Team TimeSheet for Outlook & SharePoint
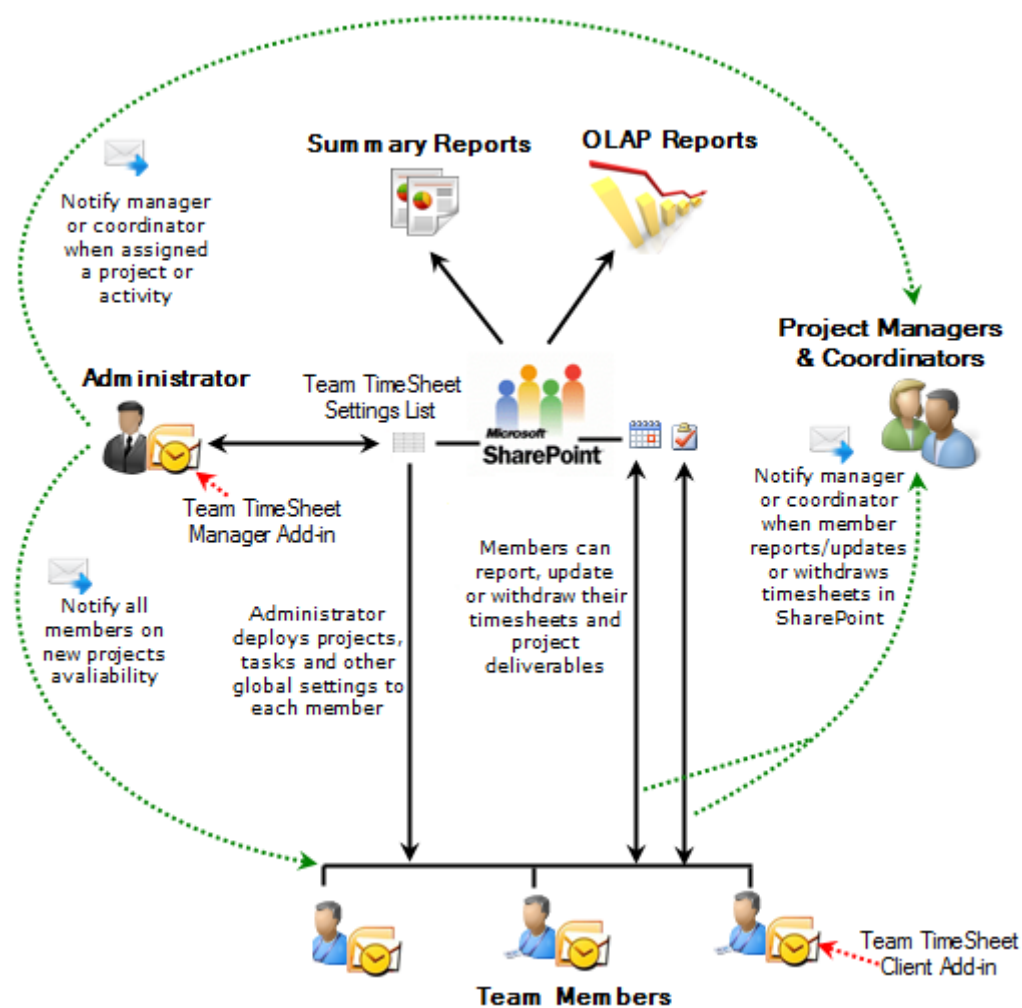
Help Manual for Administrators

Welcome

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

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

Contents

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. Due to the seamless integration of timesheet collection in Outlook and SharePoint, user adoption is **maximized**, yet training time and costs are minimized, and most importantly, reporting process of work done and expense is streamlined for all employees, resulting in a highly scalable solution for the organization.

Purpose of this add-in

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

With Team TimeSheet, these processes are streamlined and automated so that administrator specified projects, activities and other related metadata are available on every worker's Outlook. With these project metadata, even if one is offline from the workplace, individual team member can track, measure work done and prepare timesheets for projects from the comfort of Outlook. Once timesheet in appointments or tasks are prepared in Outlook, member can publish to their company's SharePoint. With the inbuilt Summary Reports or OLAP Statistical tools (or with a 3rd party reporting solution), Managers can then use these submitted timesheets for calculating expenses, payroll or billing on projects, clients and resources among others.

Leverage Outlook for team reporting

Leveraging the familiar workflow of Outlook appointments and tasks, Team TimeSheet simplifies timesheet creation, submission and tracking. Besides, it also offers managers and administrators greater control throughout the time reporting process. With the assurance that team members are reporting through Outlook that promotes accurate, consistent time reporting, managers can leverage precise, up-to-date budget and billing reports for project estimation and budgeting. Designed to provide a fast return on investment, proven and scalable capabilities make Team Timesheet, a must for organizations that require an enterprise time and billing management solution.

What are the advantages?

- **Seamless integration** with Outlook & SharePoint
- Prepare timesheets **in Outlook calendar** or **task**
- Publish timesheets to a SharePoint list
- **Record time** and **expenses** against configured projects and activities.
- Support for revision of timesheet periodically over time.
- Support **color coding** of tagged Outlook items
- **Access Control** module for controlling which project fields are deployed, how individual member interact and report in Outlook, which members have access to administrative tools and if they are allowed to add their own projects and activities.
- Enforce **project timeline** (i.e., start, end date and due date) in tagged appointment and task items in Outlook.
- Keep vital project information fully up to date among the members.
- Streamline the timesheet collection and reporting techniques via Outlook for all members with **centralized administration** control panel.
- Set **reporting rules** and guidelines for members, such as minimum work hours, mandatory fields and valid project codes
- **Offline support** - members can continue on timesheet entry in Outlook, and only report to database when connected to the network.
- Deploy **Custom Fields** for measuring additional project deliverables
- Integrated **OLAP reporting tool** with more than 30 pre-defined reports available
- Supports Office 2016**, Ribbon**, **Backstage View** and context menu
- Included are project specific **Outlook views** that bring sense to your timesheets
- Because it is based on Outlook, Team TimeSheet can be deployed rapidly throughout your organization with **high scalability**.
- And by presenting users with the Outlook user interface they're already familiar with, training time and costs are greatly minimized.
- Real-time graphical reports provide immediate insight into productivity
- Automated **e-mail notifications** to prompt timesheet submission and other events
- Replace paper based timesheet entry and disparate IT systems to avoid data falling into the cracks and information loss.
- Groupware solution - simple **Managerial** and Client install.
- Reduces time misappropriation

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.
SharePoint Version	SharePoint 2010 or Higher. Cloud based SharePoints such as Office 365 are also supported.
Others	Microsoft .NET Framework 4.5

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3. Installation

Team TimeSheet consists of two separate installs – **Admin** and **Client**. The Admin install is for project managers and administrators who would setup and configure projects and activities, and maintain drop down lists, templates, reporting settings etc. in a SharePoint accessible to all members of the team. Whereas, the Client install is meant for normal users who would be preparing timesheets in Outlook before reporting and submitting to the project SharePoint database.

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

There are two different setup types:

For **'Per User Installation'** (ideal for standalone single user/workstation)
TeamTimeSheetSPSetups_x86.zip (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019*)
TeamTimeSheetSetups_x64.zip (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

For **'Per Machine Installation'** (ideal for installing on Citrix and Terminal Servers)
TeamTimeSheetSPSetups_x86_Citrix.zip (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019*)
TeamTimeSheetSPSetups_x86_Citrix.zip (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

The downloaded zip file contains 3 files: **TeamTimeSheetManagerSPSetup_xXX.exe**, **TeamTimeSheetClientSPSetup_xXX.exe** and **VersionInfo.txt** where 'xXX' can be either **x86** (32-bit Outlook) or **x64** (64-bit Outlook)

Extract these file contents to a file folder. It is recommended that you place the setup files on a shared network folder, such that all users can have access to it, and ease the installation and upgrade process.

Before continuing with the installation, don't forget to go through the System Requirements page. For version numbers and changes history, refer to the Version History page.

Per User Installation and **Per Machine Installation**

Per User Installation: both the Manager and Client installs are performed 100% on the local system and nothing is installed on your Exchange or Windows Server. Further, this install is intended to serve only the current logged on user of the system/workstation and will be installed under the user's application data folder (instead of Programs Files folder) and no elevated permission is required (This is known as per user installation). So, there won't be a prompt from UAC to allow this install unless you change the install directory to say, Programs Files which will warrant an elevated permission/UAC prompt. If the same system is used by multiple users, each user needs to install Team TimeSheet add-in on their profile with the default installation folder location.

Per Machine Installation: If you have the need to have a single install that serves all users of the system (i.e., per machine installation, which technically means the files will be installed under Program files folder and the add-in will be registered under HKEY_LOCAL_MACHINE registry hive rather than HKEY_CURRENT_USER), download the Citrix/Terminal Server version of the setups to perform a per machine installation.

