

# Personal TimeSheet for Outlook and SharePoint

## Installation and Configuration

Personal TimeSheet consists of a simple client install and you are required to setup and configure projects and activities, and maintain drop down lists, templates, reporting settings etc. And only then you would be able to prepare timesheets in Outlook and publish to SharePoint.

The downloaded zip file contains 2 files:

*PersonalTimeSheetSPSetup\_xXX.exe* {where 'xXX' can be either x86 (32-bit Outlook) or x64 (64-bit Outlook)}  
*Trial Key.txt*

Extract these file contents to a file folder.

### Requirements:

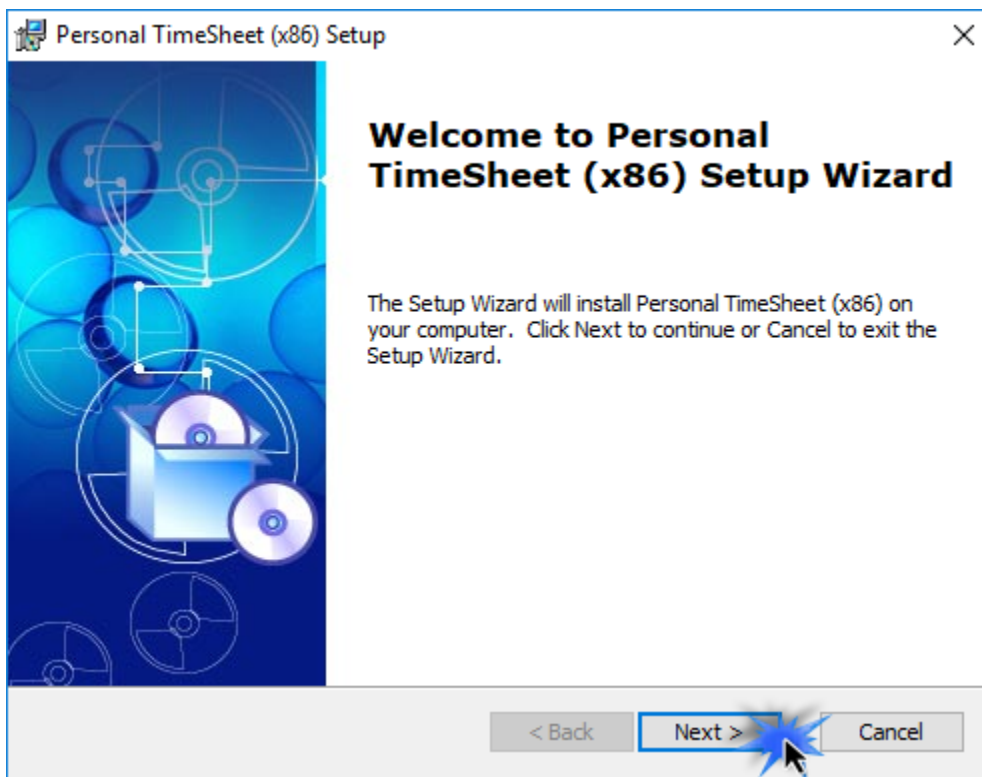
- .NET framework 4.5 or above
- Outlook 2007, 2010, 2013, 2016 and 2019 (both 32-bit and 64-bit).
- Requires SharePoint 2010 or Higher. Cloud based SharePoint such as Office 365 are also supported.

There are 2 sections in installation:

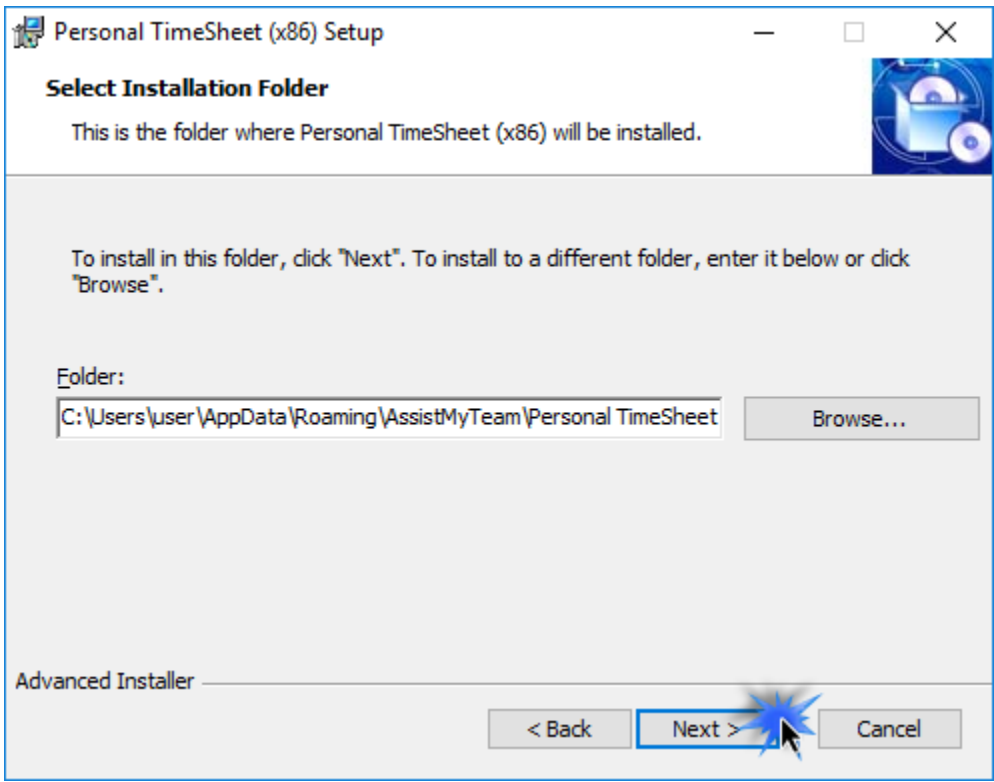
a) **Files Installation**, and b) **SharePoint Configuration**

### a) Files Installation

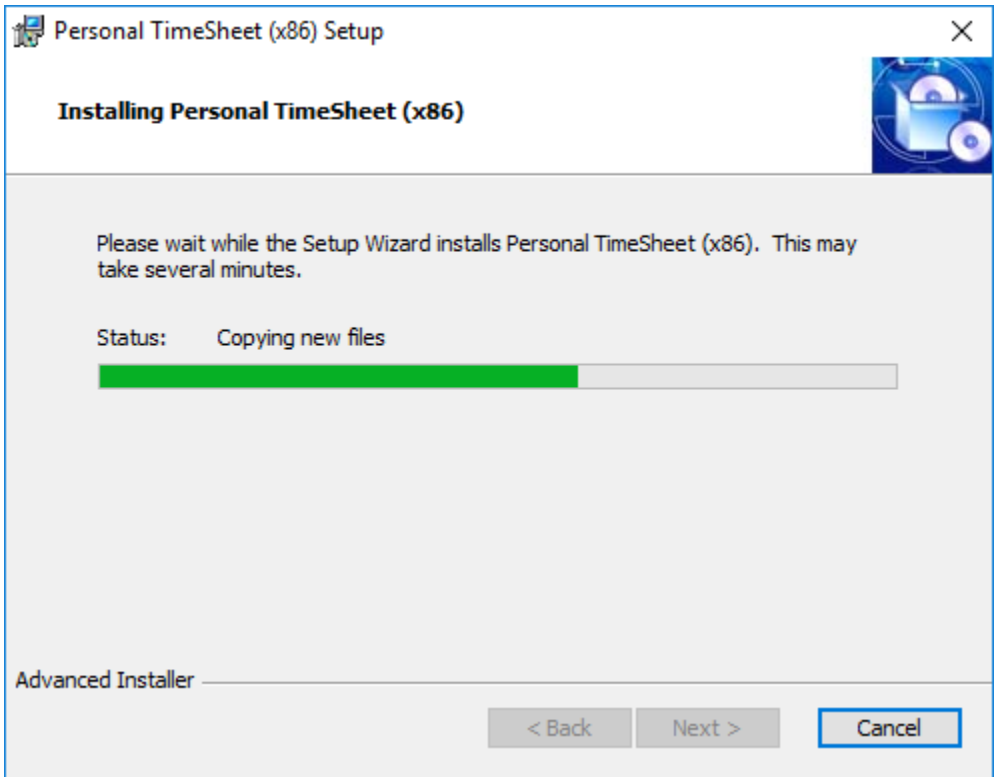
**Step 1.** Run the *PersonalTimeSheetSPSetup\_xXX.exe* to start the installation. Click 'Next' to Continue. If Outlook 2007 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.



