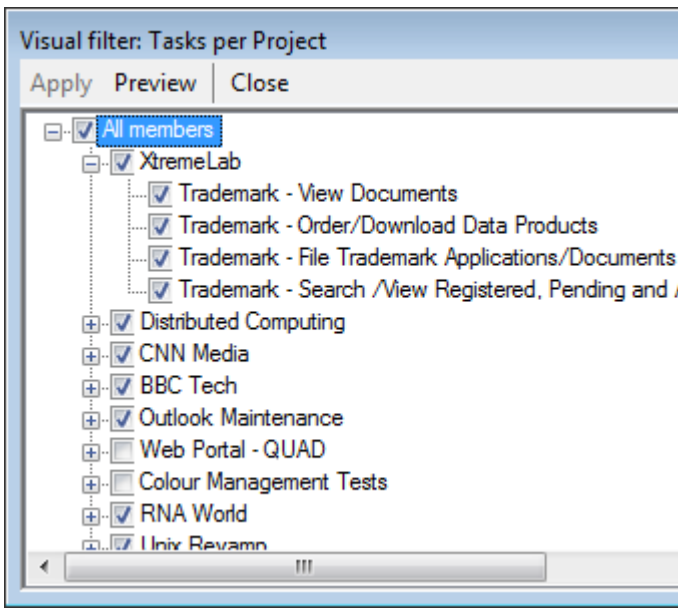
Clicking a mouse button on measures will call the context menu. From here, you can move a measure to one of the pivot panels or to the modifiers axis, or assign a measure filter. Also, you can assign the marker type of a chart point and its color.

8

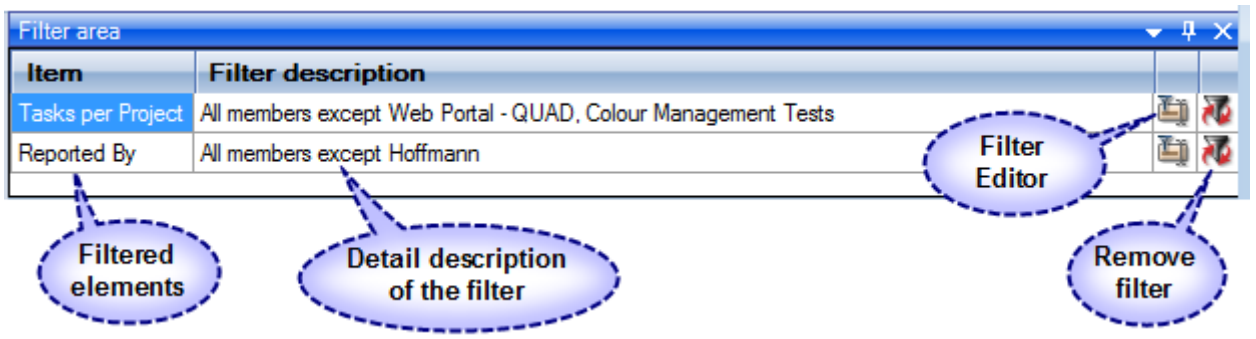
Filter panel

This statistical tool allows for easy selection on what data you want to see and what you don't. You can apply powerful filters to anything including hierarchy members, and measure values, thus leaving out the unimportant data. You can sort the data to see, for example, the top 10 values and then you can gather the rest of the values into a single group, so you only have what you really need.

The filtered elements (hierarchies and measures) are automatically transferred to the Filter panel. To assign a filter, you have to move an element to the Filter panel. If the element hasn't been filtered the appropriate visual filter editor will be shown, similar to the one on the right:



In the Filter panel, you can call the Filtered Element Editor individually for each element.



9

Working Area

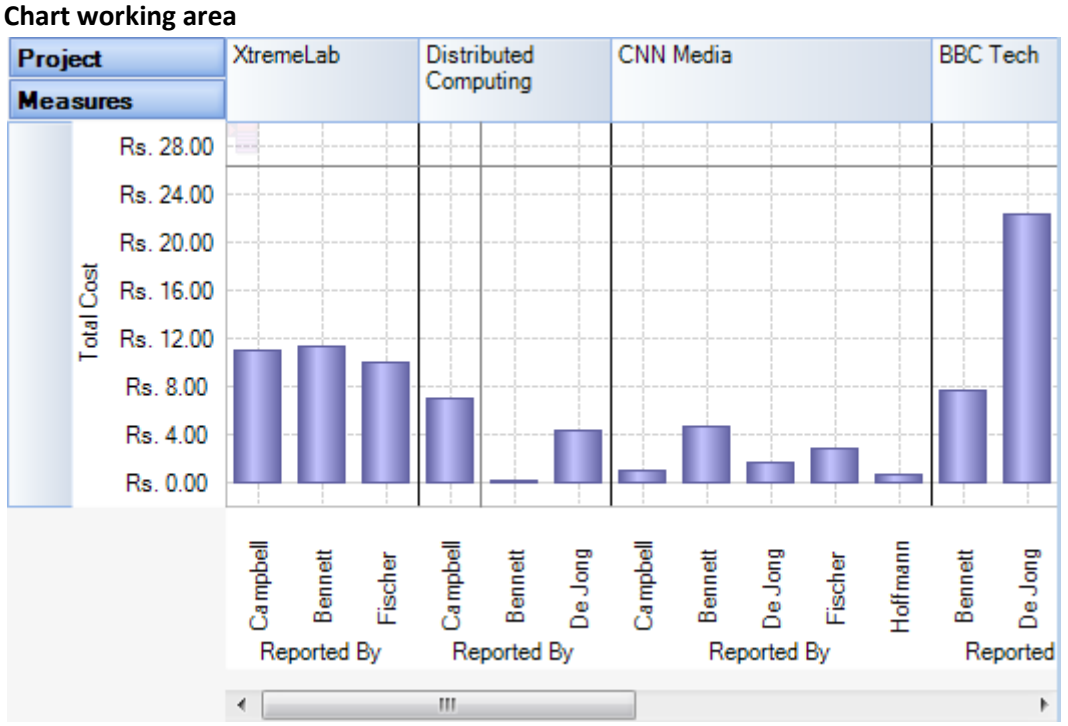
The OLAP-slice data is displayed in working area. In its upper part there is a menu for the quick access to the frequently used commands[2]. The rest is occupied by the current OLAP-slice and consists of the following parts - Cube Axis headers, Cube Axes, Data Axes, Data Axis headers, Chart Panes.

You can change the view of the slice by relocating measures and hierarchies within the environment panel. When you start dragging an element, all the possible locations, where it can be dropped to, will be highlighted. Most elements have context menus that duplicate the mouse actions and provide additional control functions for managing the slices' view.

Grid working area

Reported By / Project	Campbell	Bennett	De Jong	Fischer	Total
XtremeLab	$11.00	$11.40		$10.00	$32.40
Distributed Computing	$7.07	$.13	$4.27		$11.47
CNN Media	$.93	$4.73	$1.67	$2.80	$10.13
BBC Tech		$7.67	$22.33	$24.00	$54.00
Outlook Maintenance		$.38			$.38
RNA World			$4.50		$4.50
Unix Revamp				$.85	$.85
Zeta Grid				$4.50	$4.50
Total	$19.00	$24.32	$32.77	$42.15	$118.23

Chart working area



11.2 Working with the OLAP grid

The OLAP Grid view comprises of a multi-dimensional table with expandable nodes. These nodes group and display data according to the hierarchies used to define the measures and dimensions upon which the underlying data has been organized. In tandem with the OLAP Chart view, the OLAP Grid view provides an ideal means of clearly conveying data to the user. It is highly navigable and quickly provides detailed information to the user. The speed with which data recall occurs and the strong formatting the grid enforces ensure data is always presentable and easily understandable. Consequently, OLAP Grid views can easily be ported to spreadsheet applications for report compilation purposes.

Additionally, the OLAP Grid view allows you to effortlessly add and remove categories, filter and sort categories, and drill up or drill down on data using powerful built-in menus. One of its greatest benefits is that it allows users to explore, navigate and refine data until the desired snapshot is achieved. Once in place this snapshot can be reflected in a complementary chart. This is possible as OLAP operations in Grid view can be synchronized with Chart view. These two data views can then be deployed side-by-side or on top of one another.

- *Unicode support.*
- *Simultaneous display of several different measures in the Grid.*
- *Simultaneous drilling down based on different parameters: up to the nearest child, up to the next level, up to the next hierarchy.*
- *Saving and restoring the current OLAP-slice.*
- *Hierarchy members grouping (including multilevel and parent-child hierarchies).*
- *Separate sorting on different hierarchy levels. Possibility to override any sorting method.*
- *Ascending or descending sorting based on the cell values in any column of the Grid.*
- *Filtering of hierarchy members with or without applying these filters to the OLAP calculations.*
- *Auto filtering of the hierarchy members depending on their values in the Grid. Major/minor members selection, either based on their rank or on the Pareto principle.*
- *Replacing hierarchy members by drag-n-dropping them within the Grid.*
- *Auto sizing of cells depending on their contents.*
- *Flexible export to MS Excel, HTML, GIF, JPG, PNG, BMP, CSV, TXT, PDF formats.*

Operating the OLAP-slice

The OLAP-slice data are displayed in a table, whose appearance may be amended to some extent. For operating the current OLAP-slice there are the following functions available:

1. **Navigation**
2. **Selecting and copying data**
3. **Drilling, sorting and moving hierarchy members**
4. **Operating context menus**
5. **Filtering data**
6. **Editing data**
7. **Setting the column width**

1. Navigation - You can easily navigate the data using the keyboard:

Button	*Action*
Home	Move to the first cell of the row
End	Move to the last cell of the row
PageUp	Move one page up
PageDown	Move one page down
Ctrl+Home	Move to the top left cell
Ctlr+End	Move to the bottom right cell

Using the mouse, you can scroll the table up and down.