The Admin setup is of two different types - one each for 32-bit Outlook and 64-bit Outlook

For Per User Installation:
TeamTimeSheetManagerSPSetup_x86.exe (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019)*
TeamTimeSheetManagerSPSetup_x64.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

For Per Machine Installation:
TeamTimeSheetManagerSPSetup_x86_Citrix.exe (*for 32-bit Outlook 2007, 2010, 2013, 2016, 2019*)
TeamTimeSheetManagerSPSetup_x64_Citrix.exe (*for 64-bit Outlook 2010, 2013, 2016, 2019*)

Managerial Installation

This has to be performed by the administrator before the Client tool is installed on every user's system. Step by step procedure is given below:

Step 1. Run the **TeamTimeSheetManagerSPSetup_xXX.exe** to start the installation. Click **'Next'** to Continue. If Outlook 2010 or later is not installed, the setup wizard will not be able to proceed. Please also ensure Outlook is shutdown (if already running or active in the task manager) as the setup has to install an Outlook add-in.
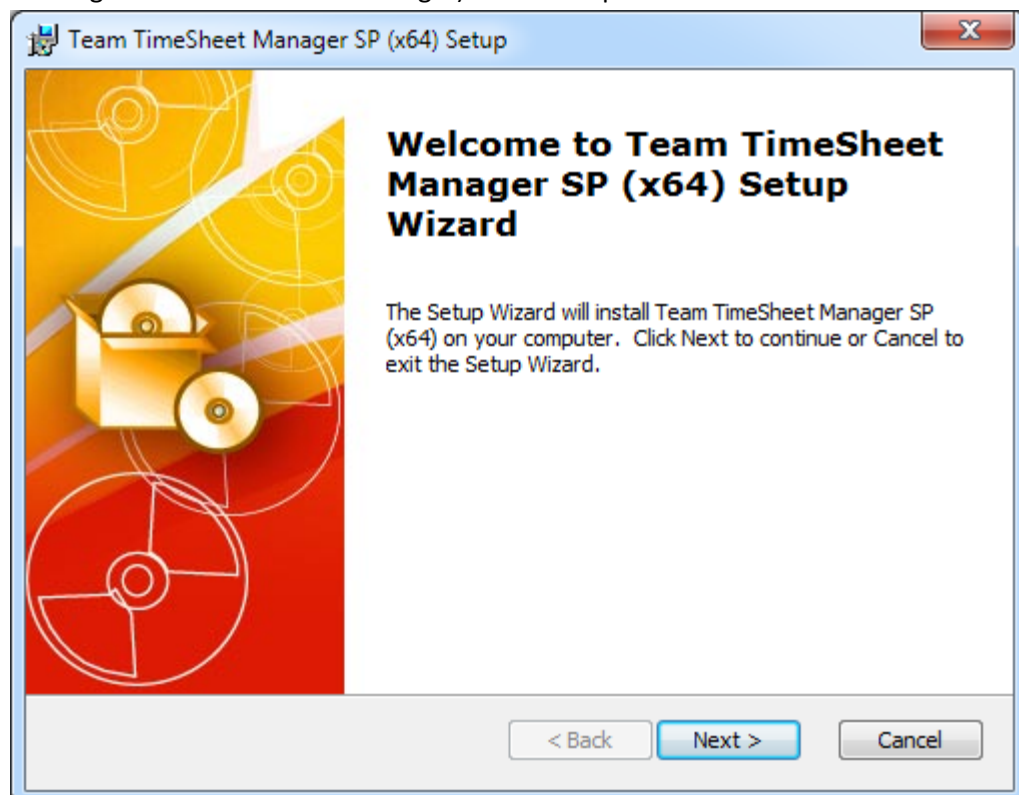
Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission. (Note: by default, it will be installed under your application data folder)

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Step 3. Click 'Next' to continue with the files extraction. It just takes a few minutes to complete the whole copying process
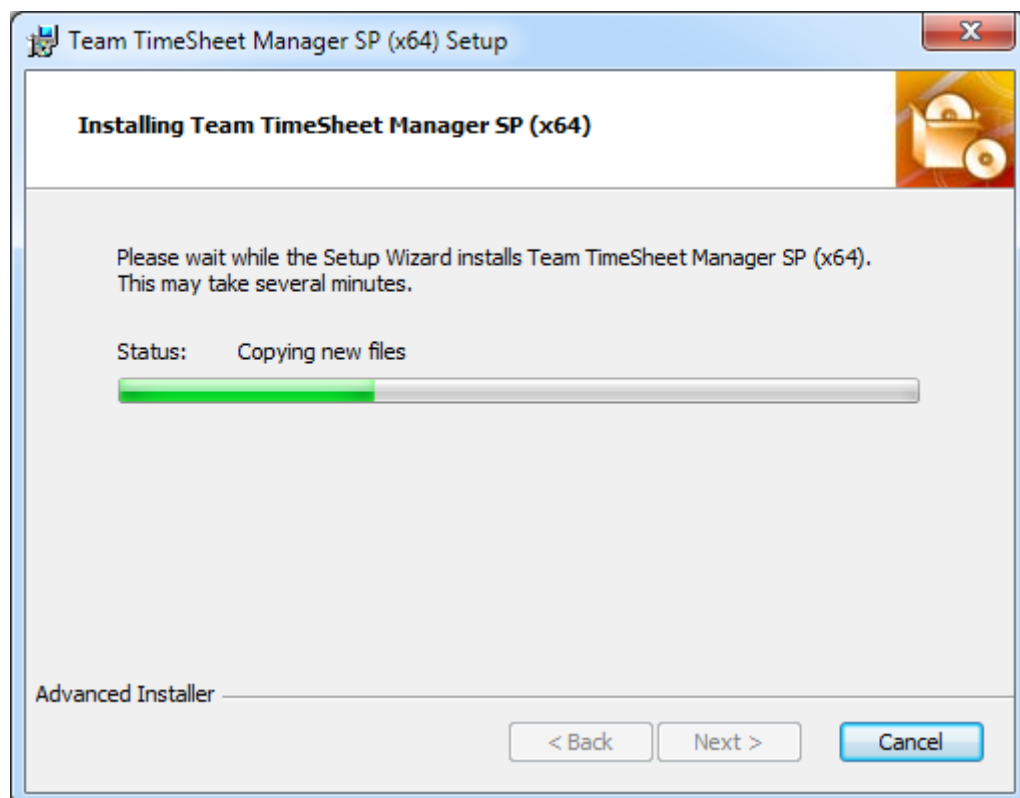
Step 4. Click **'Finish'**. This ends the files installation process in your system. Now start Microsoft Outlook
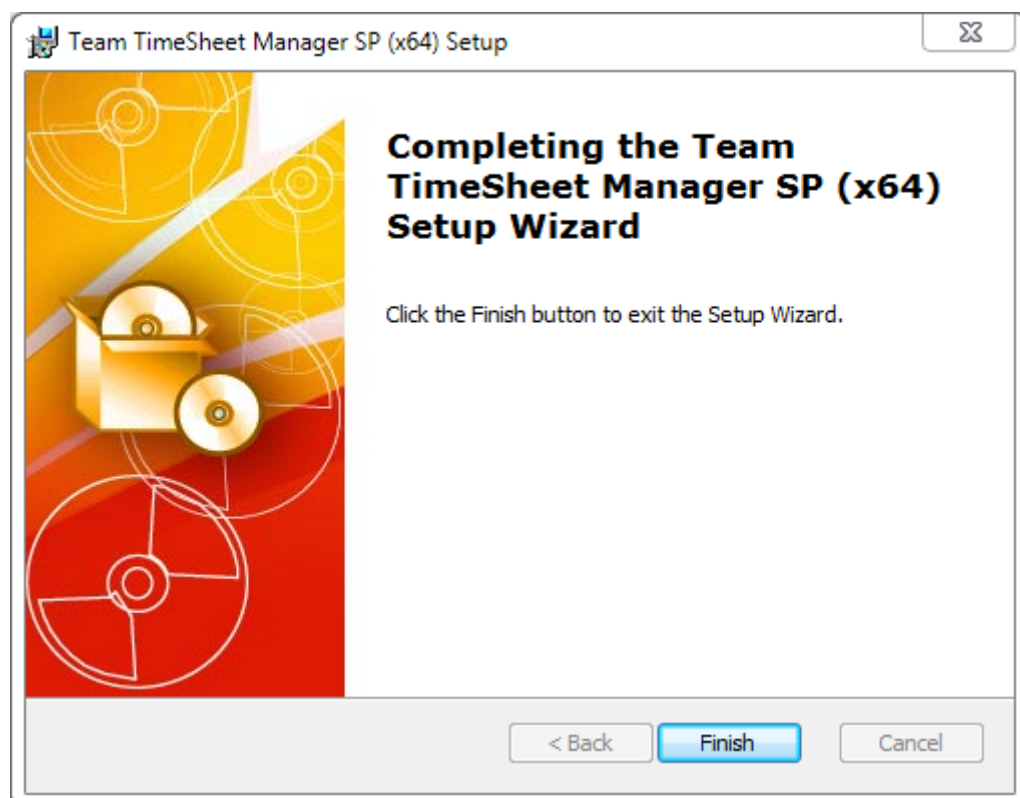
4. Configuring Project Data Source in SharePoint

The next step is to choose a SharePoint site, under which, a new list titled **'TeamTimeSheetSettings'** would be created, to store the project metadata such as project/activity lists, notification options, email templates, members list, reporting settings etc. that are configured by the Administrator.