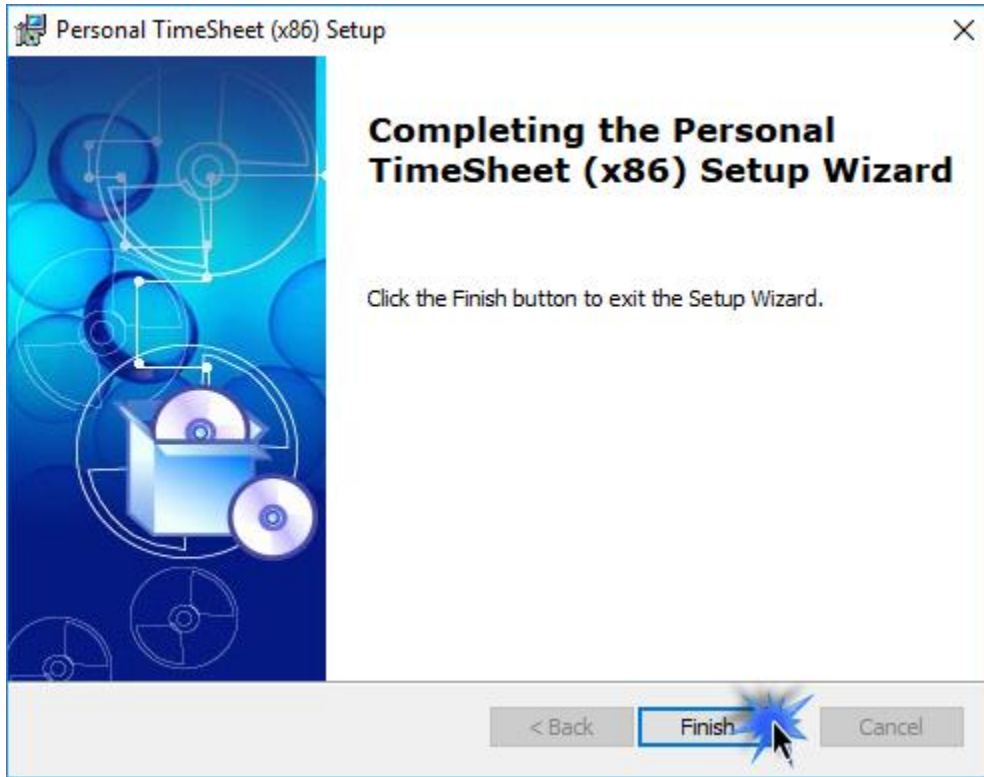
**Step 2.** Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.



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



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



Now start Microsoft Outlook.

## b) SharePoint Configuration

The next step is to choose a SharePoint list that will be used for storing all timesheets published from Outlook.

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.

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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