Mouse Action	*Component Action*
Scrolling the mouse wheel	Vertical scrolling of the table

Scrolling the mouse wheel with the Shift button held down	Horizontal scrolling of the table

2. Selecting and copying data - The data area in the component can be selected like everything else in Windows:

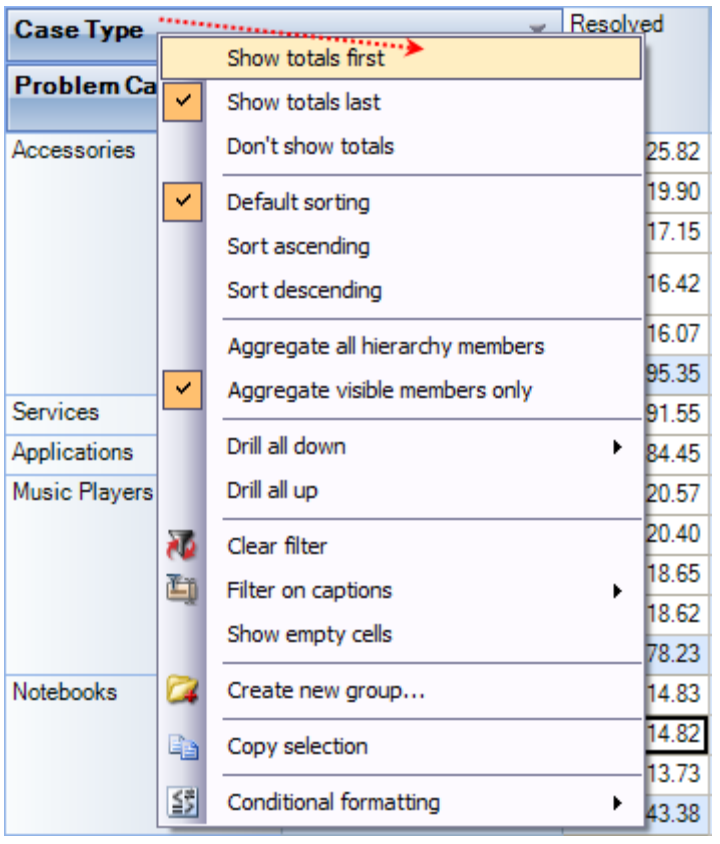
- Select all the cells pressing Ctrl+A;
- Capture the area with the mouse;
- Change the boundaries of the selected area with direction buttons, holding down the Shift button.

You can copy the data from the selected area to the clipboard by pressing Ctrl+C. If there's no selection, pressing these buttons will copy the whole OLAP-slice to the clipboard.

3. Drilling, sorting and moving hierarchy members - To perform the drilling of the hierarchy members press buttons on the Grid cells. If there's only one drilling button in a cell, then, instead of pressing it, you can double-click the cell itself. By default, the drilling buttons are shown only in the cells under mouse. To see all the buttons, press the Ctrl button. The last cells in the column area of the hierarchy members allow showing the sorting direction. A pointer that indicates the descending order of data illustrates it. You can manage the sorting modes by single clicking on the cells of the specified area: they are changed cyclically [descending sorting] -> [ascending sorting] -> [no sorting].

Case Type		Resolved	Total
Problem Category	Problem Type		
Accessories	Apple Wireless Mouse	25.82	25.82
	Time Capsule	19.90	19.90
	Airport Base Station	17.15	17.15
	Apple Wireless Keyboard	16.42	16.42
	Apple TV	16.07	16.07
	Accessories	95.35	95.35
Services	Complains	22.72	22.72
	Loyalty Scheme	17.42	17.42
	AppleCare	17.17	17.17
	Sales	14.75	14.75
	Apple Rental	10.77	10.77
	Buy Back Scheme	8.73	8.73
	Services	91.55	91.55

4. Operating context menus -The context menu, called by right clicking a table cell, partly duplicates the OLAP-slice control functions.

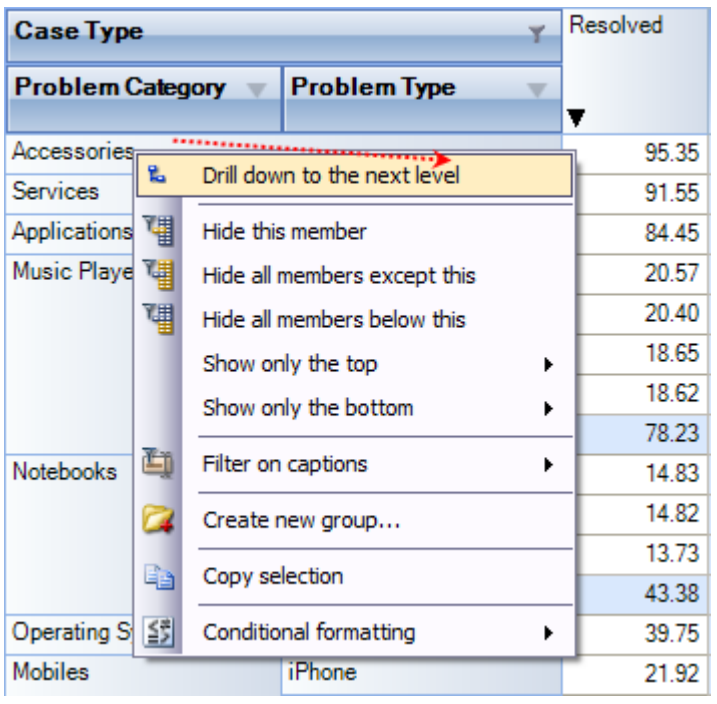


Hierarchy levels' menu

The view of context menu of the hierarchy levels' area. There is a list of commands available in the context menu of the hierarchy levels' area:

Command	*Function*
Show totals first	Show the aggregated cells before all the rest
Show totals last	Show the aggregated cells after all the rest
Don't show totals	Do not show the aggregated cells
Default sorting	Range hierarchy members by default
Sort ascending	Range the hierarchy members by values from the bottom to the top
Sort descending	Range the hierarchy members by values from the top to the bottom
Aggregate all hierarchy members	Aggregate all the hierarchy members (including hidden)
Aggregate visible members only	Aggregate the visible hierarchy members only
Drill all down\ to the next hierarchy	Drill all down to the next hierarchy
Drill all down\ to the next level	Drill all down to the next level
Drill all down\ to the same-level children	Drill all down to the same-level children
Drill all up	Collapse all the elements of this level
Clear filter	Remove any applied filters
Filter on captions	Set the filter for measures
Show empty cells	Show the cells with no aggregated values
Create new group …	Create a new group. It will appear at the first level of the hierarchy
Copy selection	Copy the selected area to clipboard
Conditional formatting	Show the Conditional formatting menu

Hierarchy members' menu

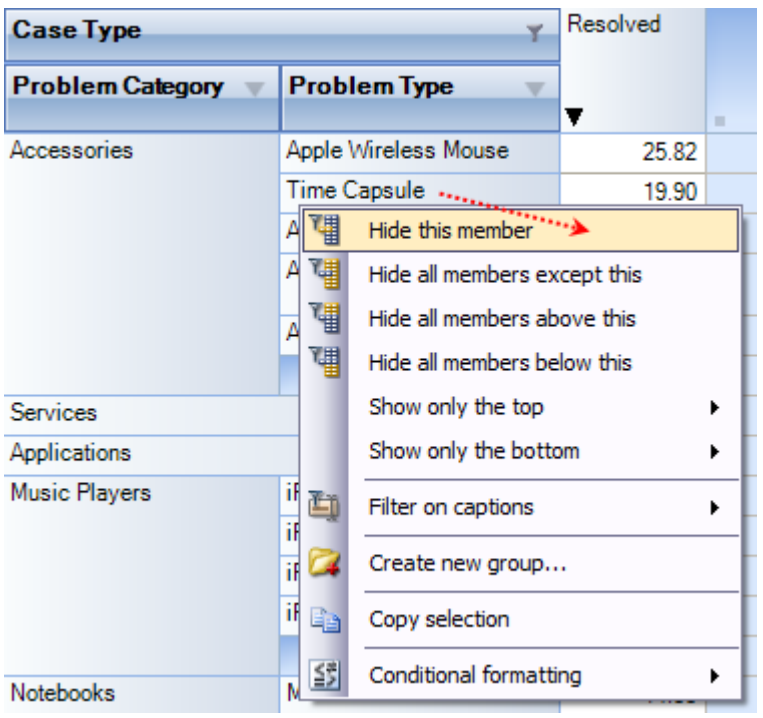


The view of the context menu of the hierarchy members' area

Command	*Function*

Drill down to the next hierarchy	Open the node up to the next hierarchy in the current area, ignoring all the lower levels of the current hierarchy
Hide this member	Hide the member
Hide all members except this	Hide all the members of the hierarchy, except the selected one
Hide all members above this	Hide all the members of the hierarchy above the selected one
Hide all members below this	Hide all the members of the hierarchy below the selected one
Show only the top	Show the top elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Show only the bottom	Show the bottom elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Filter on captions	Set the filter for measures
Create new group..	Create a new group on the current level
Copy selection	Copy the selected area to clipboard
Conditional formatting	Show the Conditional formatting menu