Why store the project metadata settings in a special SharePoint list?
Because your users can be scattered in different geographical locations, and might not have access to the company's local network remotely, using a network database or shared folder won't be feasible. Instead, in Team TimeSheet system, the project configuration and settings data are stored in a special SharePoint list (having the name 'TeamTimeSheetSettings') which is accessible to all users, on the local network, WAN or via the WWW. In short, these are global settings that streamline the behavior on how all members work, track and publish their timesheets in Outlook.

If you have just installed the Team TimeSheet Manager add-in, you will see '**Project Data Source**' dialog when you start Outlook. Alternatively, you can invoke this dialog box from **Outlook > the backstage File > Team TimeSheet Manager SP > Project Data Source** button.
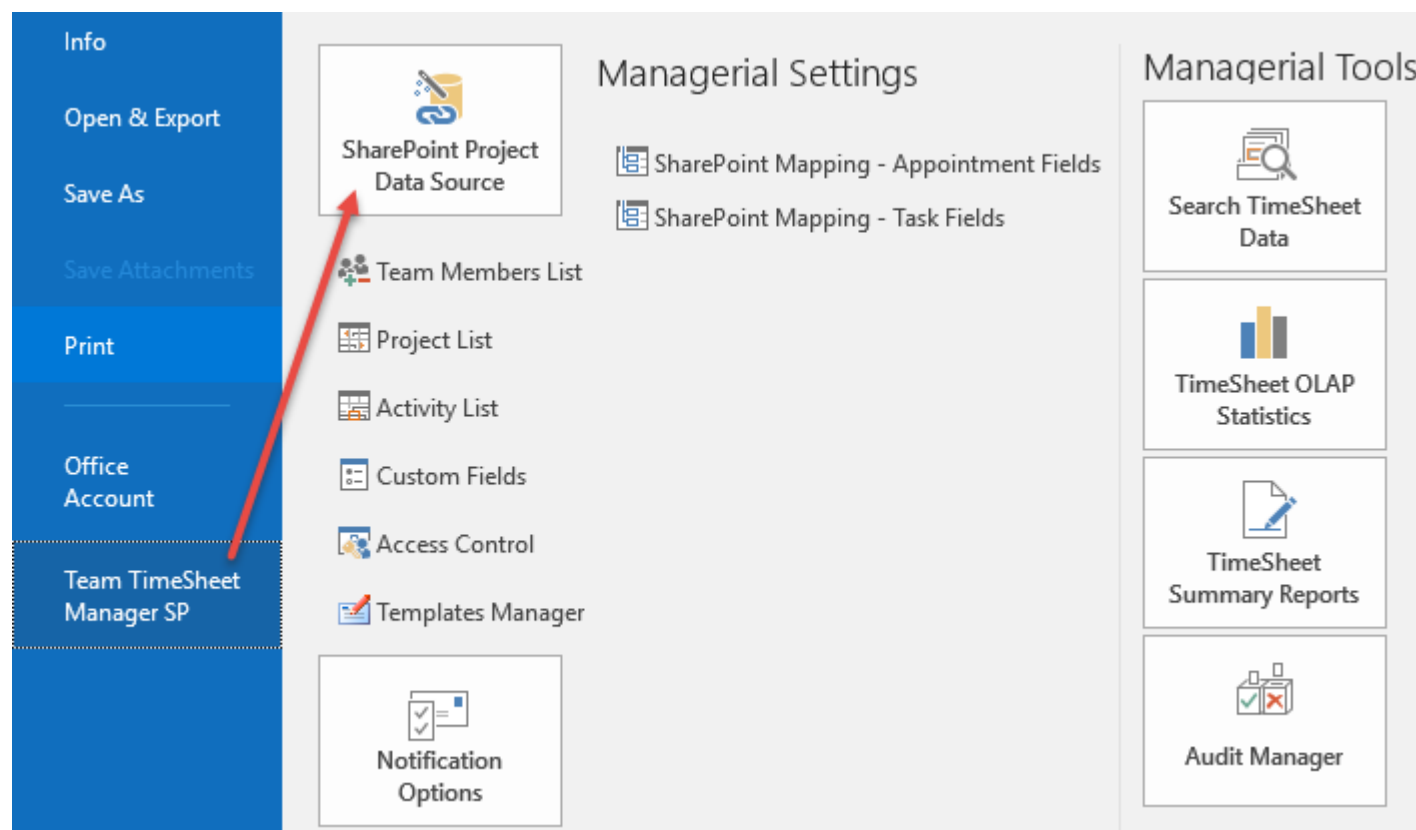
To specify a SharePoint site, click the **'Browse…'** button.
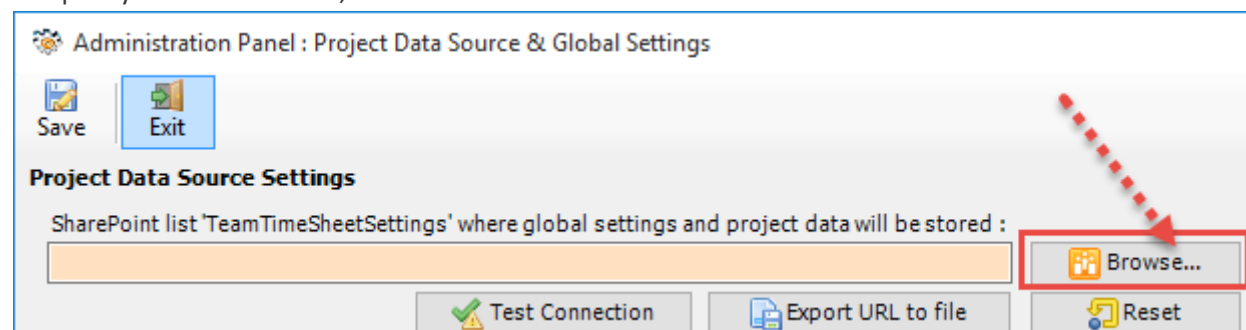
This would allow you to enter the URL of the SharePoint. When entering the URL, always use the parent site URL in the format *http://mySharePointsite.* And click '**Retrieve'** to show all available sub-sites and lists.

Select the particular site to which the Settings list would be created, and then click 'Confirm'.

Very Important! **Your permission to the SharePoint site**: Make sure that you have **'Full Control'** permission over the SharePoint site so that Team TimeSheet Manager add-in can create the '*TeamTimeSheetSettings*' list automatically.

And then select the particular site under which the project settings would be stored. You can also choose to create a new sub-site on the fly by clicking the **'New Site...'** button and select it. When you click **'Continue'**, the add-in will automatically create and configure a new SharePoint list titled '*TeamTimeSettings'* under the site. And then any settings/drop down lists you defined from TimeSheet Manager add-in in Outlook would be saved in this repository.

If the 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 (and others) to enter their 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'**.

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Once you click '**Save'**, this Project settings list will be automatically created in the chosen SharePoint site, when the manager configures the admin tool the first time. And then any project settings/drop down lists you defined from Team TimeSheet Manager add-in in Outlook would be saved in this repository.

Next, install the Team TimeSheet Client add-in to the systems of your other staffs. You can install the Team TimeSheet Manager add-in on other systems as well if the particular user has the need to perform administrative tasks.

Make sure that you have provided the chosen SharePoint site URL (e.g. http://company.sharepoint.com/ in the above example) to all users who have or will install the Client tool. This is required because as when user starts Outlook the Team TimeSheet Client add-in will prompt the user to specify the SharePoint site where the **'TeamTimeSheetSettings'** list is located. And only then the add-in would automatically connect to the admin specified SharePoint site and would retrieve the project logic and timesheet settings data to the local system.

What SharePoint permissions are required for other users?

All users should have at least '**Contribute**' permission the SharePoint list '*TeamTimeSheetSettings'* as well as to all other SharePoint lists that are chosen as the timesheet repositories.

