Team TimeSheet for Outlook & SharePoint

Help Manual for Client Users

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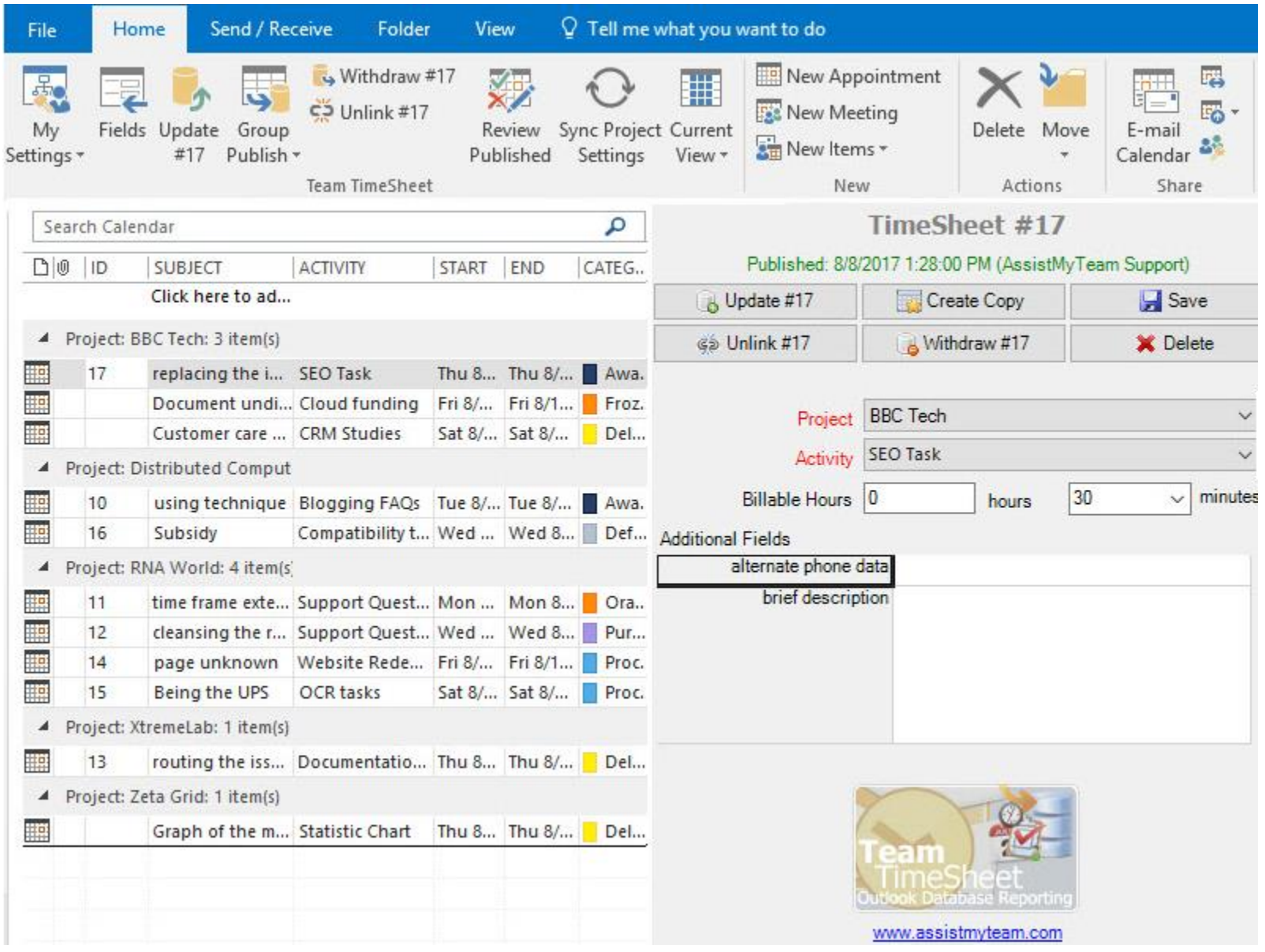
AssistMyTeam

1. Introduction

Team TimeSheet for Outlook & SharePoint is a **reporting solution** for a team of any size to work, plan and execute project related activities and timesheets in Microsoft Outlook and publish to company's SharePoint. 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.



The client portion of Team TimeSheet provides an add-in interface in Microsoft Outlook to allow individual team members to prepare their timesheets in Outlook appointment or task items, and then publish to SharePoint repository. Published timesheet includes most of the important predefined Outlook, Project and other custom fields (as deployed by your administrator.

2. Requirements

Team TimeSheet is available right inside your Outlook unlike any other standalone application and web based project and time reporting software. It can be easily deployed through an installer (manually or via a group policy object with MSI) across the entire organization. Please make sure that your system meets the following requirements before installing *Team TimeSheet for Outlook & SharePoint*:

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. Team TimeSheet operates directly inside the Microsoft Outlook application (using Microsoft's "COM add-in" technology). Outlook Express is not supported.

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3. Installation

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

The Team TimeSheet Client setup is of two different types - one each for 32-bit Outlook and 64-bit Outlook:

For **'Per User Installation'** (ideal for standalone single user/workstation)
TeamTimeSheetClientSPSetup_x86.exe (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019*)
TeamTimeSheetClientSPSetup_x64.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

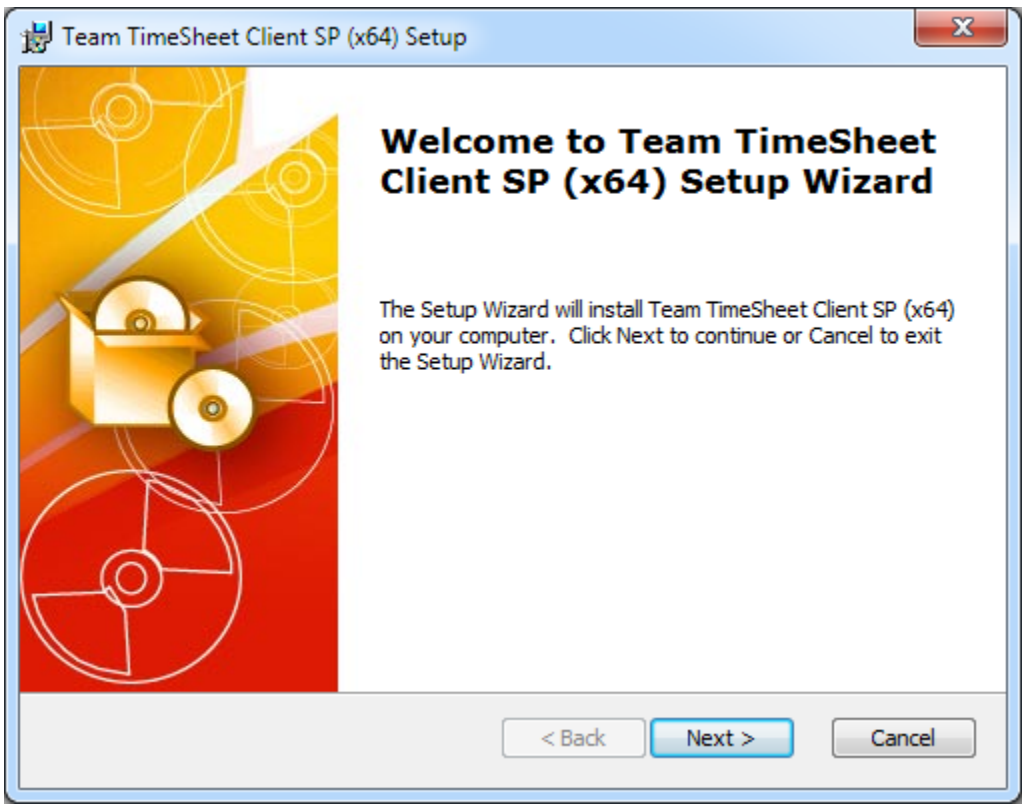
For **'Per Machine Installation'** (ideal for installing on Citrix and Terminal Servers)
TeamTimeSheetClientSPSetup_x86_Citrix.exe (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019*)
TeamTimeSheetClientSPSetup_x64_Citrix.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

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

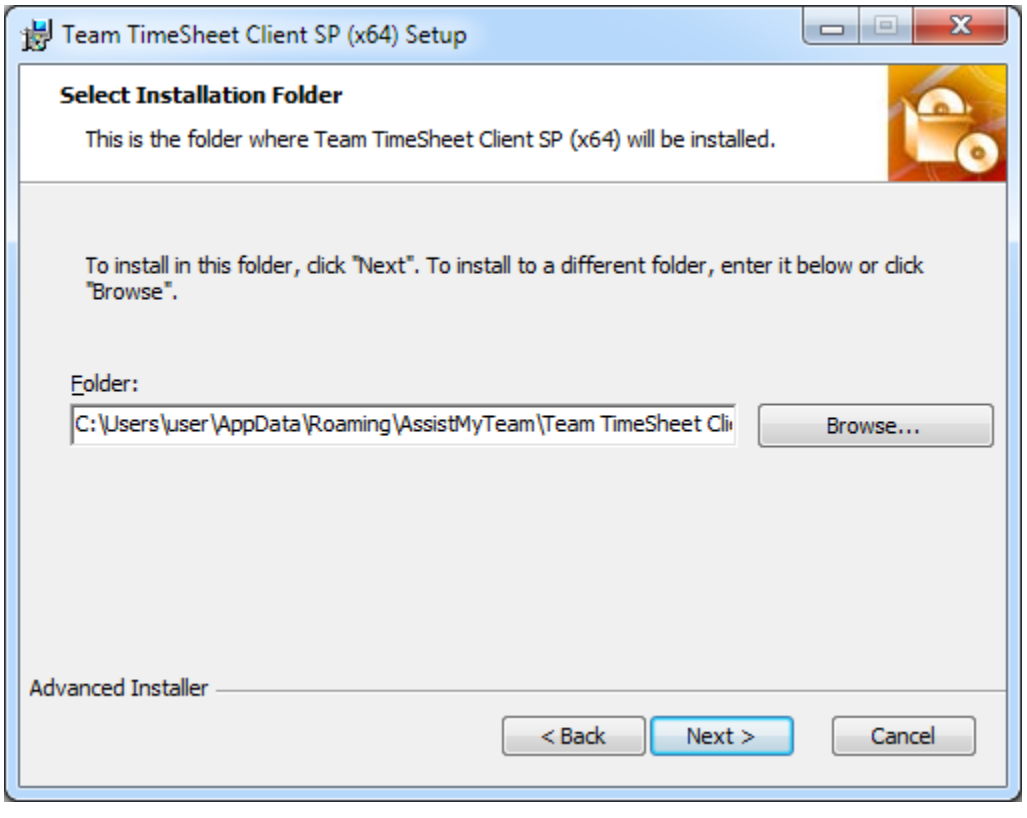
(**Note**: I*f the administrator/manager needs to prepare timesheets and publish to SharePoint from Outlook, the Client tool also needs to be installed, apart from the admin portion. It is perfectly normal to have both Admin and Client add-ins installed on the same machine. However, for normal users, just the Client add-in is enough*).

Step by Step Install Guide

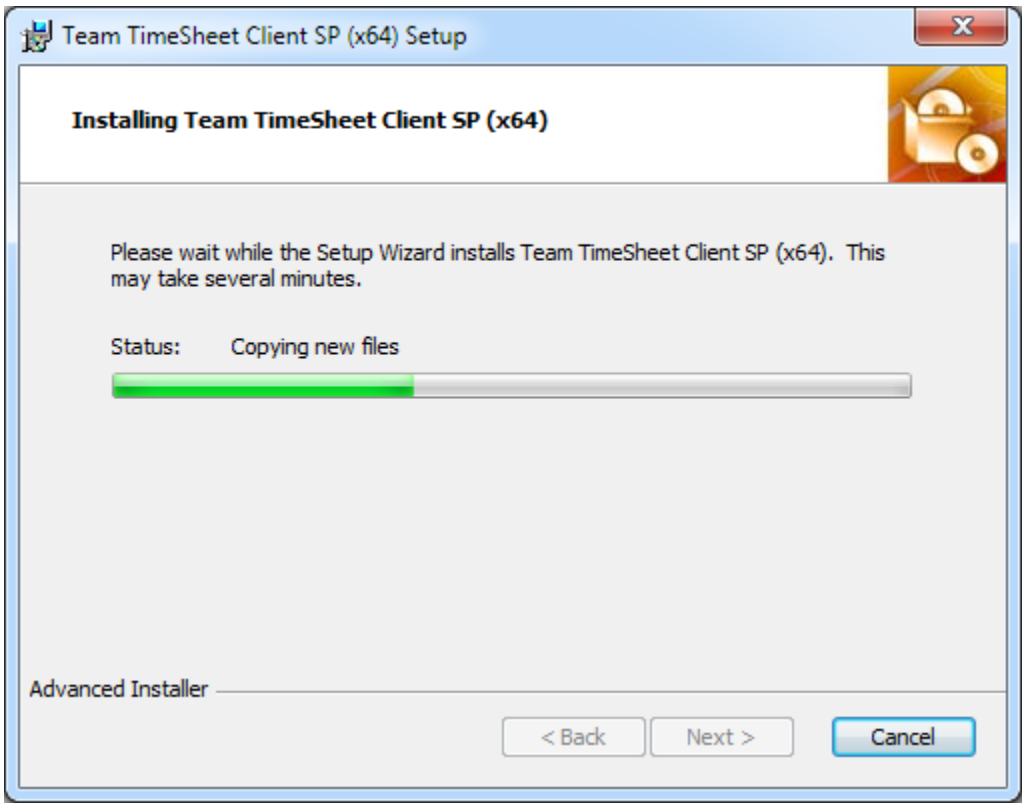
Step 1. Run **TeamTimeSheetClientSPSetup_xXX.exe** to start the installation. Click **'Next'** to Continue. If Outlook 2007 or later is not installed, the setup wizard will not be able to proceed.



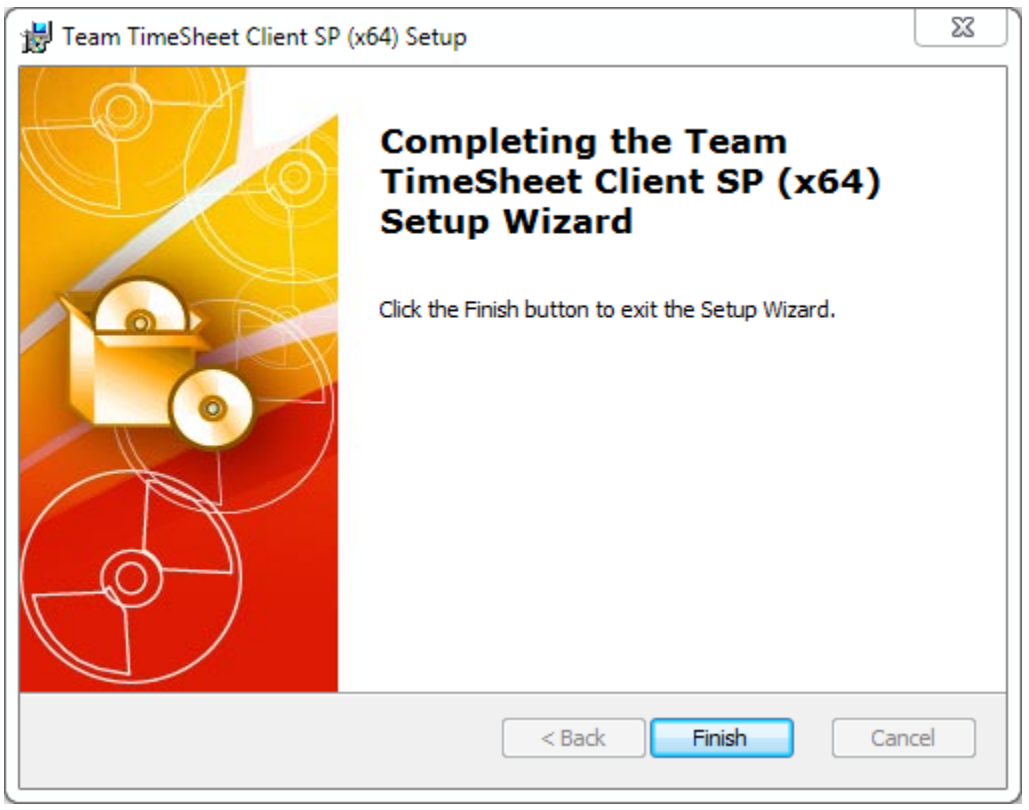
Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your application data folder)



Step 3. It may take a few minutes to complete the whole copying and registration process.



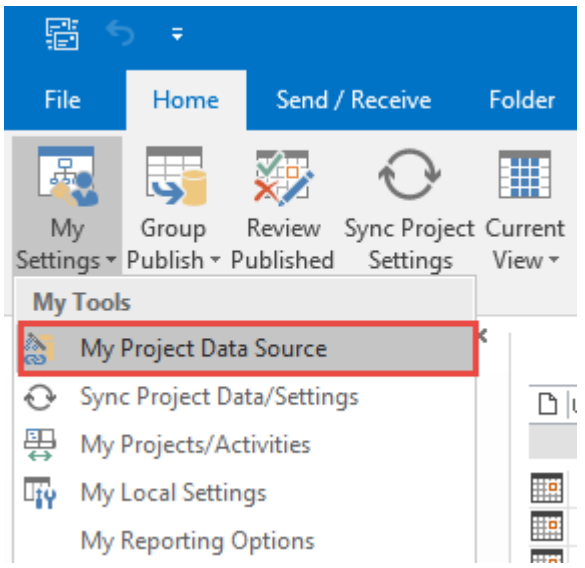
Step 4. Click **'Finish'** to end the installation wizard. Now start Microsoft Outlook.



4. Setting connection to the Project Data Source (SharePoint)

Once you have just installed the Team TimeSheet client add-in tool, you will get to see this '**My Project Data Source**' panel when you start Outlook.

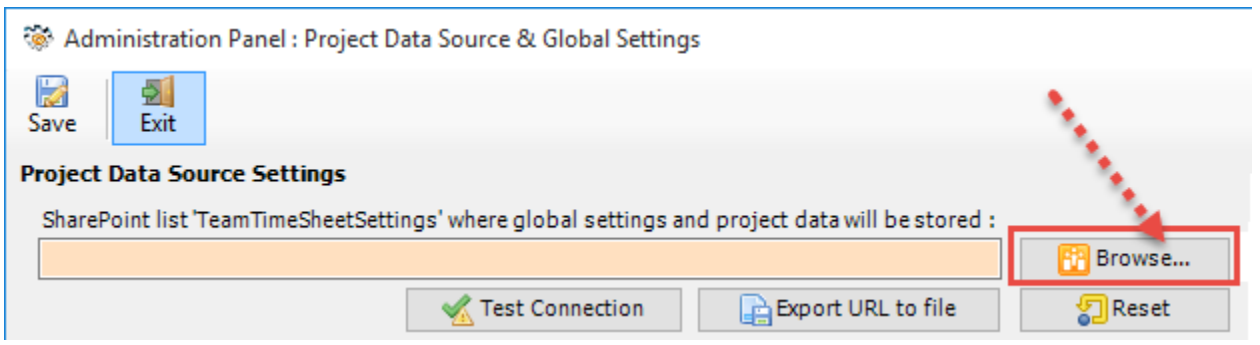
You can also get to this from **Outlook > Any Calendar folder > Team TimeSheet toolbar > My Settings > My Project Data Source** button.



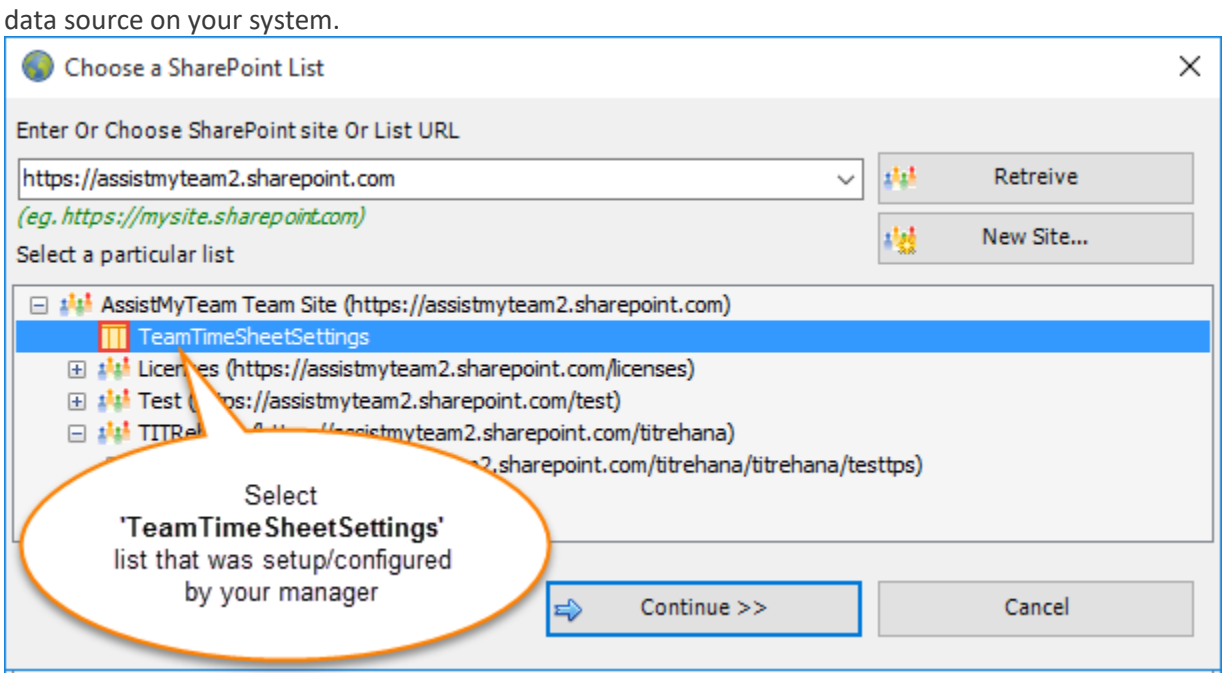
So, what is the Project Data Source?

The project data source is nothing but a simple SharePoint list (with the name '**TeamTimeSheetSettings'**) that your administrator had created and configured under your company's SharePoint site with the Team TimeSheet Manager tool. This list stores the projects and activities, email templates, notification and reporting settings. In short, these are global settings that streamline the behavior on how all members work, track and publish their timesheets in Outlook.

Click **'Browse...'** to specify the SharePoint site where the ***'TeamTimeSheetSettings'*** list is located.

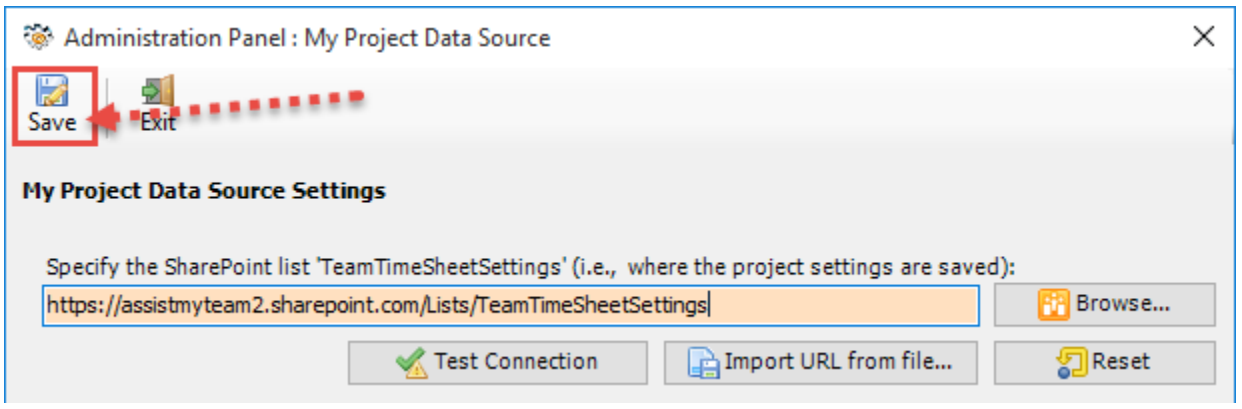


Enter the SharePoint URL site to show all available sub-sites and lists. If your administrator had already configured the Project Data Source with the Team TimeSheet Manager tool earlier, there would be a list ***'TeamTimeSheetSettings'*** that stores the project metadata and other configurations including destination timesheet SharePoint lists and their corresponding mapping settings. Select that list to maintain a permanent link between the Team TimeSheet Client add-in and the SharePoint Project data source on your system.



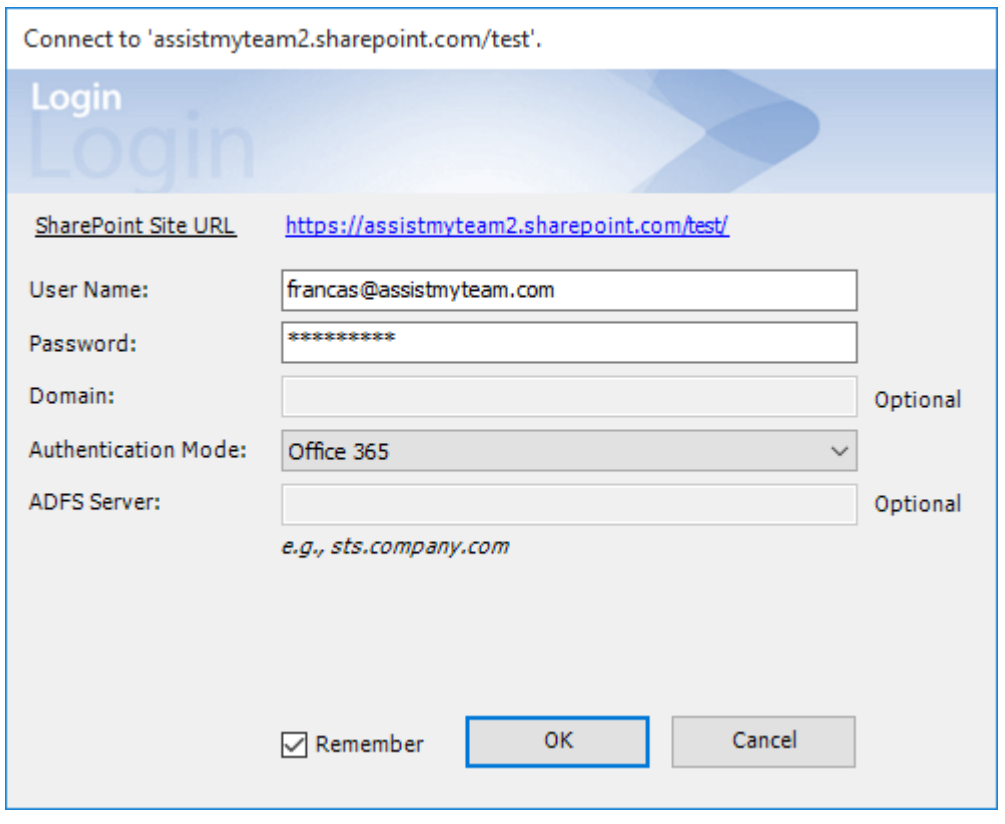
In the screenshot above, the root 'Team Site' has the '***TeamTimeSheetSettings'*** list, and that is what you need to select to

continue. If this list is not available in the root or sub-sites, then contact your administrator for the correct SharePoint site URL.



Now, click the Save button, to confirm the connection. Team TimeSheet Client add-in is now ready to connect to the Project Data Source to synchronize projects and other settings metadata from SharePoint to your system

Login prompt dialog to SharePoint site - If the chosen SharePoint site uses the NTLM or windows authentication, the add-in will use the default credential to connect to the SharePoint. However, for form based or claimed based authentication (for example, Office 365 SharePoint online), it may prompt you to enter your credential.



Check **'Remember'** so that the add-in can use the same credential to logon to the SharePoint site in subsequent connection.

You can also specify the authentication mode that is used by your SharePoint to allow connection to it. For instance, if your SharePoint is configured for Windows authentication, choose **'NTLM'**. If your SharePoint site is secured with ADFS, you can also specify the STS site URL under the ADFS server to get the authorization token.

If the site uses a form based authentication, then choose **'Forms'** whereas if it uses a claimed based authentication (for Office 365 SharePoint Online), choose **'Office 365'**.

And when you and other users with the Team TimeSheet Client add-in starts Outlook, the add-in would automatically connect to the admin specified SharePoint site and would retrieve the project logic and settings data to the local system.

What SharePoint permissions are required for users?

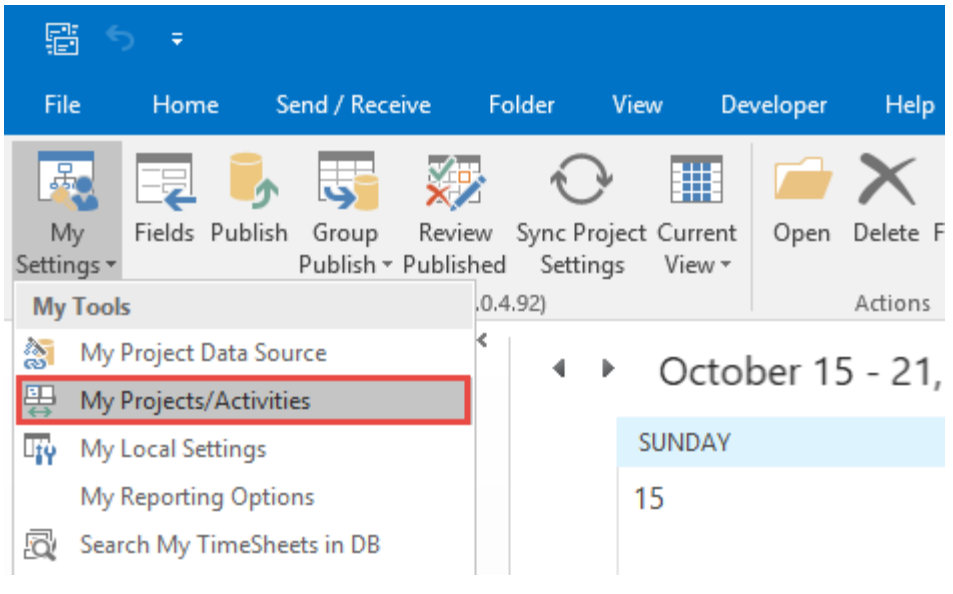
Your permission to the SharePoint site - Make sure that you have at least '*Contribute*' (or '*Full Control*') permission over the SharePoint list ***'TeamTimeSheetSettings'*** as well as to all other SharePoint lists that are chosen as the timesheet repositories.

5. Configuring Projects and Activities List

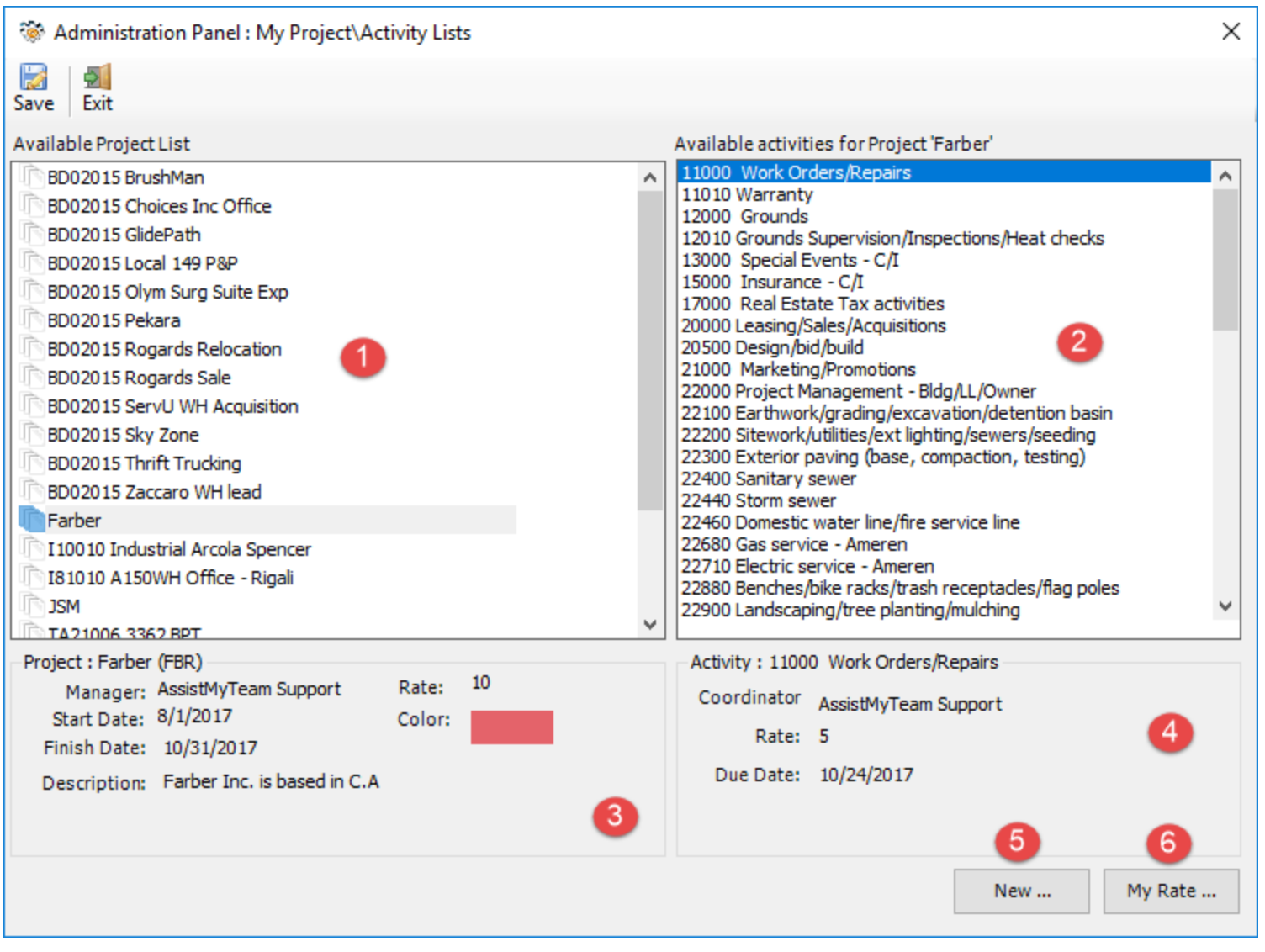
Team TimeSheet Client > My Projects/Activities List

Before you can start tagging Outlook items such as task or appointment with project metadata and prepare timesheet, you need to choose your own relevant list of projects, activities and other custom fields from the project database.