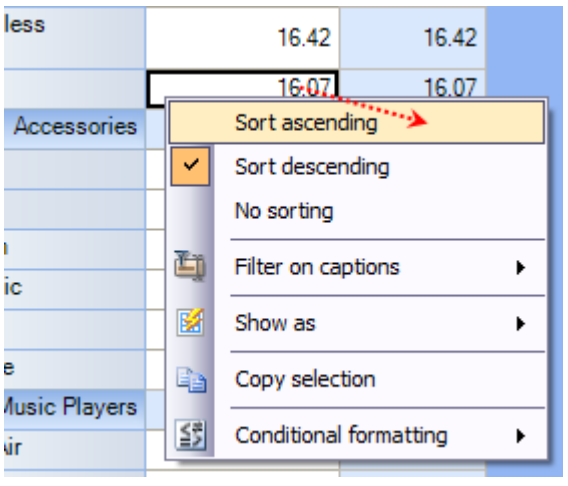
The menu for groups of hierarchy members



The context menu that appears above the group cell.

Command	*Function*
Hide this member	Hide the selected member
Hide all members except this	Hide all the hierarchy members except the selected one
Hide all members above this	Hide all the hierarchy members above the selected one
Hide all members below this	Hide all the hierarchy members below the selected one
Show only the top	Show the top elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Show only the bottom	Show the bottom elements of the level. Their number is specified in the sub-menu. If you specify a percent value there, then the picking of members will be such that their total value does not exceed the one, specified in the sub-menu. You can choose a threshold value from those offered in the appropriate menu item or set your own one, selecting Other from the menu.
Filter on captions	Set the filter for measures
Create new group	Create a new group
Delete this group	Delete the selected group
Clear this group	Clear the selected group
Rename this group	Rename the selected group
Copy selection	Copy the selected area to clipboard
Conditional formatting	Show conditional formatting menu

Measure values' menu



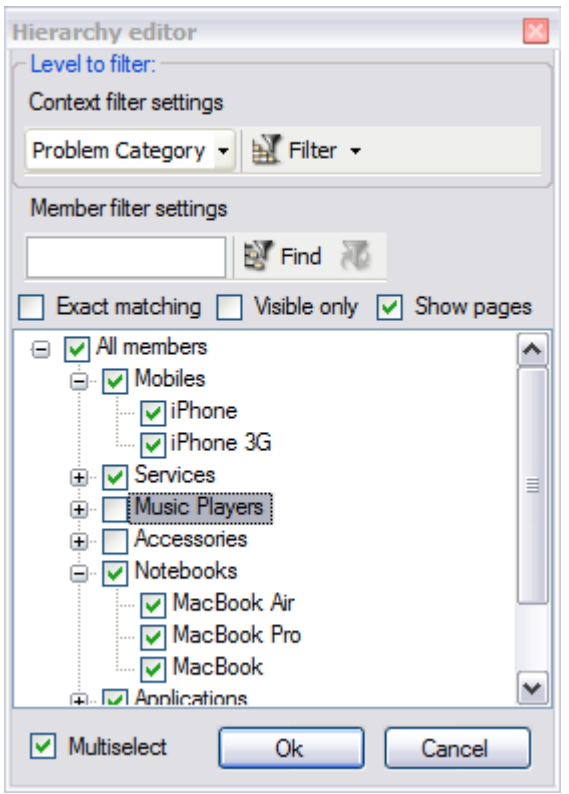
The context menu that appears above the group cell:

Command	*Function*
Sort ascending	Range the cells in the column by values from the bottom to the top
Sort descending	Range the cells in the column by values from the top to the bottom
No sorting	Remove any sorting
Filter on captions	Set the filter for measures
Hide this measures	Hide the selected measure
Show as	Specify the display mode of the current measure in the Grid:

	default percent aggregated value in the row percent parent element of the row percent parent element of the column percent total aggregated value
Copy selection	Copy the selected area to clipboard
Conditional formatting	Show conditional formatting menu

5. Filtering data - The filtered elements (hierarchies or measures) are automatically placed on the filters' panel. To start filtering, move the element to the filters' panel. In case the element has not been filtered, the appropriate editor will launch (the Hierarchy Editor for hierarchies and the Measure Filter Editor for measures). In the filters' panel, you can launch an editor for each element independently.

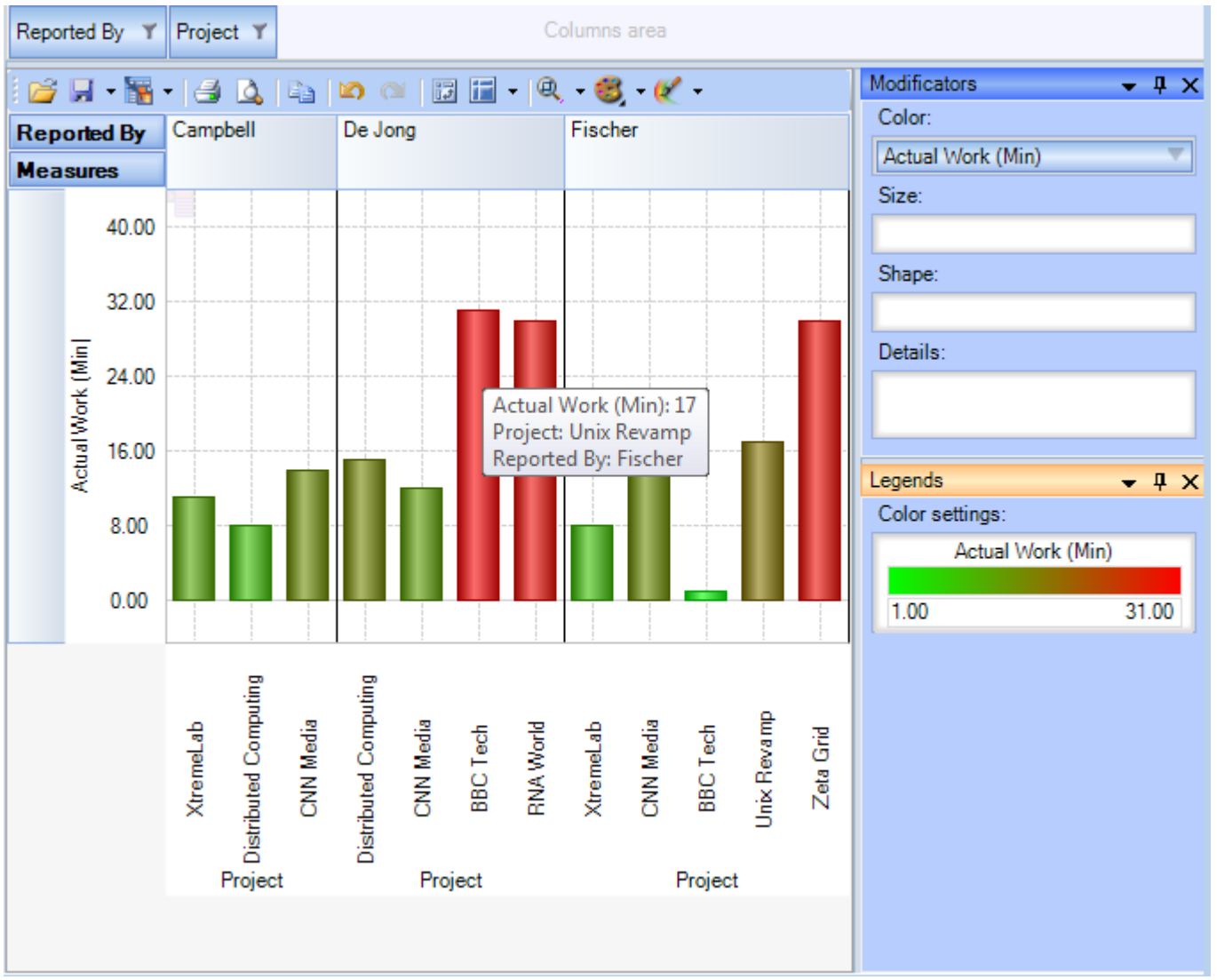
The buttons for launching the editor ( ) are placed on the panels in the Hierarchy levels' area. If the button looks like this ( ), it means the hierarchy had hidden members inside. Pressing the button starts the Hierarchy editor.



6. Setting the columns' width - You can change the width of columns in the data display area by dragging the right boundary with the mouse. If possible, these changes will be saved during other operations with the table (like drilling, sorting, etc.) To return to the original width, double click the right boundary of the column where it is visible. In case there were such changes in the table that saving the assigned width of the columns was impossible (for example, if as a result of the Collapse drilling, the column with the assigned width has disappeared), it will be set automatically. Unfortunately, if you operate a big table, calculating the columns' width takes up too much time. That is why if there are more than 10, 000 cells in your table, their width will be set to default, but it can be corrected later.