4.1. Mapping fields between Outlook and SharePoint

Team TimeSheet Manager SP> Tasks Fields Mapping or Appointments Fields Mapping

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

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

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

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

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

To start mapping the fields, go to **Team TimeSheet Manager SP > Appointments Fields Mapping/ Tasks Fields Mapping.**


This will allow you to choose a destination SharePoint list where the timesheets published from Outlook (by users) will be stored.
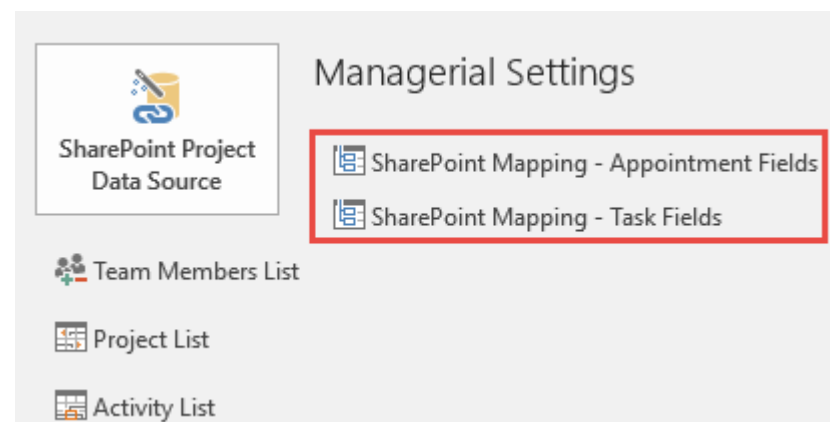
You can choose any existing SharePoint list, Calendar or task lists or a bare bone custom list in which case, you would need to add the required columns.

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

Alternatively, you can choose to create new one for this purpose.
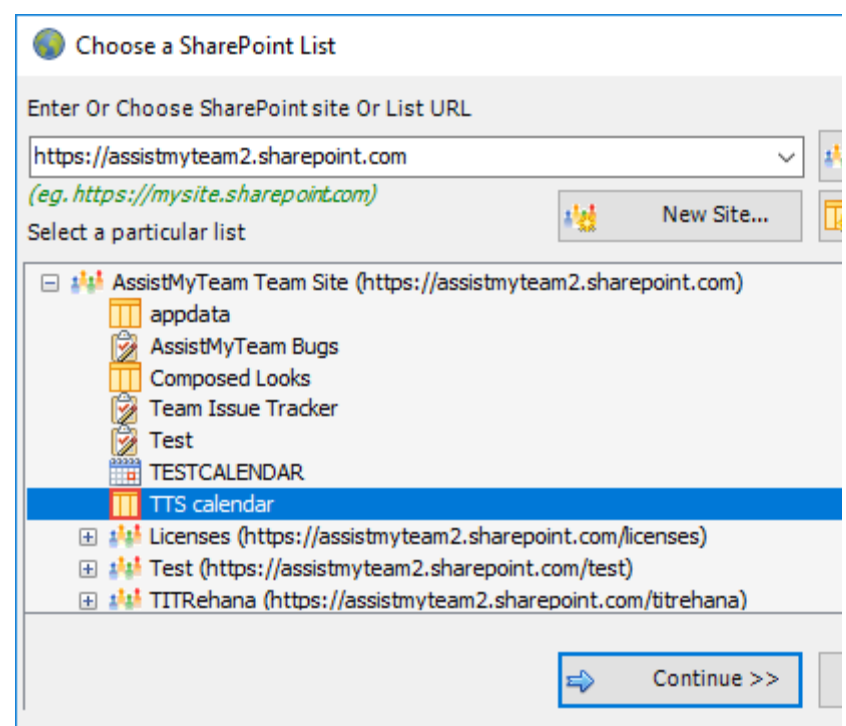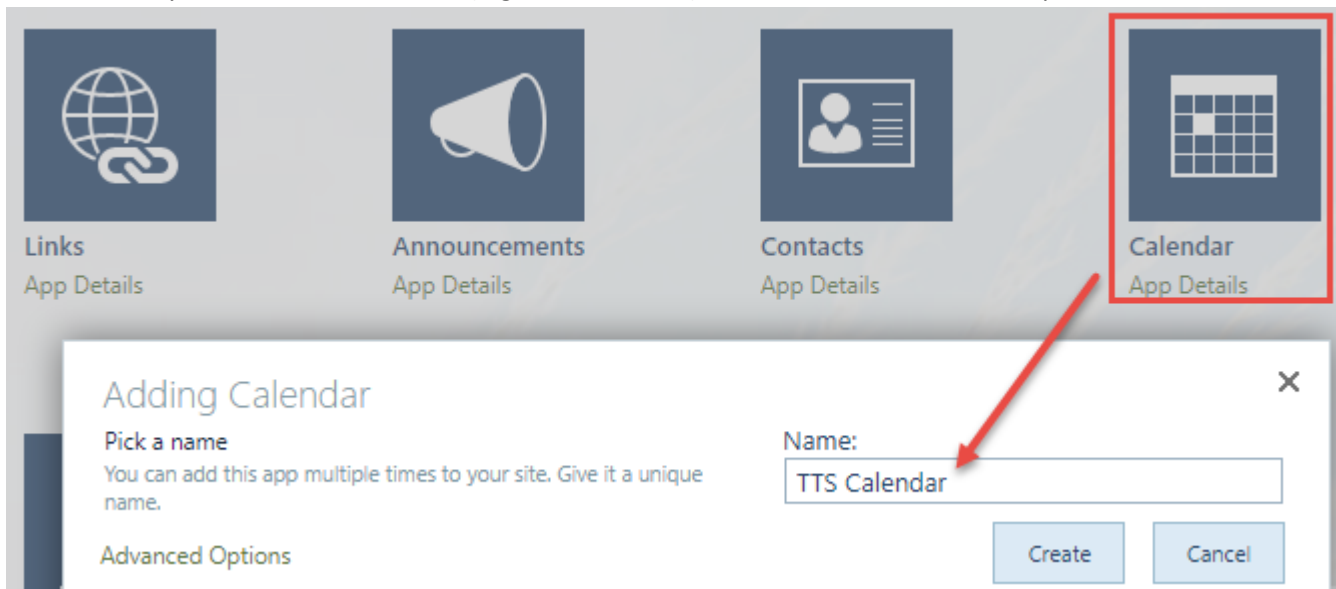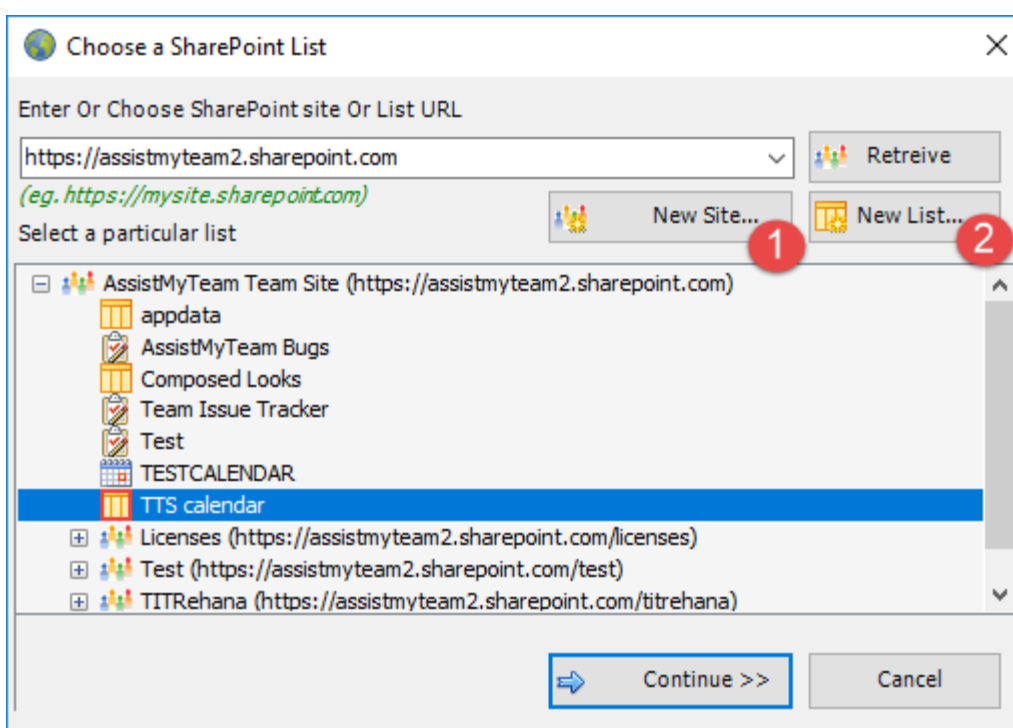
To create a new list, go to your SharePoint site and click 'Add Lists, Libraries or other Apps'.
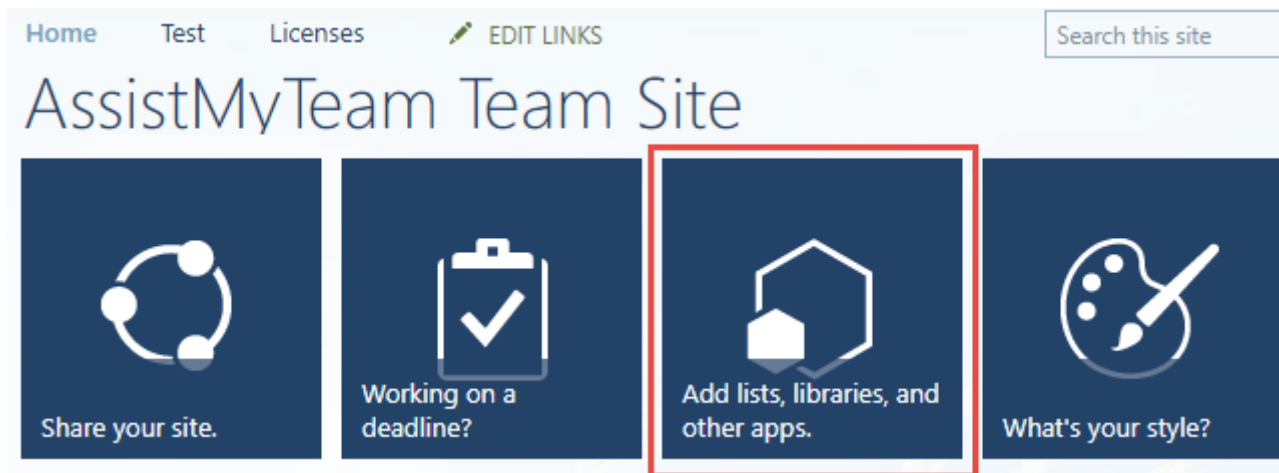
For instance, you can create a new list (e.g., *TTS Calendar*) based on the 'Calendar' template below:

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

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

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

Enter New Site Info ✕

New Site...

Title	Test	*
Template	Blank Site	*
URL Name	https://assistmyteam2.sharepoint.com/ Test	*
Description	This site will be used to store cases raised from Outlook	
Language	English	

☑ Use same permissions as parent site

Create   Cancel

* Mandatory Fields

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

Enter Info For New List ✕

New List...

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

List Name	TTS Calendar	*
Template	Calendar	*
Description	This list stores all the timesheets published by users from Outlook	

Create   Cancel

* Mandatory Fields

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

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

A mapping is nothing but an association between an Outlook field *(e.g., subject of the appointment item)* to a specific SharePoint list field *(e.g., Title)*. You have complete control over which data goes to the SharePoint list from Outlook. In the mapping dialog box (above), the first column lists all the appointment/task fields as available in Outlook. The second column displays the data type of the field. In the last column, there is a drop-down list on each row, consisting of all available SharePoint fields. Simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field.

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

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

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

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

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

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

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

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

Create New SharePoint Field - on the fly:

In the drop-down list of the SharePoint field, you will also notice that there is an item '[NEW LIST FIELD]'. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, without requiring you to create it in your SharePoint site.

Specify a field name that you would like to appear in the SharePoint list. Only input valid characters and avoid using special characters such as symbols.

The new SharePoint field will have the same data type as that of the corresponding Outlook field.

29	HTML Body	Note	
30	Subject	Text	TimeSheet Subject
31	Reported By	Text	ReportedBy
32	Project	Text	Project
33	Activity	Text	Activity

5. Managerial Settings

The Team TimeSheet Managerial tool provides a central panel that allows administrator to customize the contents of all project drop-down boxes, templates for outgoing emails, notification options, custom fields etc. Project data and managerial settings are stored on a network database, accessible to all members of the organization.

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

Team TimeSheet Manager *(backstage view of Outlook 2016)*
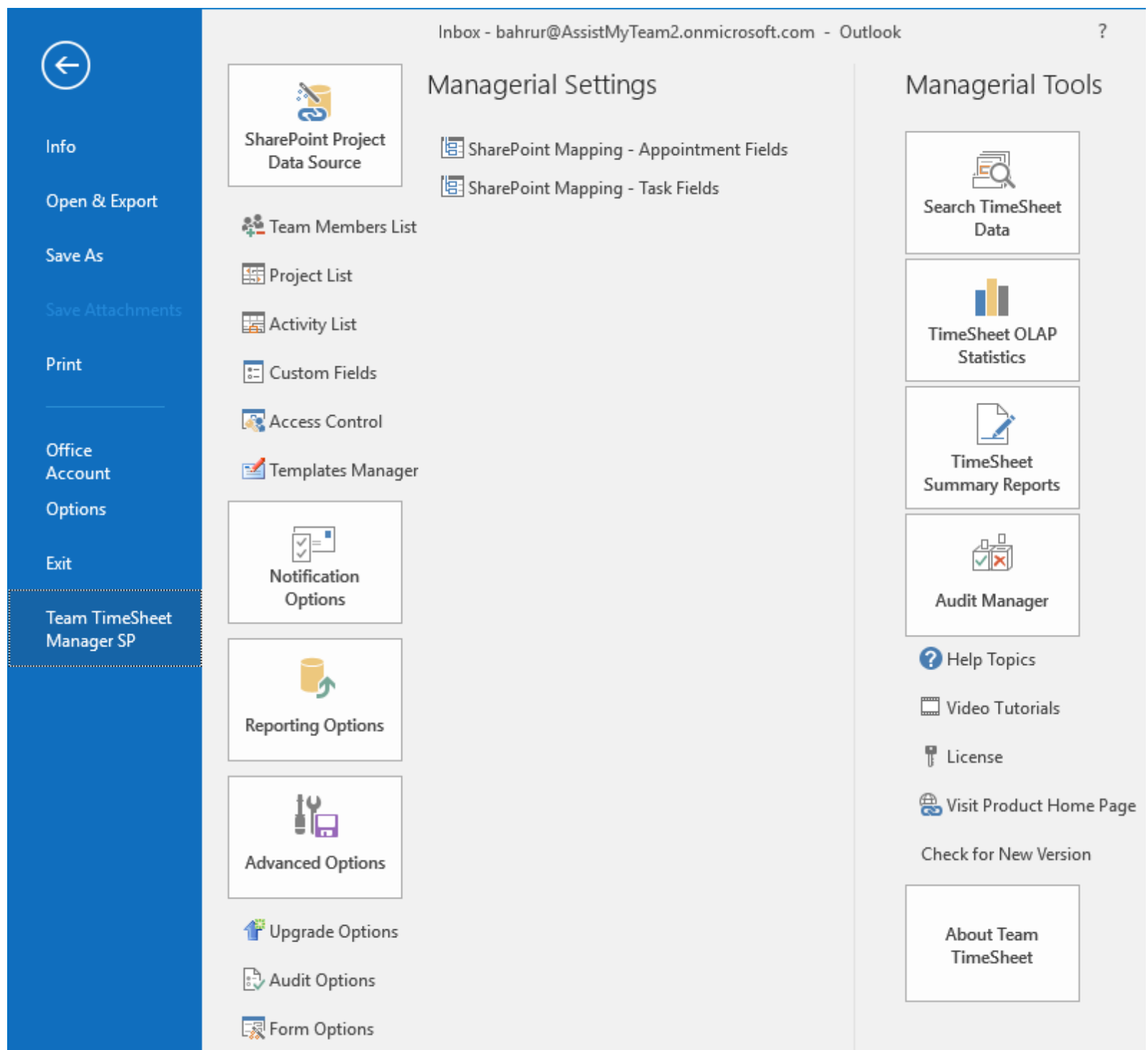
5.1 Team Members

Team TimeSheet Manager > Team Members

Team TimeSheet Manager needs to maintain the detail of each member that would be reporting to the central database. The member name and email address are mandatory fields and should be unique for each member in the list.

Administration Panel : Members

	Name	Email	Department	Rate	Admin Access	Notify To Report	SharePoint Login Name	SharePoint User ID
1	AssistMyTeam Support	helpdesk@AssistMyTe	Support	$50.00	☑	Notify	i:0#.f|membership|helpdesk	18
2	Bahrur Rahman	bahrur@AssistMyTeam	HRM	$20.00	☑		i:0#.f|membership|bahrur@a	13
3	Francas Freedi	francas@AssistMyTear	Support	$30.00	☐		i:0#.f|membership|francas@	17
4	Monica Lewis	monica@AssistMyTean	Sales	$35.00	☐		i:0#.f|membership|monica@	12
5	Rehana Rahman	rehana@AssistMyTeam	Sales	$40.00	☐		i:0#.f|membership|rehana@a	11
6					☐			

① Import members from SharePoint – Click this to import contact details of the members from your SharePoint site. The member's name, email, department fields (as well as SharePoint user ID and login Name) would be then automatically filled in the grid. The SharePoint user info in last two columns (greyed out e.g., read only) are used for identifying members who will publish their timesheets from Outlook to SharePoint.