You do that from **Outlook > Calendar > Team TimeSheet toolbar > My Settings menu > My Projects/Activities**

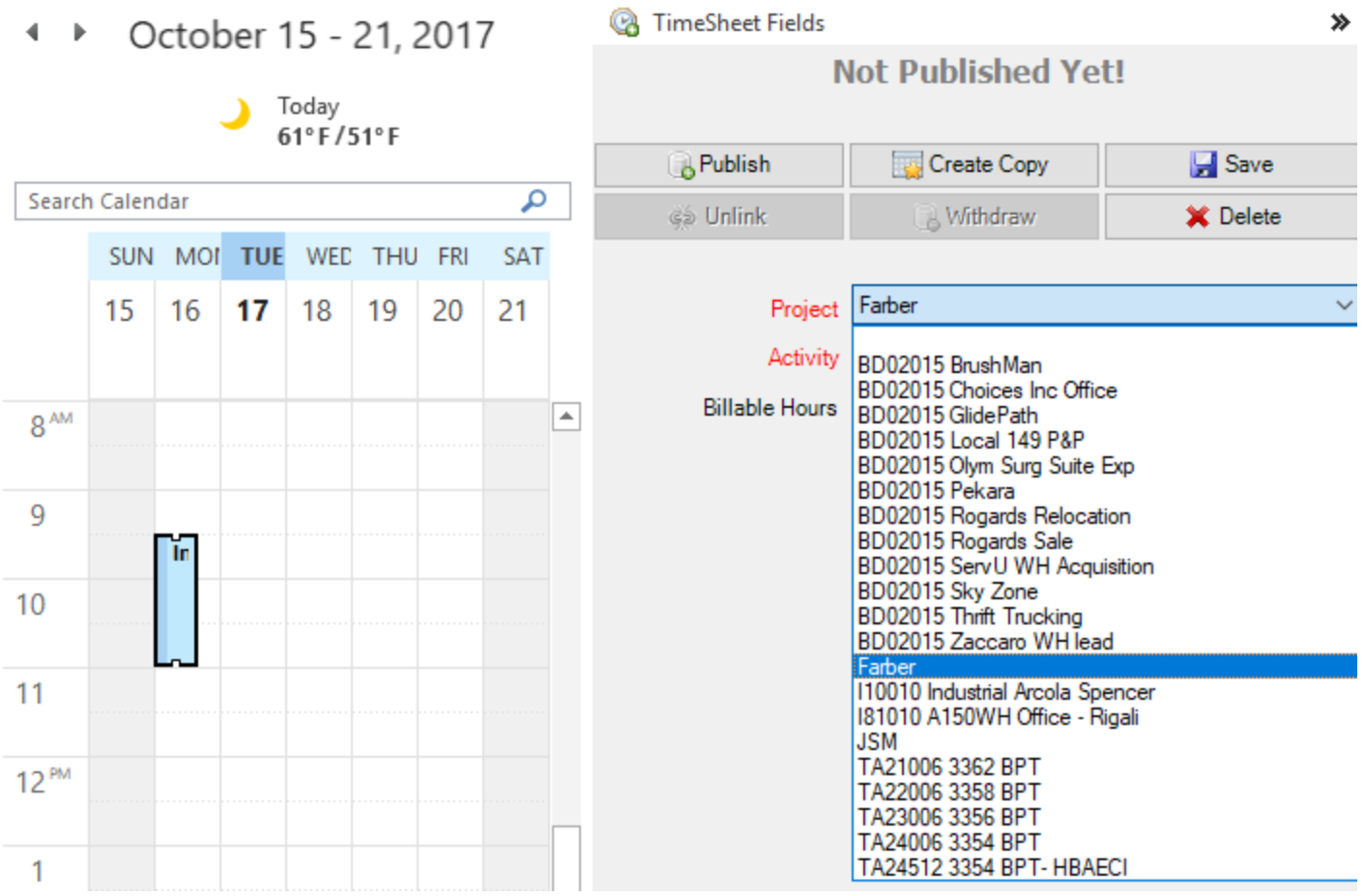


Below is the Projects/Activities list that are deployed by your administrator (through the Team TimeSheet manager add-in tool). Depending on the administrator's choice, you may or may not choose your own projects and their activities.

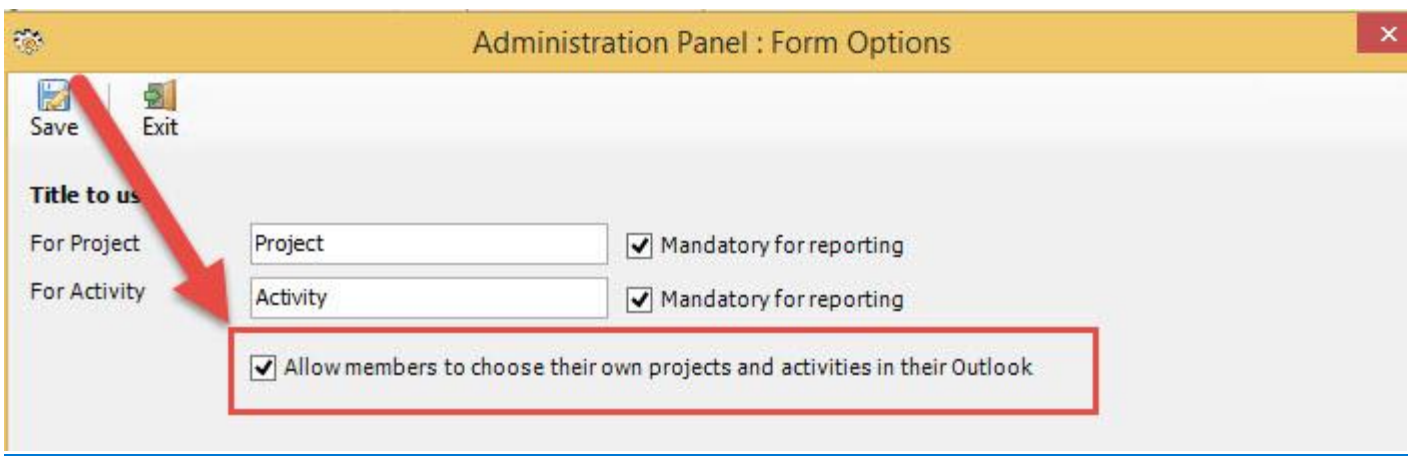


1 **Available Projects List** – All the available projects are listed in this list box. Selecting a particular project shows all the activities defined for that project on the right box (in point. 2).

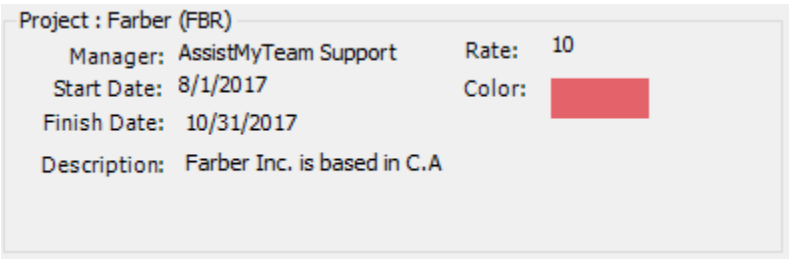
This is how the projects would appear in a drop-down list in your Outlook calendar and task timesheet form.



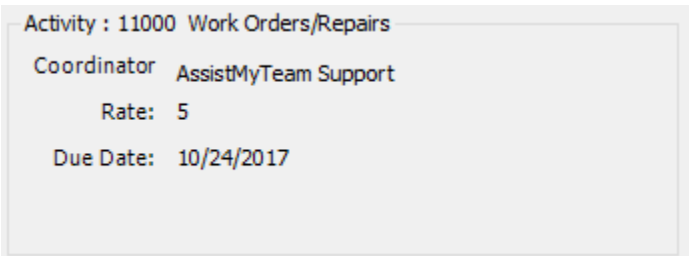
2 **Activities list for the selected project** – This list all the available activities for the selected project.
If your administrator had enabled *'Allow members to choose their own projects and activities in their Outlook'* in **Team TimeSheet Manager > Form Option**, you would be able to select your own set of activities for that particular project so that you can only work with those in Outlook. Otherwise, the activities list will not be selectable, and all activities for that particular project will be automatically made available in Outlook.



3 **Project Summary** – This portion shows the detail information on the selected project, such as, who the *manager* is, when is the *start* and *finish* date, what the *rate* is and the unique *color code* assigned by the administrator/supervisor. The short *description* of the project is shown at the bottom and the *project code* is also shown in bracket.

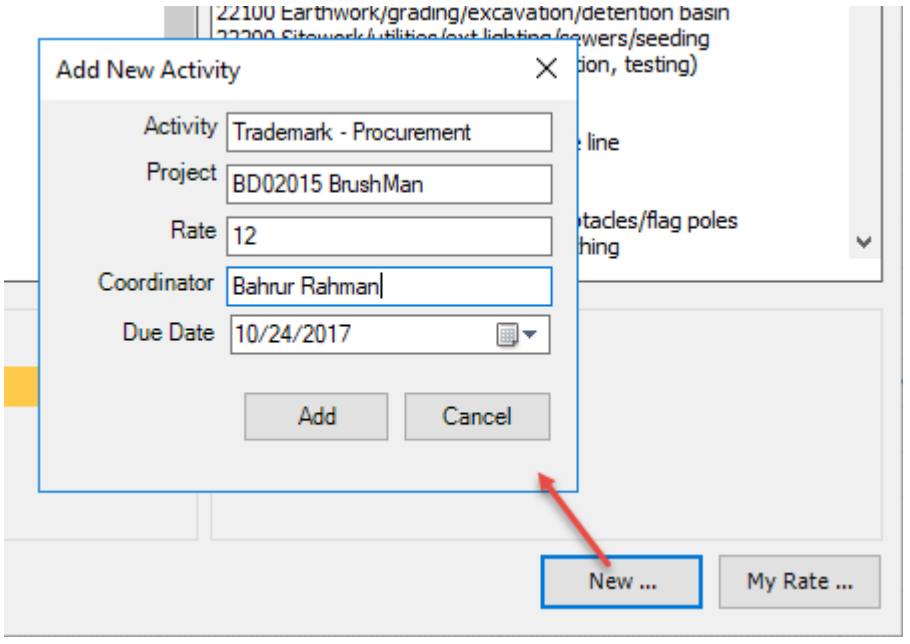


4 **Activity Summary** – This portion shows the detail information on the selected activity, such as, who the *coordinator* is, what the *rate* is and the *due date*, if specified.

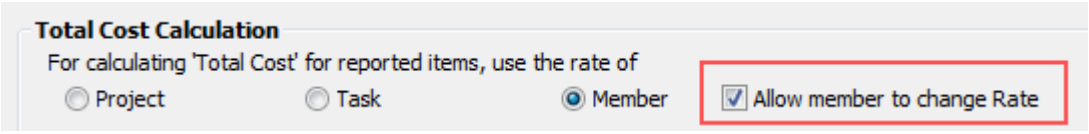


5 **New Project or Activity** – If your administrator had allowed members with administrative access to add new projects and activities (under Team **TimeSheet Manager > Access Control**), you would see the button '**New…**' just below the window panel.

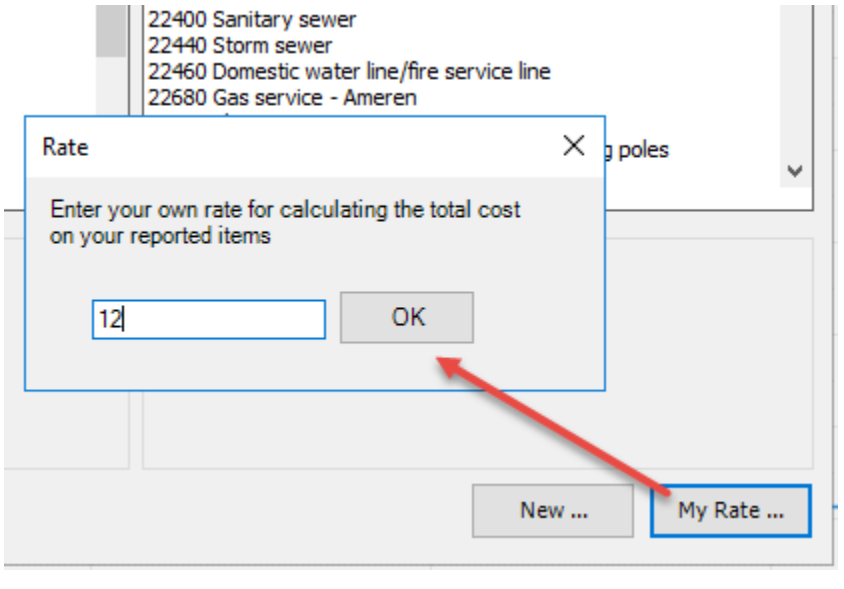
When you click it, a popup window allows you to enter the detail of the activity that you want to add. By default, you will be assigned as the '**Coordinator'** of this activity to be added. Note that, this new activity would be added to the activities list in the global settings (under the project database).



6 **Specify my own Rate** – Your administrator can enable each team member to set their own rate from **Team TimeSheet Manager > Advanced Options > Total Cost** tab.



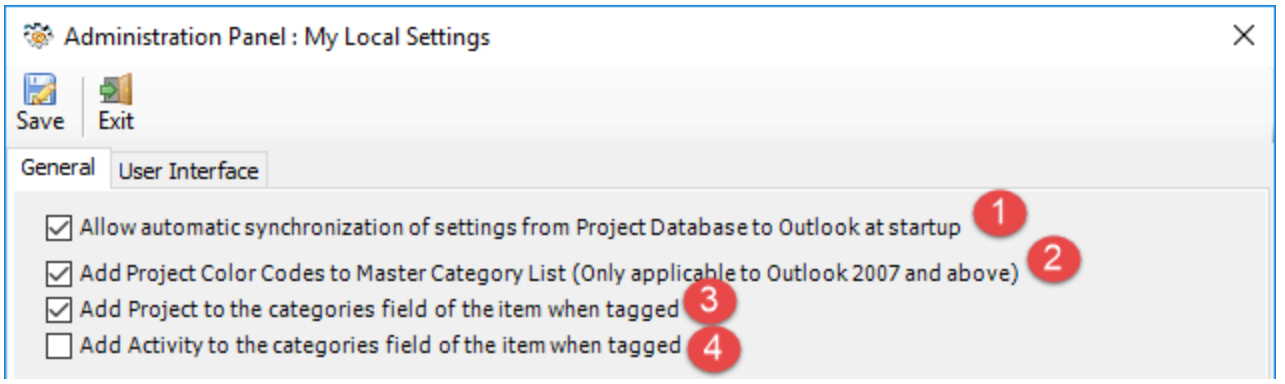
If such option is enabled (by the administrator), you would see the '**My Rate…**' button at the bottom of the window panel. Once you input your own rate, it would be updated in the members list under the global settings (under the project database).


22400 Sanitary sewer
22440 Storm sewer
22460 Domestic water line/fire service line
22680 Gas service - Ameren
Rate
Enter your own rate for calculating the total cost on your reported items
12
OK
New ...
My Rate ...

6. Configuring Local Settings

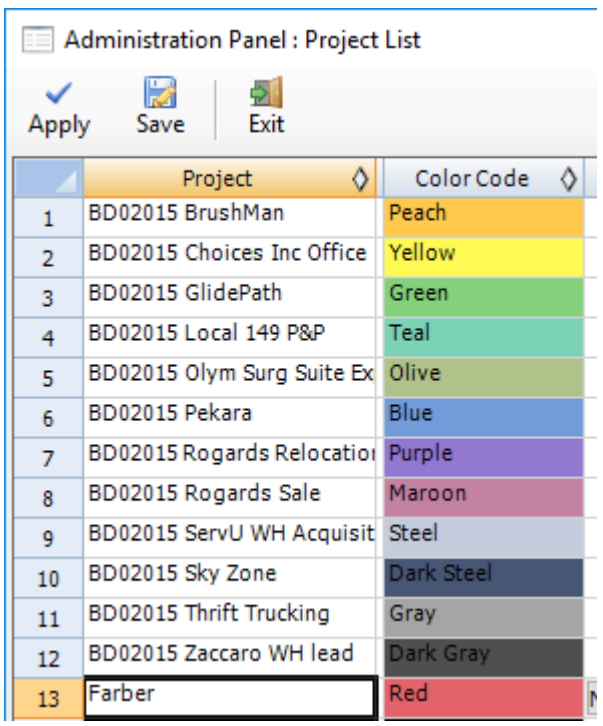
Team TimeSheet Client > My Local Settings

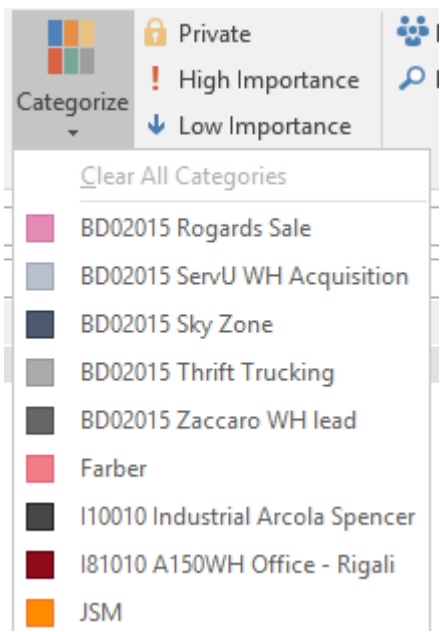
Each member can customize how Team TimeSheet is used with Outlook in ways that the member finds useful and informative when working with their projects.



1 **Allow automatic synchronization of settings from the database at startup**
When this is enabled, at every Outlook startup, Team TimeSheet client add-in will try to establish connection to the global settings list that was configured by your administrator in the Project database. And it would synchronize all the projects, activities, custom fields and other global settings (as defined by your administrator) with the local cache. This is helpful to automatically retrieve any new projects/activities or settings that were added by the administrator in due course. If you are working in offline mode (i.e., disconnected from the network), synchronization is bypassed.

2 **Add Project Color Codes to Outlook Master Category List**
From Team TimeSheet Manager 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.

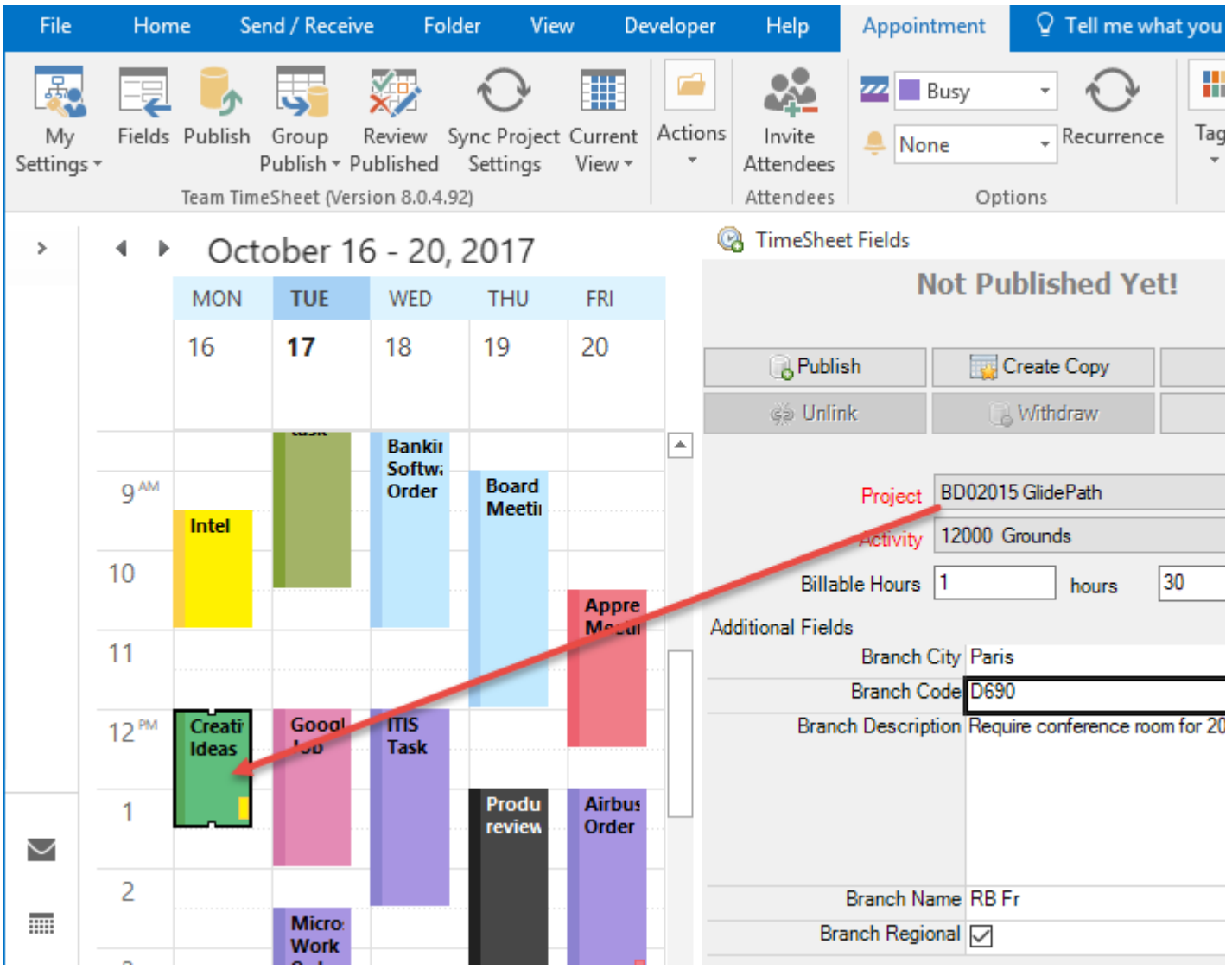




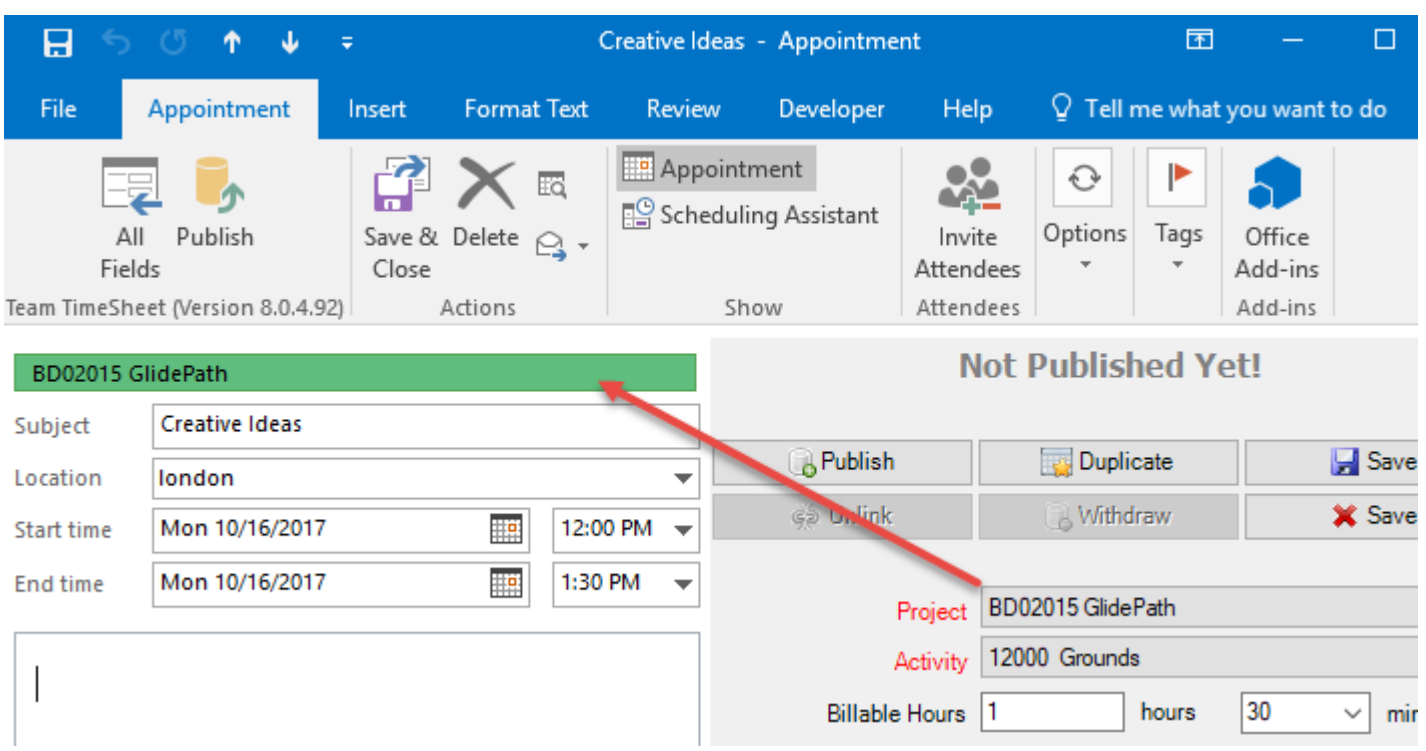
Once the projects with color codes are imported to your Outlook, when you tag an Outlook appointment or task item with a project, the corresponding color code would be applied automatically.

This is very helpful to give a quick visual cognition as well as to organize your items in Outlook in a more obvious way. As this color code is deployed centrally, all members working on projects would have same uniform color coding for the entire team.

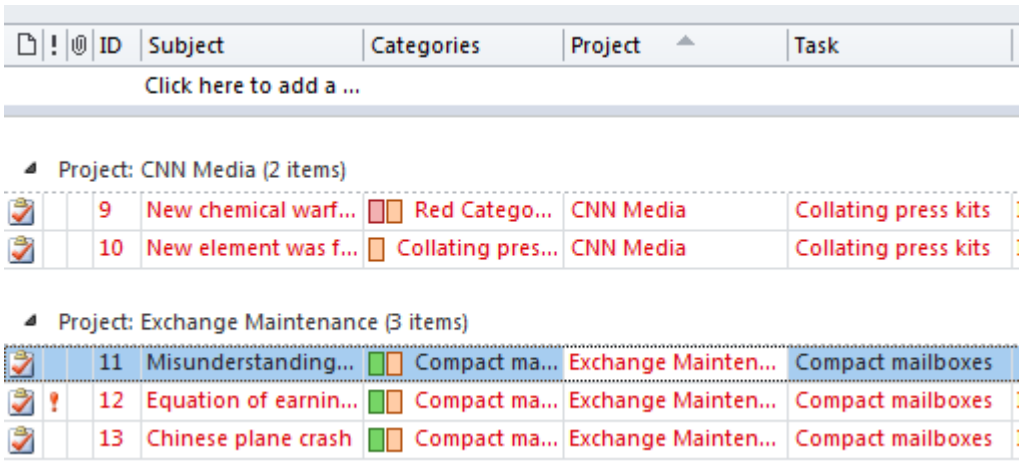
Screenshot below: *Explorer view of calendar month in Outlook 2016 with appointments tagged with different projects and consequently the inherited color codes.*



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:

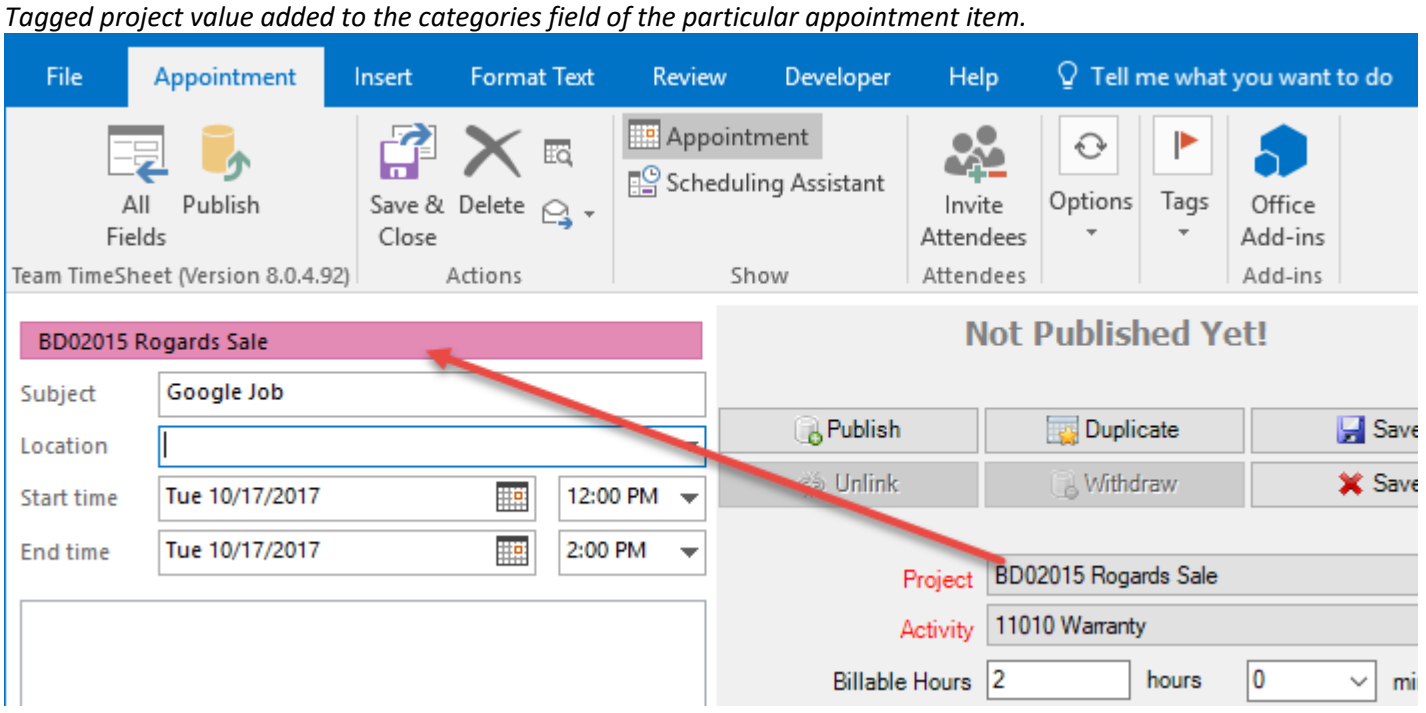


Note: *Color coding of tagged Outlook item requires that you enable 'Add Project to the Categories field of the item when tagged' option (3).*

3 **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.

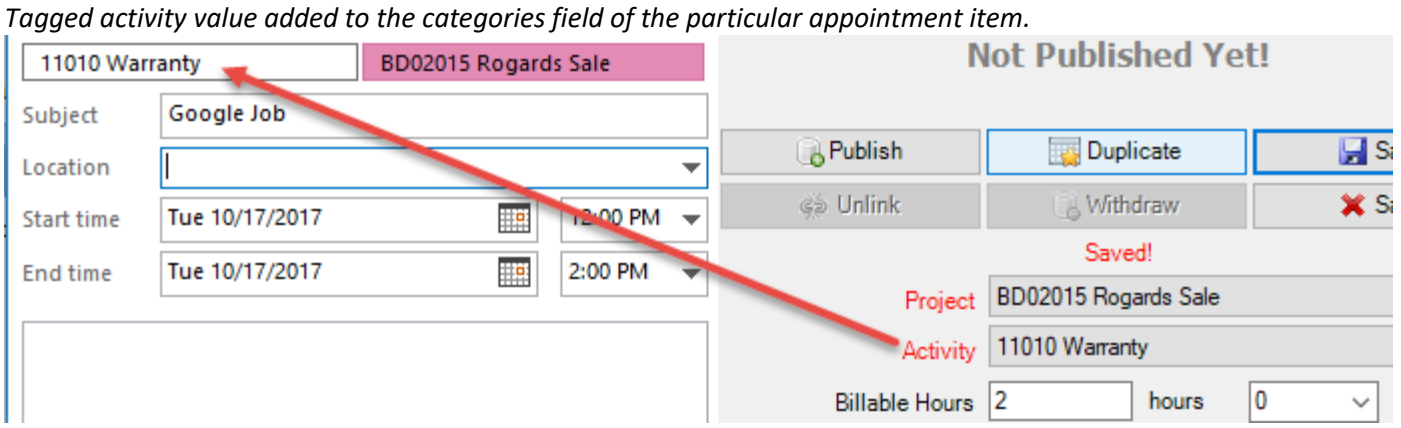
Tagged project value added to the categories field of the particular appointment item.