11.3 Working with OLAP Chart

While the Grid view allows working with numbers, chart view allows representing submitted project data graphically. This gives you a unique opportunity to analyze reported data visually, as dealing with charts rather than numbers, is much easier. Now it's easier than ever to spot new trends and discover unknown problems in your data flow. The statistical tool will help you gain an insight into your data and make new discoveries.



Tools panel

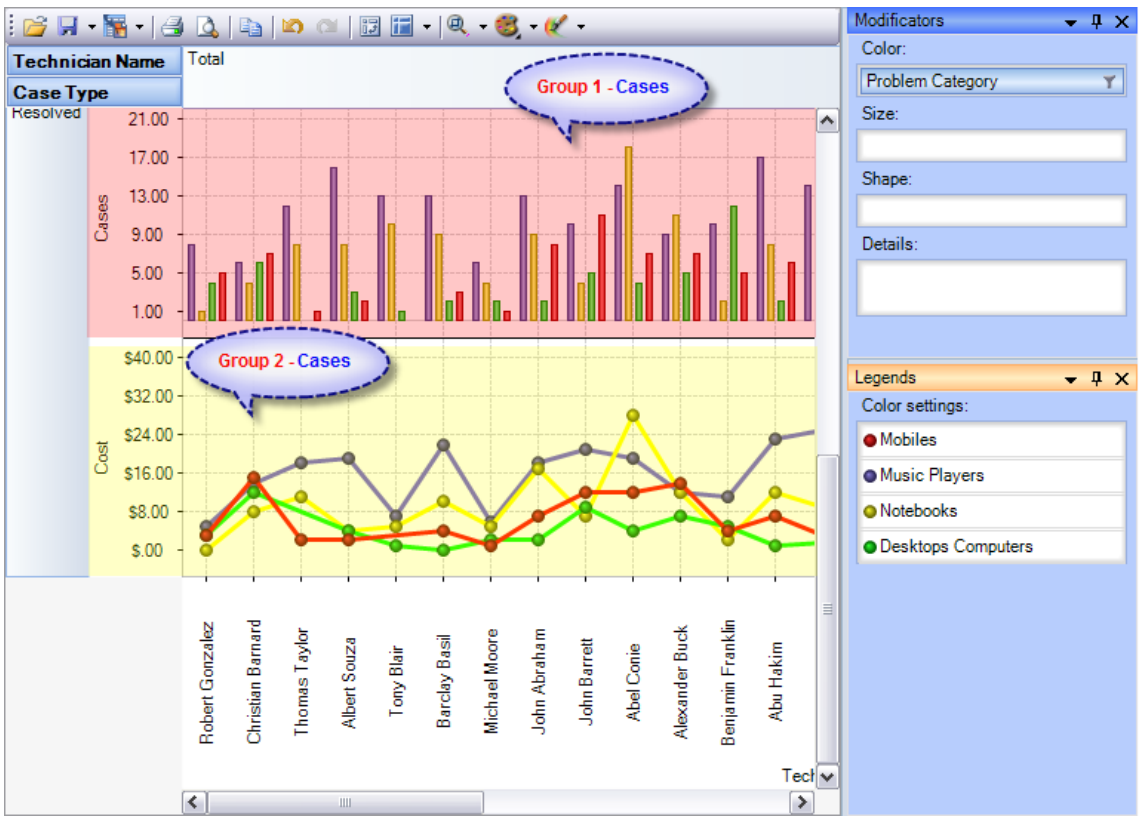
This panel houses all the frequently used operations on the OLAP chart - save, export, print and display options.

Button	*Function*
	Load the Grid state
	Save the Grid state
	Export OLAP-slice data
	Print OLAP-slice data
	Preview
	Undo
	Redo
	Switch axes
	Select the docking panels layout
	Set the scale of Chart display
	Select the color palette for measures

Modifier panel

Modificators are easy and powerful means of data representation. You can choose your data be shown in different colors, using different shapes and sizes, so that you can easy distinguish them in a single graph. You can simply place a dimension or a measure on a modificator's pane and get the graph showing different values in a different manner.

For example, you might place the "Problem Category" dimension on Color pane and get the Chart showing problem categories in different colors. Or you can place the "Cost" measure on Color pane to highlight the top rates of supporting the service requests. The same can be done for Shape and Size so that you can make your data perfectly distinguished.



The layout of panels and hierarchies on the Modifier panel allows you to change the appearance of the displayed slice. When an element is placed to the modifier panel (except for Details), its legend will contain the display parameters. If you modify the color and shape of an element, the appropriate parameters can be amended.

Modifier	The changes made upon placing a Chart element to the modifier area of...	
	a measure	***a hierarchy***
	The color of the Chart elements will be chosen from the standard set of gradient colors	Hierarchy members will be painted with the colors from the current palette
Color	The elements with the minimal value will be painted with the first of the gradient colors, and the elements with the maximal value - with the last one	N/A
Size	Depending on the value of the measure the size of the Chart points will vary from the minimal to the maximal.	Hierarchy members will differ in size
Shape	Forbidden	Hierarchy members will differ in shape. If the number of hierarchy members will exceed the number of available shapes, some of them will be used more than once

Details	Forbidden	The panels will display series for all hierarchy members

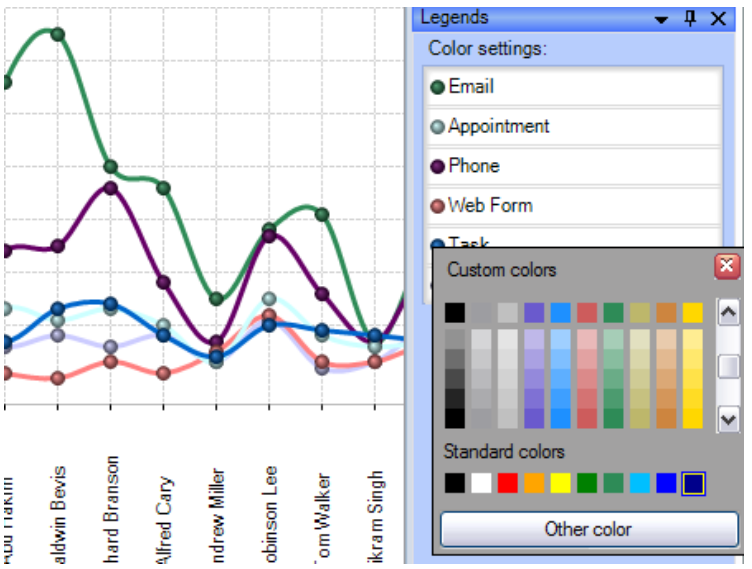
If a measure is placed on the Color pane, its values range is mapped to the given colors range so that it's tremendously easy to spot the top/low values. If you select the discrete gradient type, you'll be able to set threshold values for filling the Chart elements. While the continuous gradient will let you evaluate the trend as a whole. To select the gradient type and tune its content, turn to the legend panel.

The Legend panel

The panel contains descriptions of the modified elements. The value, shape and color of a legend element can be edited.

Setting the Color legend

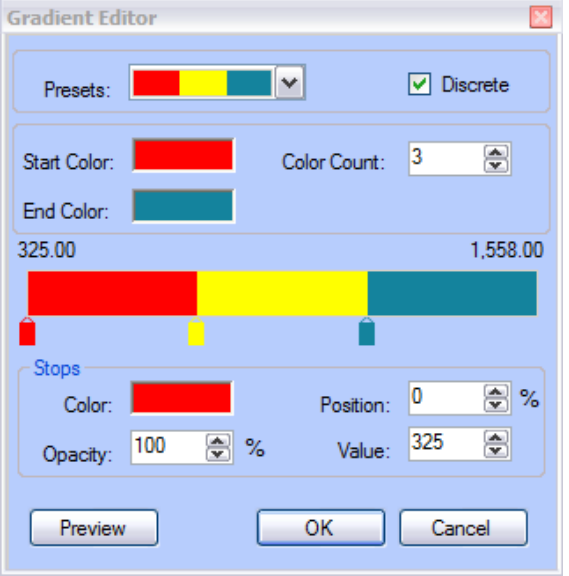
To select a color, simply double-click the appropriate element and choose a color from the pop-up editor.

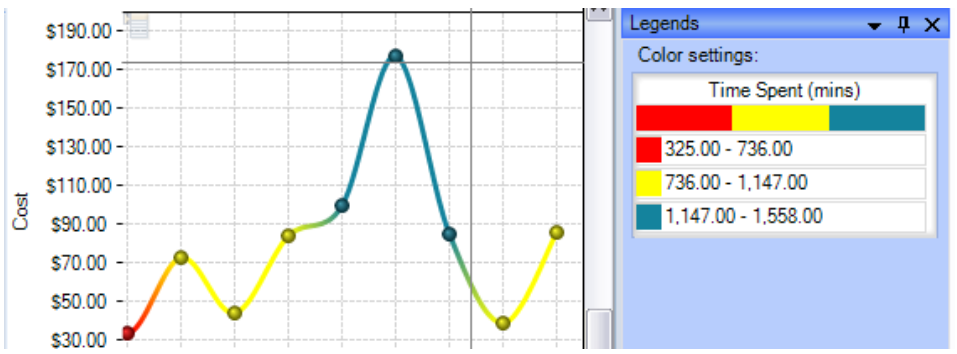


Setting the Gradient legend

To edit the gradient, double-click the element and tune the settings in the editor. In the Gradient Editor there are:

- a set of pre-made gradients;
- selecting gradient option (continuous or discrete);
- creating a gradient with a set number of intermediate colors option;
- setting threshold in per cent and measure values option;





Selecting threshold color option.