② Import members from Global Address List/Active Directory - Most likely, you might already have contact details of the members in the exchange global address list. Use the '**Import from Address Book**' button to display the address book and select those contacts that you want to import. The member's name, email, department fields would be then automatically filled in the grid.

③ Admin Access – You can grant administrative rights to certain members so that they can view statistics for all members, as well, to allow them to add their own projects/activities and other project data from within their Outlook. For more on admin access, refer to **Team TimeSheet Manager >** '**Access Control**' settings.

④ Notify a member to report their timesheet – As a project manager or supervisor, from time to time, you might need to inform a particular member to report their project deliverables such as timesheets to the central database. Just click the corresponding '**Notify'** button to send out the alert email instantly. You can customize the email template for this alert from the **Team TimeSheet Manager > 'Templates Manager'**.

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5.2 Projects List

Team TimeSheet Manager > Projects list

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

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

To specify the Project start or finish date, just double-click the particular cell and it would popup the date picker.

The description field allows for a short description of the project. This short description is displayed to each team member in the '**My Projects & Activities**' settings of the Team TimeSheet Client tool. So, it is a good practice to put up a meaningful description of each project.

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expense, billing, task, timesheet reporting from Outlook to SharePoint made easier for your team members!

If you have any internal naming convention for project, you can enter it in the '**Project Code**' field.

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

Lastly, administrator can click the corresponding '**Notify all Members**' button of a particular project to send out an email notification alert to all or selected members to report their tasks and timesheets (relating to the particular project) from Outlook to the central database. The administrator can customize this email template via the '**Team TimeSheet Manager > Templates Manager**' panel.

5.3 Activities List

Team TimeSheet Manager > Activities list

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

You can define the due date for each activity by double-clicking the corresponding cell of the '**Due Date**' column.

The activity coordinator is chosen from drop down list of the team members, that you get when click the down button.

Lastly, administrator can click the corresponding '**Notify all Members**' button of a particular activity to send out an email notification alert to all or selected members to report their timesheets and related project data from Outlook to the central database. The administrator can customize this email template via the '**Team TimeSheet Manager > Templates Manager**' panel.

5.4 Custom Fields

Team TimeSheet Manager > Custom Fields

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

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

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

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

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

Custom List

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

5.5 Access Control

Team TimeSheet Manager > Access Control

In this panel, the administrator can control what particular subset of features and options are available to the team members.

① List of team members with no admin access (one with the red background). You can use the buttons **>>** or **<<** to swap the access level.

② List of team members with admin access (one with the green background). You can use the buttons **>>** or **<<** to swap the access level

③ **Add their own Projects** – Enabling this option would allow team members with admin access to add new projects from within the Team TimeSheet Client tool (*Team TimeSheet Client > My Projects & Activities List*).

④ **Add their own activities** – Enabling this option would allow team members with admin access to add new activities for a project from within the Team TimeSheet Client tool (*Team TimeSheet Client > My Projects & Activities List*).

⑤ **View Search/Summary Reports on all published timesheets (for all members)** – If this is checked, only members with admin access can view summary reports of published timesheets for the entire team. Leaving it unchecked would load the summary reports of the current member only. (*Team TimeSheet Client > My TimeSheet Summary Reports*)

⑥ **View OLAP Statistics on all published timesheets (for all members)** – If this is enabled; only members with admin access can view OLAP Statistics on published timesheets for the entire team. Leaving it unchecked would load the OLAP Statistics reports for the current member only. (*Team TimeSheet Client > My TimeSheet OLAP Statistics*)

5.6 Form Options

Team TimeSheet Manager > Form Options.

The administrator has the provision to customize the titles of the project, activity, give permission to allow members to choose their own projects and activities. The changes in the titles here are reflected to the Team TimeSheet Client tool i.e., in the timesheet form, toolbars and ribbons in Outlook.

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

Mandatory for reporting – When team members submit their time sheets and other data, you can set certain fields as required or mandatory before accepting the reported data (into the database). When a team member tries to submit timesheet or other reportable data without filling in the mandatory fields, the Team TimeSheet Client process would automatically display a warning message.

Allow members to choose their own Projects and activities in their Outlook
When you enable this option, team members who are working on Team TimeSheet for Outlook would be able to choose their own projects and activities as in '**Team TimeSheet for Client > Personal Setting >My Projects/Activities'**.

Substitute the logo with your own
You can specify an image of your choice and upload the image file by browsing the the image located. This uploaded image would be displayed in Team TimeSheet Client item forms.

expense, billing, task, timesheet
reporting from Outlook to
SharePoint made easier
for your team members!

5.7 Templates Manager

Team TimeSheet Manager > Templates Manager

Team TimeSheet for Outlook uses various emails for sending out notifications and reminders to managers and team members - both manual and automatic. Email notifications take HTML.
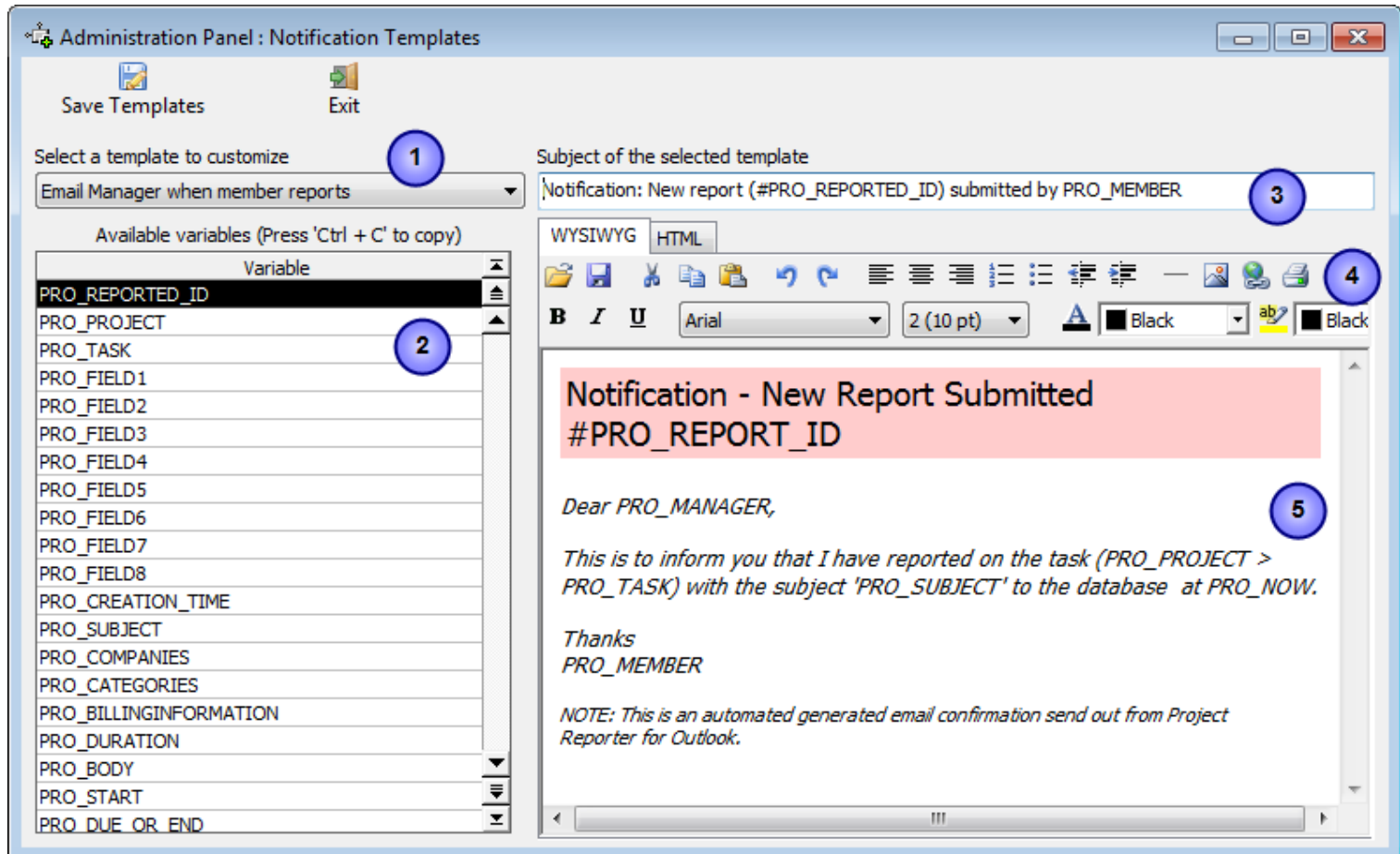
There are a whole lot of notification options for different events such as email to manager when a new timesheet is submitted or withdrawn, or when new projects or activities are added by the administrator, or when a project manager is assigned etc. Automated emails are sent out directly when a relevant event occurs and the whole exercise is transparent to the users.