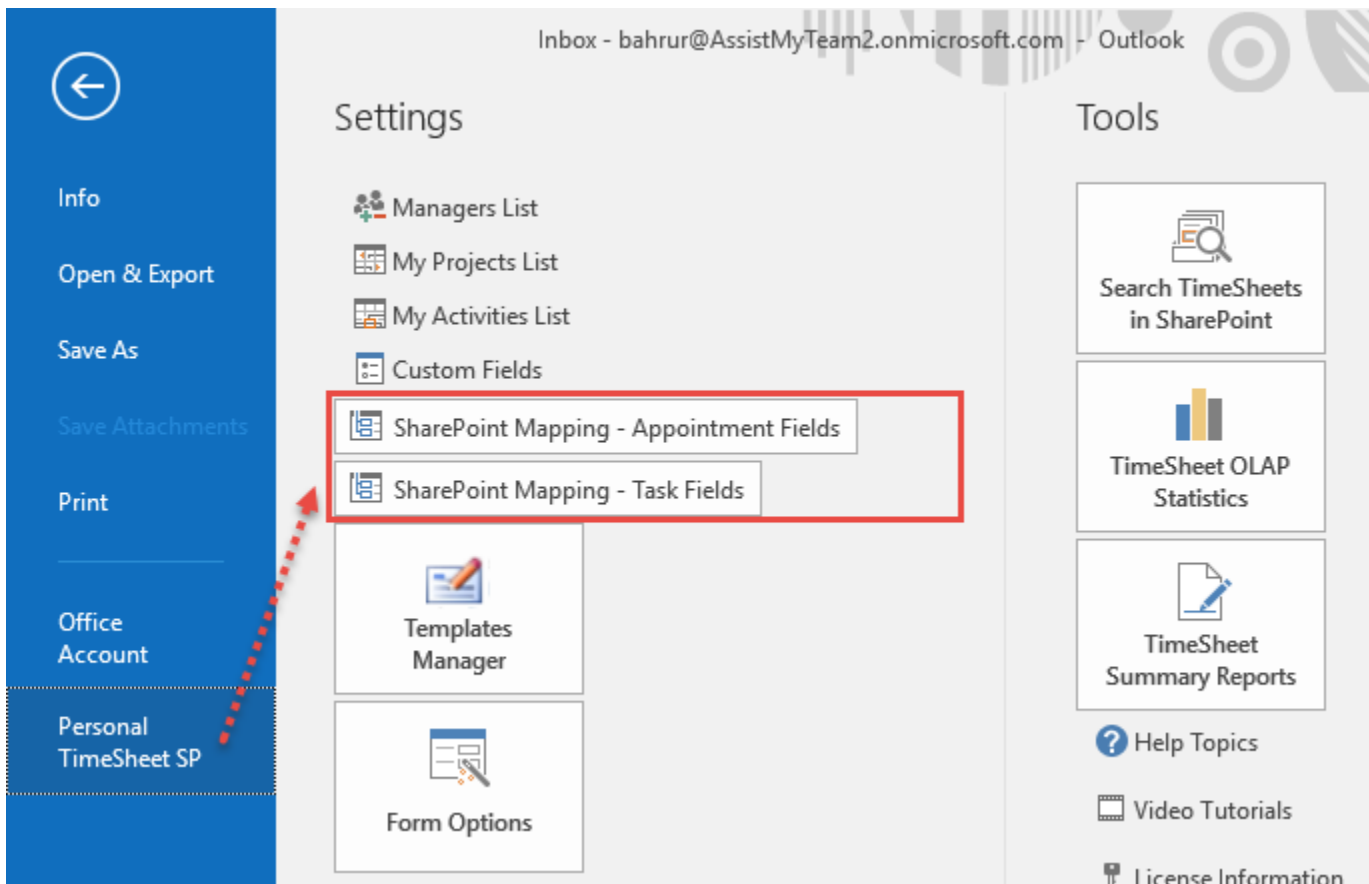
*All Day Event, Billing Information, Busy Status, Categories, Companies, Duration, End Date, Importance, Is Recurring, Location, Meeting Status, Optional Attendees, Organizer, Recurrence State, Required Attendees, Start Date, Subject, Body*

### 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).*



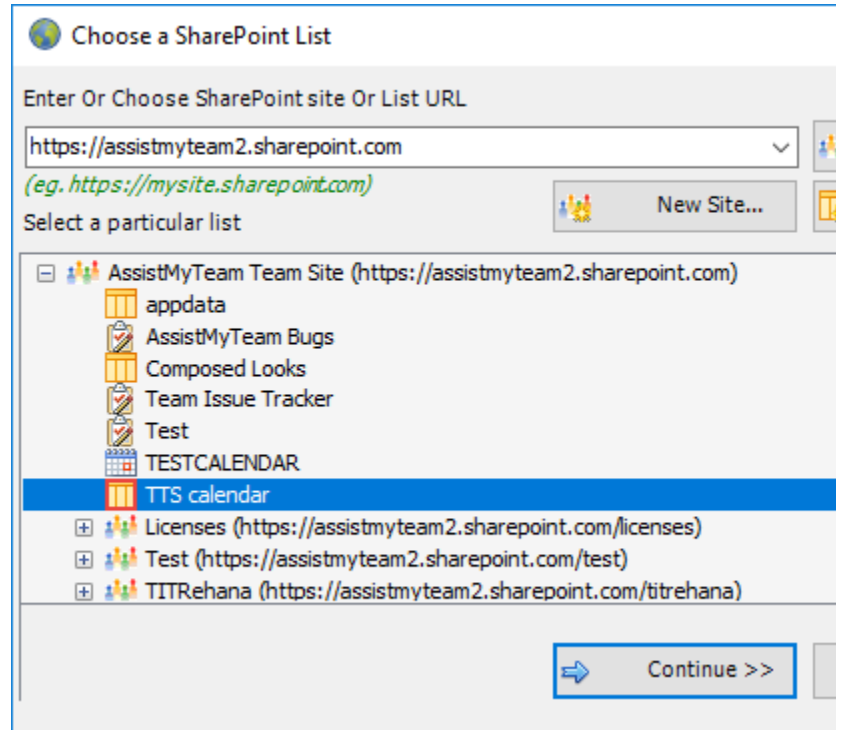
To start mapping the fields, go to **Outlook > File > Personal TimeSheet SP > SharePoint Mappings - Appointments Fields / Tasks Fields**.