Setting the Shape legend

The shape selection is made through the context menu. This option is available only for points or lines Charts. If the number of hierarchy members exceeds the number of available shapes, they will be repeated.

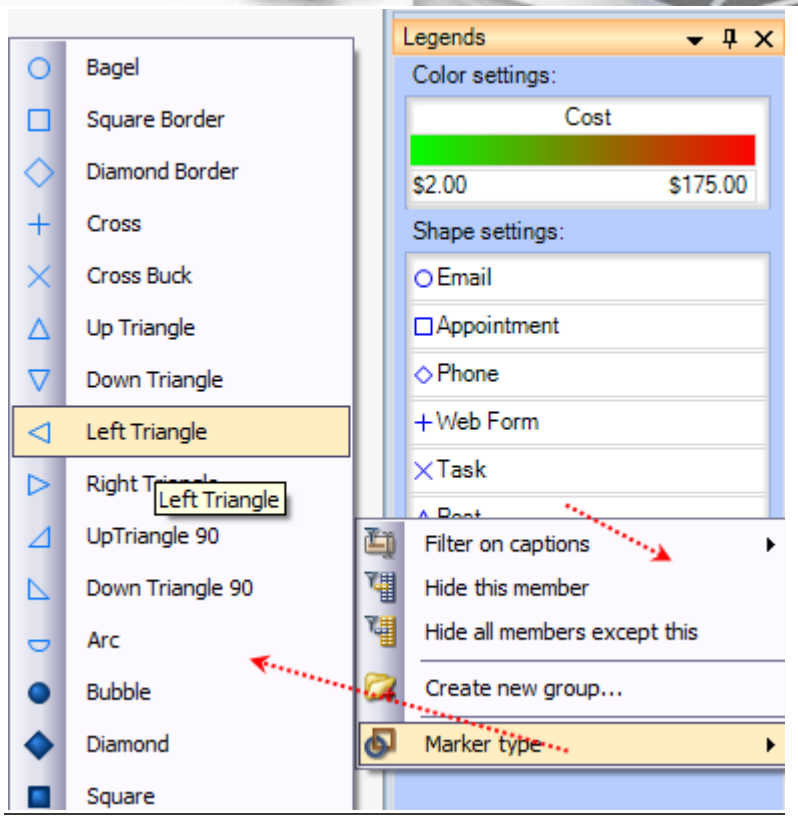
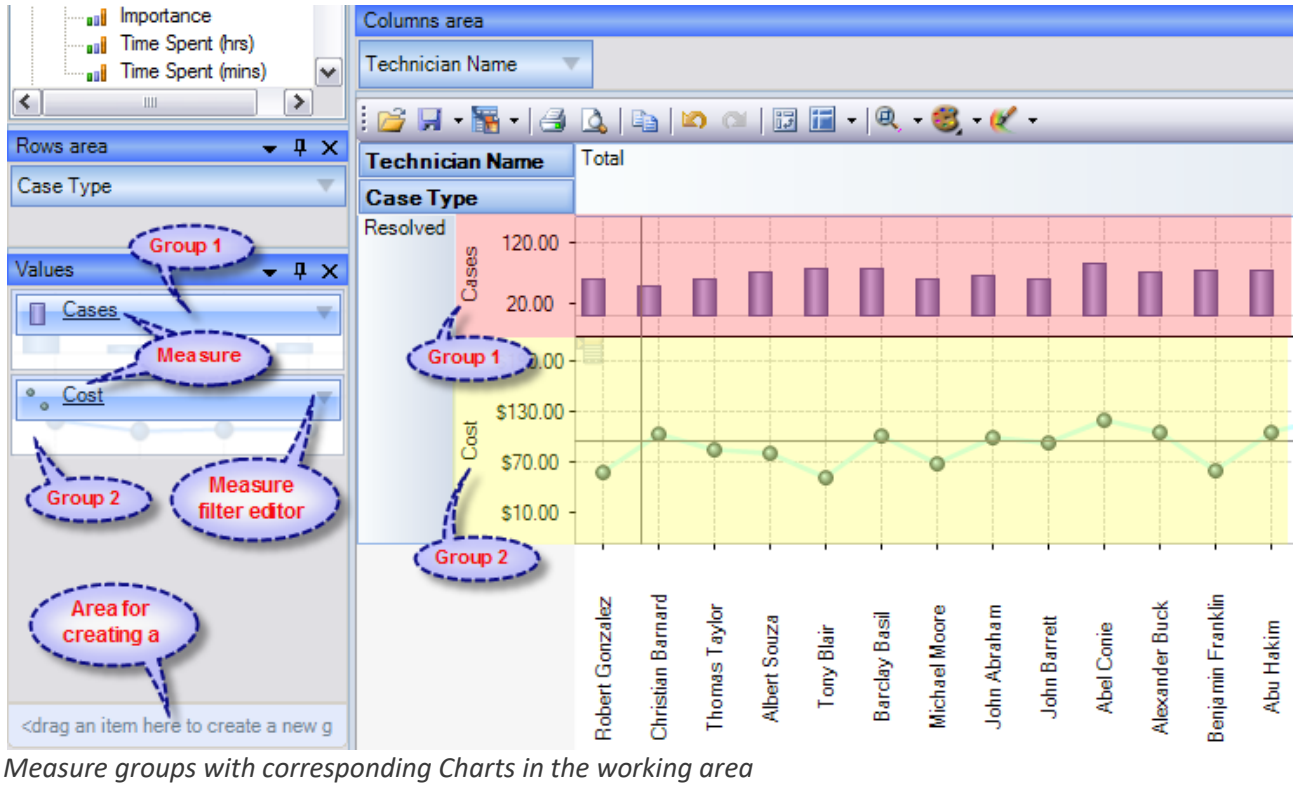


Chart Panes

The bulk of the OLAP-slice data are placed into cells with Charts. Each measure group has its own set of panes.



Measure groups with corresponding Charts in the working area

Chart Type

In the upper left part of each Chart, there will appear a context menu for selecting its type. There are six (6) charts that you can use, namely, *Point Chart, Histogram, Point Shape Selection, Lines, Curved lines and Step lines.* By default, the Histogram is used.

The size of Charts can be changed to some extent. To expand a Chart along either one of the axes, you need to capture its boundary with the mouse and drag it. You can change the size along both axes (and return to default) through the tool menu in the upper part of the working area.

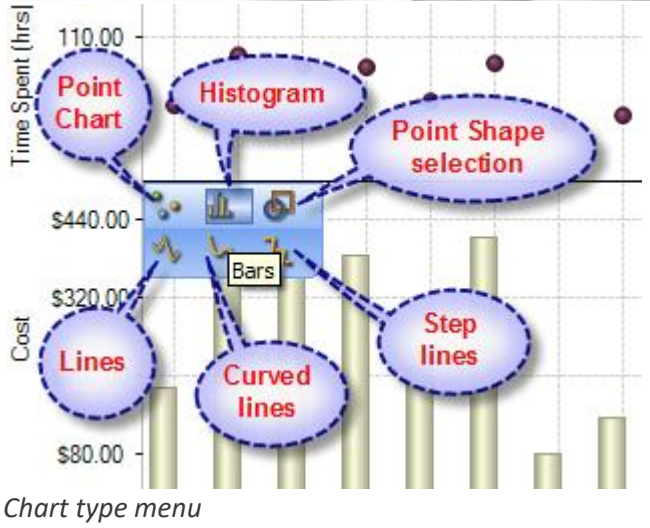


Chart type menu

Hot keys for changing the scale	
Ctrl+*	Reset Scale to 1:1
Ctrl+Num+	Zoom In
Ctrl+Num-	Zoom Out

Navigation

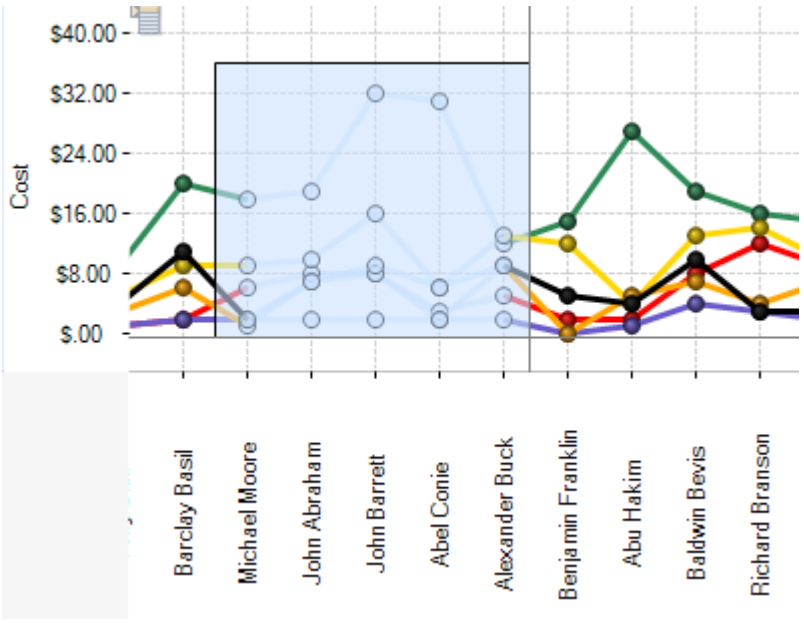
If the content of the Grid exceeds the client area, the scroll bars will appear. You can scroll down the data using the mouse wheel. To scroll the Grid in the vertical direction, turn the mouse wheel, while holding Shift.