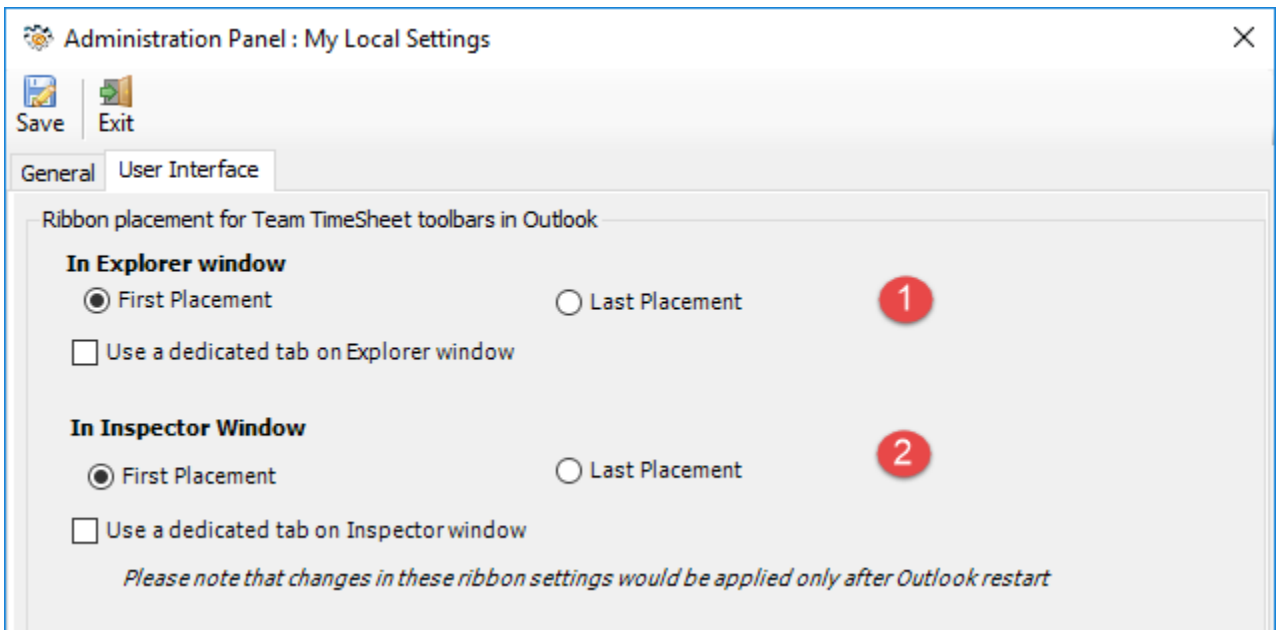
4 **Add Activity to the categories field of the item when tagged**

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

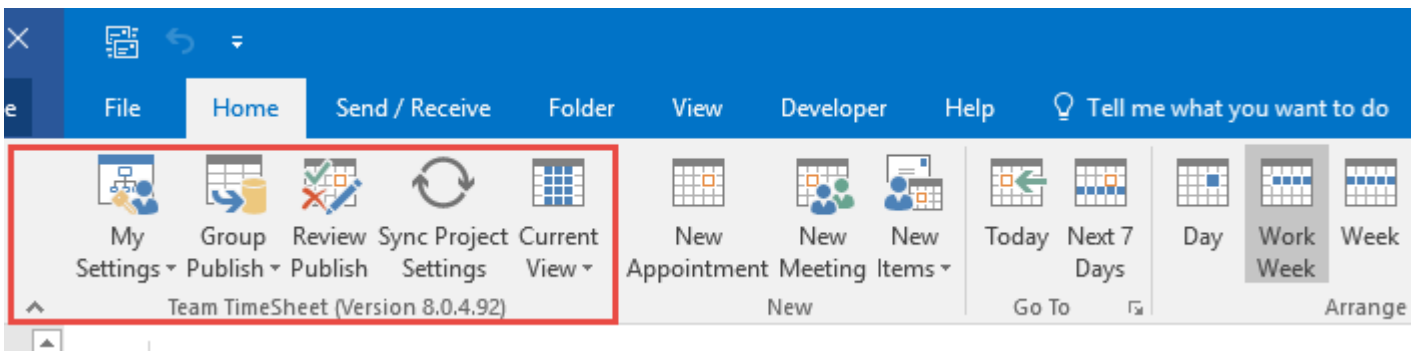
Tagged activity value added to the categories field of the particular appointment item.



The User Interface

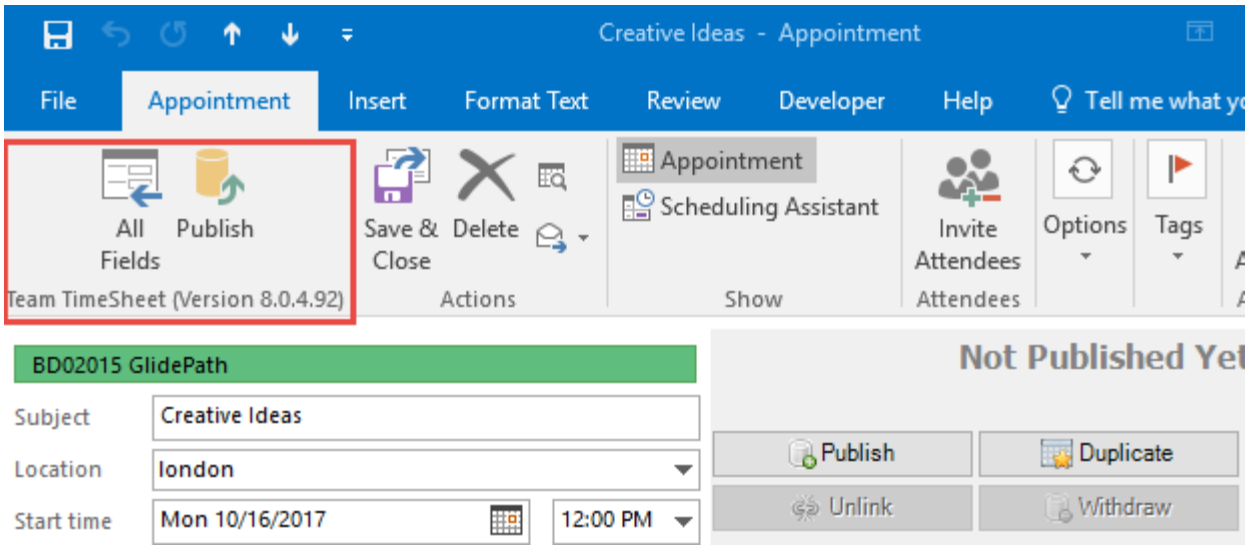


1 You have a choice where the timesheet toolbar should be placed in your Outlook main explorer window. By default, the timesheet toolbar is placed under Outlook predefined tabs such as 'Home' or 'Appointment'. And that too, the first in the sequence of groups.



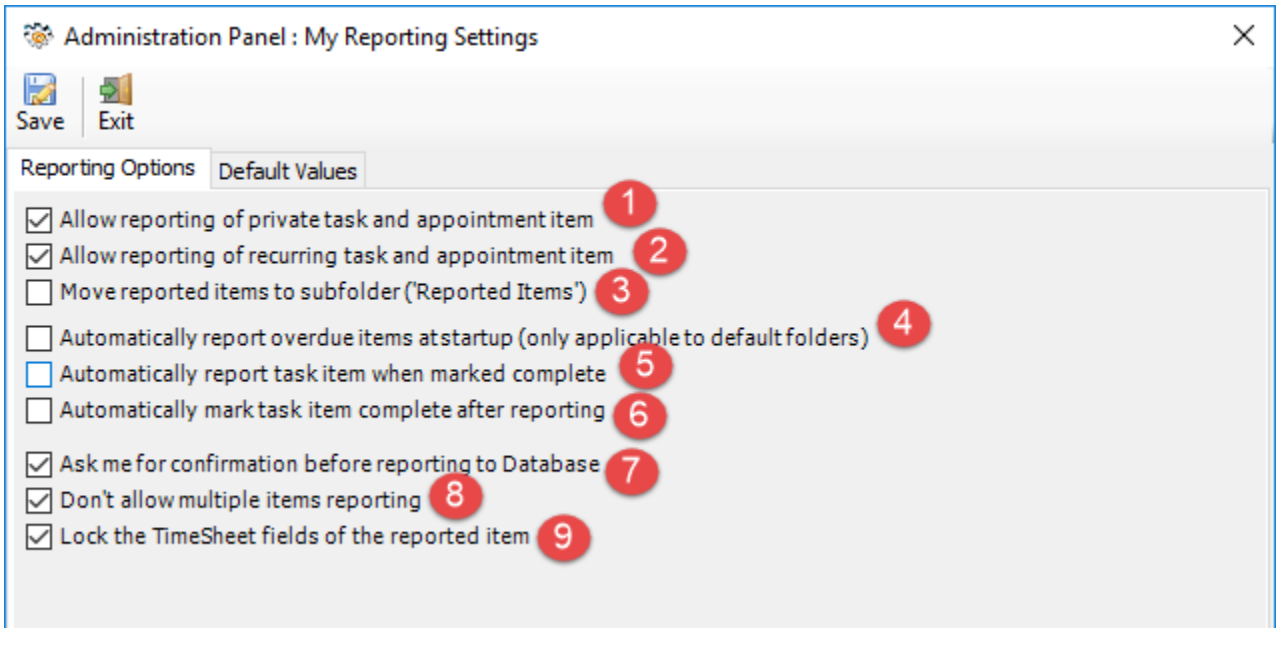
You can change this option to place the timesheet toolbar in its dedicated tab, or to place in the last sequence of the groups.

2 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.



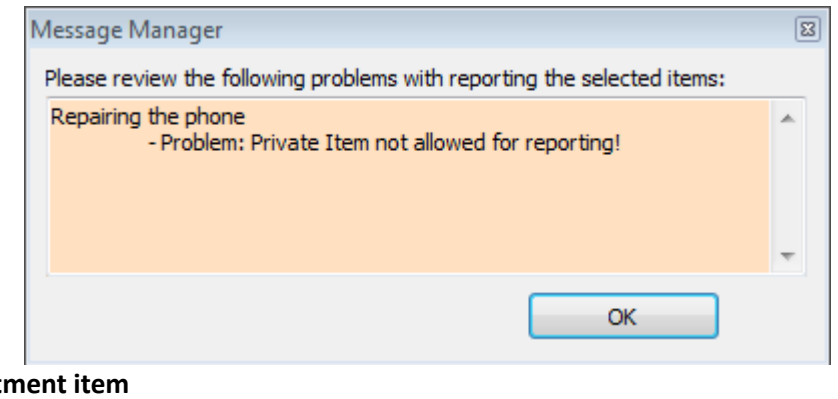
7. Configuring Reporting Options

Team TimeSheet Client > My Reporting Options



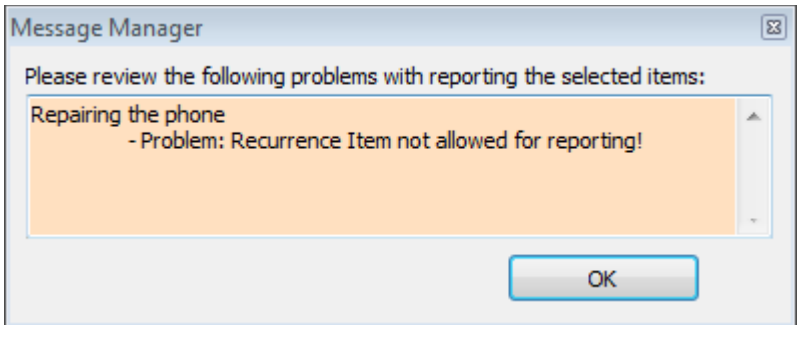
Allow reporting of private task and appointment item
By default, Outlook items that marked private are enabled for reporting, just like normal items. You can prevent private items from being reported by disabling (un-checking) this particular option. Preventing private items might be useful to separate 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.



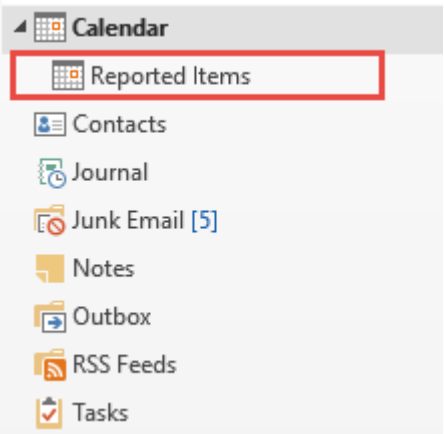
Allow reporting of recurring task and appointment item
By default, recurring items are enabled for reporting. You can prevent recurring items from being reported by disabling (un-checking) this particular option. This might be useful, if you don't use recurring items for project reporting.

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.



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.



4 **Automatically report overdue items at startup**
If this is enabled, items that are overdue will be reported to the database 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 project database.*

*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 project database.*

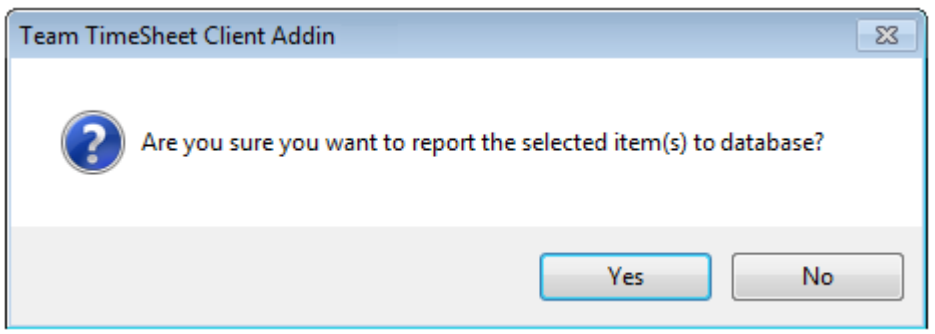
In both cases, if the overdue item is already reported, it is ignored.

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

5 **Automatically report task item when marked complete**
This option is only applicable to Outlook task item. If enabled, Team TimeSheet Client 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).

6 **Automatically mark task item complete after successful reporting**
This option is also only applicable to Outlook task item. If enabled, Team TimeSheet Client add-in would automatically mark a reported task item as complete.

7 **Ask me for confirmation before reporting to the database**
By default, when you report any Outlook task or appointment items, either one a time or in multiple mode, Team TimeSheet client 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.

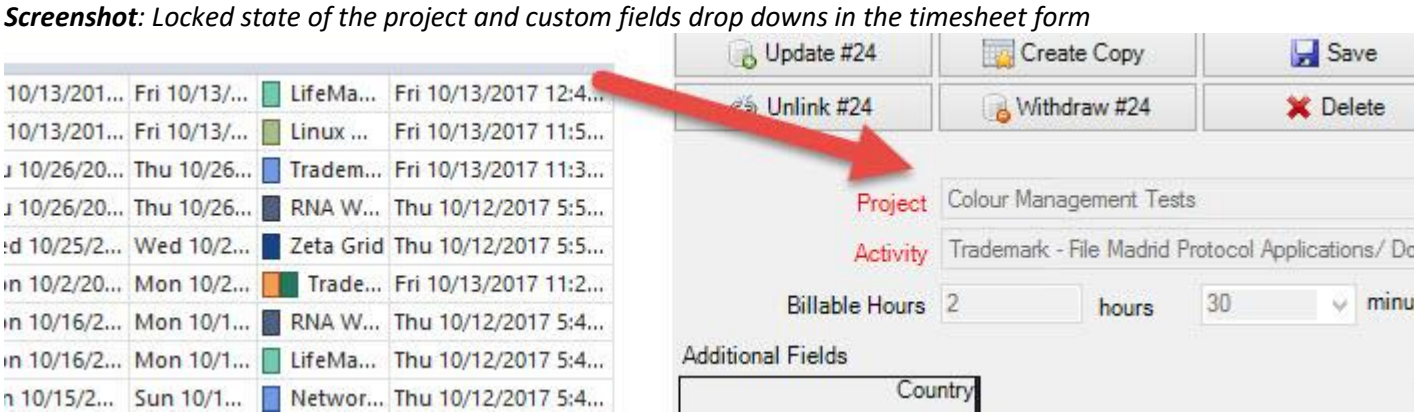
8 **Don't allow multiple items reporting**
By default, you can select multiple Outlook task or appointment items and report at once, to the database in a single click. But you can change this behavior by enabling this particular option. Doing so, only the first selected item (among the selected items) will only be reported.

9

Lock the Team TimeSheet fields of the reported item

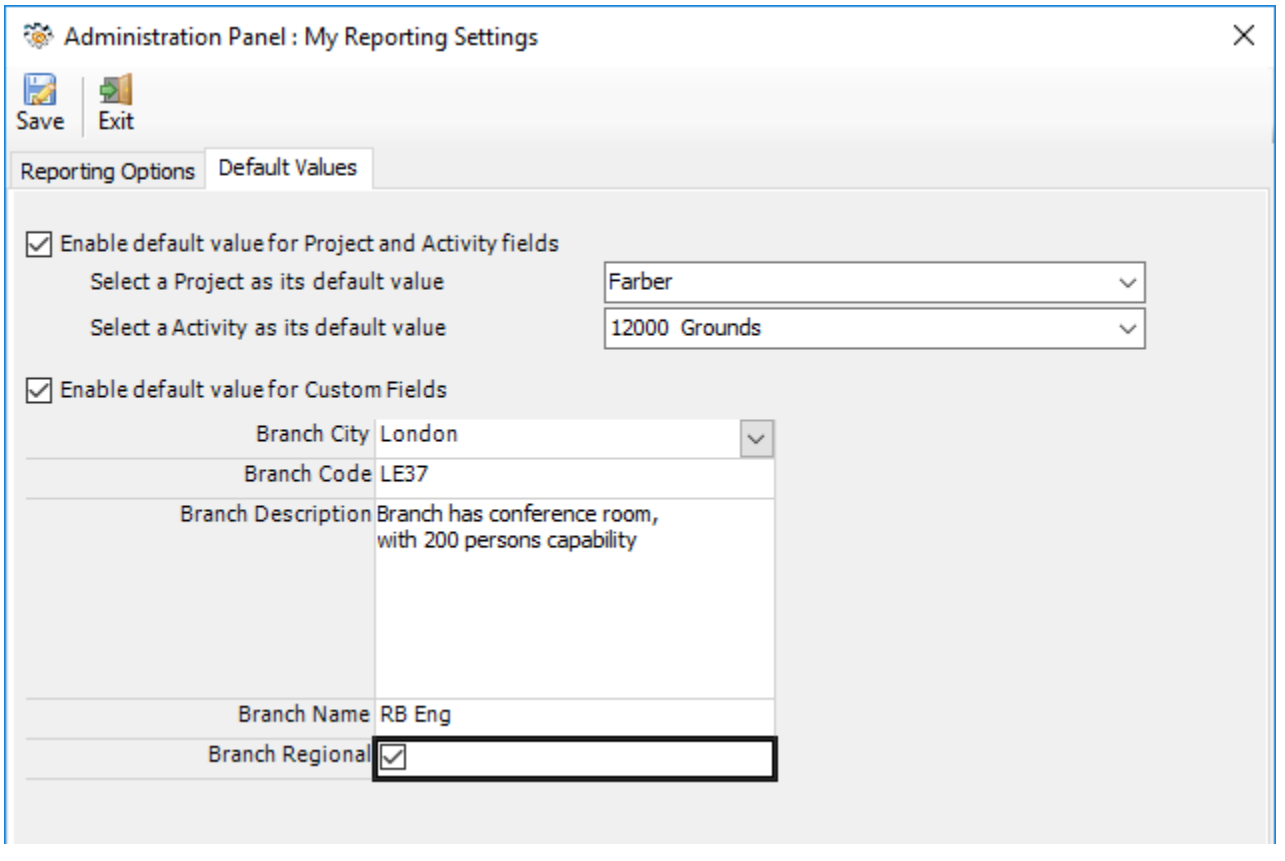
By default, the tagged fields of the reported item are enabled, which mean, you can edit and change the value even after successful reporting. But if you don't have the need for editing or changing project related fields once it is reported, you can have it disabled to make it read-only.

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



Default values for empty fields when reporting

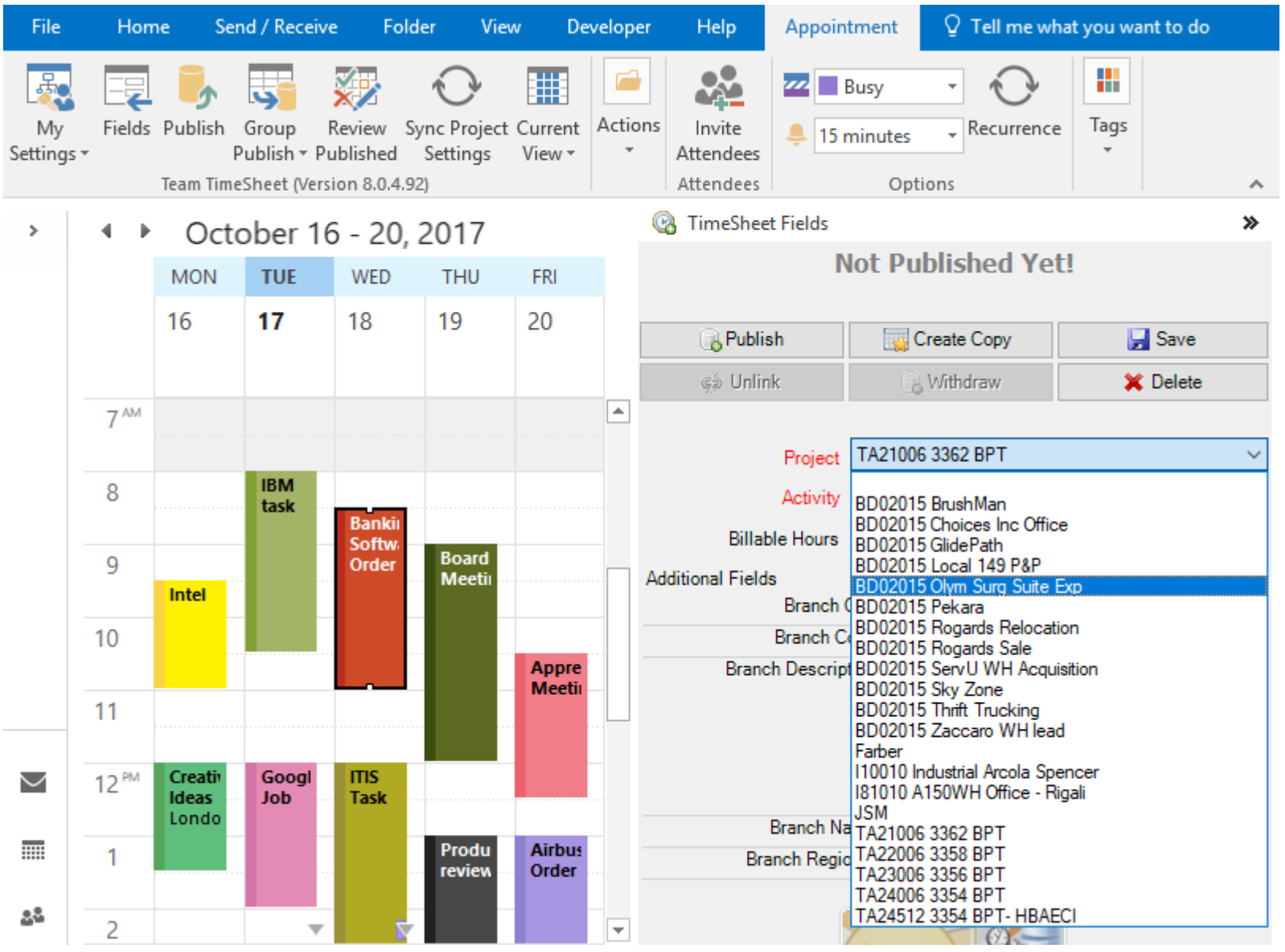
You can set a default value for each of the project field (including the custom drop down fields) such that when you report any Outlook task or appointment item, if one or more of the project fields including the custom fields are empty, Team TimeSheet add-in would automatically fill in the default value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



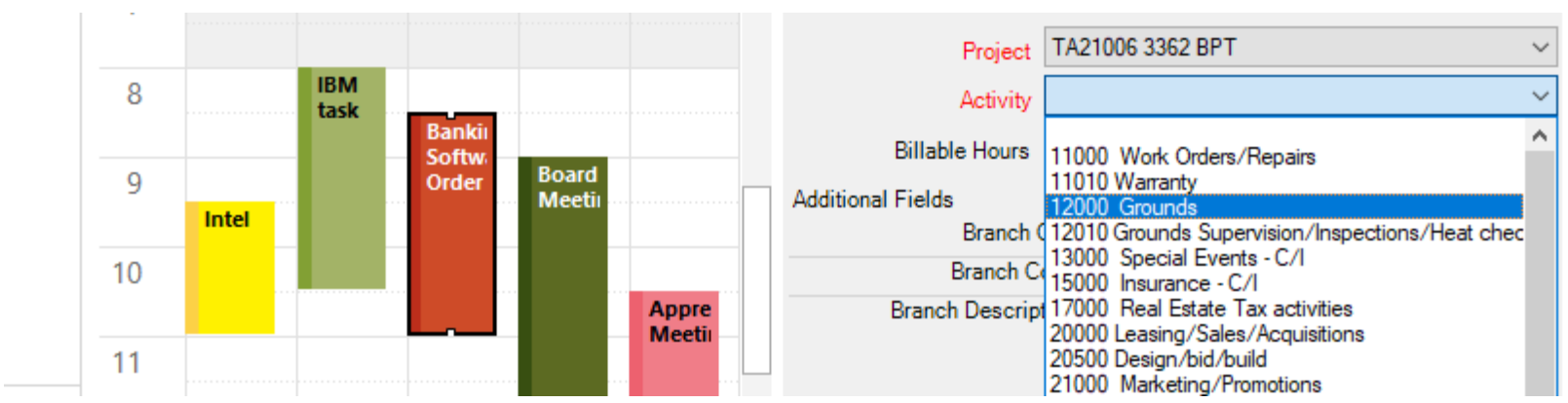
This automatic assignment of default values might be particularly useful if your administrator had marked project and other custom fields mandatory for reporting.

8. 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.

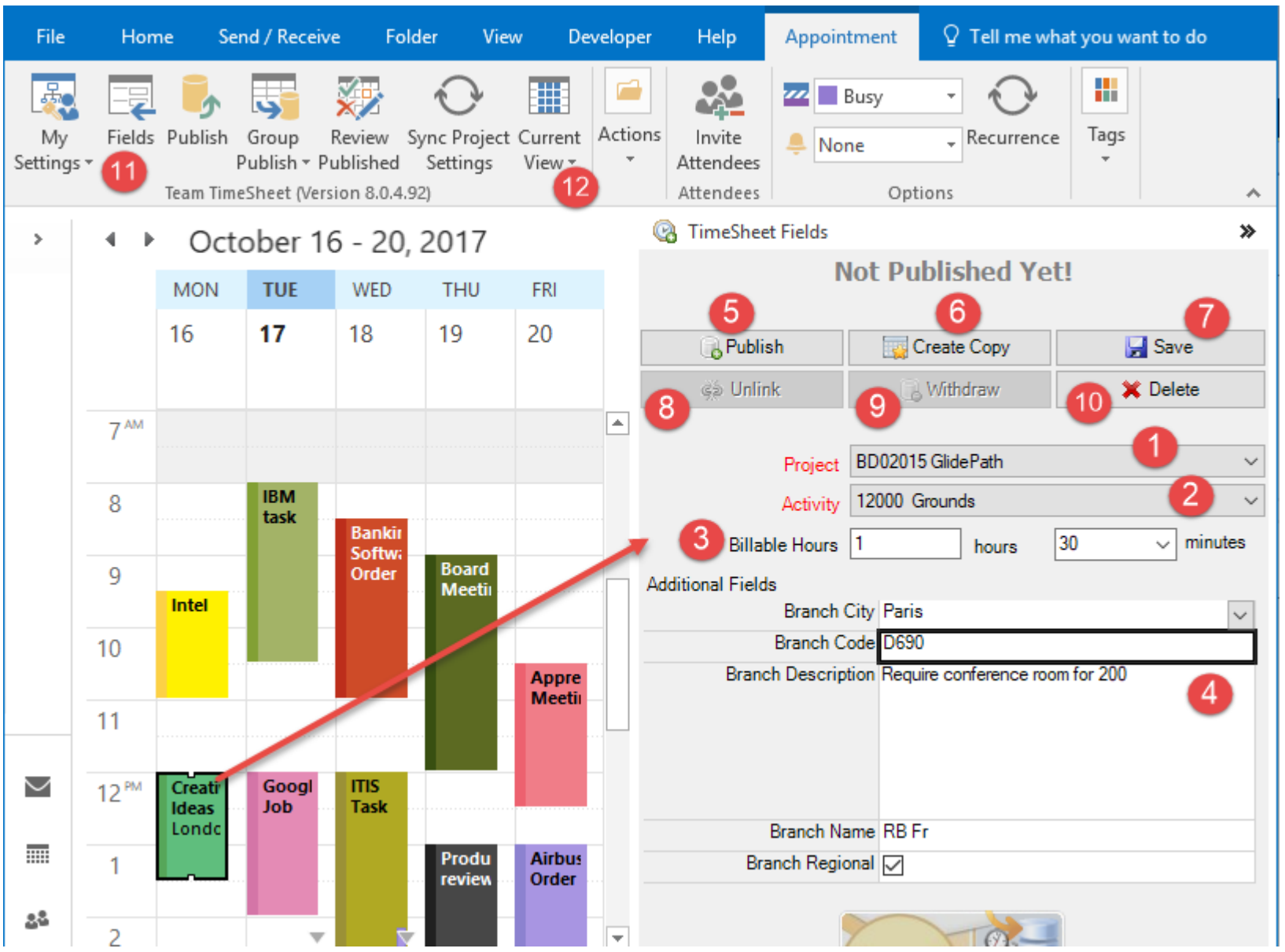


8.1 Tagging Outlook items with project data

Recording time is as simple as creating a calendar or task item and setting a few properties. You can use Team TimeSheet Client in Outlook to tag and report it to database. 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 defined by the manager.



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 from the central database.
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 database is computed either by using the 'Duration' or the

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

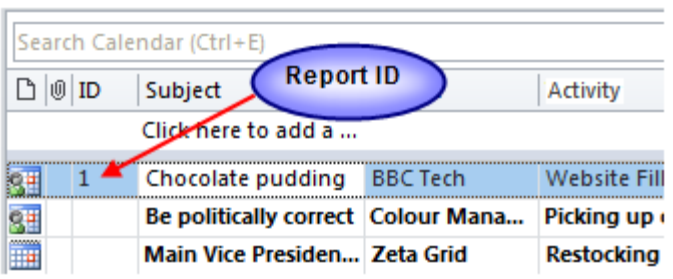
Note:
When preparing a new timesheet in Outlook, by default, the Billable Hours field have the same value as the 'Duration' field of the appointment/task item.

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

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

4 **Custom Fields** – are additional fields that are deployed by your administrator 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 the central database.

5 **Publish Item** – After finishing tagging project related data on the Outlook item(s), clicking this button would report to the project database. If the reporting was successful, the report ID that was generated in the database 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 the central database and would get a new timesheet ID.

9 **Withdraw –** remove the published timesheet record entry that was published in the central database from the current Outlook appointment or task item. Once timesheet record is removed from database, 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.

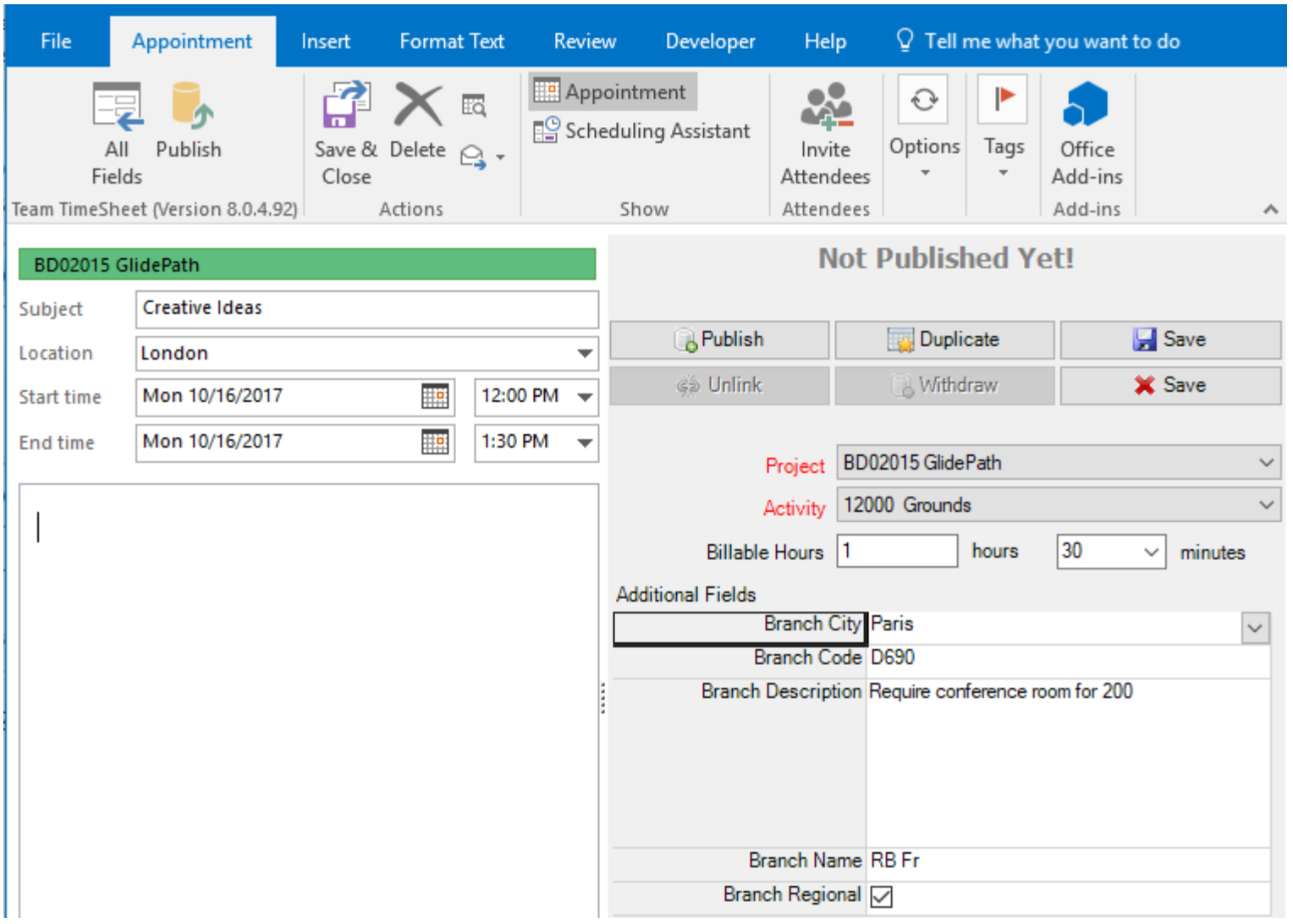
11 **All Project Fields** – Clicking this button will pop-up a form that contains all the Team TimeSheet fields that are deployed by your administrator. This provides you a central place to manipulate the fields.