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

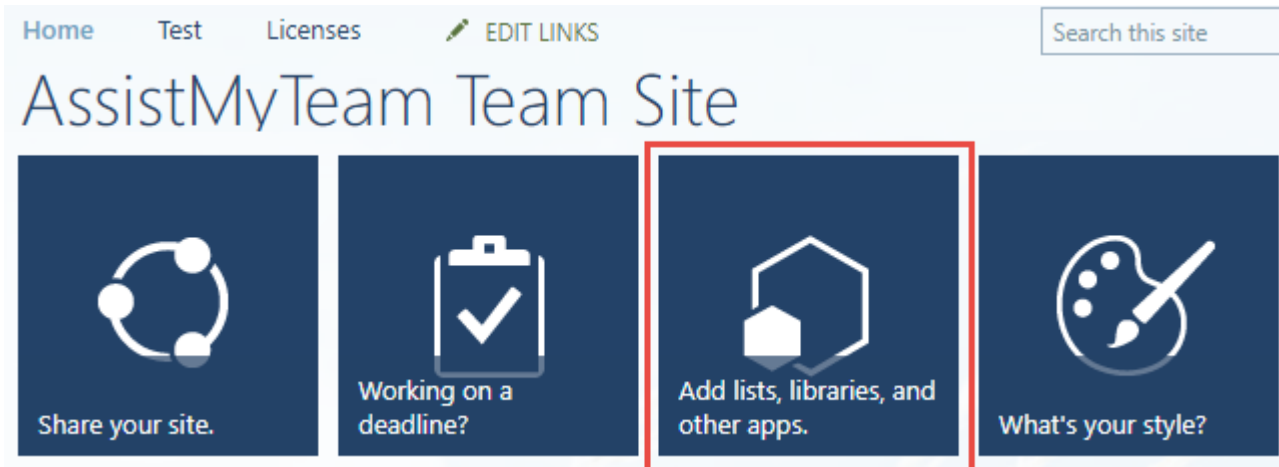
You can choose any existing SharePoint list, Calendar or task lists or a bare bone custom list in which case, you would need to add the required columns.

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.

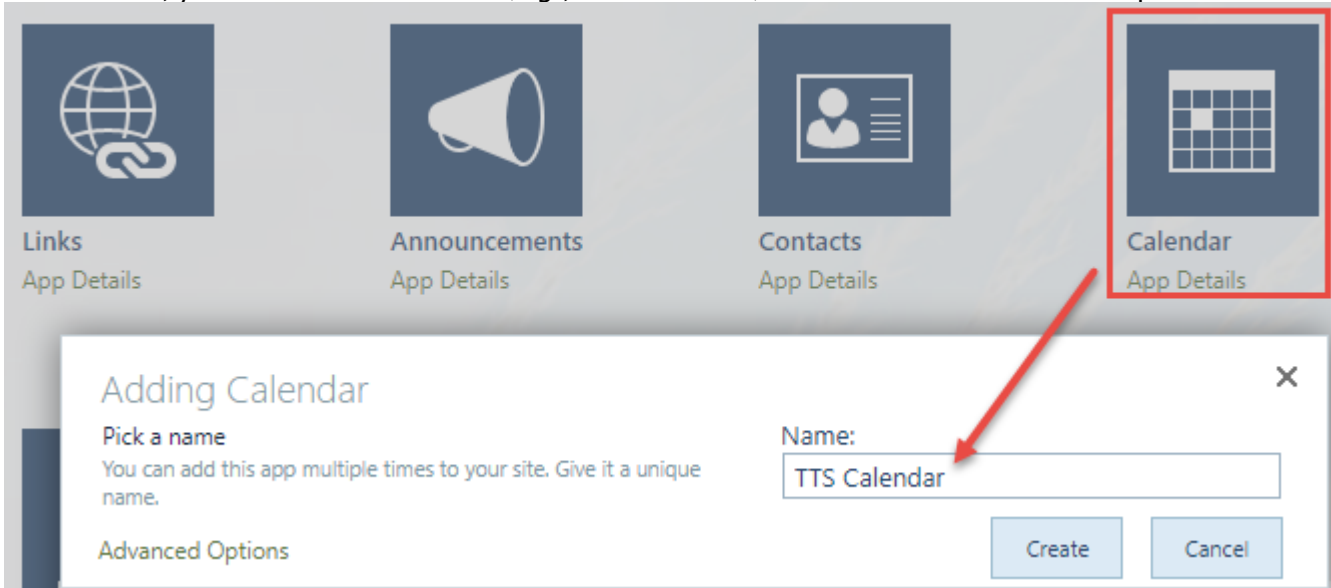
Alternatively, you can choose to create new one for this purpose.