Selecting Data

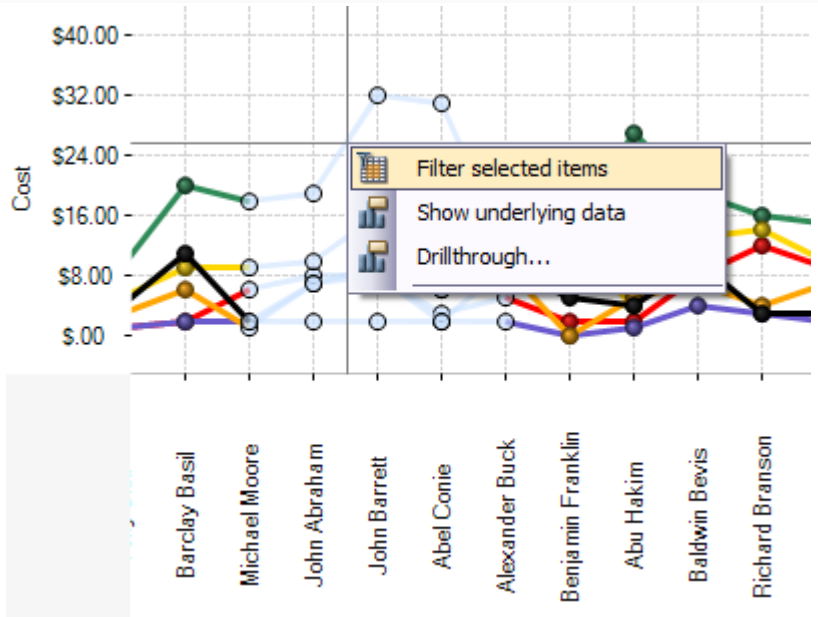
You can select Chart points with the standard Windows' method. Holding down the Ctrl button, you can add selected points, holding down the Shift button, you can select the horizontal range. You can filter the Grid's points while selecting. In that case, the corresponding hierarchy members will be filtered automatically.

Selecting and filtering parts of Charts

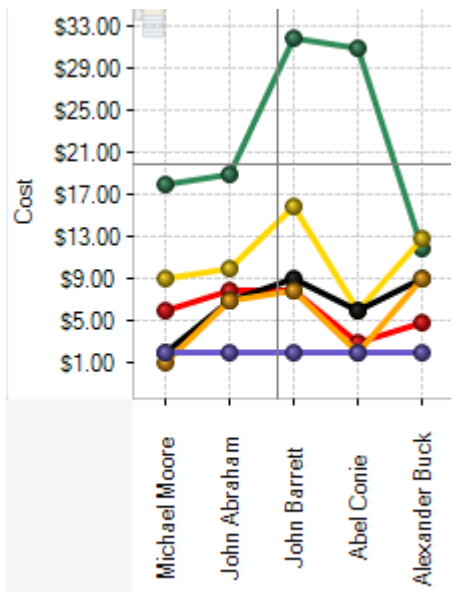
a. Selecting some of the Chart points



b. Selecting the Filter command



c. The result



Note: When moving the mouse cursor over a data axis, you are able to select a continuous range of members (if the axis is composed of them) or a range of values in Charts.

Filtering hierarchies

In case you need to collect data not from the whole Grid, but just from a part of it, the component has a few functions at your disposal: they let you select or remove elements from the slice. Also, there is a standard option of exporting data into a number of formats and printing out the content of OLAP-slices. The simplest way of selecting data is through the context menu. When you click a hierarchy member on the Cube axis, there is a set of commands for quick operations with members:

- Hide this member
- Hide all members except this
- Hide all members above this
- Hide all members below this

Filter on hierarchy level

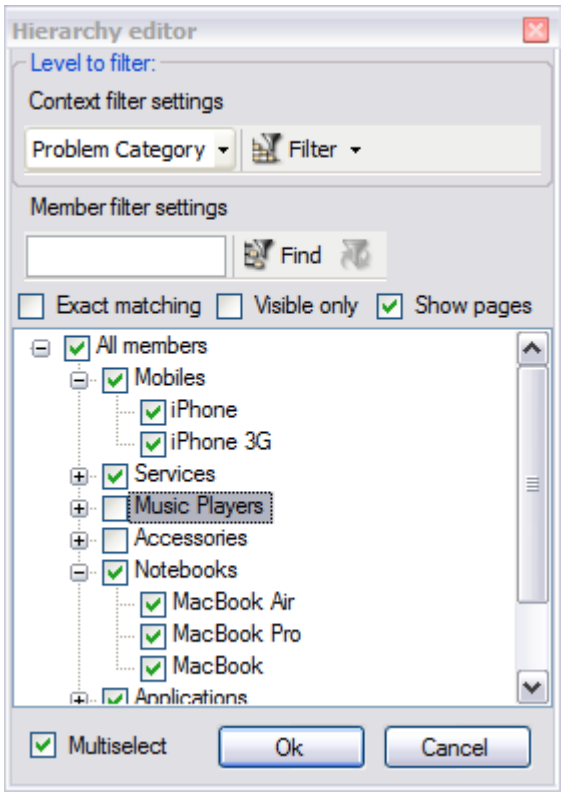
The Filter area of the Editor becomes visible only in case if filtering by hierarchy levels is available. To apply a filter to hierarchy members, you need to select a hierarchy level (if there's more than one) and assign the Filter condition in the Filter menu. In the same menu, there's a command to clear filter.

Filtering hierarchy members

If the search field is not empty, the "Find" command will make the component perform a search for hierarchy members, whose levels contain the specified string. You can narrow the search results by checking the "Exact matching" box.

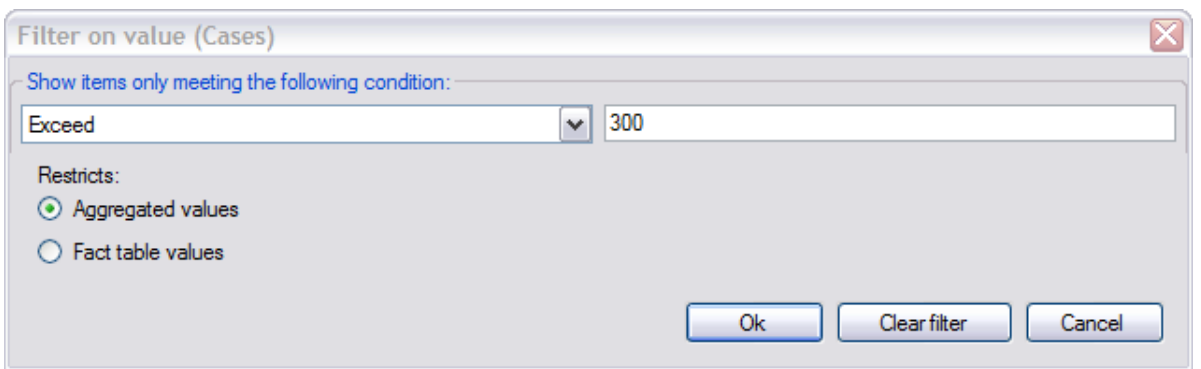
Filtering a single member of a hierarchy

By default, the Editor is able to select any number of hierarchy members. To switch to the single-select mode, uncheck the "Multiselect" box. In that case, only one the hierarchy member with all its parents and members will be selected.



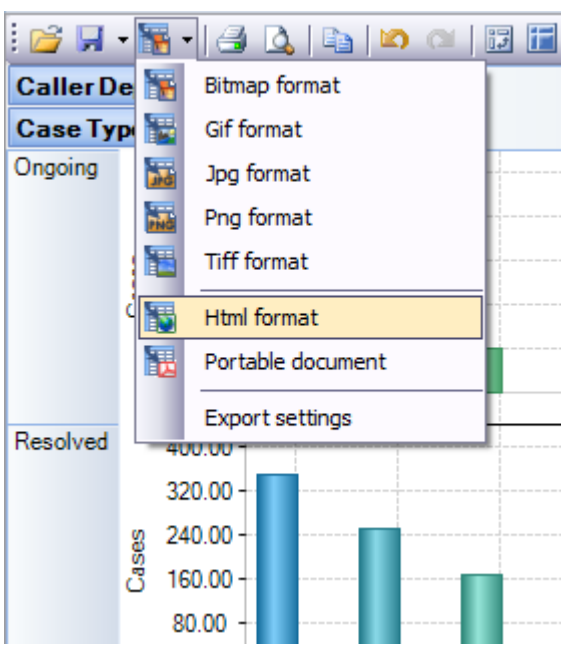
Filtering measures

There is a number of available parameters for filtering measures. In the same Editor, you can clear the filter.