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 Team TimeSheet specific views as well as the normal Outlook views.

Inspector window mode

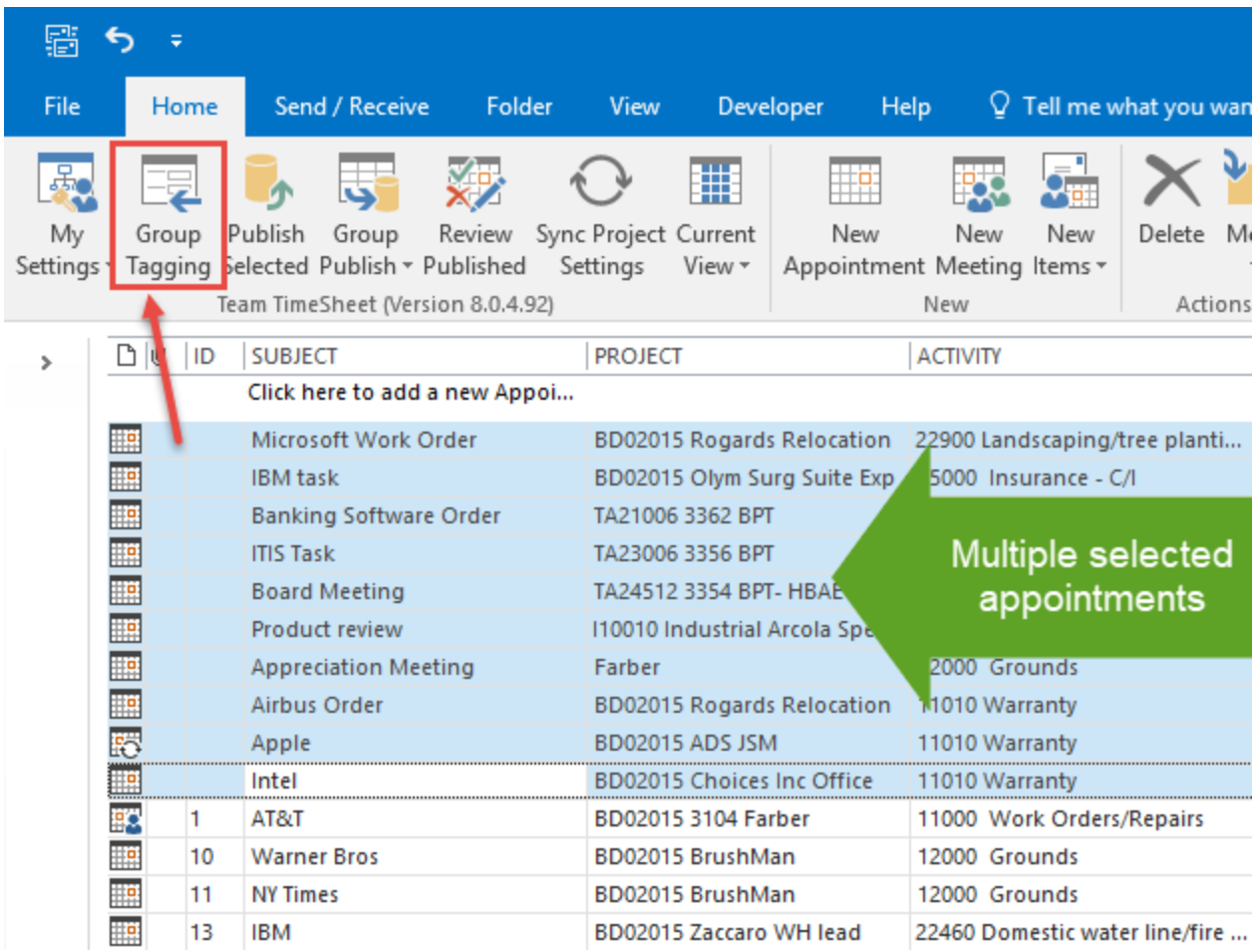
When you open an Outlook task or appointment item, the inspector window pop-ups and it shows all the project information on that item under the timesheet form that is available at sidebar location of Outlook.



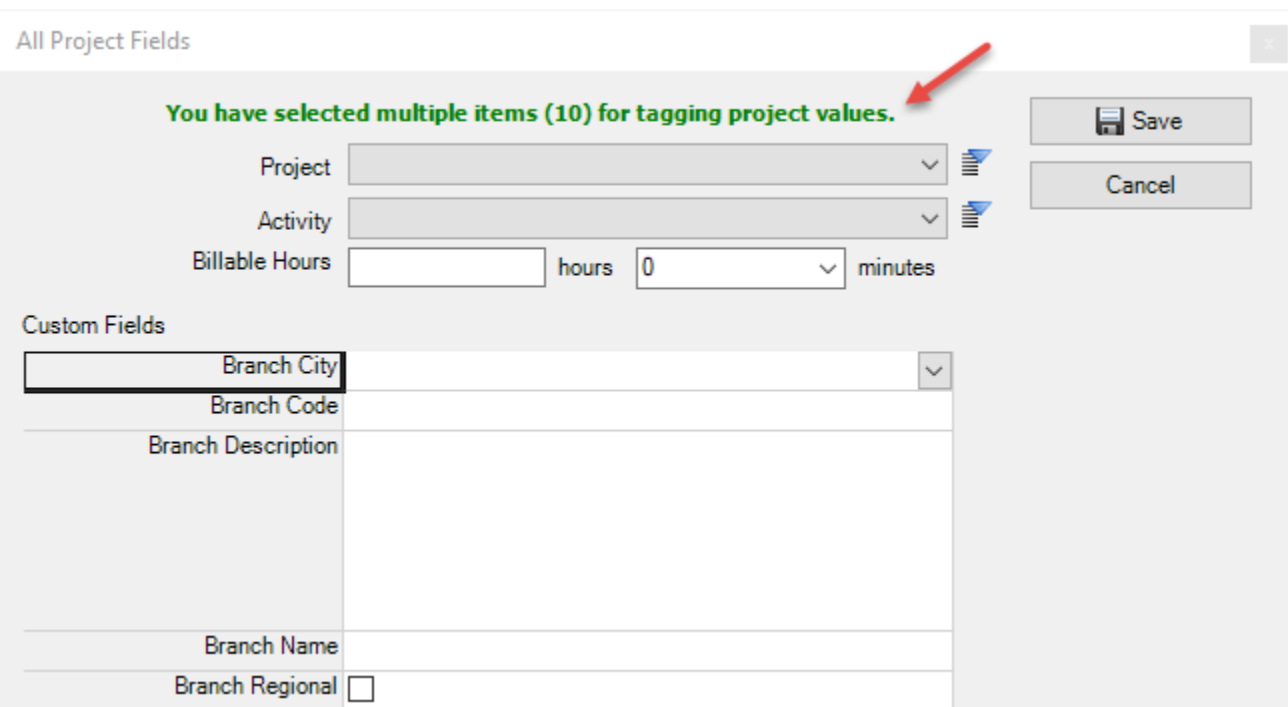
The project fields, buttons etc. under the timesheet form of the inspector window remains the same as discussed previously in the Outlook explorer mode.

8.2 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 Team 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.



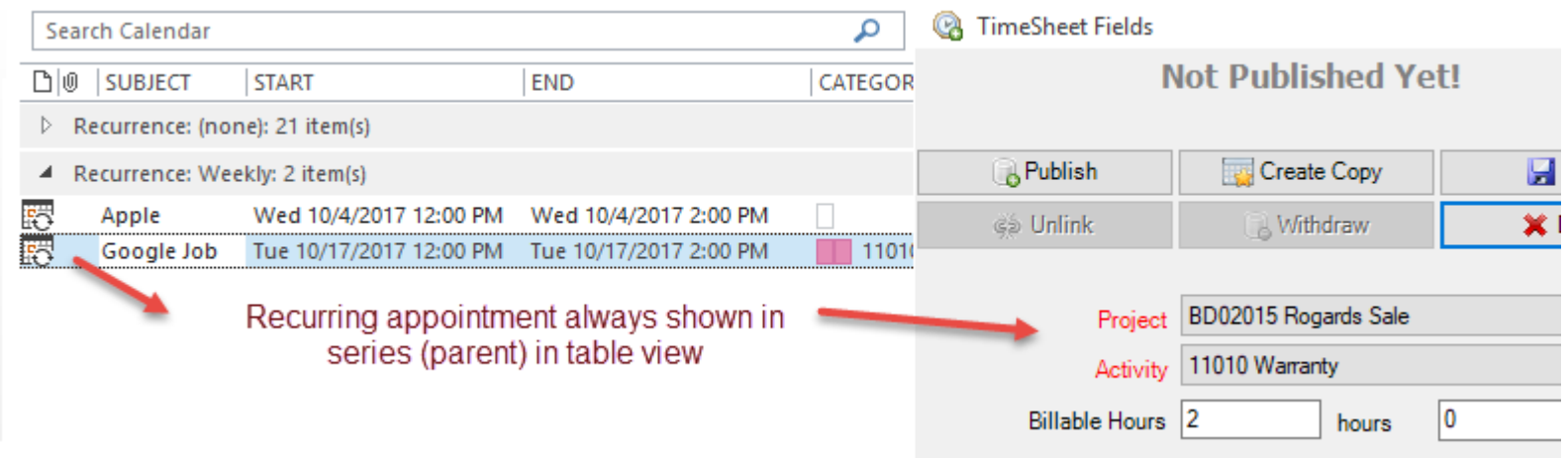
8.3 Tagging Recurring appointments

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**.

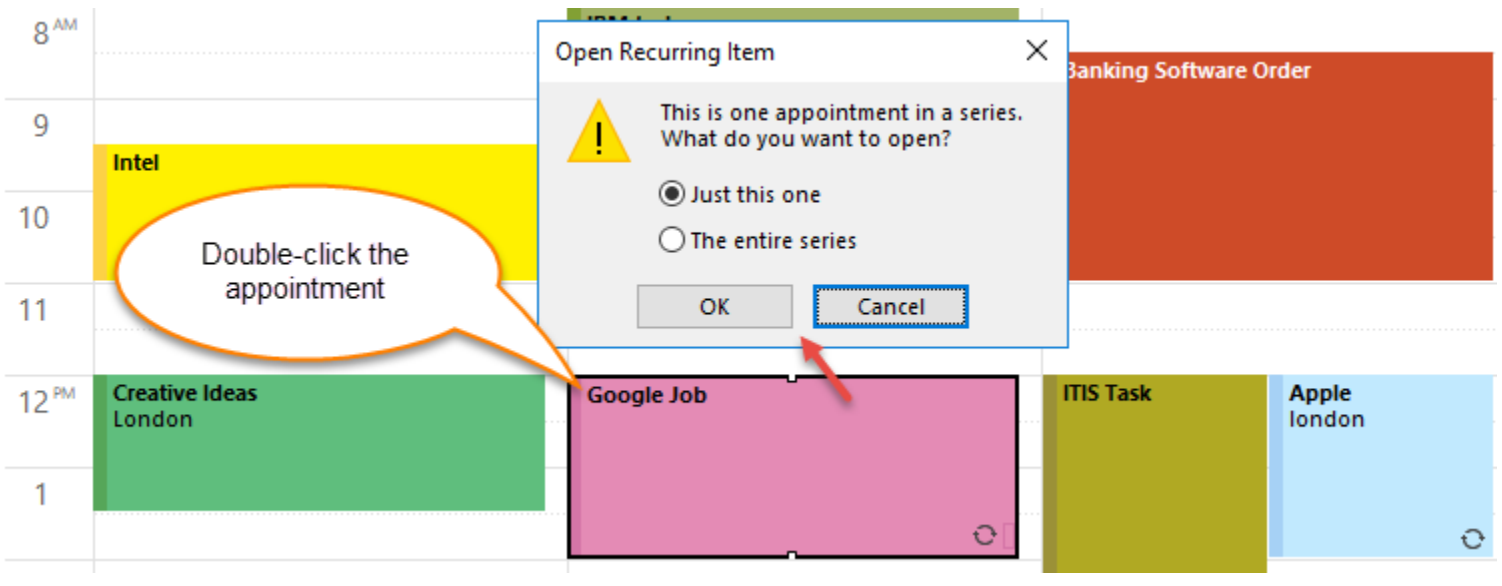
In recurring appointment, you can
- tag the parent series item
- tag individual occurrence item

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



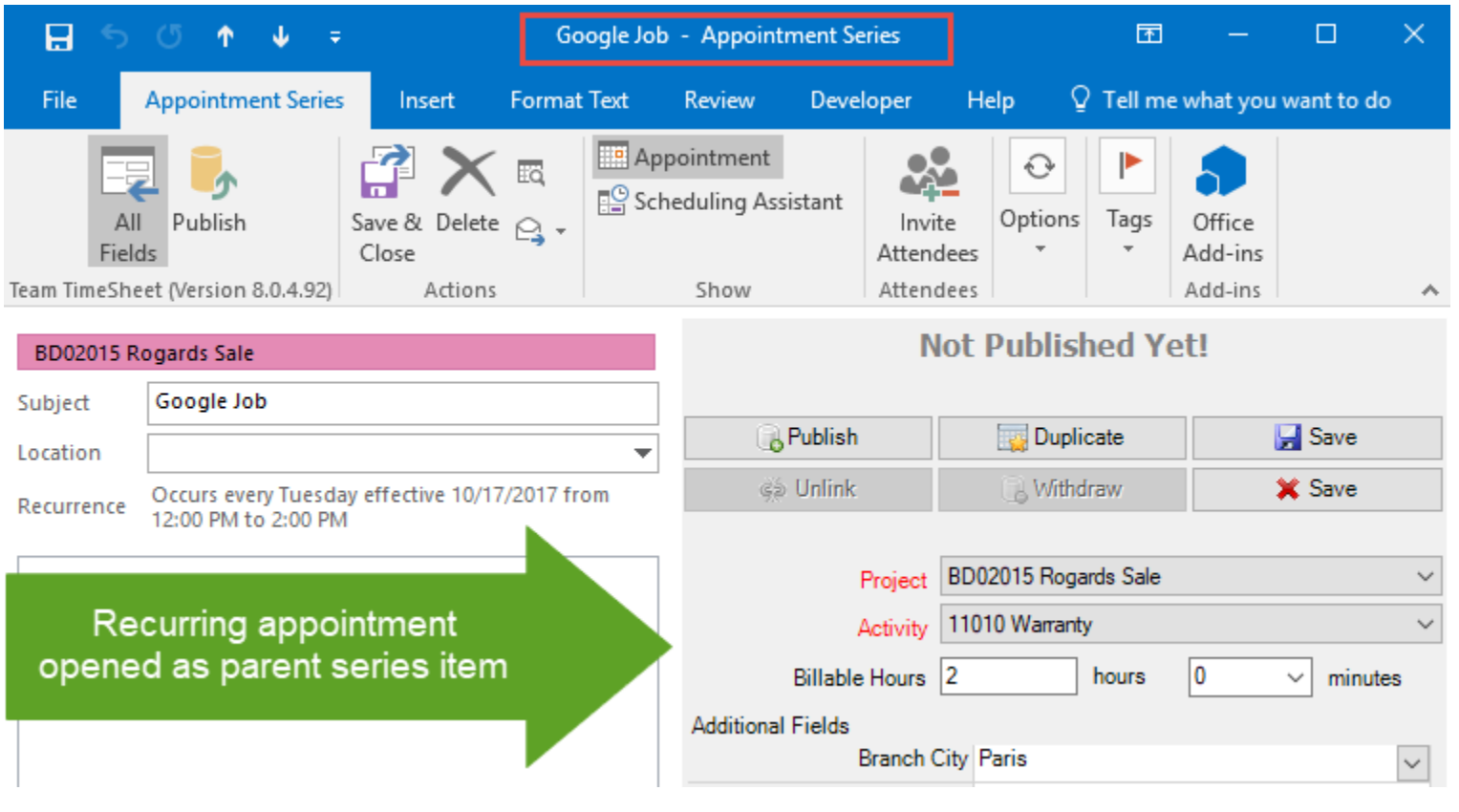
However, in calendar (Day/Month/Year) view, a recurring appointment is shown by occurrence, i.e., an item for each occurrence. This means, if you tag an occurrence item with a project or custom field value, it would be applied to that particular occurrence only. In Calendar view, you can open it in both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



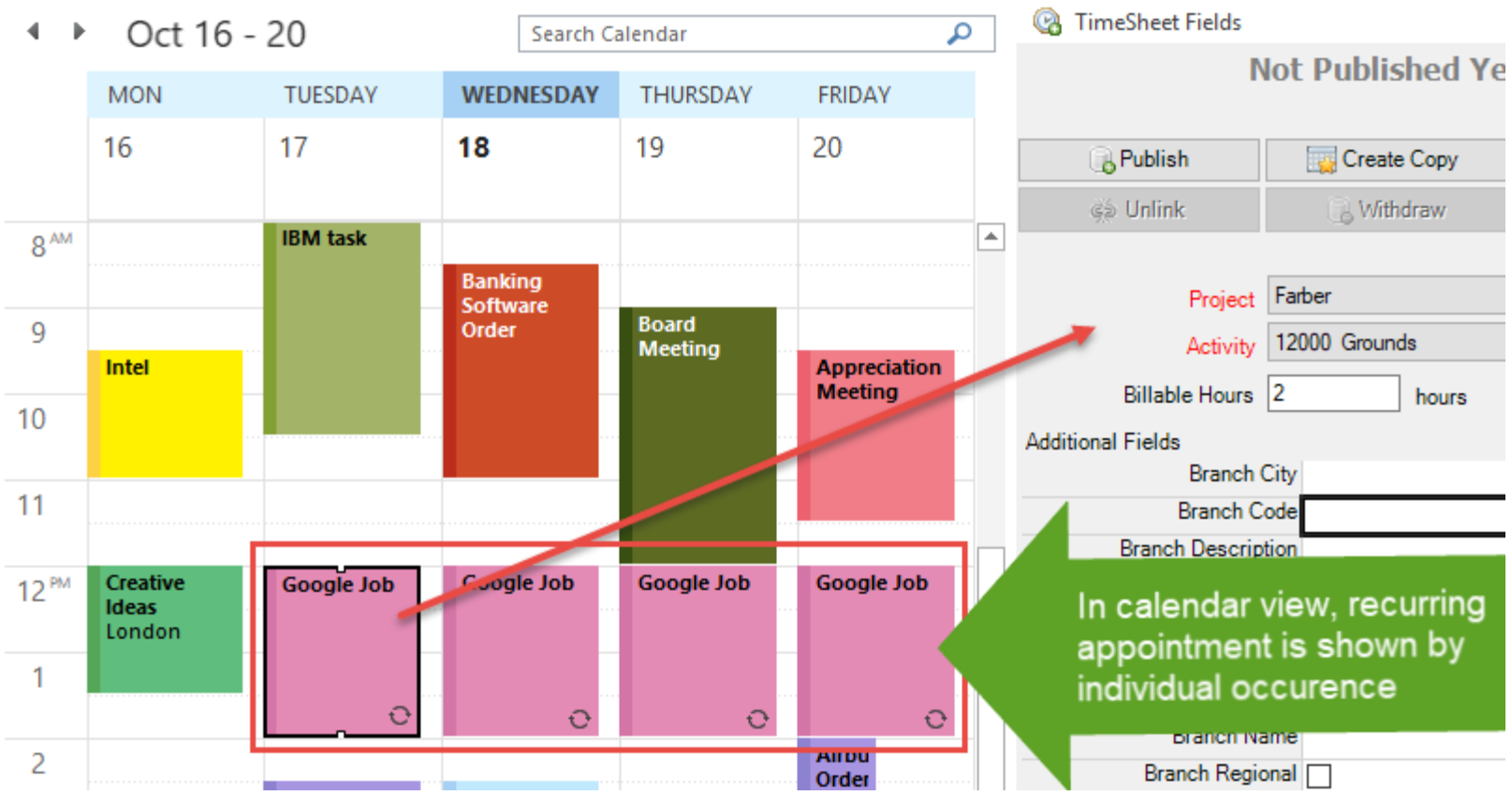
Team TimeSheet supports tagging individual occurrence item as well as the parent series item. Likewise, you can report both individual occurrence and the parent series item as well. Team TimeSheet will treat them as if they were multiple standard appointments.

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



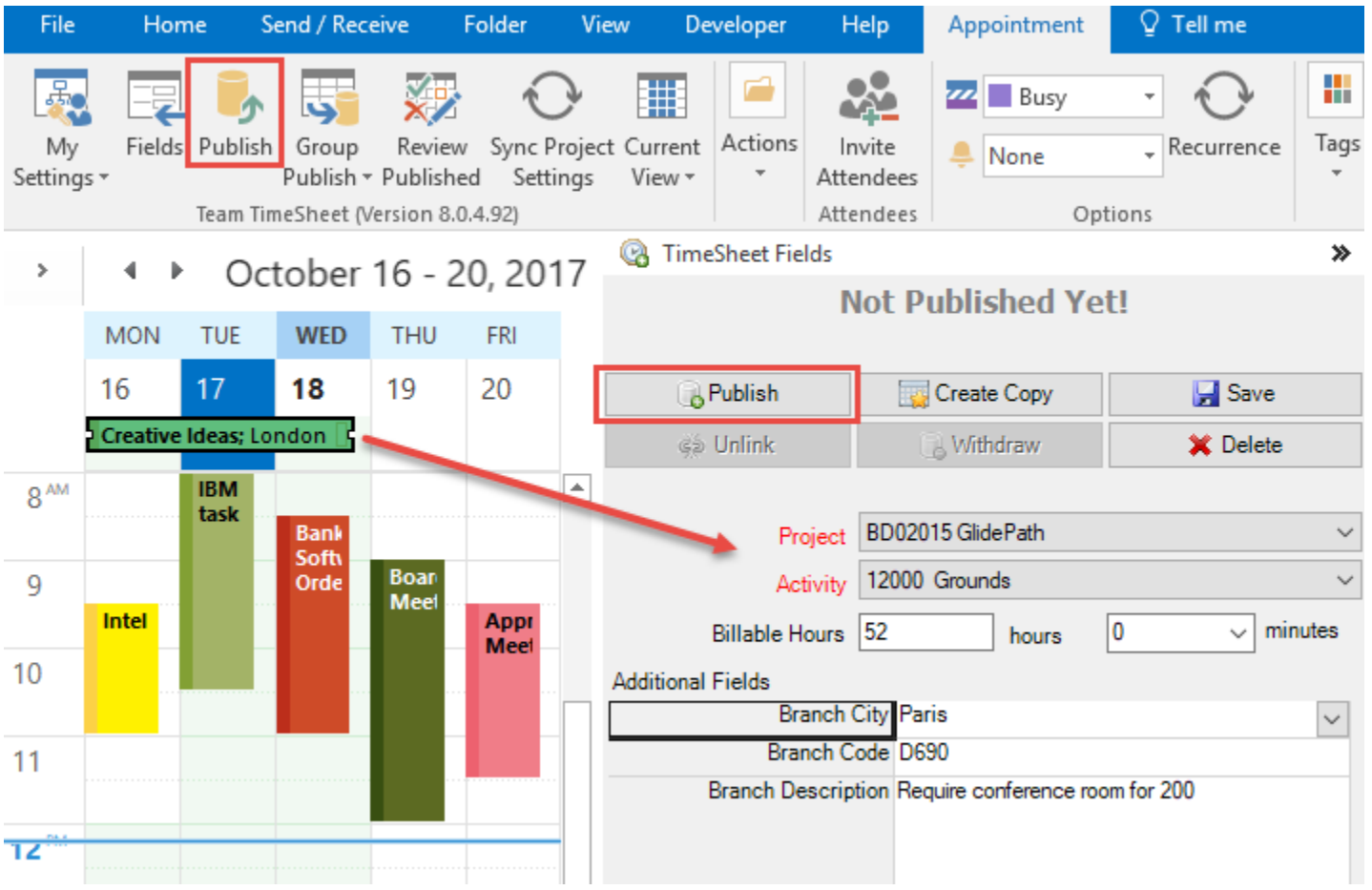
Project and custom field values for the first occurrence



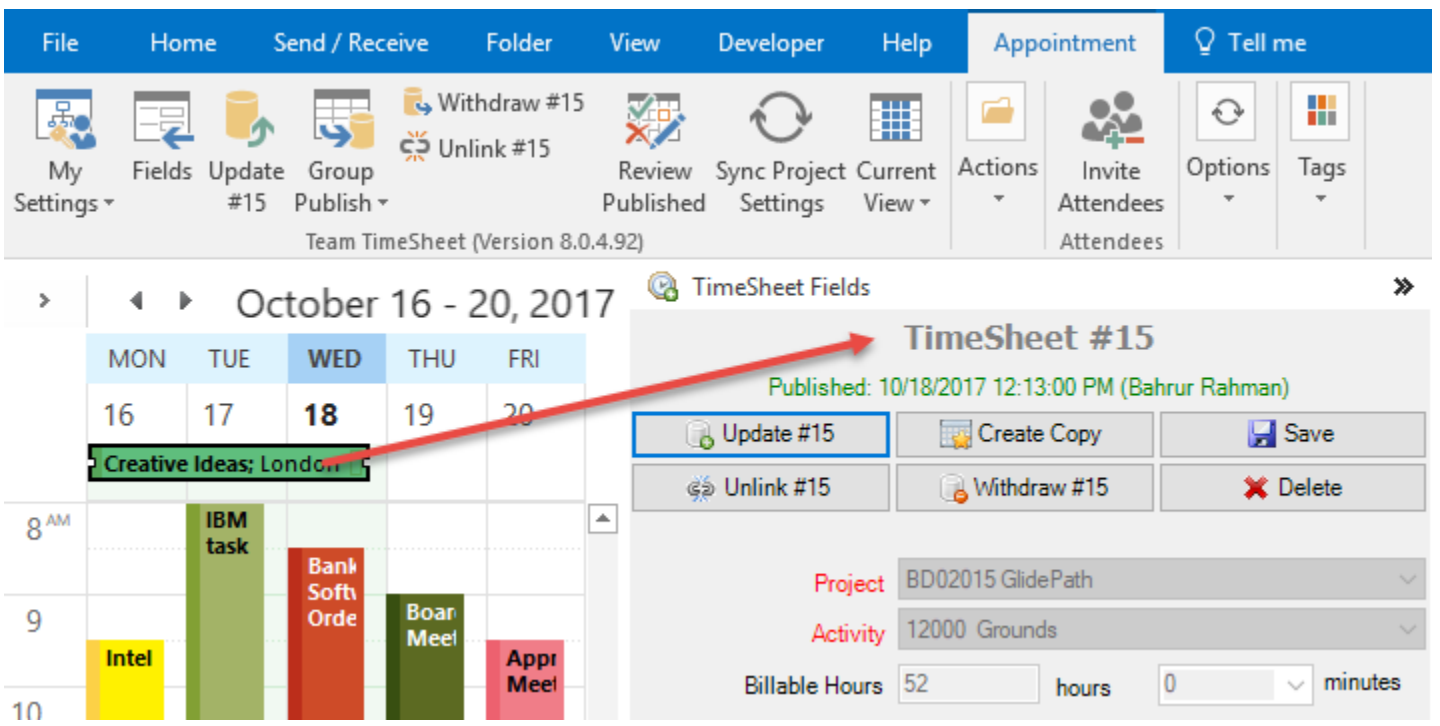
If you have enabled project color coding of tagged Outlook items, the color code of the recurring appointment is applied across the series. So, if you tag a different project to individual occurrence (than that of the series item), it won't overwrite the series color code.

8.4 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 network connectivity to SharePoint site and then simply click **'Publish'** button in the 'Team 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 database.

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.

SharePoint

BROWSE VIEW CUSTOM COMMANDS

Edit Item | Version History | Shared With | Delete Item | Manage | Alert Me | Workflows | Actions

Title	Creative Ideas
Location	london
Start Time	10/23/2017 8:00 AM
End Time	10/23/2017 10:30 AM
Total Cost	$25.00
Approved	No
Project Name	BD02015 GlidePath
Activity Name	12000 Grounds
BillableHours	3,120
ApprovedBy	
Duration	150
AllDayEvent	No

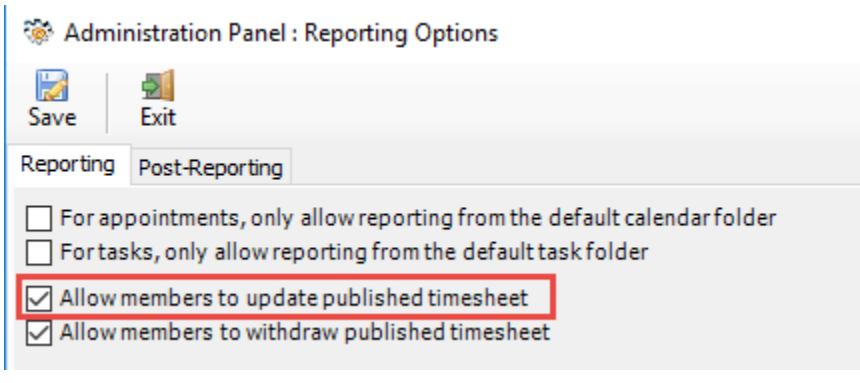
Notice that Outlook predefined fields and project fields are included in the timesheet. The total cost of the timesheet is also automatically calculated during the reporting process.

8.5 Updating and withdrawing reported timesheets

Once you have reported project deliverables and timesheets via appointment or task items from Outlook to the 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 SharePoint. The availability of updating and withdrawing of published timesheet in Outlook depends on the administrative settings on the Team TimeSheet Manager tool.

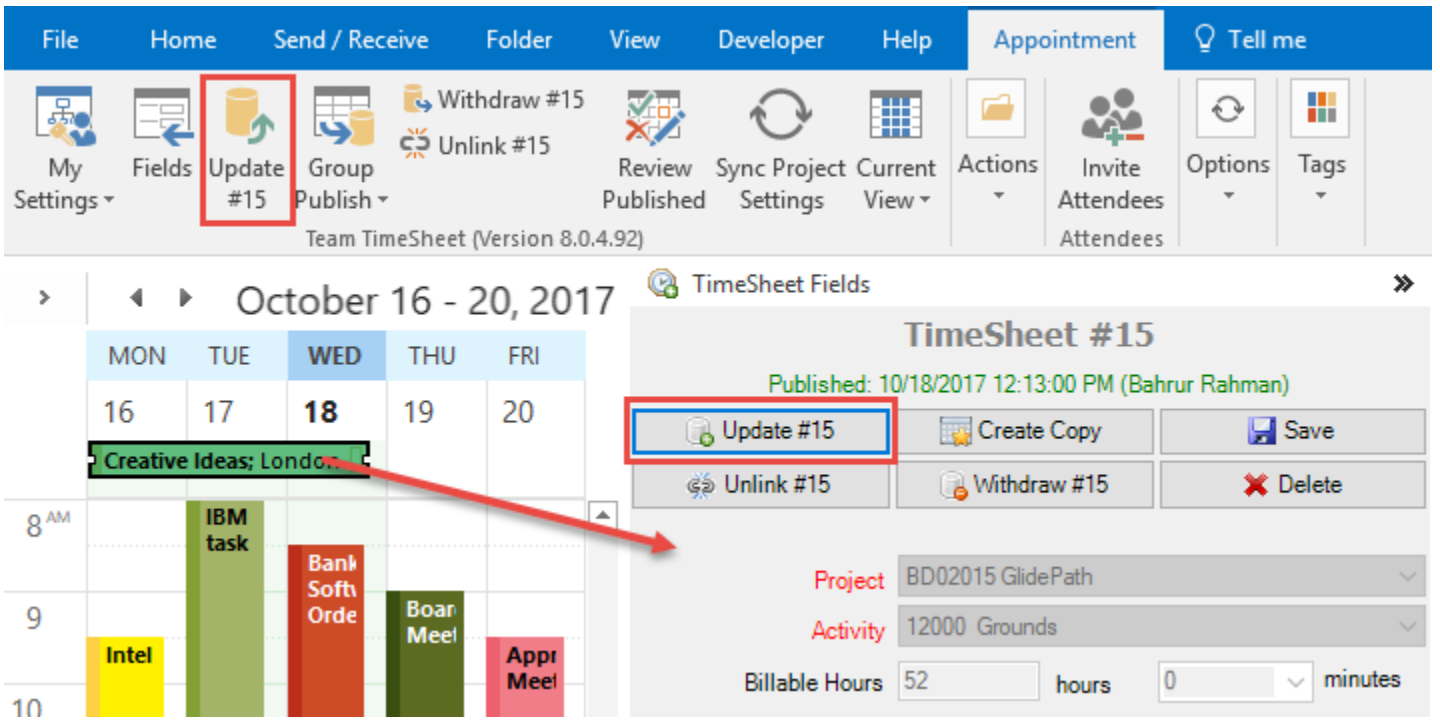
Updating reported data via Outlook

You can update or modify published data directly from Outlook only if your administrator had enabled *'Allow members to update reported timesheet'* option in the **Team TimeSheet Manager > 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.