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

Template	Purpose
Email Manager when member publishes timesheet	HTML template of the notification email that is sent automatically to the project manager when a user submits timesheet and other deliverables from Outlook to Database.
Email Coordinator when member publishes timesheet	HTML template of the notification email that is sent automatically to the activity coordinator when a user submits timesheet and other deliverables from Outlook to Database.
Email Members when new projects are added	HTML template of the notification email that is sent to all members when the administrator adds new projects.
Email Members when new activities are added	HTML template of the notification email that is sent to all members when the administrator adds new activities of a project.

Email Manager when assigned a project	HTML template of the notification email that is sent to the particular manager when a project is assigned.
Email Coordinator when assigned an activity	HTML template of the notification email that is sent to the particular coordinator when an activity of a project is assigned.
Email Manager on withdrawal of published timesheet	HTML template of the notification email that is sent to the project manager when a member withdraws a reported timesheet from Database.
Email Coordinator on withdrawal of published timesheet	HTML template of the notification email that is sent to the activity coordinator when a member withdraws a reported timesheet from the Database.
Email Members to submit timesheets on a project	HTML template for email that is sent out to selected or all members by the administrator (*via the Team TimeSheet Manager > Projects list*) manually to notify to submit deliverables and timesheets on a particular project.
Email Members to submit timesheets on and activity	HTML template for email that is sent out to selected or all members by the administrator (*via the Team TimeSheet Manager > Activities list)* manually to notify to submit deliverables and timesheets on a particular activity of a project.
Email Member to submit timesheets	HTML template for email that is sent to a particular member by the administrator (*via the Team TimeSheet Manager > Team Members*) manually to notify to report their timesheets and project deliverables.
Email Manager when member updates (revises) timesheet	HTML template of the notification email that is send automatically to the project manager when a user updates or revises existing timesheet and other deliverables from Outlook to Database.
Email Coordinator when member updates (revises) timesheet	HTML template of the notification email that is send automatically to the activity coordinator when a user updates or revises existing timesheet and other deliverables from Outlook to Database.

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

Variable	Purpose
PRO_REPORTED_ID	Unique ID that is automatically generated when a report is submitted to the database.
PRO_PROJECT	Project name of the reported item
PRO_ ACTIVITY	Activity name for a project of the reported timesheet
PRO_CREATION_TIME	Creation time of Outlook item that is being reported
PRO_SUBJECT	Subject of the Outlook item that is bring reported
PRO_COMPANIES	Companies field of the Outlook item that is being reported
PRO_CATEGORIES	Categories field of the Outlook item that is being reported
PRO_BILLINGINFORMATION	Billing Information field of the Outlook item that is being reported
PRO_DURATION	Duration of the Outlook item that is being reported
PRO_BODY	Body description of the reported Outlook item
PRO_START	Start date of the Outlook item
PRO_DUE_OR_END	Due date (in case of task item) or End date (in case of appointment item)
PRO_REPORTED_DATE	Date/time the Outlook item was reported to the database
PRO_MEMBER	Name of a particular member
PRO_TOTALCOST	Total cost that is computed after the item is reported successfully
PRO_APPROVED	Audit status of the reported item. If TRUE, it is approved, else it is rejected (declined).
PRO_APPROVEDBY	The user/administrator who audited the reported item in the database.
PRO_MANAGER	The manager of the particular project
PRO_COORDINATOR	The Coordinator of the particular activity of a project
PRO_ACTIVITY_DUE_DATE	The Due Date of the particular activity of the project
PRO_NOW	Current date/time stamp
PRO_REPORTED_BY	Name of the member who submitted the item to the database
PRO_HOURS	Billable Hours

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

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

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

authoring tool.

The actual template in its raw state.

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5.8 Notification Options

Team TimeSheet Manager > Notification Options

Automatic Email Notifications - Automatic email notification and alerts are essential for keeping managers and team members informed with the progress and status of the project.

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

Check the box of the corresponding notification that you want to enable and then click 'Save' button.

Automatic Notifications

- ☑ Notify Manager when a team member submit timesheet to the database **1**
- ☐ Notify Coordinator when a team member submit timesheet to the database **2**
- ☑ Notify Manager when a team member updates existing timesheet in database **3**
- ☐ Notify Coordinator when a team member updates existing timesheet in database **4**
- ☑ Notify Manager when a published timesheet is withdrawn by the member **5**
- ☐ Notify Coordinator when a published timesheet is withdrawn by the member **6**
- ☑ Notify Manager when a new project is assigned **7**
- ☐ Notify Coordinator when a new activity is assigned **8**
- ☑ Notify team members when new projects are added **9**
- ☑ Notify team members when new activities are added **10**
- ☑ Notify member when submitted timesheet is declined **11**
- ☑ Notify member when submitted timesheet is approved **12**

1 **Notify Manager when a team member submits timesheet to the database**– This notification email is sent out to the concerned manager in-charge of the particular project on which the member has reported.

Notification: New report (#18) submitted by john

Sent: None
To: 'Schuster@mangostar.com'
Cc:

Notification - New Report Submitted #18

Dear Schäfer,

This is to inform you that I have reported on the task (CNN Media > Faxing press releases) with the subject 'Technology takes over ' to the database at 8/9/2010 11:13:38 PM.

Thanks
john

2   **Notify Coordinator when a team member submits timesheet to the database** – This notification email is sent out to the concerned coordinator in-charge of the particular activity of a project on which the member has reported.

3   **Notify Manager when a team member updates existing timesheet to database** – This notification email is sent out to the concerned manager in-charge of the particular project when a member updates and revises an existing timesheet in database.

Notification: Existing Timesheet submitted

Sent: None
To: 'Schuster@mangostar.com'
Cc:

Notification - Existing Timesheet #35 updated/revised

Dear Kovács,

This is to inform you that I have updated/revised existing timesheet #35 on the activity (CN Media > Collating press kits) with the subject 'New submarine Ensign ' to the database   at 2011 9:40 PM.

Thanks
john

---

4   **Notify Coordinator when a team member updates existing timesheet to database** – This notification email is sent out to the concerned coordinator in-charge of the particular activity of a project when a member updates or revises an existing timesheet in the database.

5   **Notify Manager when a reported timesheet is withdrawn by the member** – If withdrawal of reported timesheet is allowed, this notification email would be sent out to the concerned project manager when member withdraws the reported timesheet from the database through Outlook.

6   **Notify Coordinator when a reported timesheet is withdrawn by the member** - If withdrawal of reported timesheet is allowed, this notification email would be sent out to the concerned activity coordinator when member withdraws the reported timesheet from the database through Outlook

7   **Notify manager when new project is assigned** - This notification email is sent out to the newly assigned manager informing   about the assignment of the particular project.

Notification: Project 'CRM Solution' Assignment

Sent: None
To: 'Haas.polik@mang35.com'
Cc:

Notification - Project Assigned to You

Dear Bennett,

This is to inform you that you have been assigned as manager for the project 'CRM Solution' at 8/9/2010 11:46:52 PM . You can now start creating new tasks and other necessary preparation on this project.

Thanks
john

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8   **Notify coordinator when new activity is assigned** - This notification email is sent out to the newly assigned coordinator informing about the assignment of the particular activity.

Notification: Task 'Database Replication' Assignment

Sent: None
To: 'Auer@mangostar.com'
Cc:

Notification - Task Assigned to You

Dear Anderson,

This is to inform you that you have been assigned as Coordinator for the task 'Database Replication' (under 'CRM Solution' project) at 8/10/2010 12:52:15 AM . For more, please contact the project manager 'Bennett'.

Thanks
john

9   **Notify team members when new projects are added** – This notification email is sent out to team members informing about the availability of new projects when manager or administrator adds new projects from Team TimeSheet Managerial tool.

Notification: New Projects Available

Sent: None
To: 'Durand@mangostar.com'
Cc:

Notification - New Project Available

Dear Staffs,

This is to inform you that the following new projects are added at 8/9/2010 11:43:19 PM and are available for use:

CRM Solution (Manager: Bennett)

Thanks
john

10 **Notify team members when new activities are added** – This notification email is sent out to team members informing about the availability of new activities of a project when administrator adds new activities from Team TimeSheet Managerial tool.

11 **Notify member when reported timesheet is declined** – If audit function is enabled and if project managers and supervisors decline the reported timesheet, this notification email is sent out to the particular member apprising about the decline.

12 **Notify member when reported timesheet is approved** - If audit function is enabled and if project managers and supervisors accept the reported timesheet, this notification email is sent out to the particular member apprising about the acceptance.

5.9 Reporting Options

Team TimeSheet Manager > Reporting Options

With the reporting options, administrators can control and streamline how all members report project deliverables from the Outlook client to the project data repository.