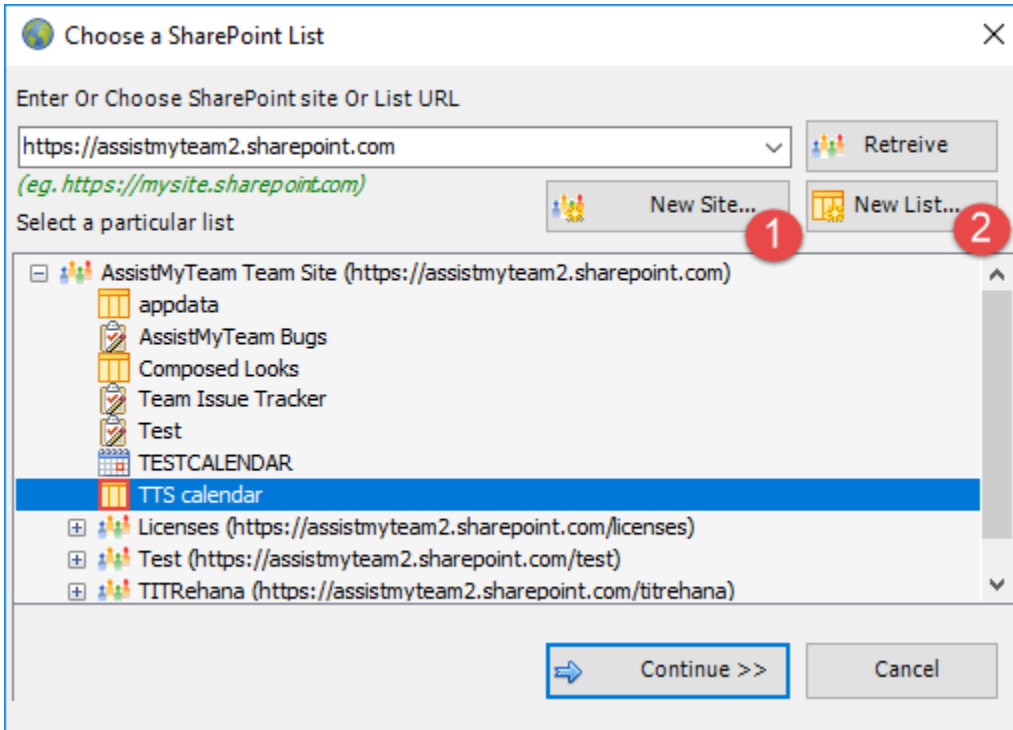
To create a new list, go to your SharePoint site and click 'Add Lists, Libraries or other Apps'.



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



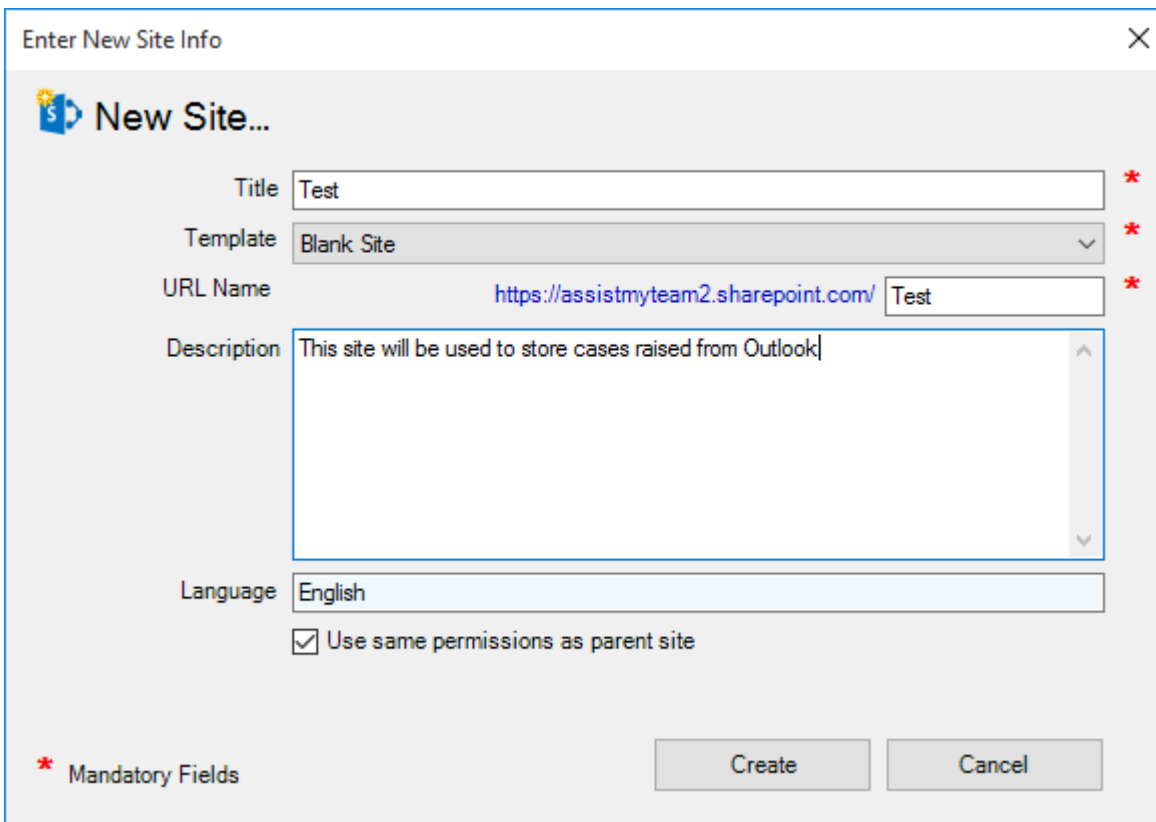
And then choose this newly created SharePoint list (e.g. *TTS Calendar*) or any other existing lists from the mapping tool and click 'Confirm'.