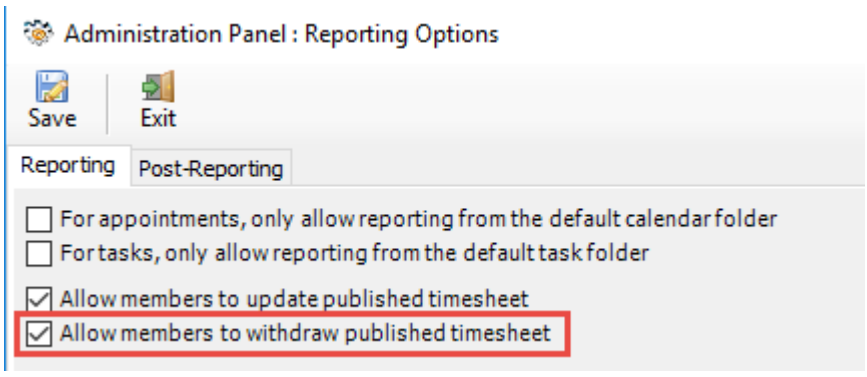


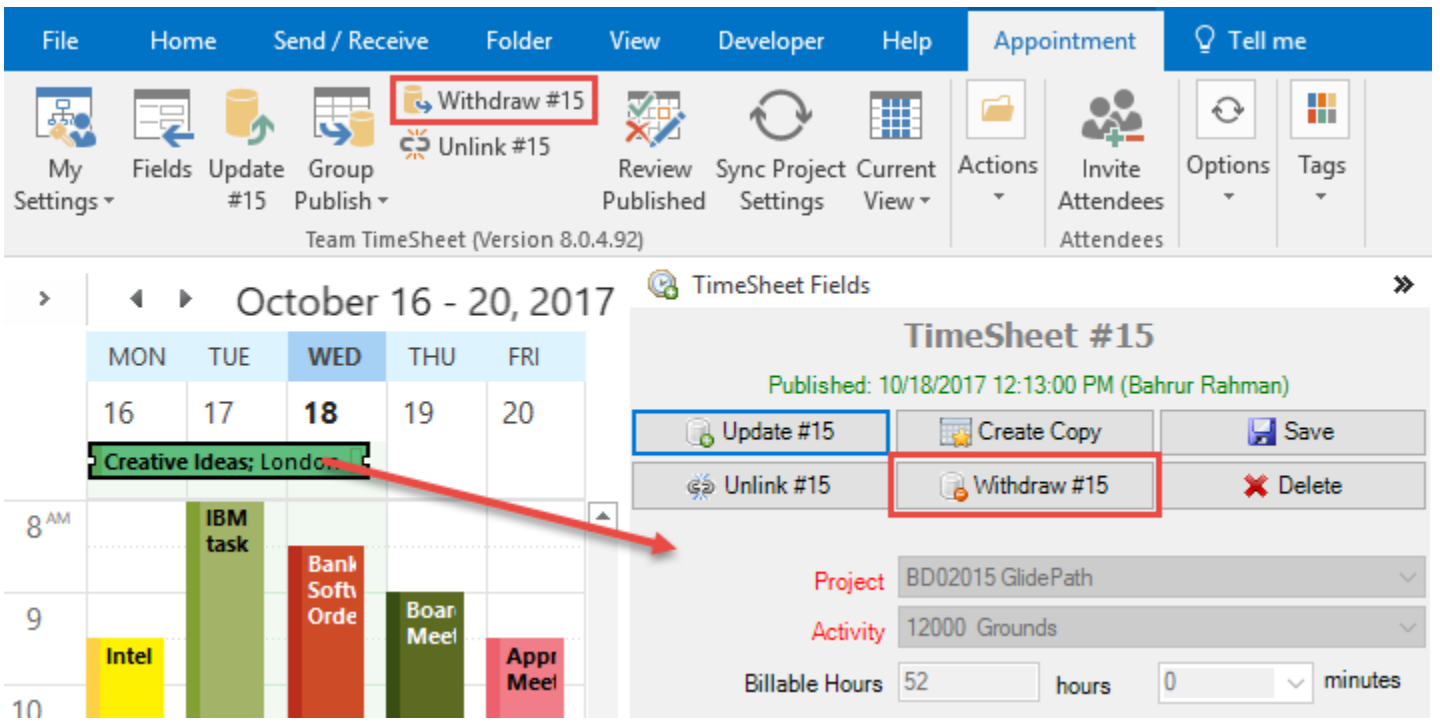
This way, you can change the project or custom field drop down values as well as update any other Outlook fields such as subject, location, mileage, body etc. and then re-submit again to update the existing report on the project database.

Withdrawing reported data via Outlook

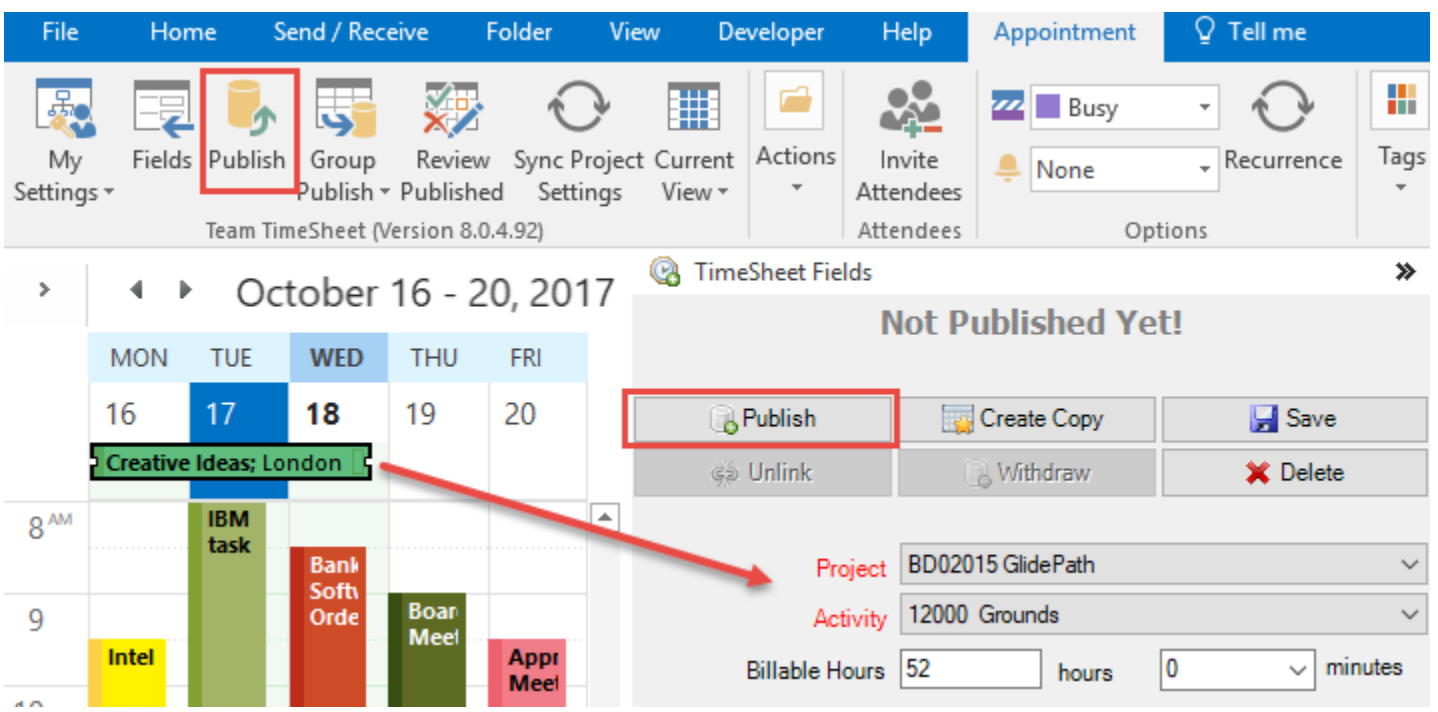
Likewise, if your administrator had enabled *'Allow members to withdraw reported timesheet'* option in the **Team TimeSheet Manager > Reporting Options** panel, you would be able to cancel a particular reported timesheet and withdraw it from the SharePoint via Outlook.

If withdrawal is allowed, once you have reported an Outlook item, a new button is available in the Team 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.





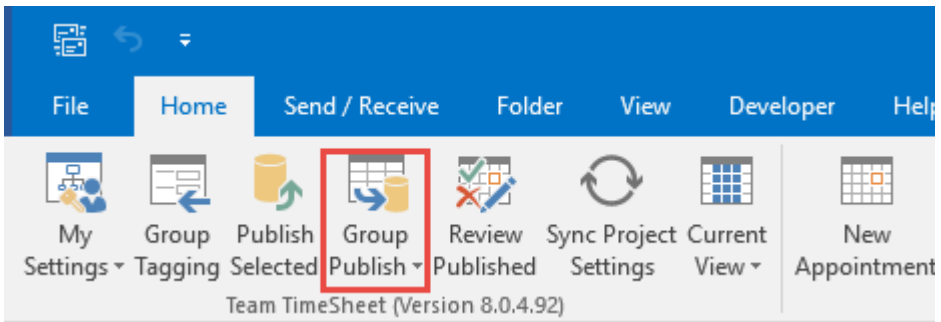
If withdrawal was successful, the reported timesheet is removed from SharePoint, and the particular Outlook item will be again available for reporting. Notice the update and withdraw buttons are substituted by the **'Publish'** button.

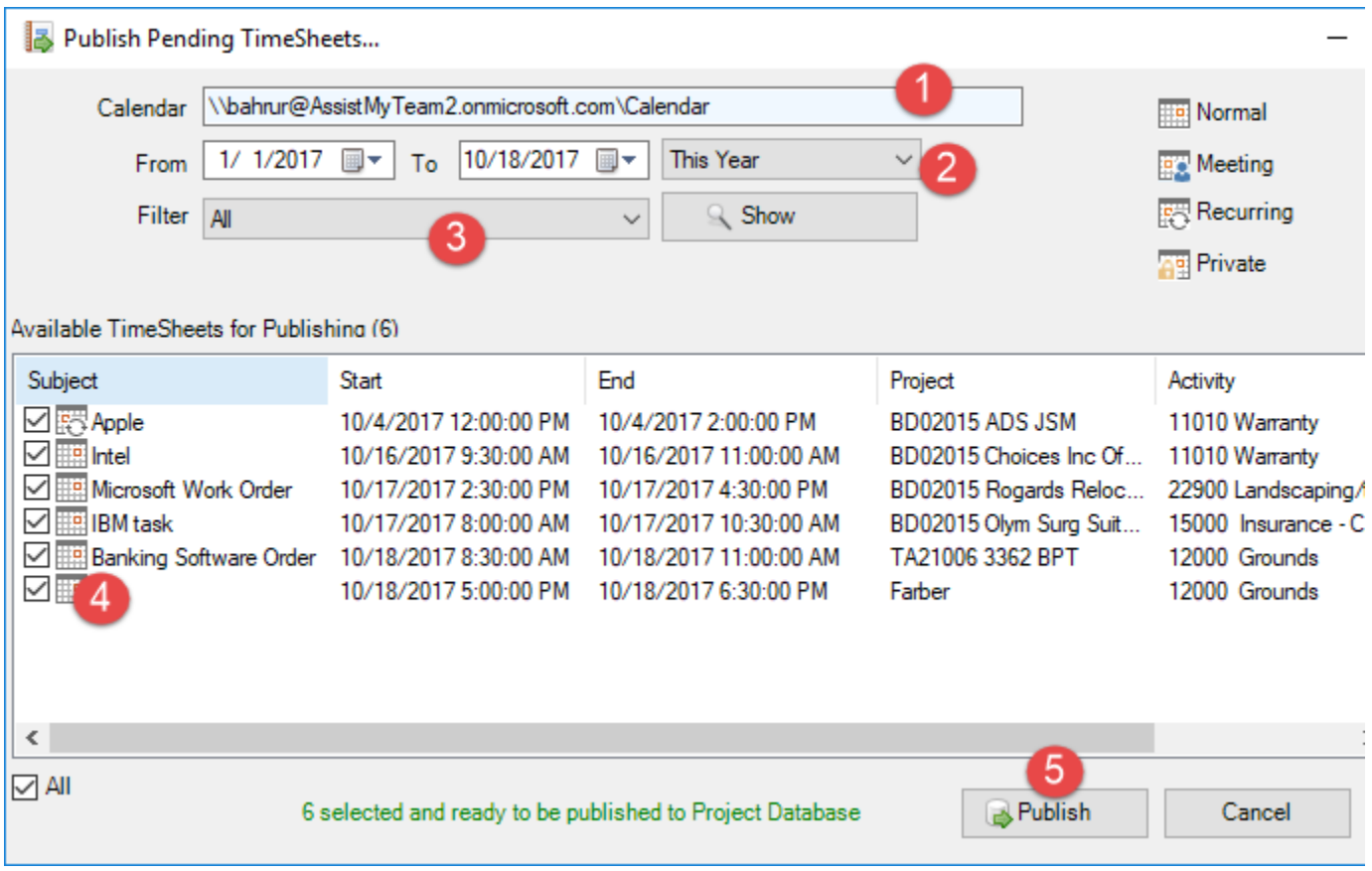


9. Group publish – Publish multiple items to SharePoint

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.

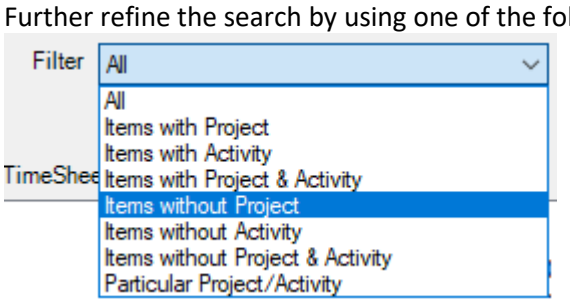




1. The current calendar or task folder path in Outlook

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:



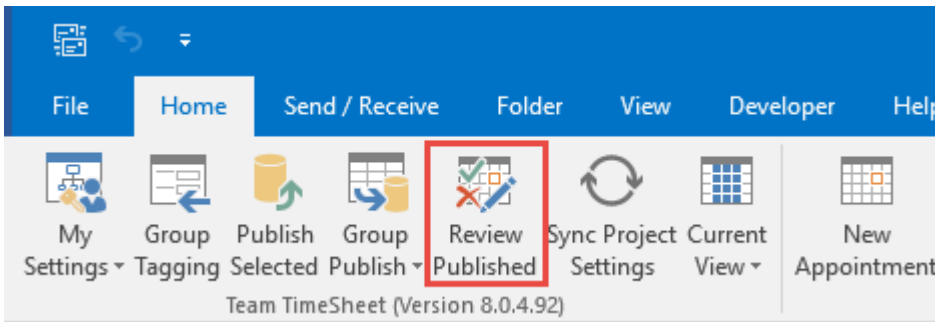
4. The unpublished outlook appointment or task items that meet the search criteria. To publish to database, check the boxes and click 'Publish'

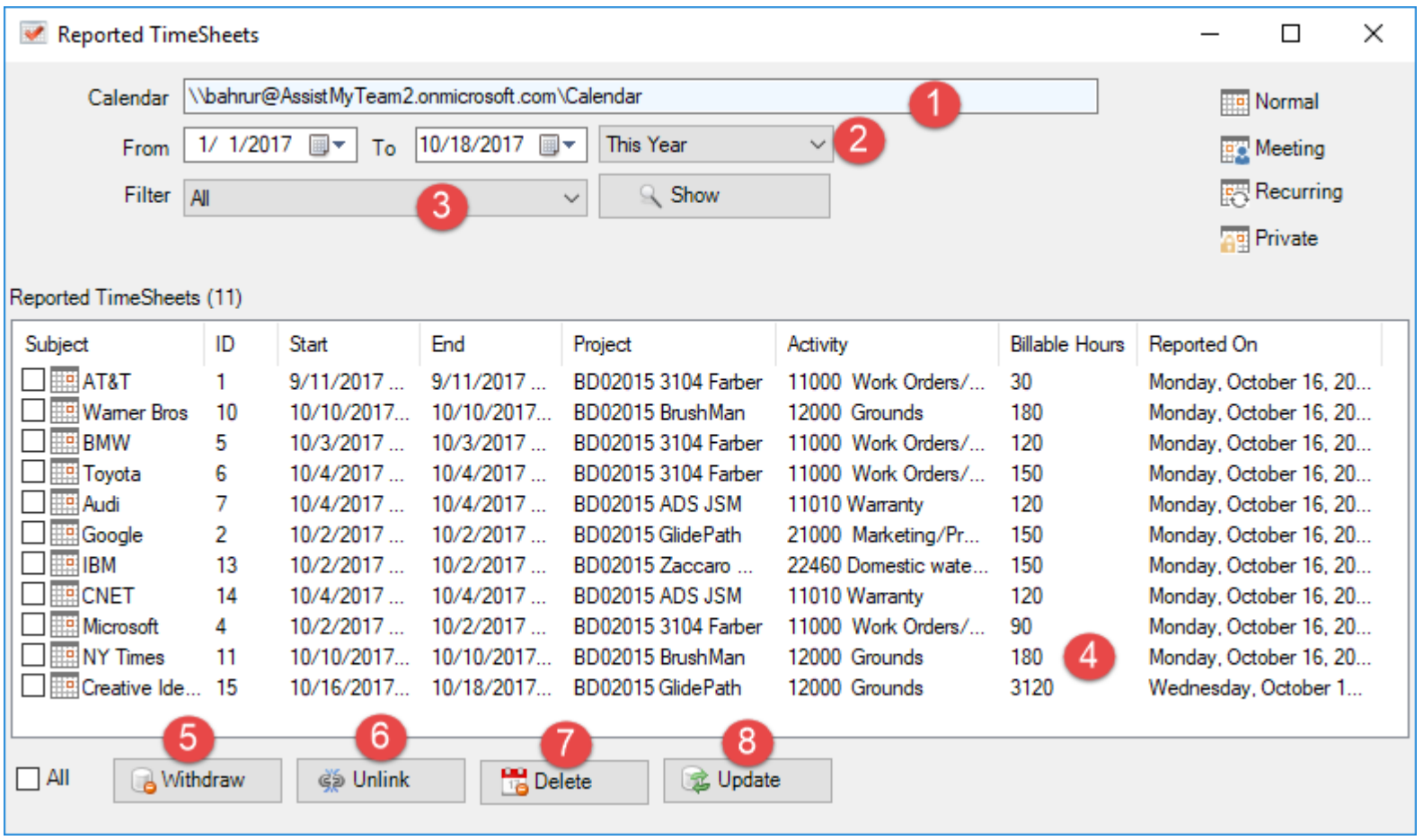
5. Publish the checked items to the project database.

10. 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 SharePoint, or if the project has been cancelled, you can withdraw the timesheets from SharePoint.

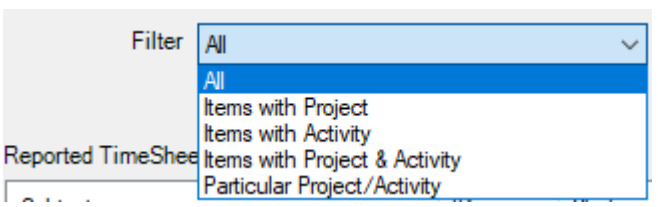




1. The current calendar or task folder path in Outlook

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 SharePoint, check the boxes and click the appropriate button accordingly.

5. **Withdraw** – remove the published timesheet record entry from the central database 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 SharePoint.

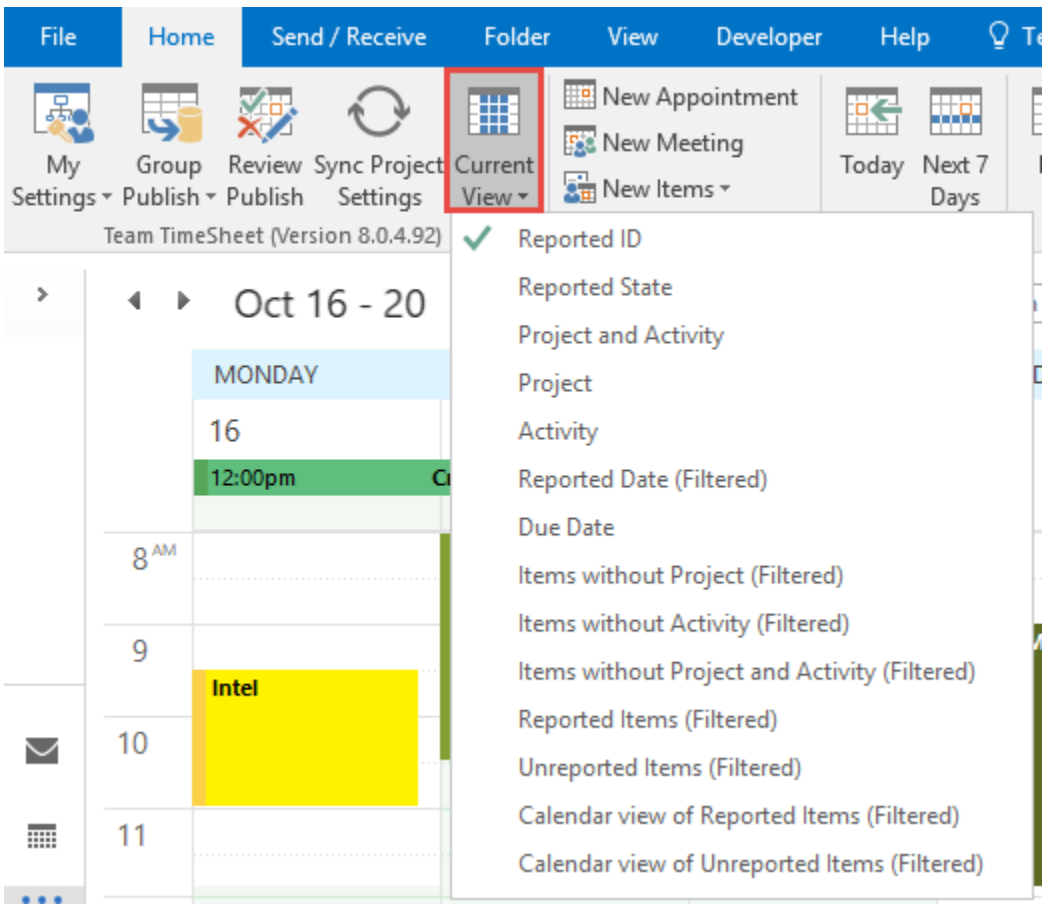
11. Work with Outlook Views

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.

Team 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 Team TimeSheet toolbar or ribbon.

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



Let us discuss some of the Team 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 the project database. 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

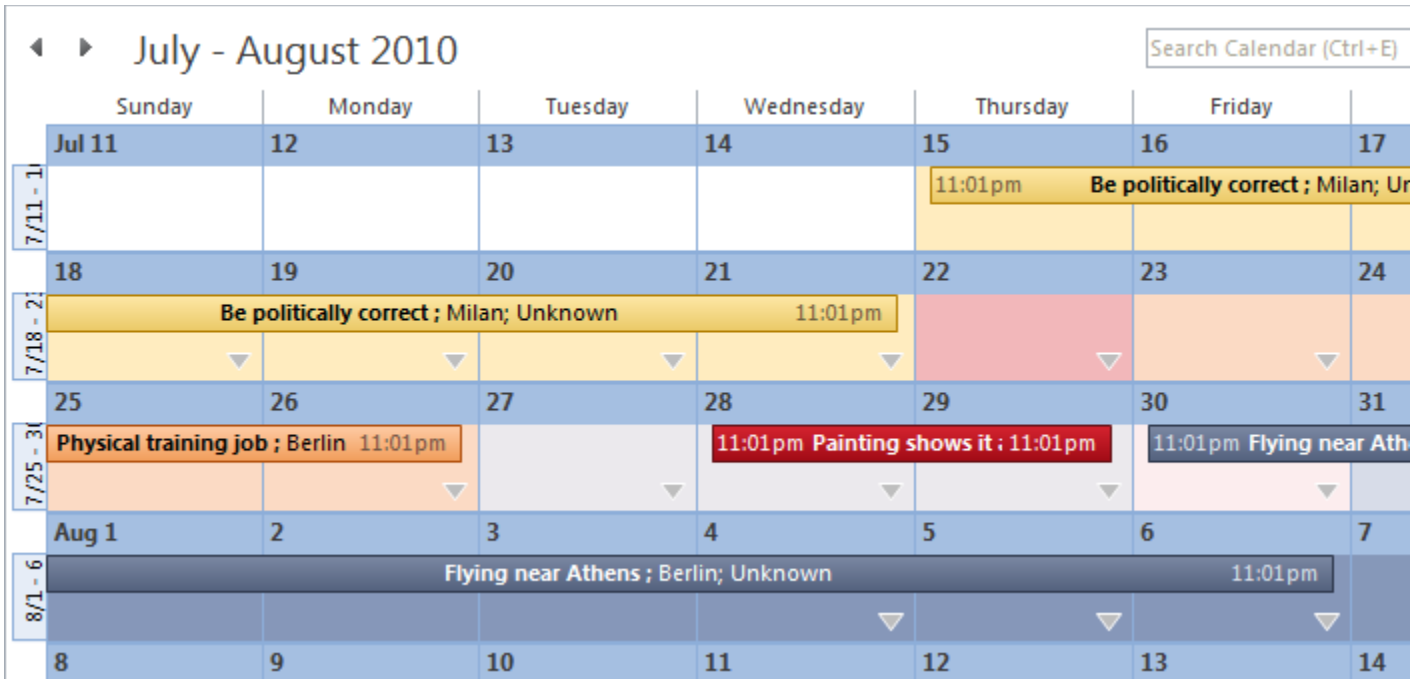
View 4 – Items without Project (Filtered)

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)

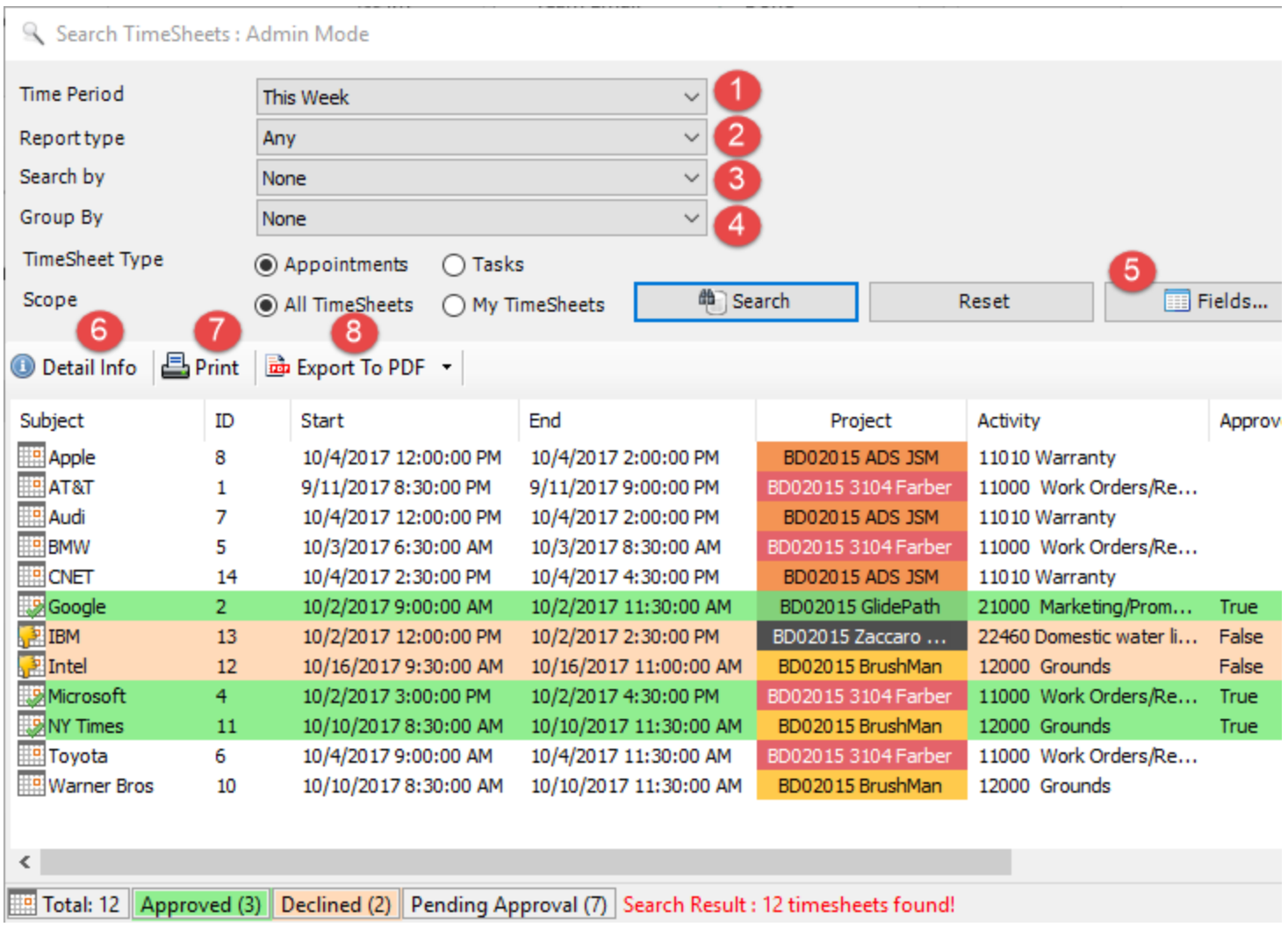
This is a special calendar view showing only reported items in that particular task or calendar folder.



12. Searching TimeSheets in DB

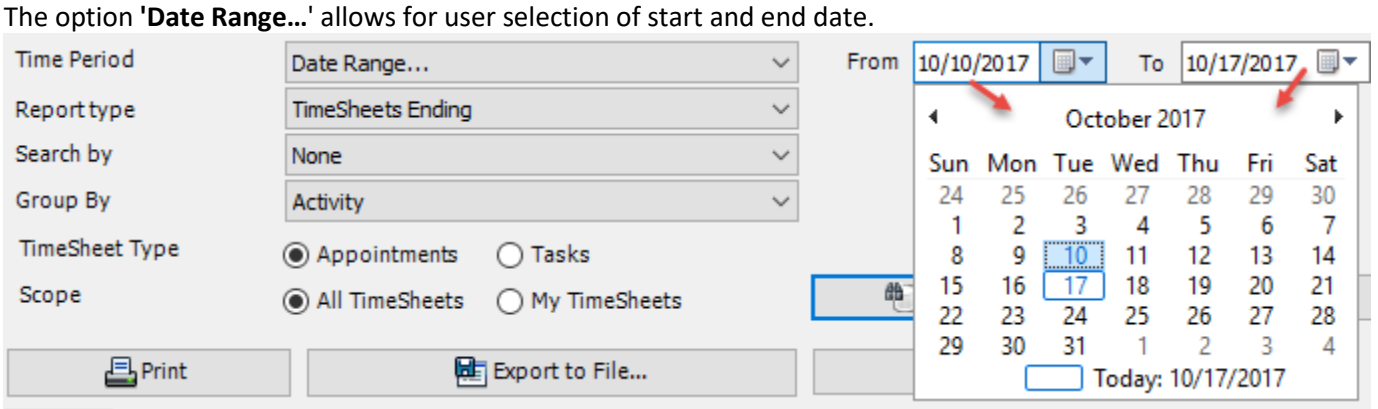
Team TimeSheet Client > Search my timeSheets in DB

With the *Search* utility, you can run queries on your published timesheets. A variety of search parameters are predefined to help you find your published timesheets easily and quickly. You can also limit the search to your published timesheets only by choosing 'My TimeSheets' scope.



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.



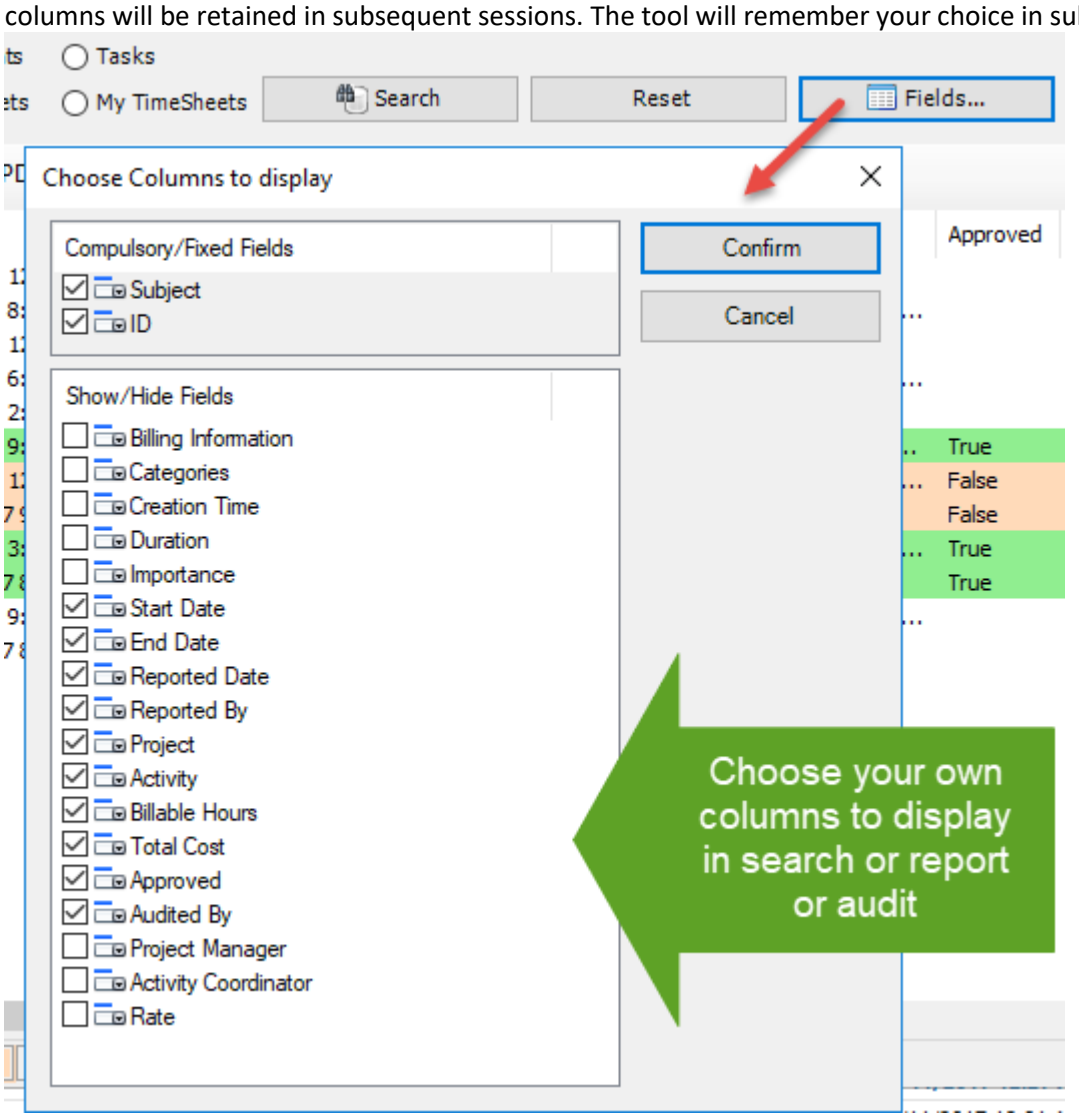
2 **Report Type:** Choose a report type from the predefined ones below:
Any, TimeSheets Starting, TimeSheets Ending, TimeSheets Reported, TimeSheets Ongoing, TimeSheets Approved, TimeSheets Declined, TimeSheets Pending Approval, TimeSheets Completed, TimeSheets with Empty Project, TimeSheets with Empty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

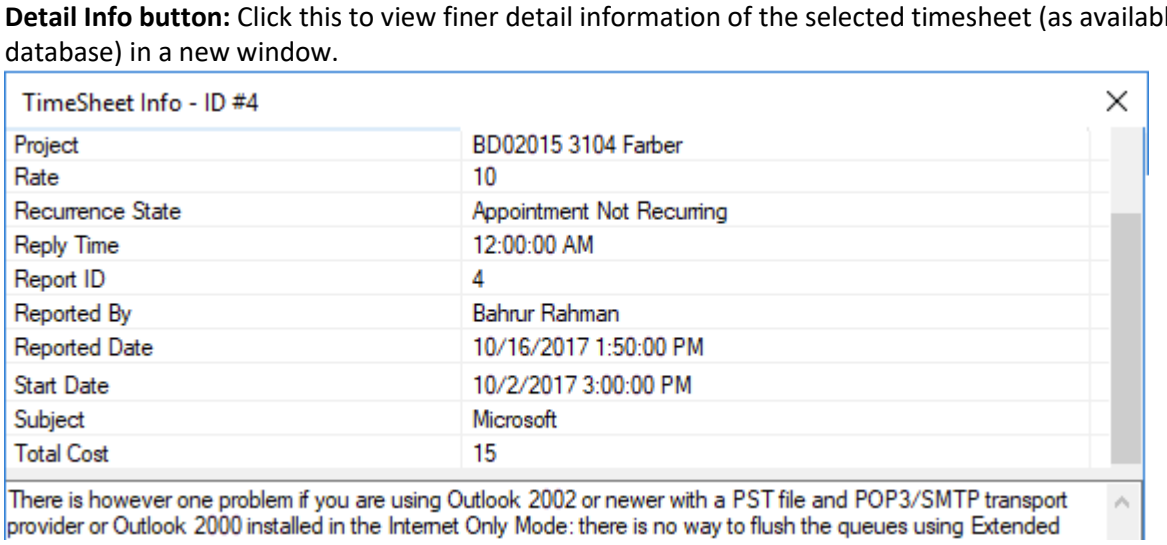
4 **Group By:** You can choose to group the timesheets either with:
Project, Activity, Reported By, Importance, Categories

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.