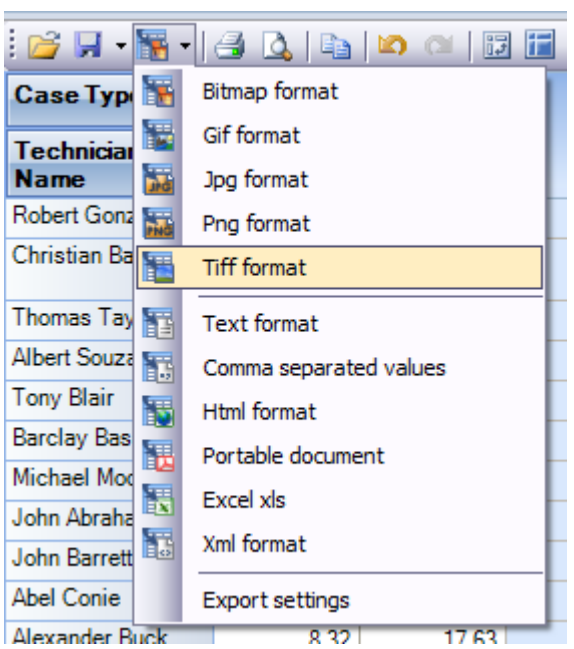


11.4 Printing, exporting statistical data and charts

Now that you have successfully designed a report, you might want to save it for future reference or share it with others. Reuse your work! You can now save data snapshots to HTML, BMP, CSV, GIF, HTML, JPEG, PDF, PNG, TIFF, TXT, XLS and XML as a simple way of reusing your data for documents and spreadsheets. Depending on the active view (Grid or Chat), the saved file would either take the grid data or the chart.