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.

**Enter Info For New List**

**New List...**

To be created under:  
<https://assistmyteam2.sharepoint.com/>

List Name: TTS Calendar \*

Template: Calendar \*

Description: This list stores all the timesheets published by users from Outlook

\* Mandatory Fields

Buttons: Create, Cancel

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.

**Maps fields between Outlook Appointments and SharePoint List**

SharePoint list to which Outlook appointments will be reported to:  
[https://assistmyteam2.sharepoint.com/Lists/TTS calendar](https://assistmyteam2.sharepoint.com/Lists/TTS%20calendar)

Buttons: Specify URL..., Clear

Legend: Required Fields (pink), Optional Fields (yellow), Custom Fields (green)

**Map fields for Outlook to SharePoint Reporting**

	Appointment Field	Data Type	SharePoint Field
19	Body	Note	Description
20	Subject	Text	Title
21	Project	Text	Project Name
22	Activity	Text	Activity Name
23	BillableHours	Numeric	BillableHours
24	Total Cost	Currency	Total Cost
25	Approved	Yes/No	Approved
26	Audited By	Text	ApprovedBy
27	ProjectManager	Text	ProjectManager
28	ActivityCoordinator	Text	ActivityCoordinator
29	Rate	Currency	Rate
30	CF_Branch Code	Text	BranchCode
31	CF_Branch Description	Note	BranchDescription
32	CF_Branch Name	Text	BranchName

Buttons: Auto Create & Map Fields..., Save Mapping, Cancel

Legend on right:  
 1 For mandatory unmapped fields only  
 2 For all unmapped fields  
 3 For the following fields...

Now configure fields mapping between Outlook and SharePoint

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.