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. The tool will remember your choice in subsequent runs.

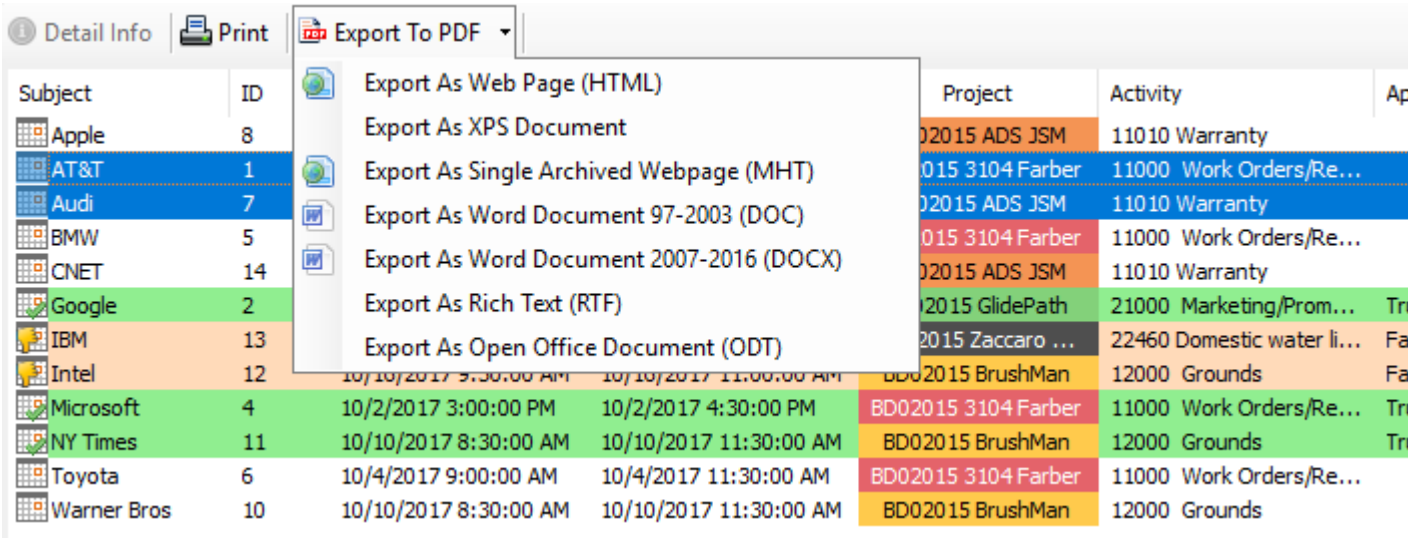


6 **Detail Info button:** Click this to view finer detail information of the selected timesheet (as available in the project database) in a new window.



7 **Print:** Click this to print the selected timesheets using the **'Print'** template (as defined under **Team TimeSheet Manager > 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.

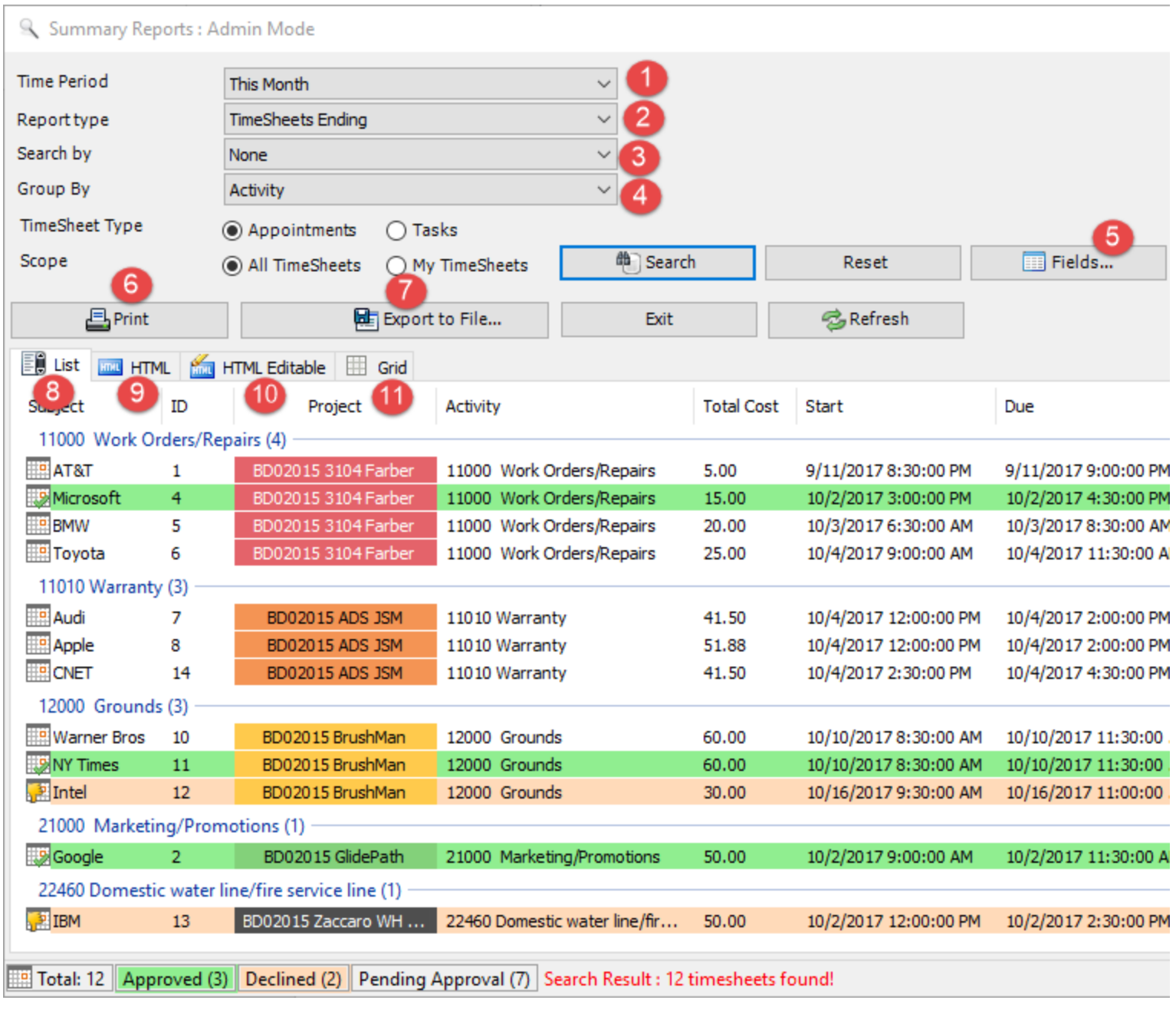


13. My TimeSheet Summary Reports

Team TimeSheet Client > My TimeSheet Summary Reports

With Summary Reports, you can get an on your submitted deliverables, timesheets and aggregate hours and expenses for the selected period. It comes handy to keep track of current budget deficit and work done, and plan and forecast requirements for resources and work hours for remaining part of the projects. Any user-defined and project specific fields can be chosen for inclusion into the reports. Aggregated and summarized reports can then be exported to PDF, Word, 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.



NOTE: You will be able to get timesheets overview for all members if your administrator had enabled the option '*Allow members with admin-access to view Summary Reports on all reported timesheets (for all members)*' under **Team TimeSheet Manager > Access Control**. *Otherwise*, you will be able to only get overview for those timesheets that you had reported.

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

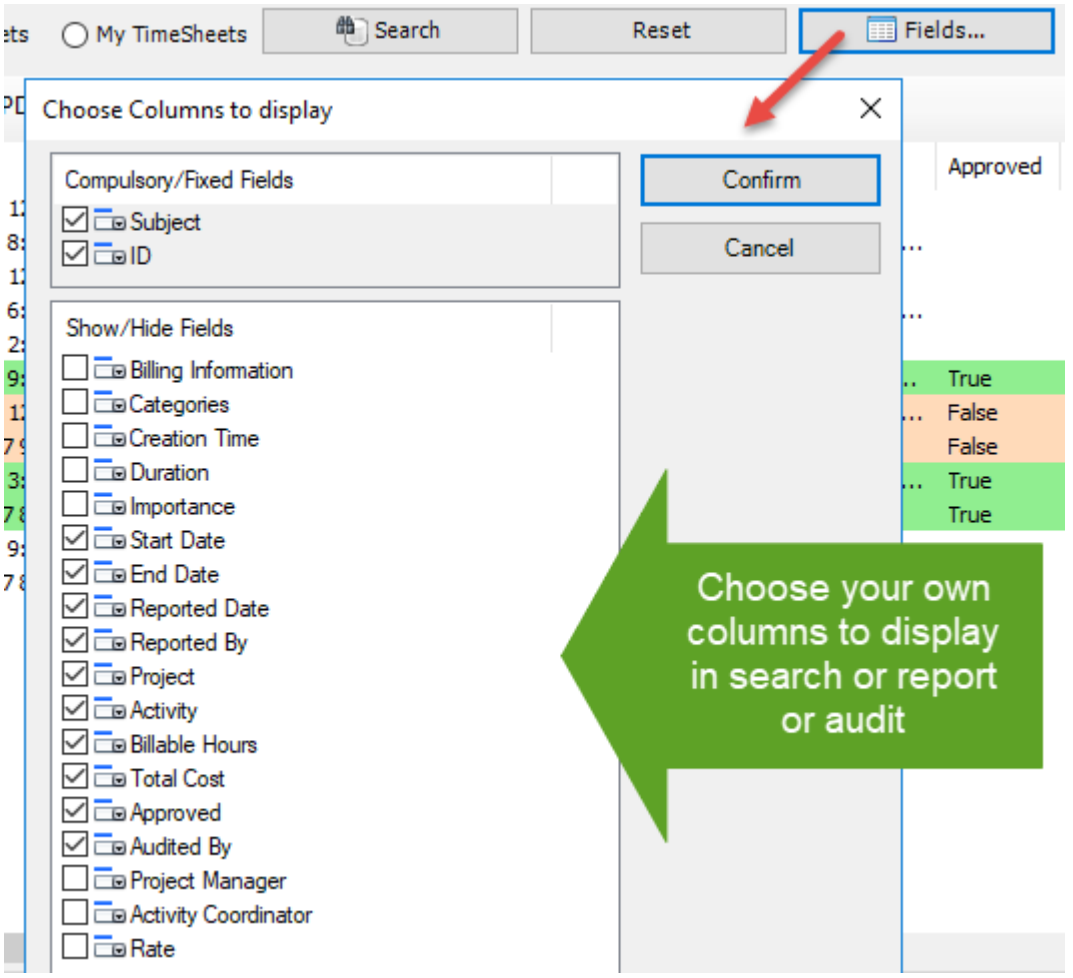
1. **Time Period:** Choose a time period from the followings under which the search will be confined:
Any, Today, Yesterday, Tomorrow, This week, Last Week, Next Week, This Month, Last Month, Next Month, This Year, Last Year, Date Range, On

2. **Report Type:** Choose a report type from the predefined ones below:
Any, TimeSheets Starting, TimeSheets Ending, TimeSheets Reported, TimeSheets Ongoing, TimeSheets Approved, TimeSheets Declined, TimeSheets Pending Approval, 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:** Click the 'Fields' option to choose which particular timesheet fields/columns will show up in the search result and report.

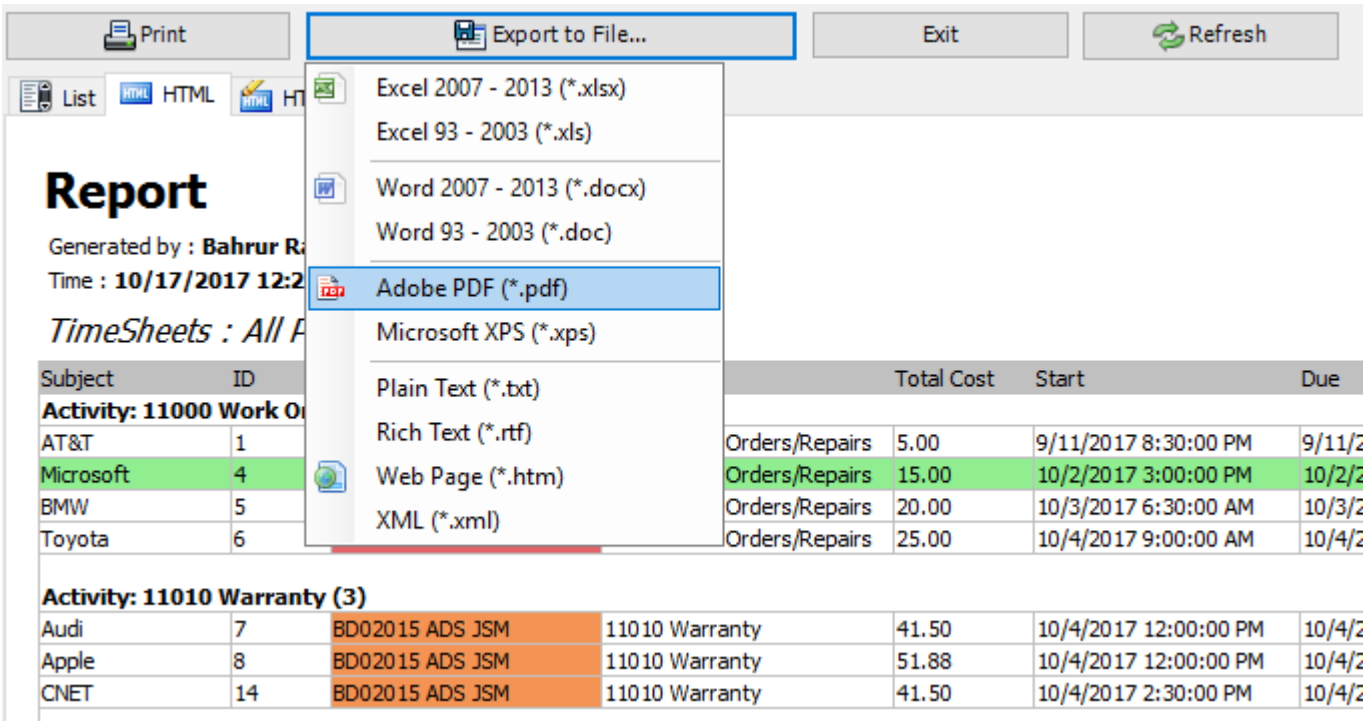


The tool will remember your choice in subsequent runs.

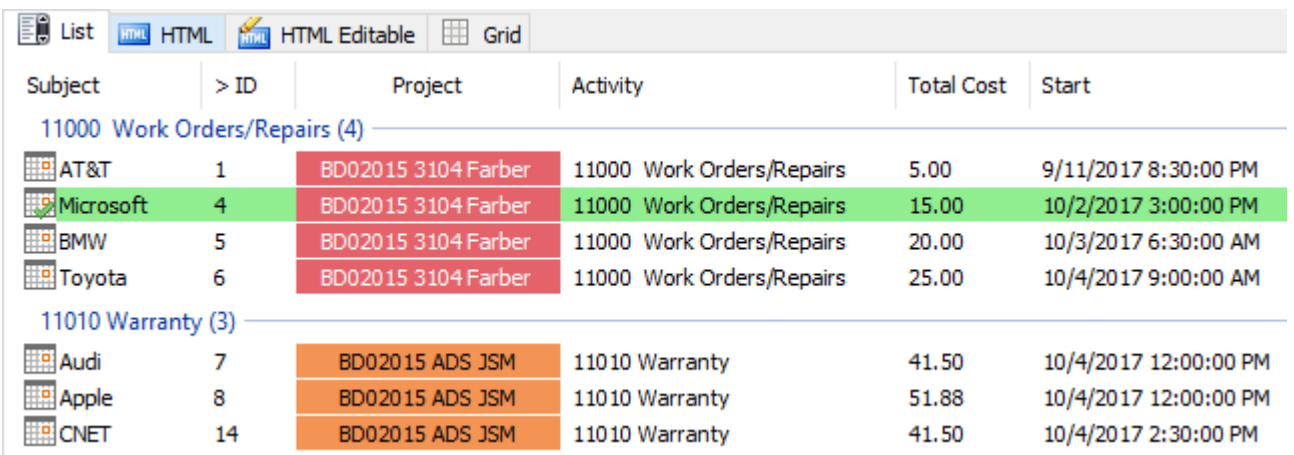
You can re-arrange the columns by drag-and-drop to get the kind of view you want. And the display order of the columns will be retained in subsequent sessions.

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.

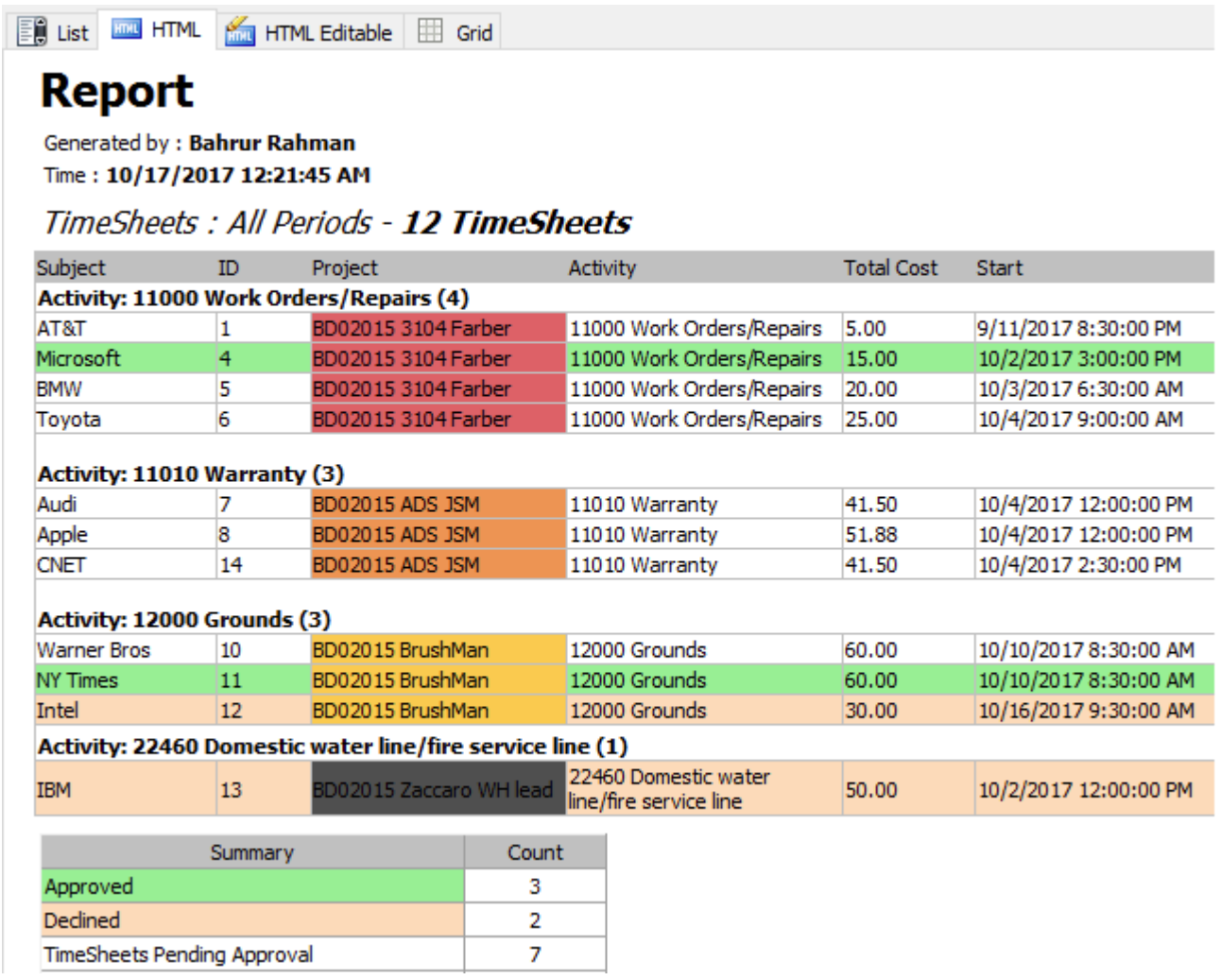
7 **Save the current report to file** – Once you get the look and feel of your report, you can then export the report to one of the many popular document formats supported such as Microsoft Excel sheets, Word documents, Adobe PDF, Rich Text or web page etc. for sharing with others users, or for future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



Report

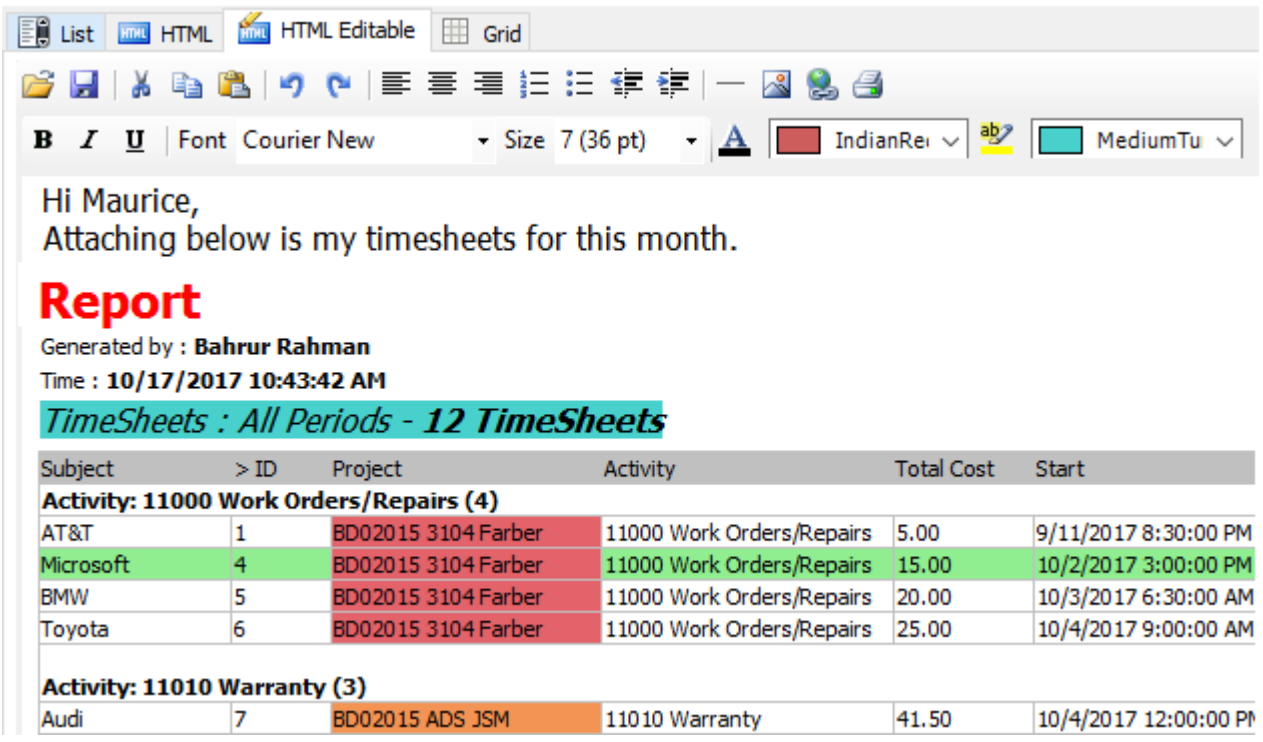
Generated by : **Bahrur Rahman**
Time : **10/17/2017 12:21:45 AM**

*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: 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.



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

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!

AssistMyTeam

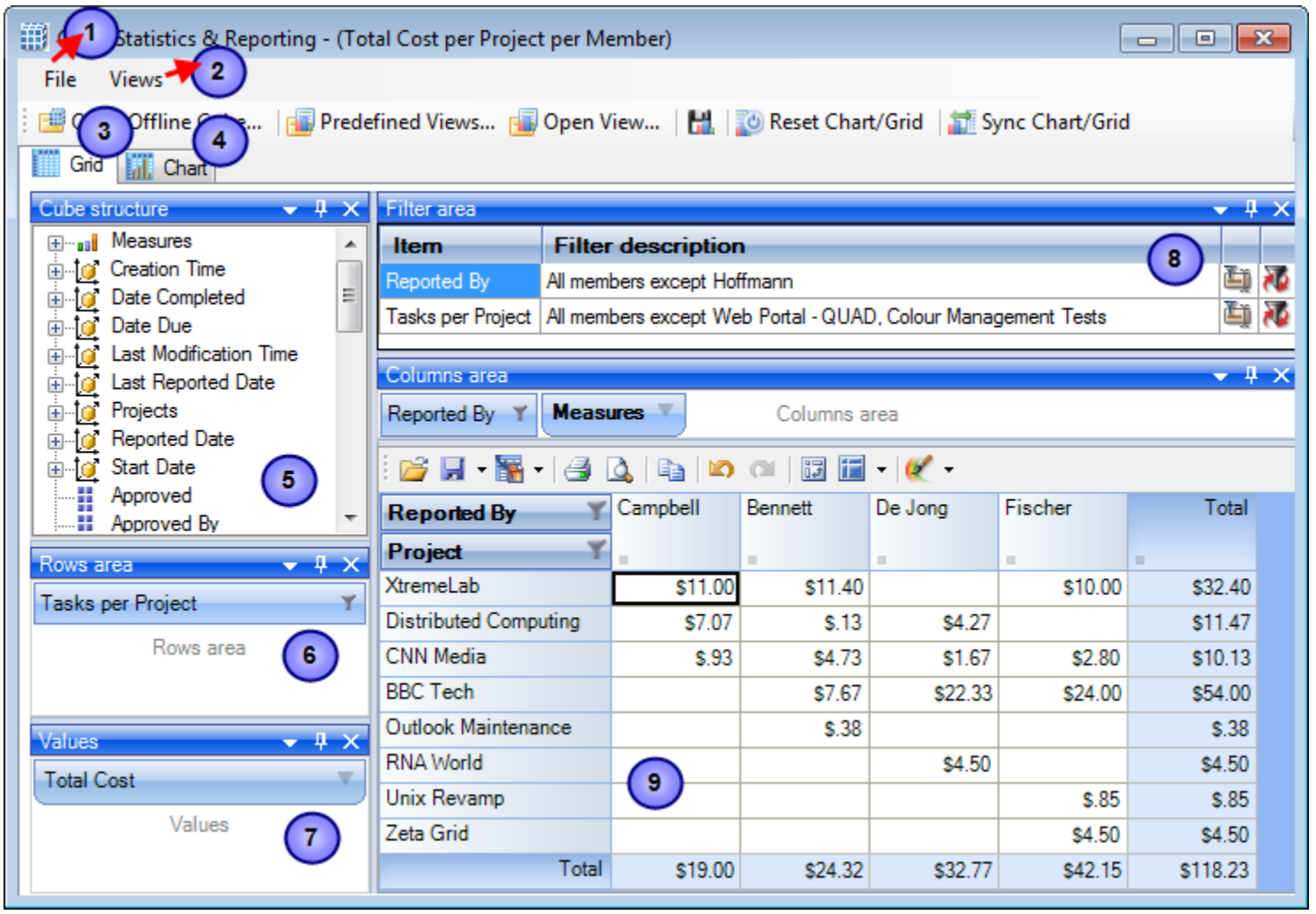
14. My TimeSheet OLAP Statistics

Team TimeSheet Client > My TimeSheet OLAP Statistics

With the integrated Online Line Analytical Processing (OLAP) tool, you can analyze your submitted timesheets and other project deliverables in multidimensional view to extract critical information and intelligence. The tool supports the ability 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.

NOTE: You will be able to get run OLAP statistics on timesheets (even those published by others) if your administrator had enabled the option '*Allow members with admin-access to view OLAP Statistics on all reported timesheets (for all members)*' under **Team TimeSheet Manager > Access Control.** Otherwise, you will be able to only see statistics for those timesheets that you had published only.

14.1 The User Interface

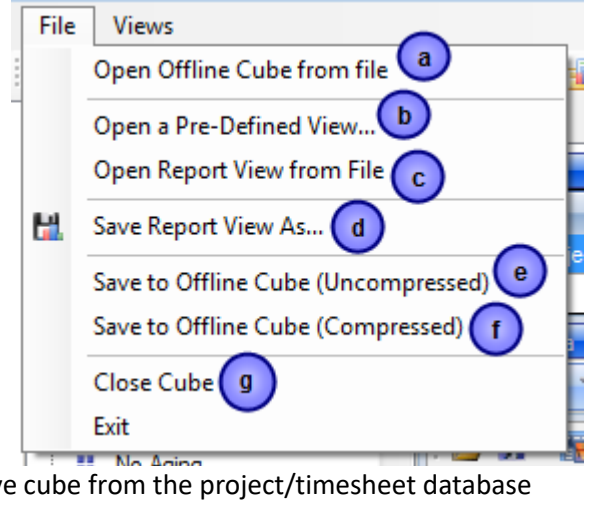


This statistical tool presents an easy-to-use interface for operating an OLAP-slice. The basic data is displayed in the working area. The environment tools for managing the content and characteristics of the slice are placed on the pivot panels. You can set the panels' layout the way you like. To drag 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.

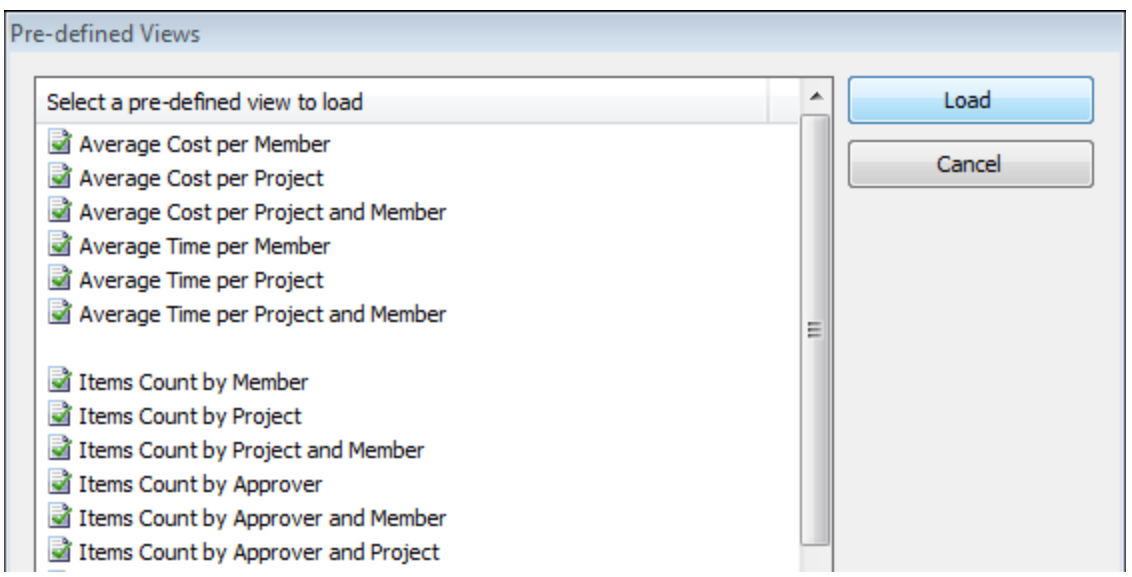
1 **The File menu**
The file menu consists of the following commands:



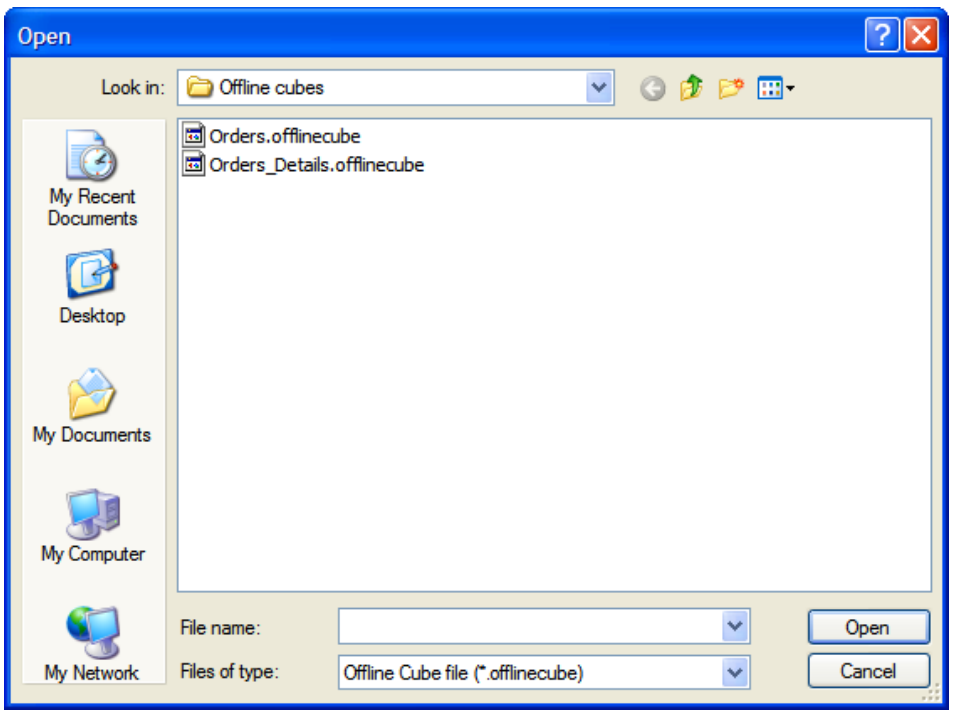
a) **Open Offline Cube from file** - While generating a live cube from the project/timesheet database provides the advantage of analyzing live data, often, you might be away or disconnected from the network.