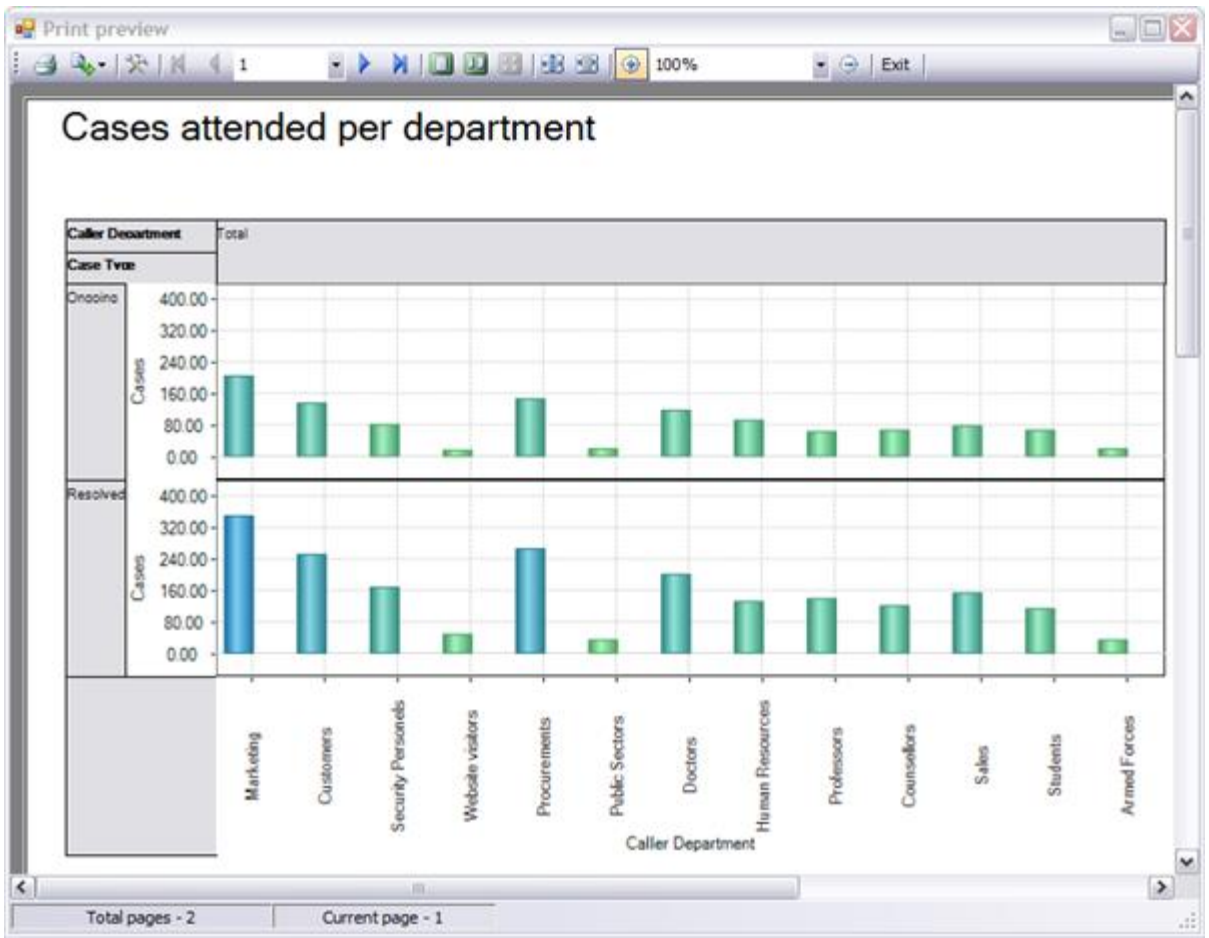
Available export formats in Chart View



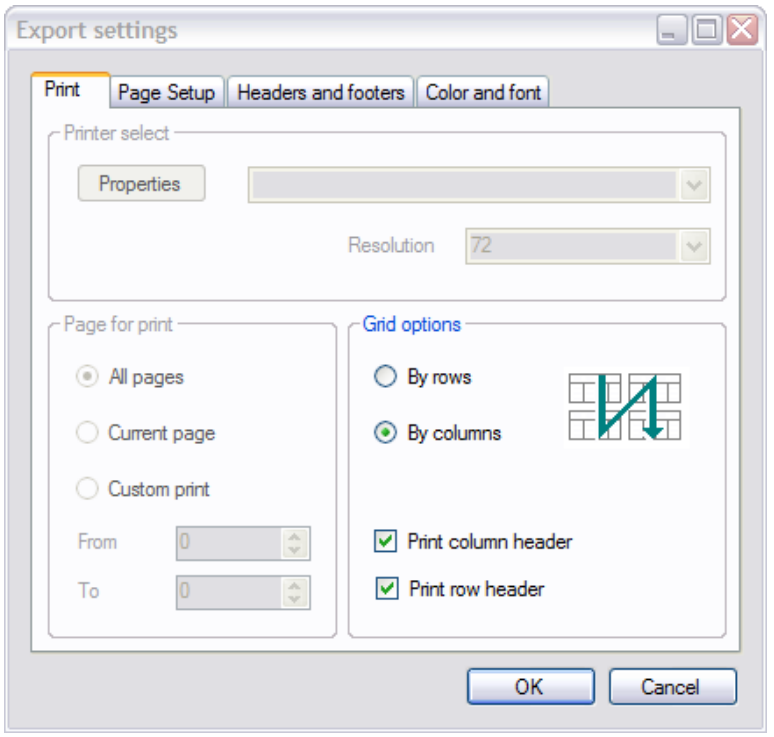
Available export formats in Grid View

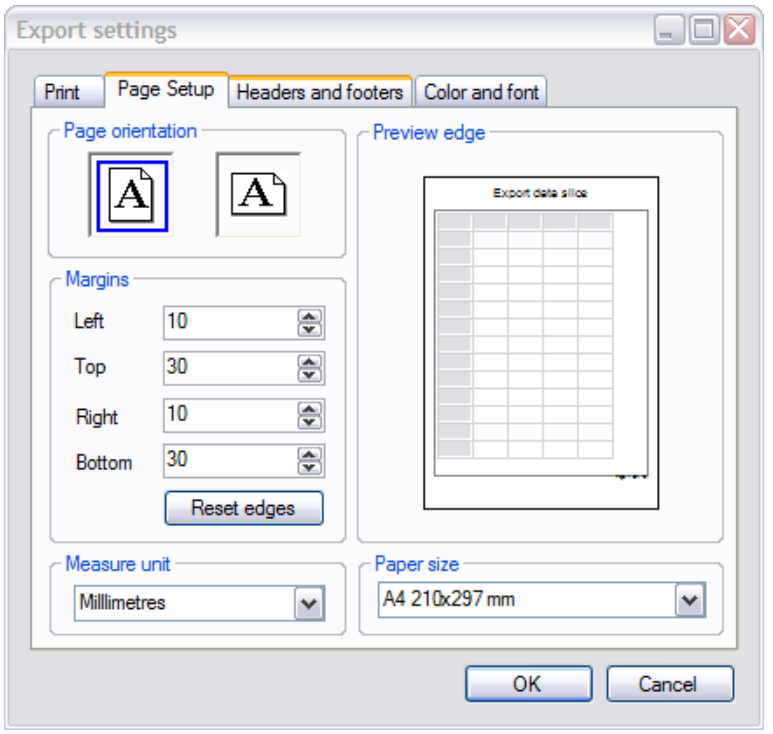
Printing

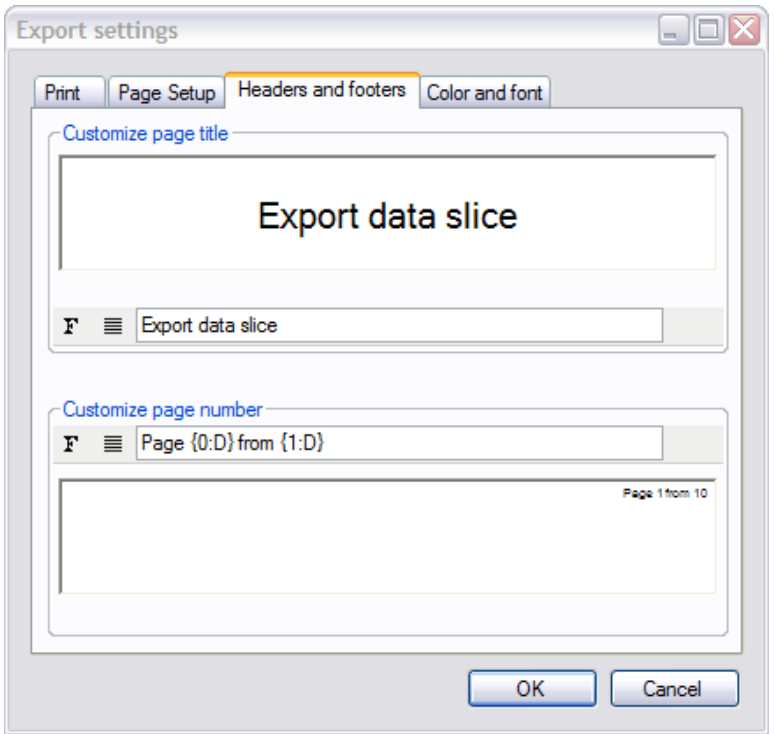
You can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including PDF, XLS, CSV, JPG, etc.

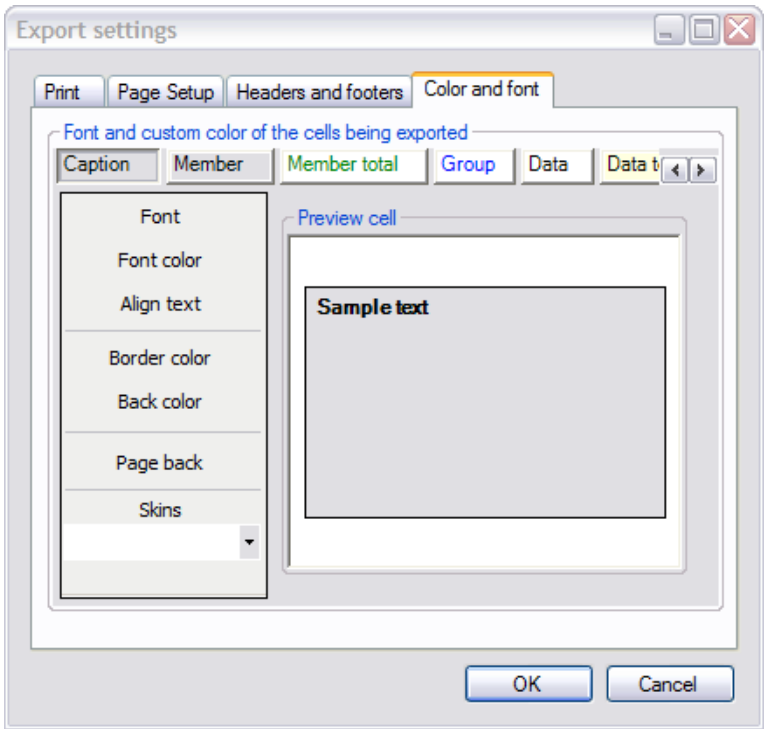


Export Settings -This tool allows you to customize the appearance of the reports to be printed or saved to a file format. You can specify the page size, orientation, headers & footers and color of the fonts and page background.





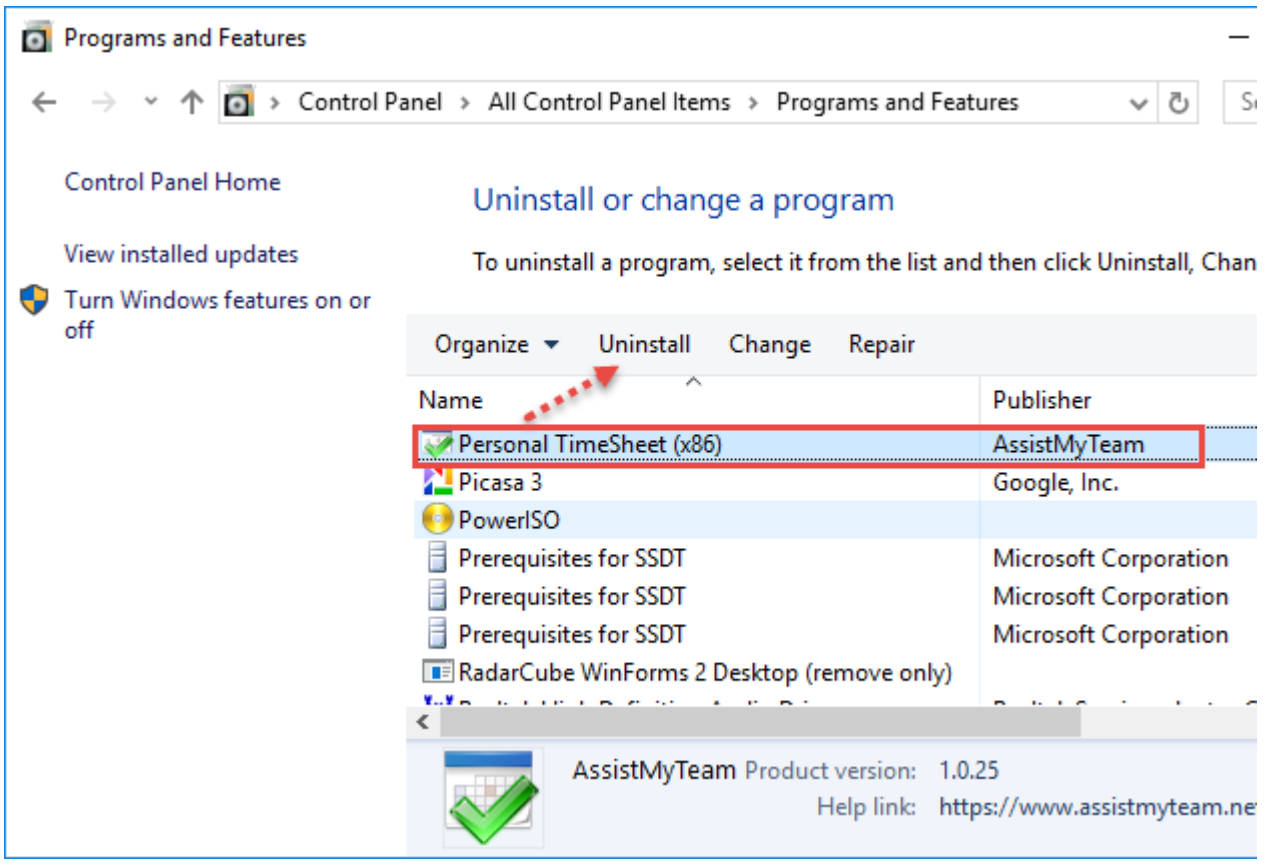




12. Uninstalling Personal TimeSheet add-in

To uninstall the Personal TimeSheet add-in from your computer, follow the steps outlined below:

Step 1: Go to '**Control Panel > Programs and Features**'. Scroll down to select 'Personal TimeSheet SP (x86) or (x64)' and click 'Uninstall' as illustrated below:



Step 2: If a dialog confirmation follows asking for confirmation, click **Yes**.

Step 3: The Personal TimeSheet setup will now start the un-installation process. Make sure that Microsoft Outlook is not running (even under the task manager).

13. Important links

Personal TimeShet for Outlook – Homepage
Go to the official website of Personal TimeSheet for Outlook.

Video Tutorial clips
Watch video tutorials that teach you how to install, configure and work with Personal TimeSheet.

Purchase a License
Purchase a personal license for Personal TimeSheet for Outlook.

Knowledgebase articles
Looking for an in-depth understanding of this application? Browse through a series of knowledge base articles on Personal TimeSheet online.

Support Maintenance contract
At AssistMyTeam, we're committed to give you the best support for all the products that we offer and more! The AssistMyteam Support Contract helps you use our products more efficiently and work out any issues that you encounter during the course of their use.

Submit an online support ticket
Use this web form to create a ticket with AssistMyTeam Technical Support.