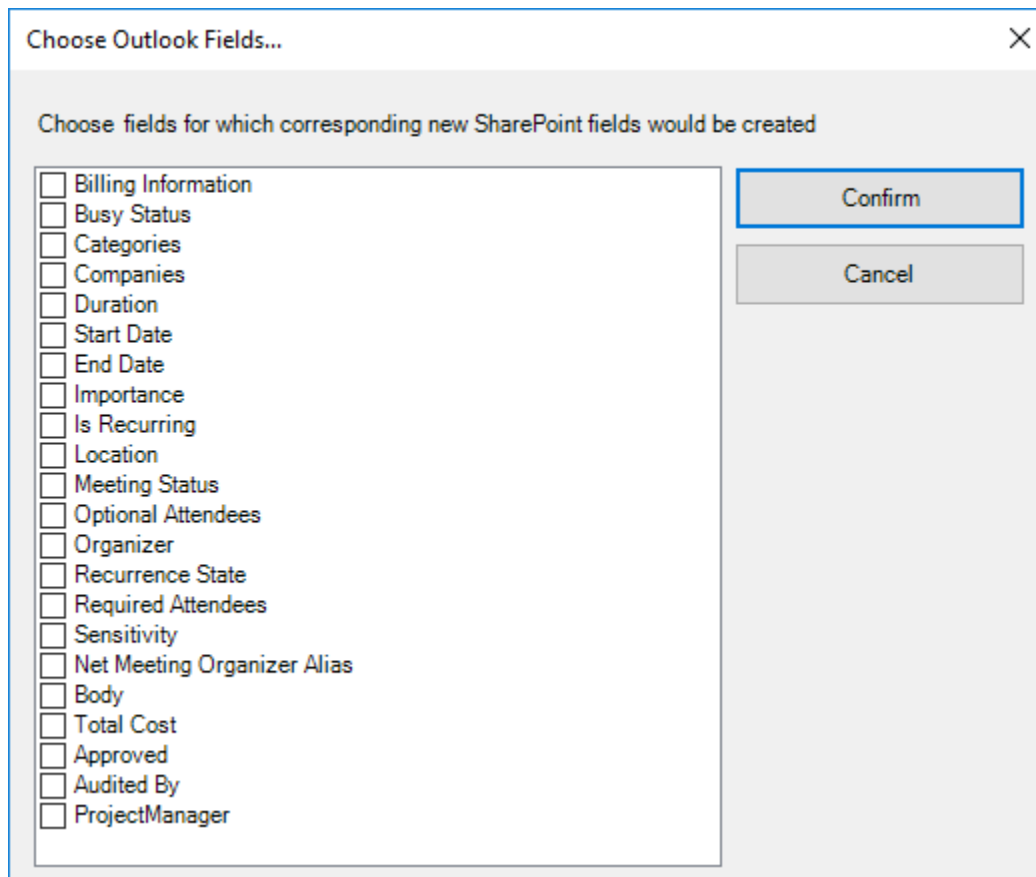
**1 For mandatory unmapped fields** - Click this option under the 'Auto Create & Map fields' menu to create the mandatory timesheet fields in the chosen SharePoint list on the fly and automatically complete the mapping. Mandatory fields are marked/colored in light red.

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.

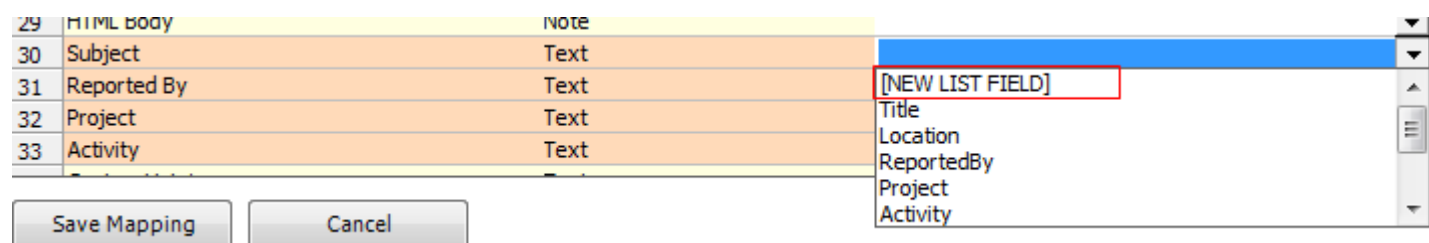
**3 For the following fields** - Click this option under the 'Auto-Create & Map fields' menu to choose specific timesheet fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.



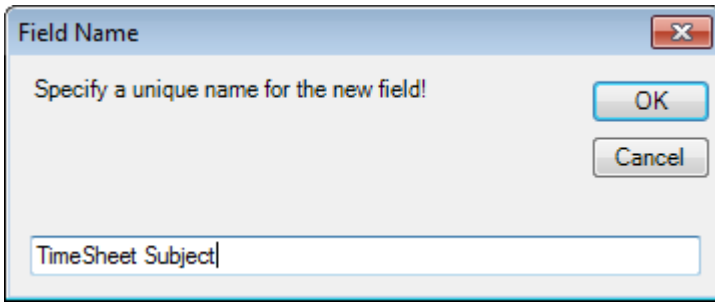
Optionally, to have finer control, you can also manually create new fields in the chosen destination SharePoint list and map with the helpdesk outlook fields.

**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.

29	HTML body	NOTE	
30	Subject	Text	TimeSheet Subject
31	Reported By	Text	ReportedBy
32	Project	Text	Project
33	Activity	Text	Activity

**NOTE:** There are other administrative configurations that you would need to undertake. These options are available in the 'Personal TimeSheet SP' menu in Outlook.

For more references and helps on performing these administrative configurations, refer to the PDF Help Manual, which can be invoke from the **Personal TimeSheet SP > Help Topics**.

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

--- End of Install Guide