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 the project/timesheet database 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.

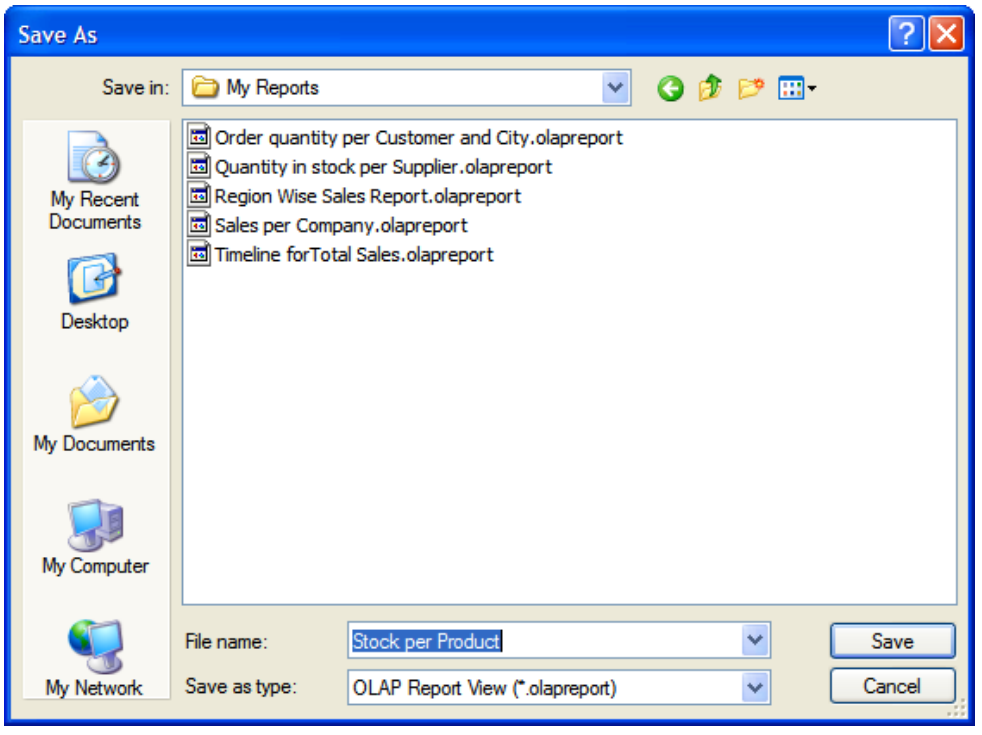
b) **Open a Predefined View** - More than 30 views specifically designed for Team TimeSheet are included. Simply select a view and click 'Load' or double-click to load the statistical analysis of that report, the result will be displayed in the Grid or Chart (depending on the current active view).



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.



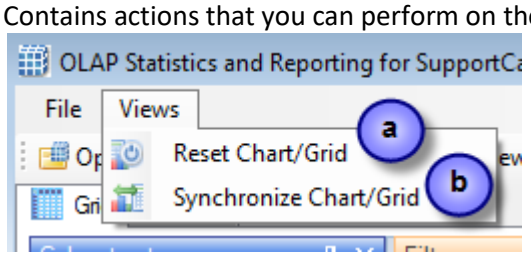
e) **Save to offline Cube** – Once you have loaded a live cube from the database, you have the option to save the entire cube data to a file (with the extension **.offlinecube**) for offline use, when you are disconnected from the network. Offline cube can be saved in compressed or uncompressed format,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

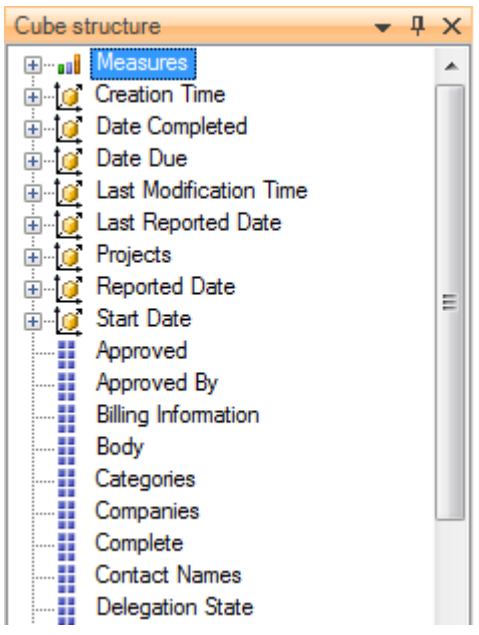
The OLAP Grid control comprises of a multi-dimensional table with expandable nodes. These nodes group and display data according to the hierarchies used to define the measures and dimensions upon which the underlying data has been organized. A unique feature of control allows for building the OLAP-reports 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 managers and members 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.

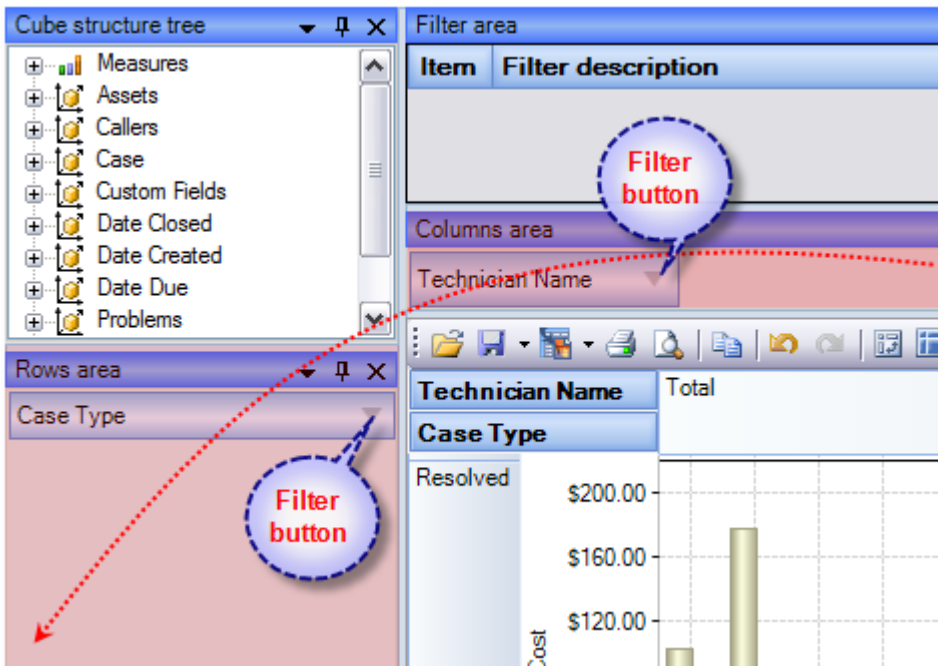
To select a hierarchy for display – drag-n-drop it to the hierarchy area or the pivot panel (rows or columns area).

- 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.

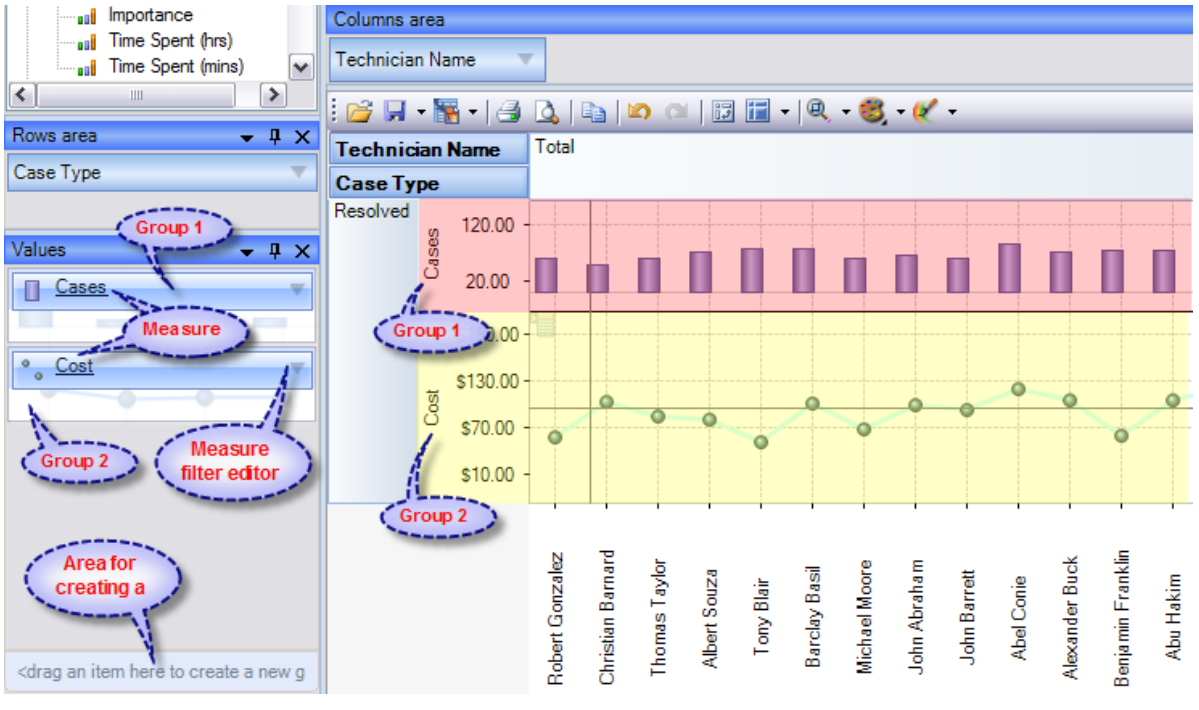
6 **Pivoting panels**

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.

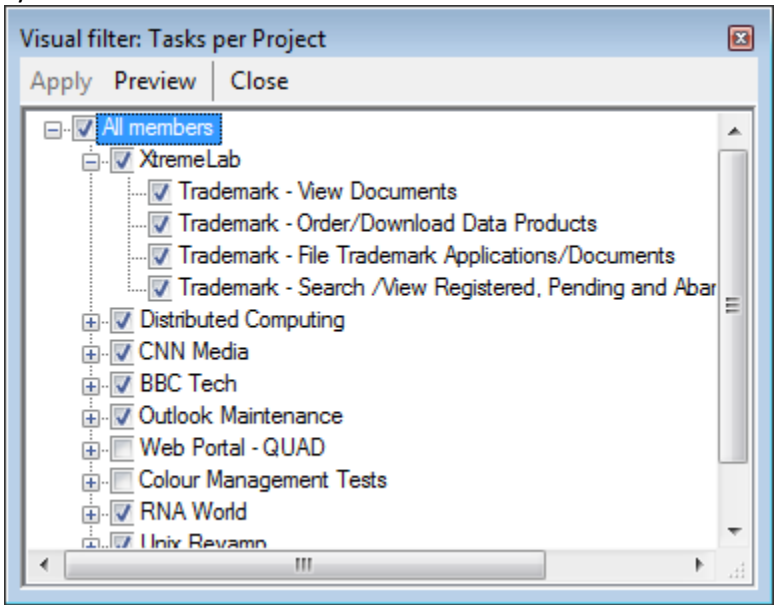
Clicking a mouse button on measures will call the context menu. From here, you can move a measure to one of the pivot panels or to the modifiers axis, or assign a measure filter. Also, you can assign the marker type of a chart point and its color.

8

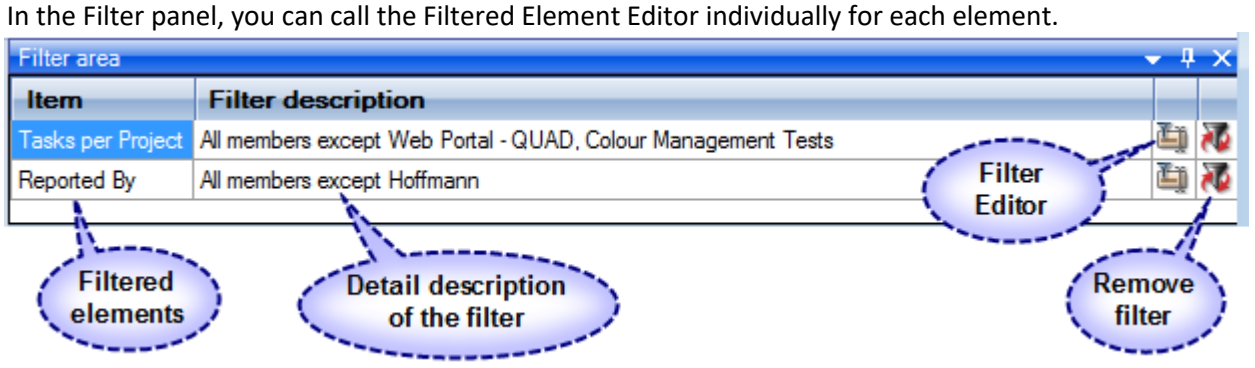
Filter panel

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

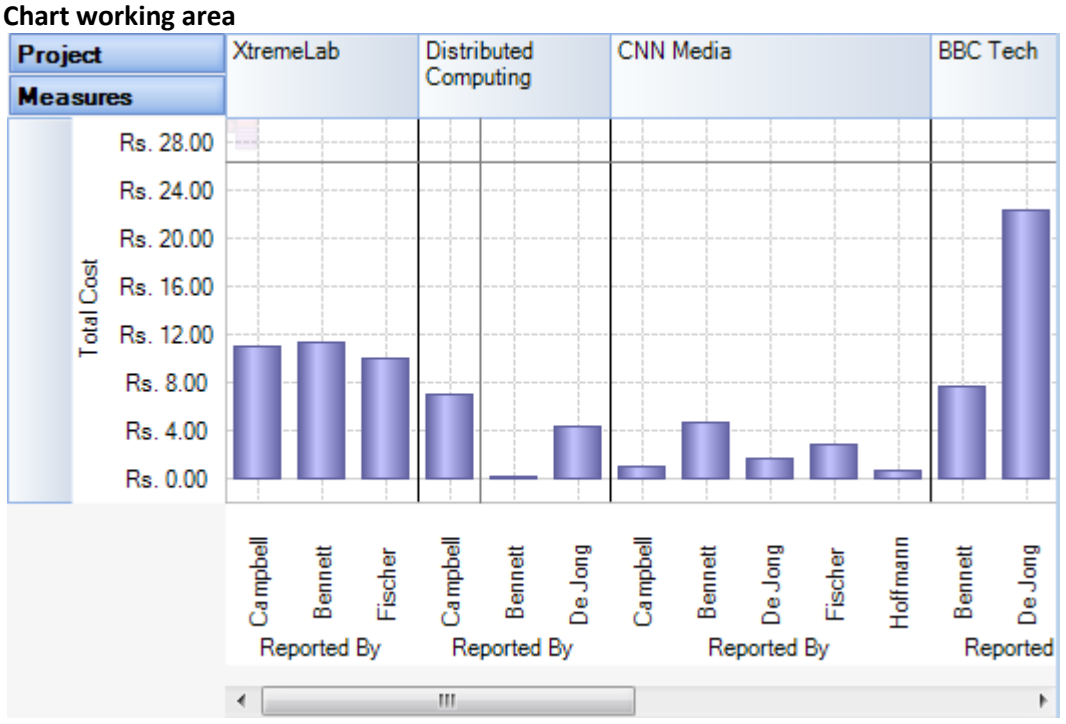
The OLAP-slice data is displayed in working area. In its upper part there is a menu for the quick access to the frequently used commands[2]. The rest is occupied by the current OLAP-slice and consists of the following parts - Cube Axis headers, Cube Axes, Data Axes, Data Axis headers, Chart Panes.

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



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14.2 Working with 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 users 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:

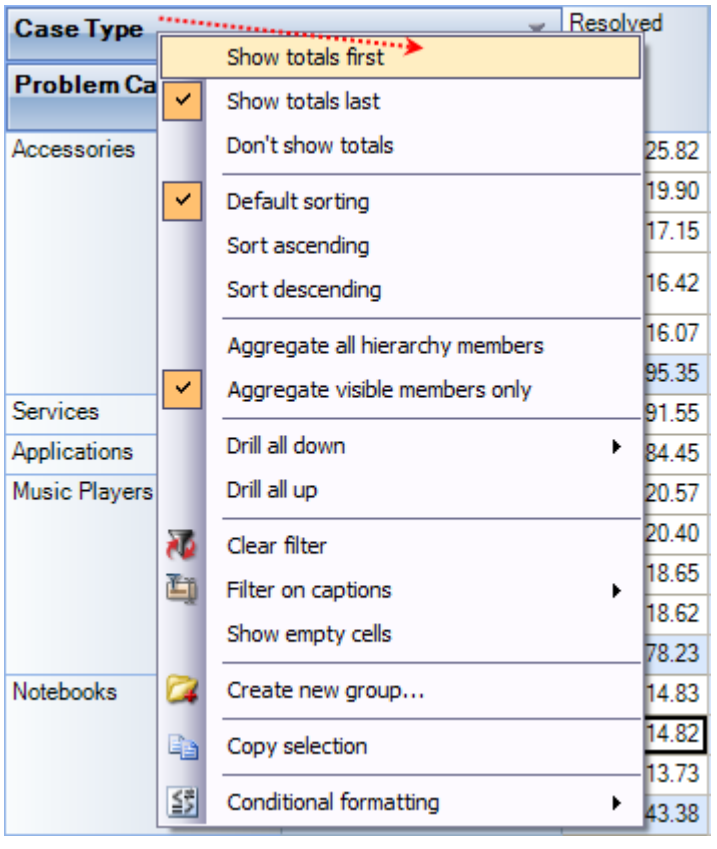
- Select all the cells pressing Ctrl+A;
- Capture the area with the mouse;
- Change the boundaries of the selected area with direction buttons, holding down the Shift button.

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

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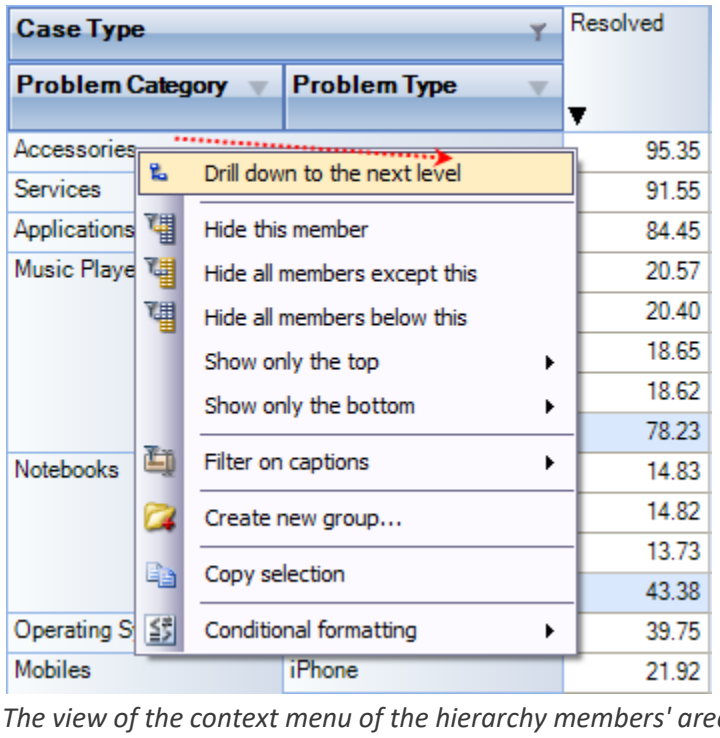
The view of context menu of the hierarchy levels' area. There is a list of commands available in the context menu of the hierarchy levels' area:

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

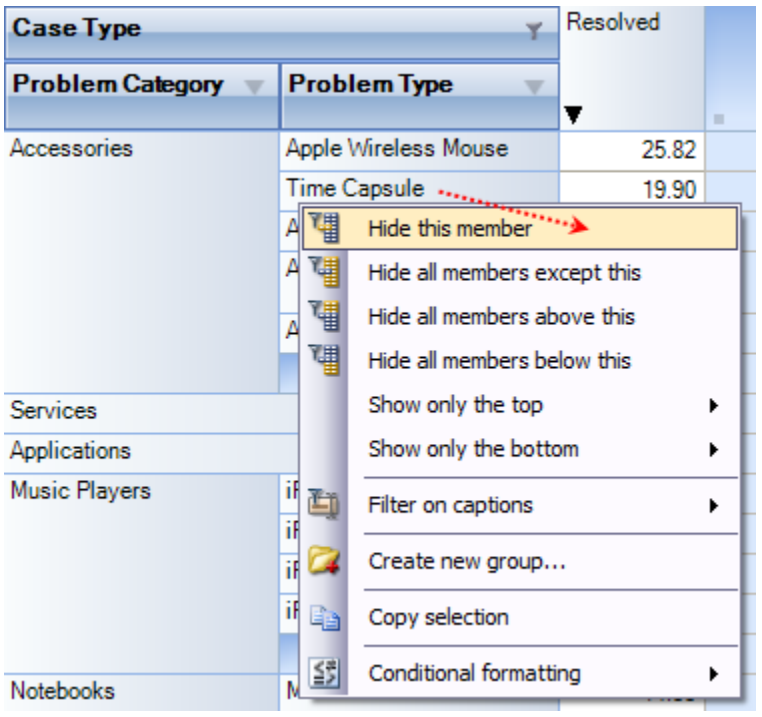


The view of the context menu of the hierarchy members' area

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

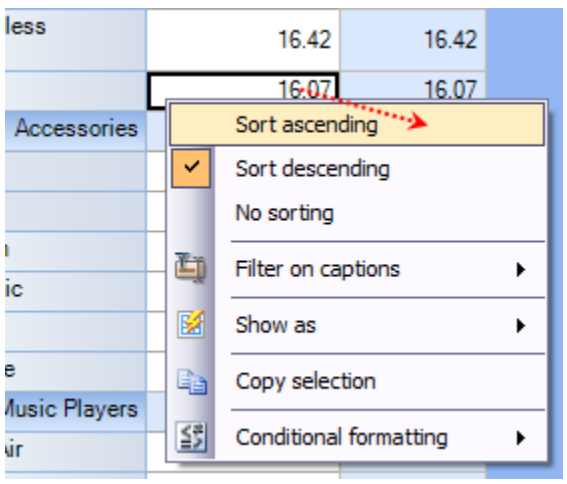


The context menu that appears above the group cell.

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

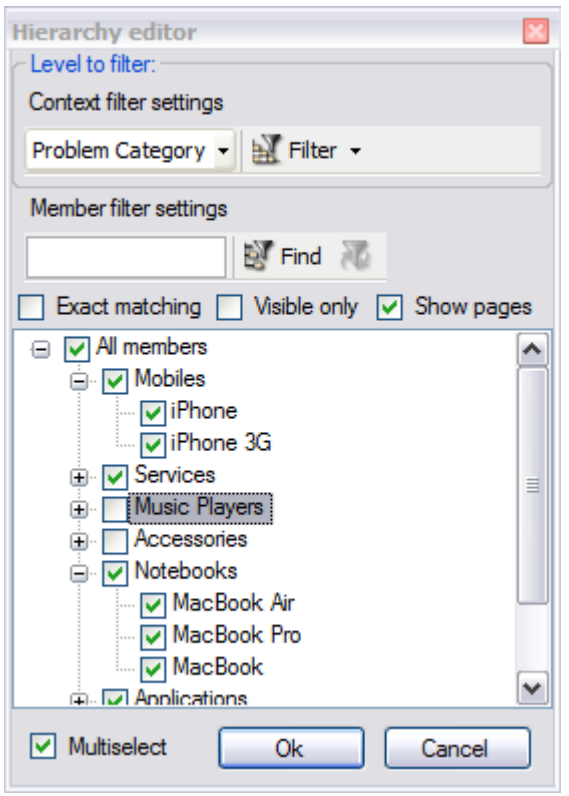


The context menu that appears above the group cell:

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 these 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.

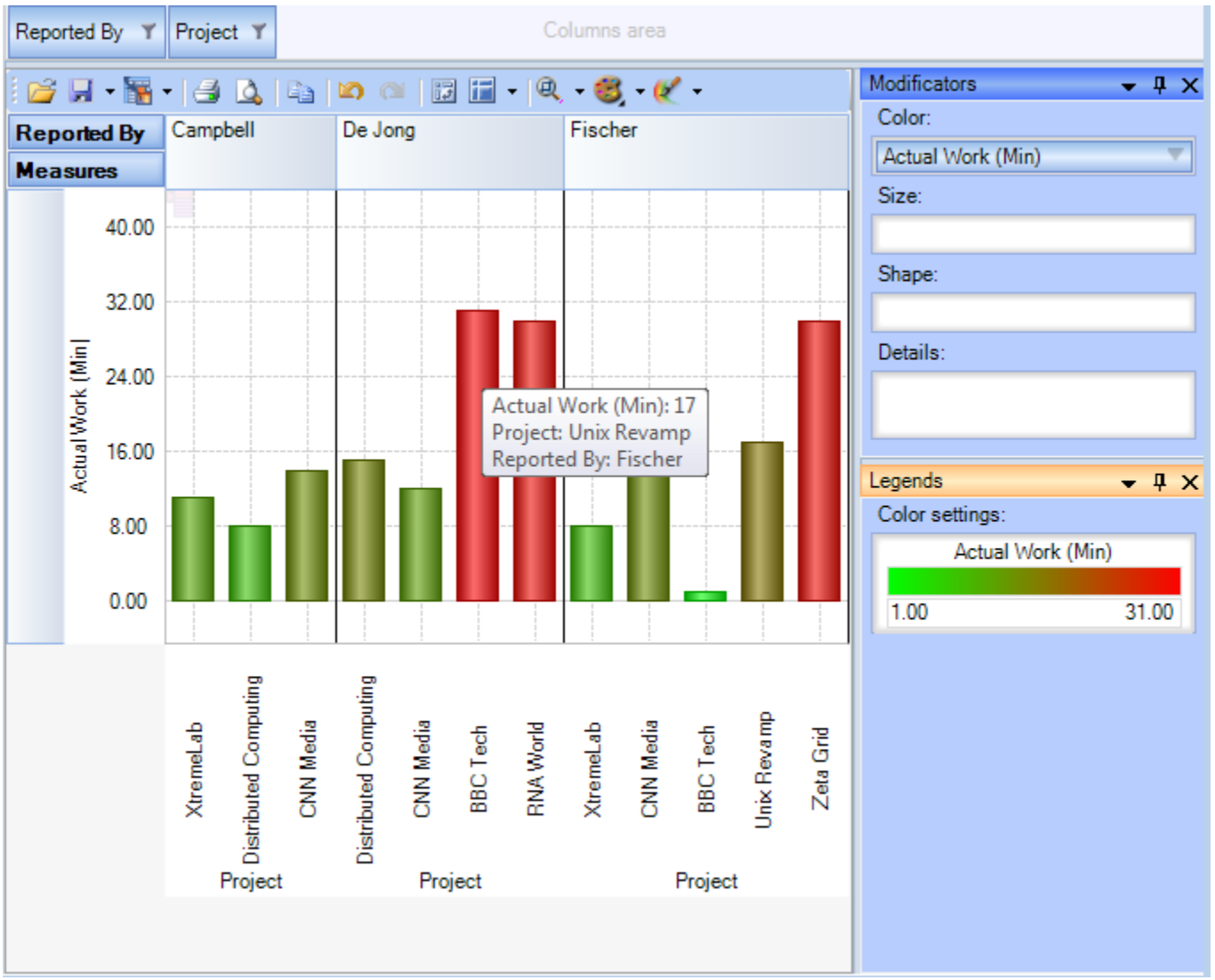
The buttons for launching the editor ( ) are placed on the panels in the Hierarchy levels' area. If the button looks like this ( ), it means the hierarchy had hidden members inside. Pressing the button starts the Hierarchy editor.



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.

14.3 Working with OLAP Chart

While the Grid view allows working with numbers, chart view allows representing submitted project data graphically. This gives you and other managers 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

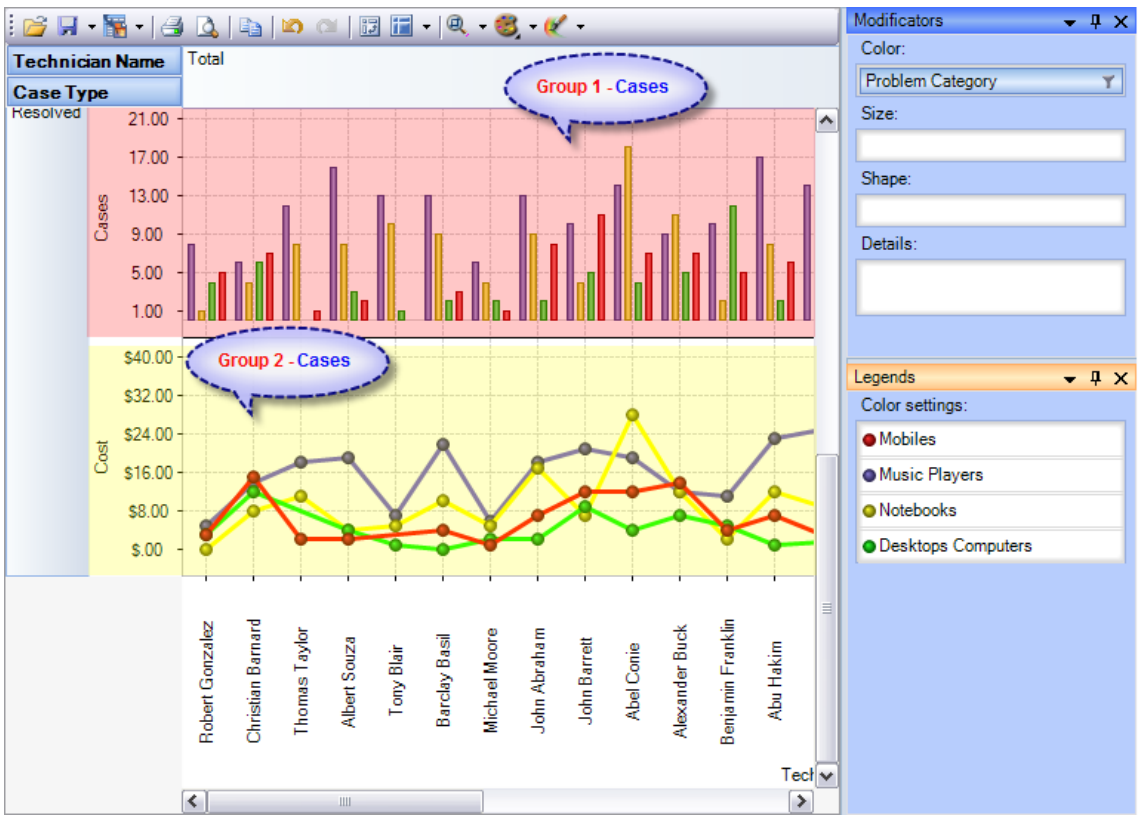
This panel houses all the frequently used operations on the OLAP chart - save, export, print and display options.

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

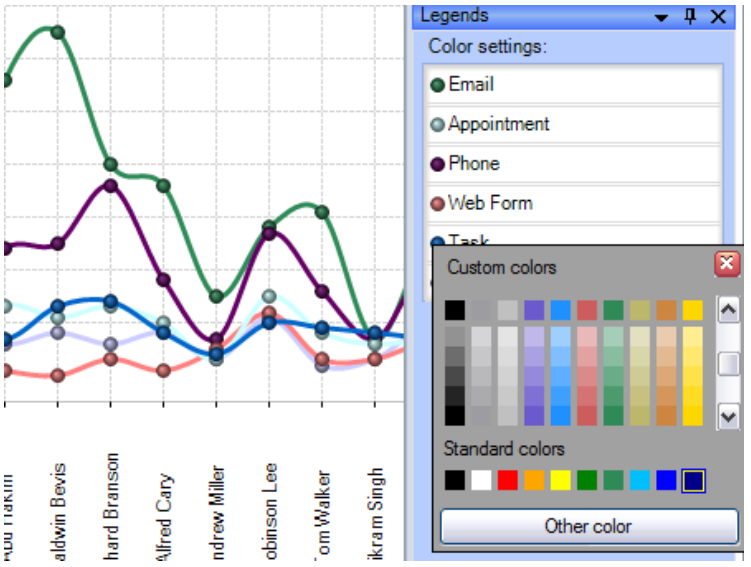
spot the top/low values. If you select the discrete gradient type, you'll be able to set threshold values for filling the Chart elements. While the continuous gradient will let you evaluate the trend as a whole. To select the gradient type and tune its content, turn to the legend panel.

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

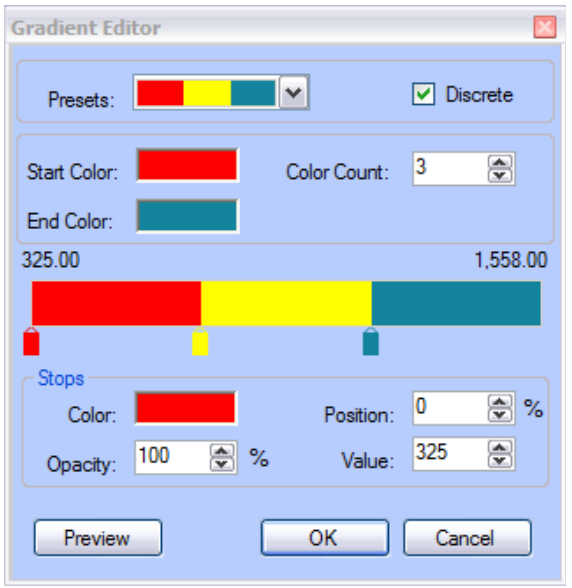
To select a color, simply double-click the appropriate element and choose a color from the pop-up editor.

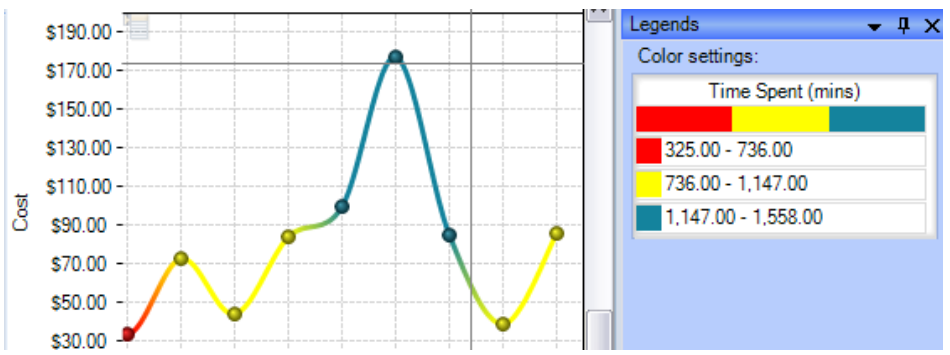


Setting the Gradient legend

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.

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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.

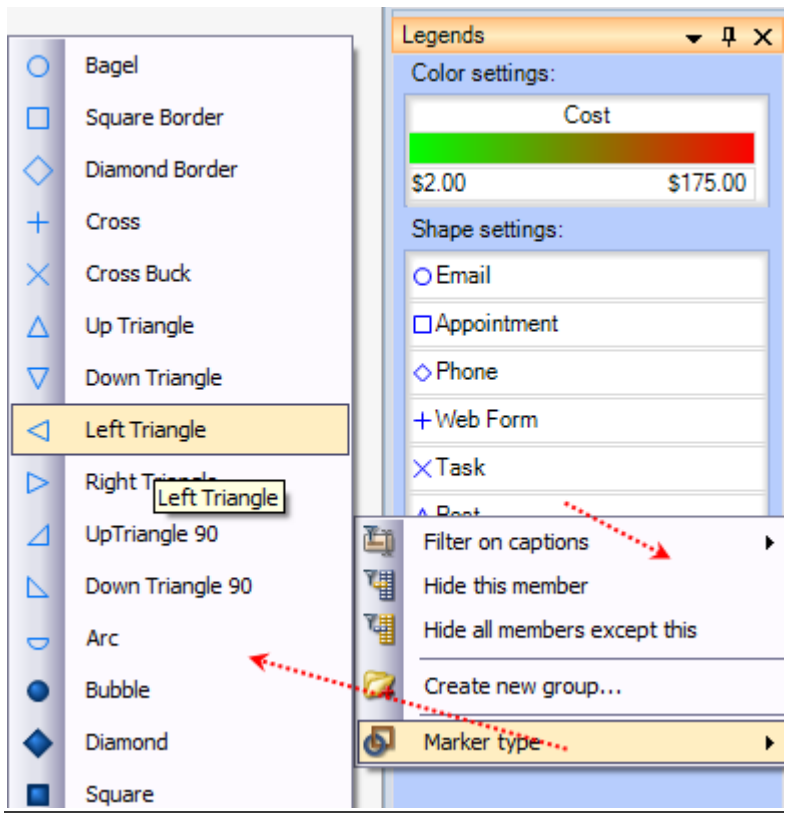
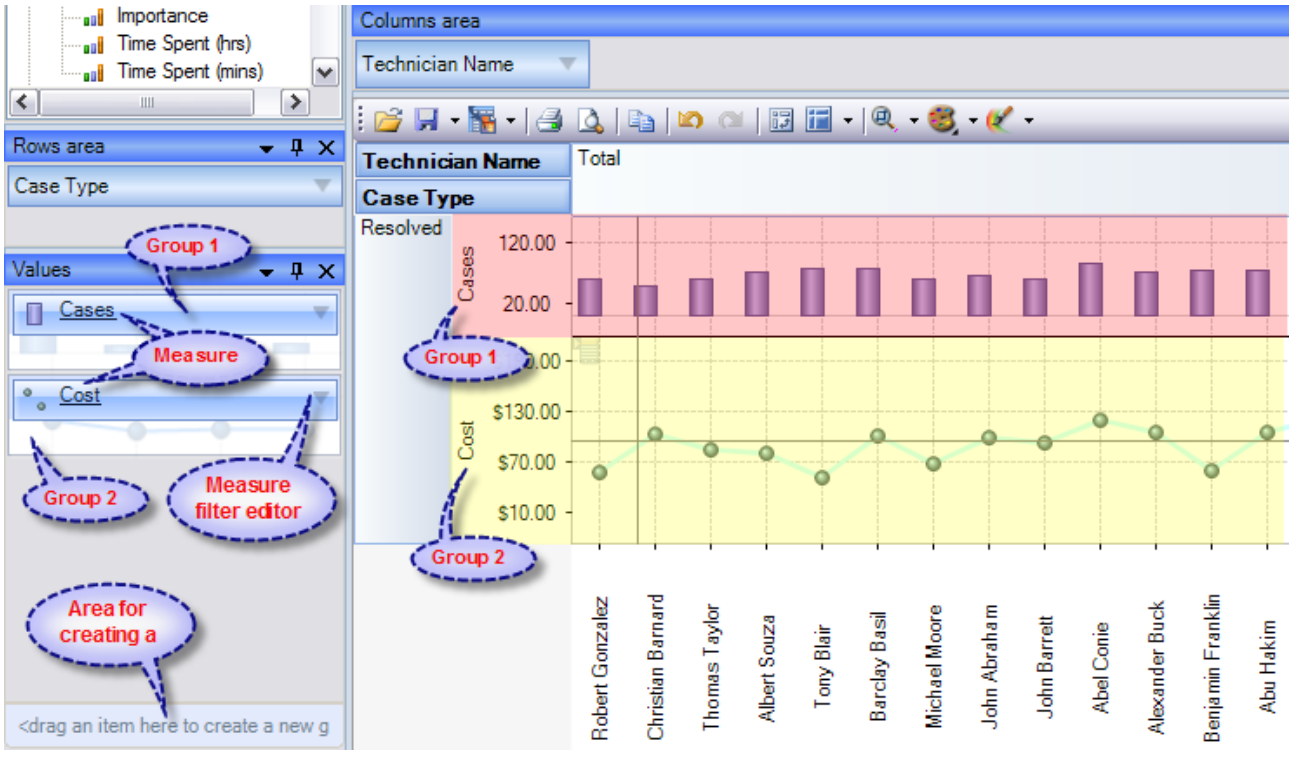


Chart Panes

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.

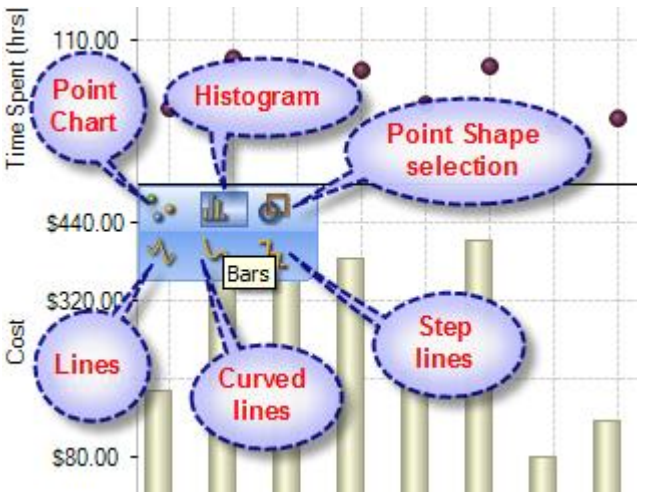


Chart type menu

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

Navigation

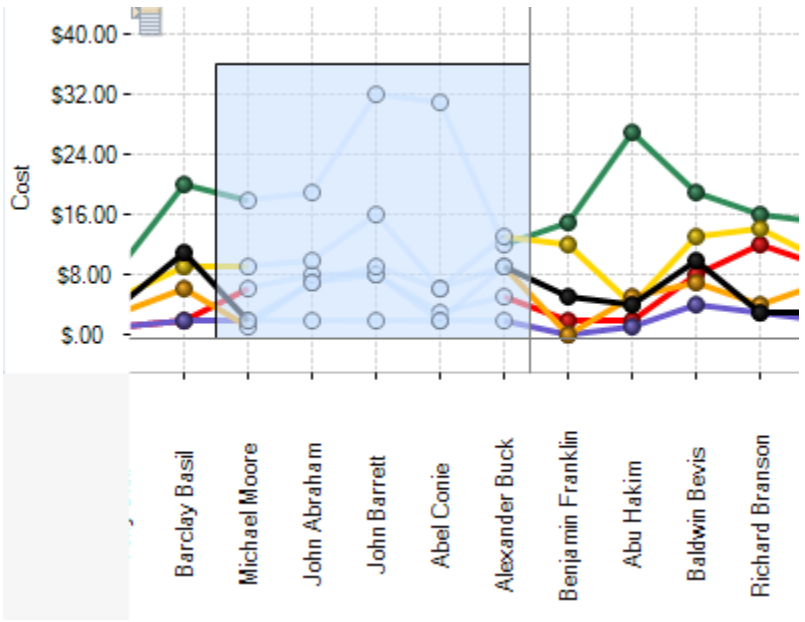
If the content of the Grid exceeds the client area, the scroll bars will appear. You can scroll down the data using the mouse wheel. To scroll the Grid in the vertical direction, turn the mouse wheel, while holding Shift.

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

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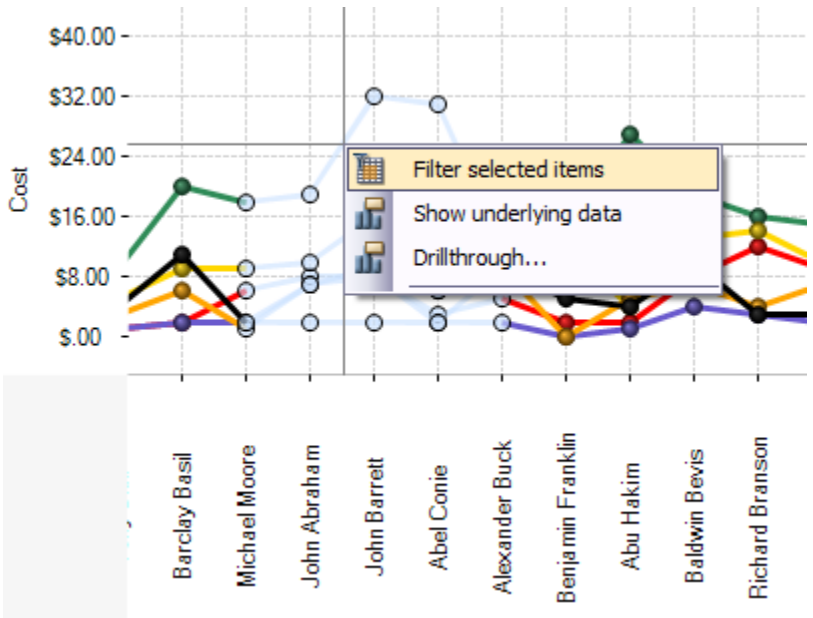
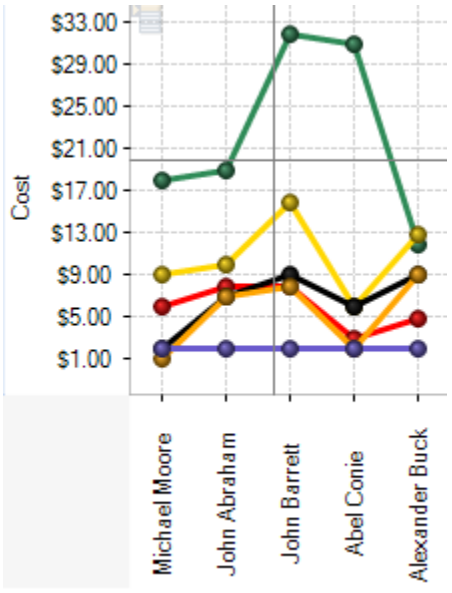


c. The result



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

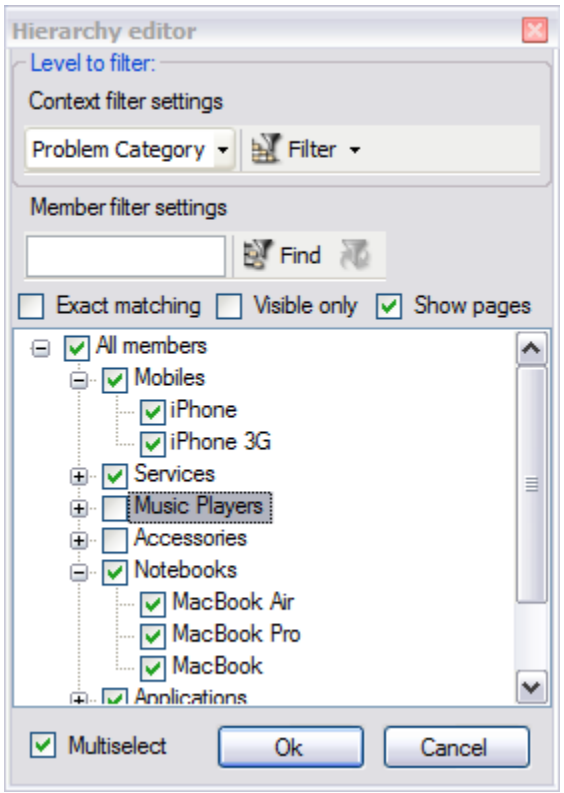
The Filter area of the Editor becomes visible only in case if filtering by hierarchy levels is available. To apply a filter to hierarchy members, you need to select a hierarchy level (if there's more than one) and assign the Filter condition in the Filter menu. In the same menu, there's a command to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

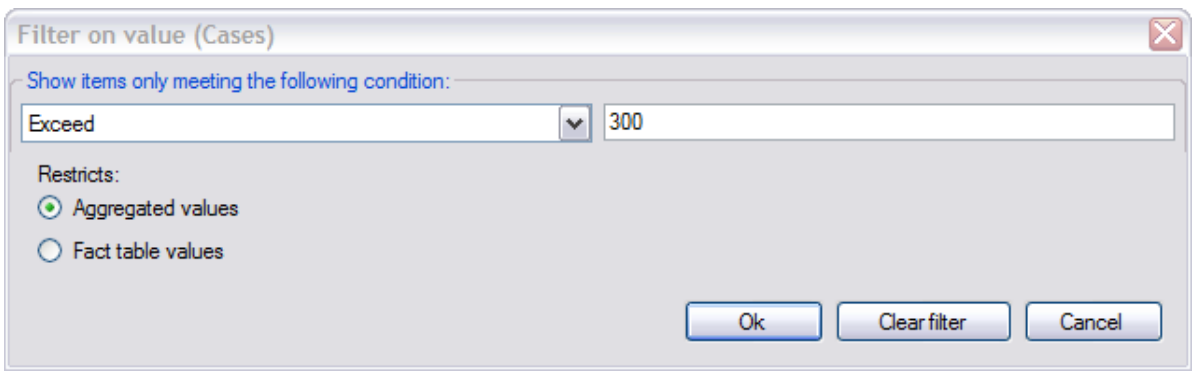
Filtering a single member of a hierarchy

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.



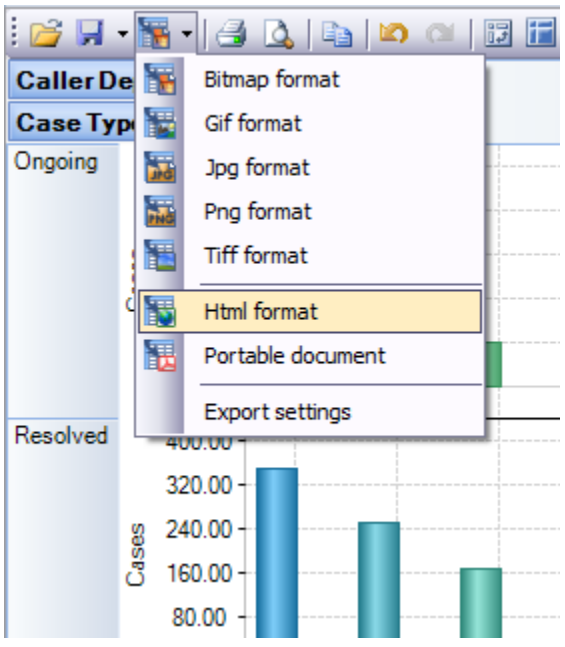
Filtering measures

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

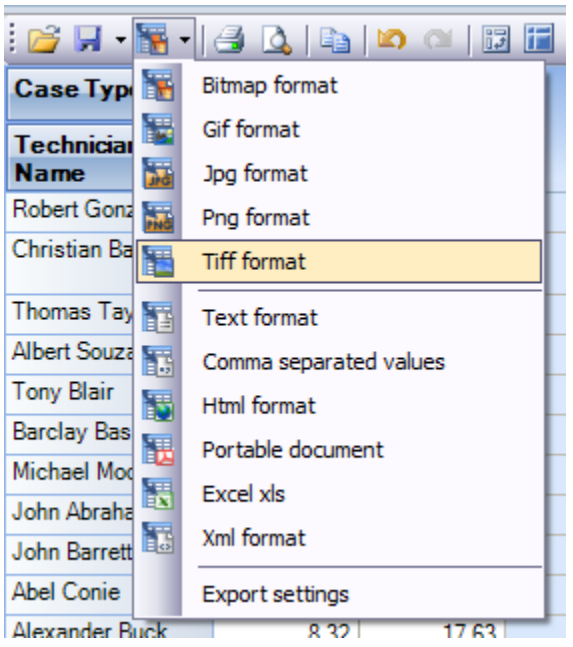


14.4 Printing, exporting statistical data and charts

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.

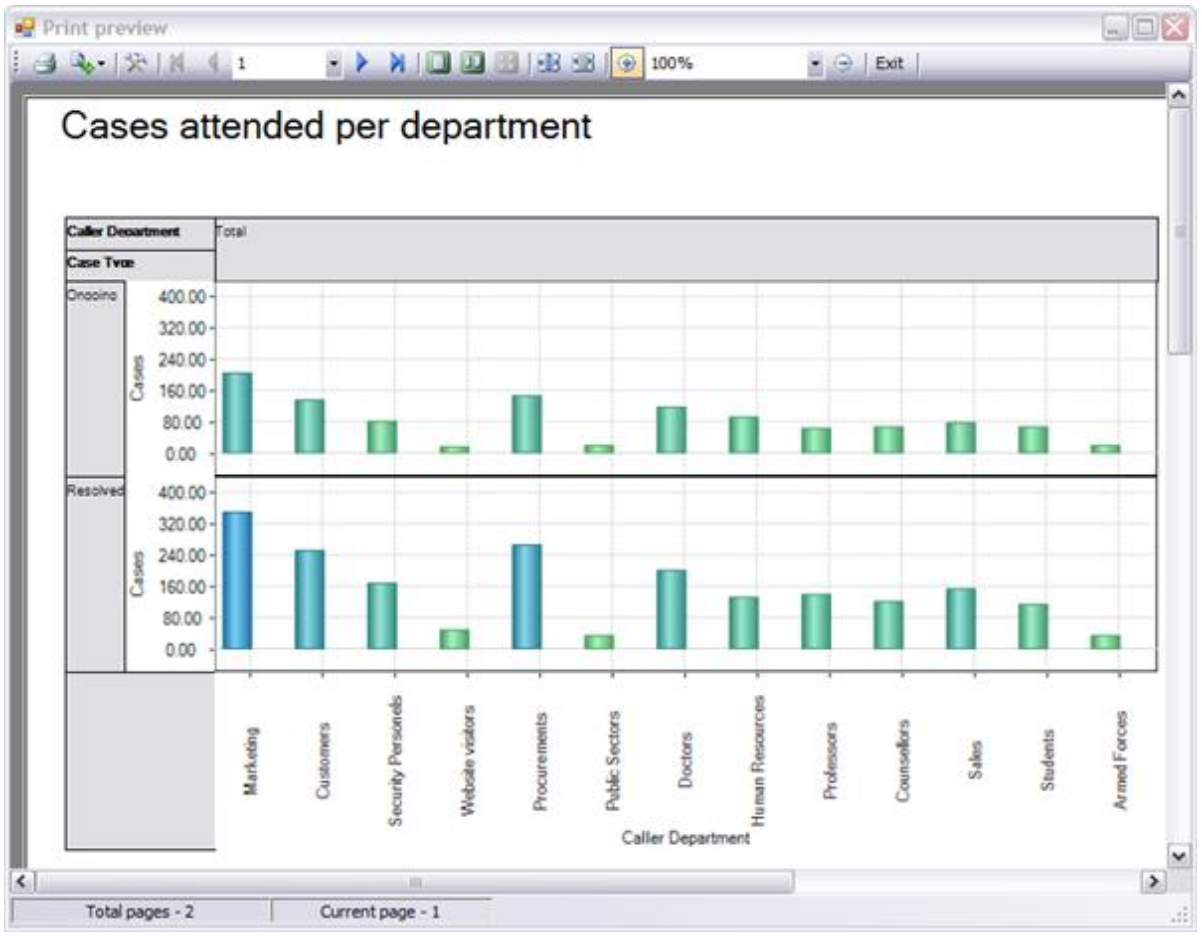


Available export formats in Chart View

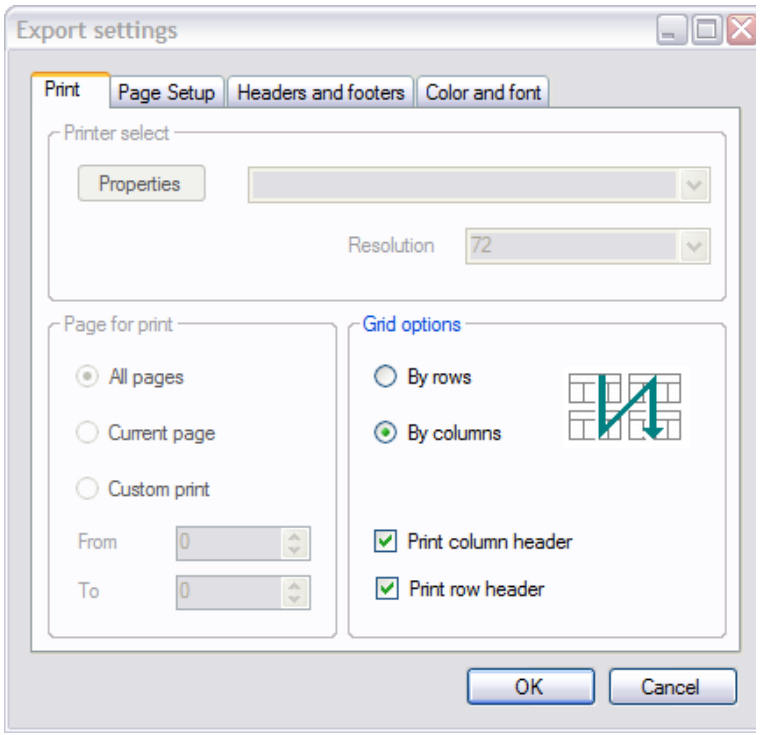


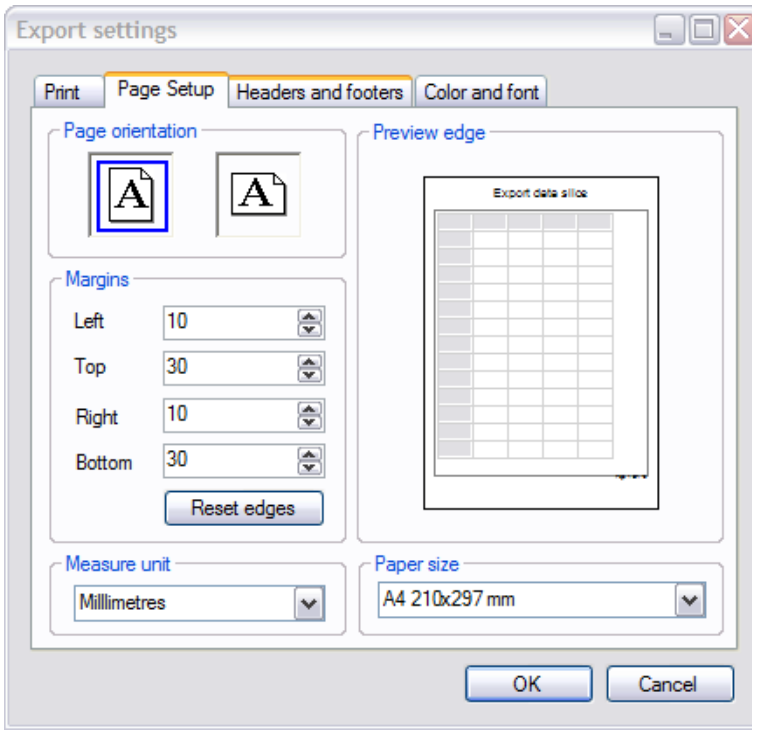
Available export formats in Grid View

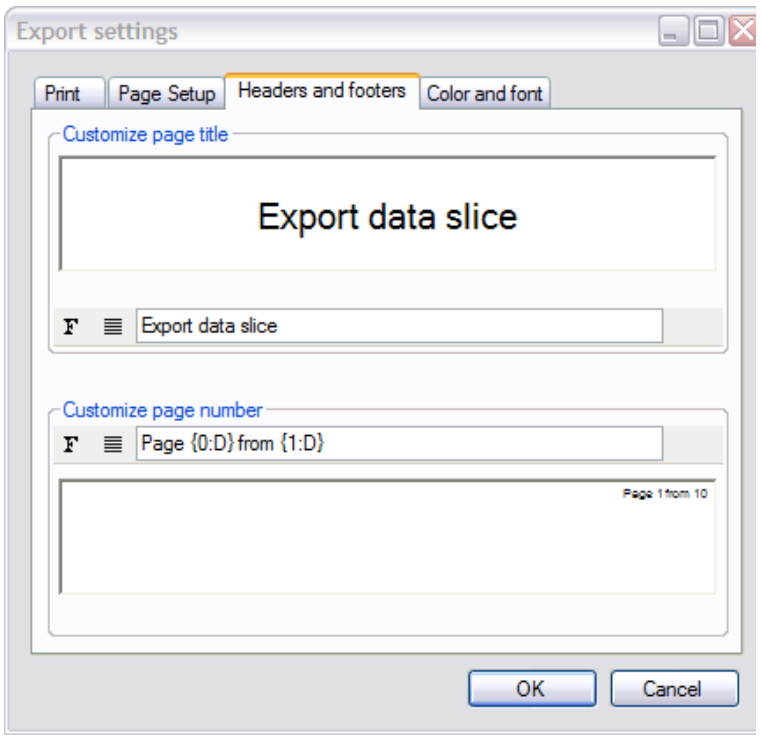
Printing - You can print your report to share it with others using the built-in Print Preview window. You can tune your page/printer settings before printing. Also, if you feel like sharing the report through the net or by email you can easy export it to a wide range of formats including PDF, XLS, CSV,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

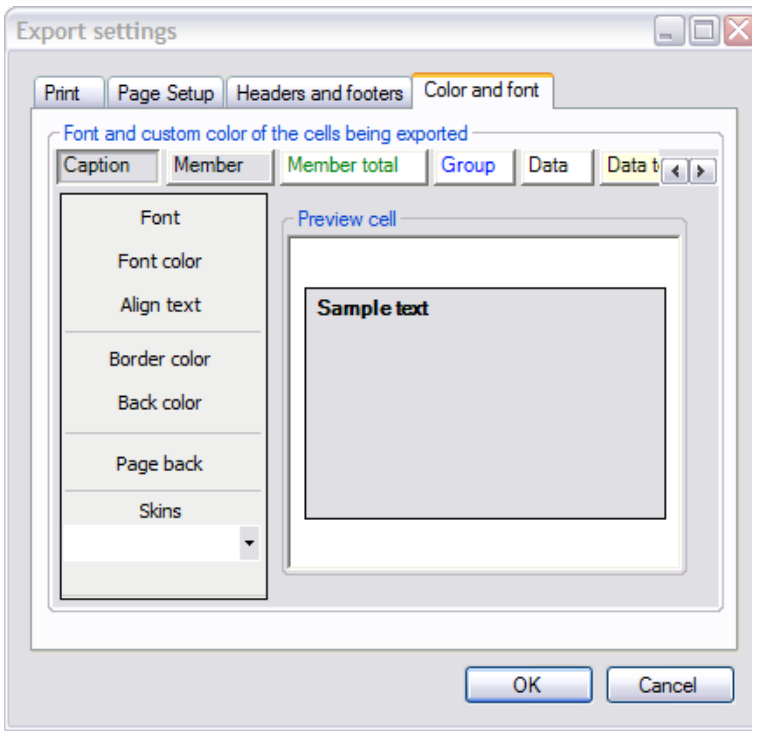


Export Settings -This tool allows you to customize the appearance of the reports to be printed or saved to a file format. You can specify the page size, orientation, headers & footers and color of the fonts and page background.









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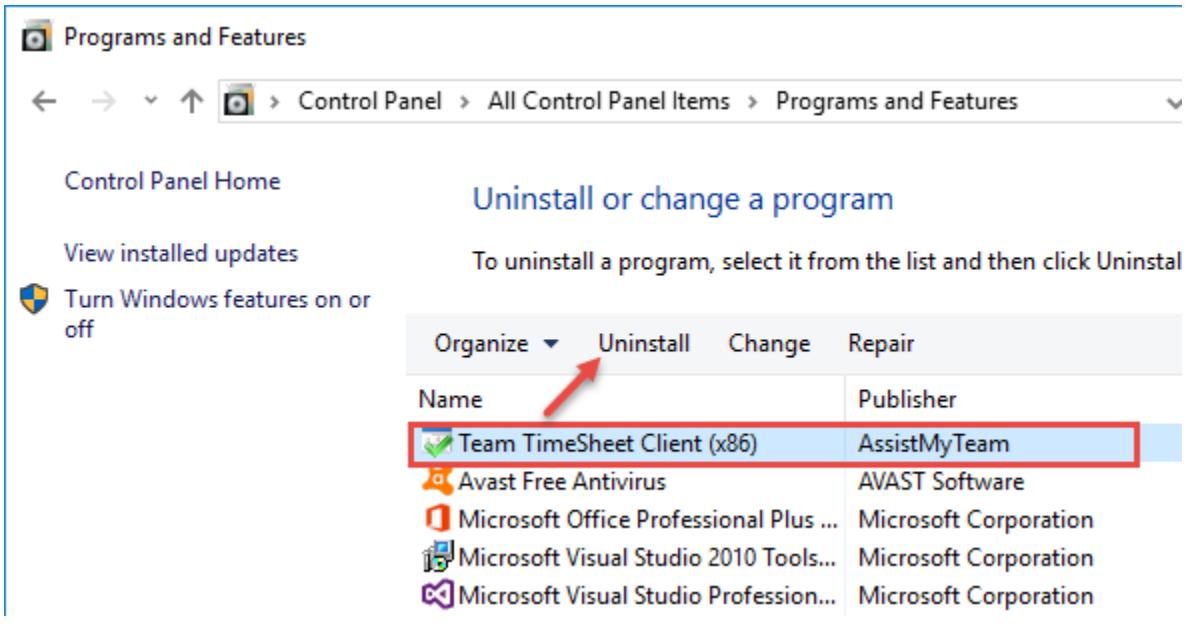
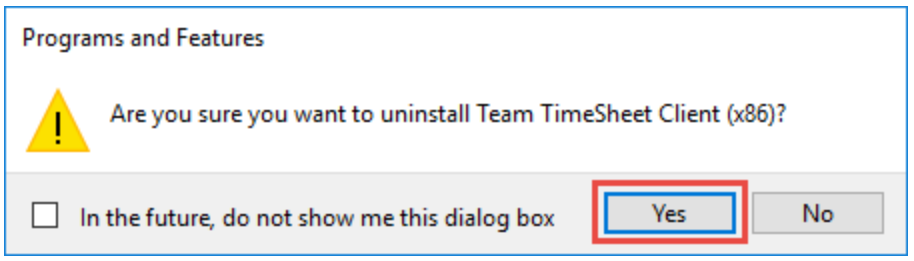
15. Uninstalling Team TimeSheet Client

To uninstall the Team TimeSheet Client Tool from your computer, follow the steps outlined below:

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



Step 2: A dialog confirmation follows asking for confirmation. Click Yes.



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

16. Important Links

Team TimeSheet for Outlook & SharePoint – Home Page
Go to the official website of Team TimeSheet for Outlook & SharePoint.

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

Purchase License
Purchase an enterprise team license for Team TimeSheet for Outlook & SharePoint.

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.