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

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

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

4 **Allow members to withdraw published timesheet** - If this option is enabled, it would allow members to withdraw (remove) reported timesheets or deliverables from the database. A new UI ribbon button with the caption **'Withdraw Report'** would be available in the Team TimeSheet toolbar or ribbon in Outlook. This withdrawal feature comes handy when members want to start-over their timesheet or work done which were already submitted.
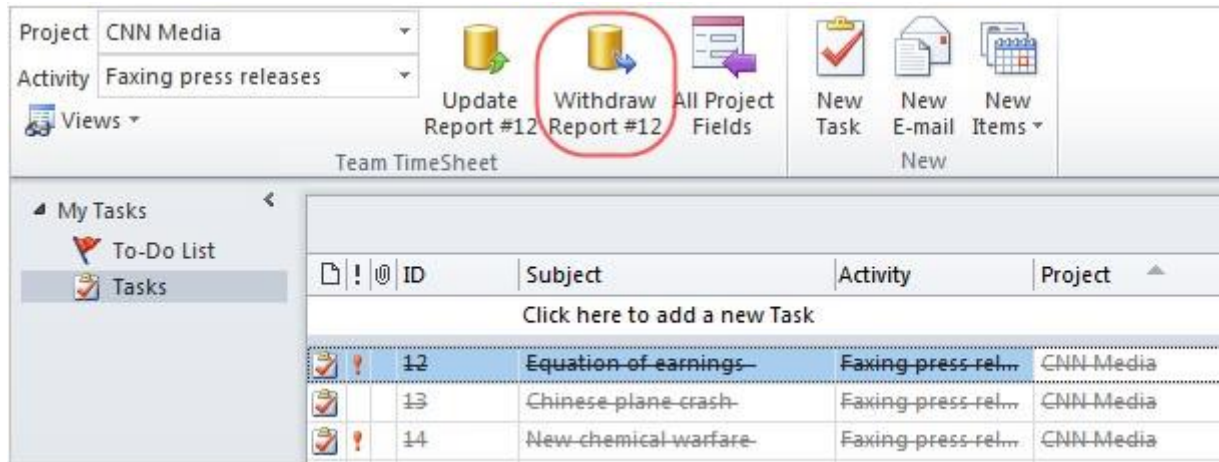
5 **Prevent members from posting items with expired projects** - when enabled, Team TimeSheet would prevent members from submitting timesheets and other deliverables from Outlook, if the tagged project has expired already.

6 **Prevent members from posting items with expired activities** - when enabled, Team TimeSheet would prevent members from submitting timesheets and other deliverables from Outlook, if the tagged activity of the project has expired already.

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

8 **Include attachments when publishing timesheets to SharePoint list** – Enabling this option will also upload any attachment files (if any) present in the Outlook appointment/task item to the published SharePoint list item.

9 **Upload the Outlook item itself (as .msg attachment) when publishing timesheets to SharePoint**
If enabled, the add-in will also upload the .MSG file of the Outlook appointment/task item (as attachment) to the published SharePoint list item.

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

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

Optional Reported Item Repository

☐ Place a copy of the reported task item to this public folder ①

Pick Folder...

☑ Place a copy of the reported appointment item to this public folder ②

\\helpdesk@AssistMyTeam2.onmicrosoft.com\Calendar

Pick Folder...

① Reported repository for task items – enable this option to place a copy of the reported task item to a public task folder.

② Reported repository for appointment items – enable this option to place a copy of the reported appointment item to a public calendar folder.

5.10 Audit Options

Team TimeSheet Manager > Audit Options

The audit options provide administrator if to enable approval management module and what all audit features will be available. If auditing is not enabled, timesheets and other project deliverables are automatically approved upon submission. By default, auditing is disabled.

1   **Enable editing values of Project/Activity** – You can set managers and supervisors to manually change and edit the project data in the submitted timesheet before or after approving it.

2   **Enable editing of Cost** – likewise, checking this option would enable managers to adjust and change the cost on the reported timesheet.

3   **Enable editing values of Billable Hours** – You can set managers and supervisors to manually change and edit the Billable Hours in the submitted timesheet before or after approving it.

4   **Enable editing values of Custom Fields** – You can set managers and supervisors to manually change and edit the custom fields data (if deployed) in the submitted timesheet before or after approving it.

5   **Notify member when reported timesheet is approved** – This would automatically generate an email notification informing the particular member about the approval of the submitted timesheet or other deliverables.

6   **Display the email before sending to the member** – By default, email notification for approval would be sent automatically. However, this can be changed by enabling this option, whereby the notification email on approval would be displayed to the manager for any additional note, that manager might want to put in.

7   **Notify member when reported timesheet is declined** - This would automatically generate an email notification informing the particular member about the decline of the submitted timesheet or other deliverables.

8   **Display the email before sending to the member** - By default, email notification for decline would be sent automatically. However, this can be changed by enabling this option, whereby the notification email on decline would be displayed to the manager for any additional note, that manager might want to put in.

9   **Permanently remove declined timesheet from the database** – Enabling this option would permanently remove the declined timesheet or deliverables from the database.

5.11 Advanced Options

Team TimeSheet Manager > Advanced Options

① **In Project/Activity List, prompt me to select recipients before sending email reminder to report** – Administrator can send email alert manually to members to notify to submit their timesheets on a particular project or activity. By default, it is sent out to all members, but enabling this check option would allow the administrator send the alert email to the chosen members only.

2 **In Project/Activity List, allow editing email reminder before sending to the recipients** – Enabling this option would allow the administrator edit the email alert before sending out to the members.

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

4 **Update Start date of the item with the Project Start Date** – If this is enabled, when member tags an appointment or task item in Outlook, the start date of the Outlook item would be automatically updated to that of the Project Start Date (provided the start date is defined in for that particular project in the list). If it is null, it is ignored.

Start date of the project 'BBC Tech' in the Projects List

When the project 'BBC Tech' is selected and tagged to the task item, the start date of that project is automatically assigned to the start date of the task item in Outlook. *E.g. 15th August 2010.*

⑤   For Outlook appointment item, update End Date of the item with either the **Project Finish Date** or the **Activity Due Date**

If Project Finish Date is enabled, when member tags an appointment item with a project from the drop down in Outlook, the end date of the appointment item would be automatically updated to that of the Project Finish Date (provided the start date is defined in for that particular project in the list). *E.g. 19th August 2010.* If it is empty/null, it is ignored.

If **Activity Due Date** were chosen, when member tags an appointment item with an activity value from the drop down in Outlook, the end date of the appointment item would be automatically updated to that of the activity Due Date (provided the due date is defined for that particular activity in the list). *E.g. 18th August 2010.* If it is empty or null, it is ignored.

Team TimeSheet for Outlook & SharePoint

expense, billing, task, timesheet reporting from Outlook to SharePoint made easier for your team members!

6 For Outlook task item, update Due Date of the item with either **Project Finish Date** or **Activity Due Date**

If **Project Finish Date** is enabled, when member tags a task item with a project from the drop down in Outlook, the due date of the task item would be automatically updated to that of the Project Finish Date (provided the finish date is defined in for that particular project in the list). *E.g. 19th August 2010.* If it is empty/null, it is ignored.

If **Activity Due Date** were chosen, when member tags a task item with an activity value from the drop down in Outlook, the due date of the task item would be automatically updated to that of the Activity Due Date (provided the due date is defined for that particular Activity in the list). *E.g. 18th August 2010.* If it is empty or null, it is ignored.

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Total Cost Calculation

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

Rate in Projects List

Rate in Activities List

Rate in Members List

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

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

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

5.12 Upgrade Options

Team TimeSheet Manager > Upgrade Options

With this feature, when a new updated version of Team TimeSheet is available, you can perform upgrade of the Team TimeSheet Client tool on each member's system automatically. If enabled, it checks for new version availability at Outlook startup.

Auto-check of new version from www.assistmyteam.com **and offer to install if a new version is available** - Check this option to enable automatic check of new version of the Team TimeSheet Client add-in from the product website at www.assistmyteam.com during Outlook startup. If a new version is available, you will be offered if you want to open the download page.

Controlled Upgrade – from an admin specified network folder - Check this option to enable automatic upgrade of Team TimeSheet Client add-in from a network path, which is specified by the administrator. In the text box, specify the network shared folder where the Client setup files (*TeamTimesheetClientSetup_xXX.exe and VersionInfo.txt*) are placed. When new versions are available, all you need to do is download the latest version from the Team TimeSheet download page, and then place the *TeamTimesheetClientSetup*.exe and *VersionInfo*.txt into this network folder.

Display a message to the member on new version availability - This would display a message about new version availability if one is found.

6. Search published TimeSheet database (SharePoint)

Team TimeSheet Manager > Search TimeSheet Data

With the *Search* utility, administrators and managers can run queries on the 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*

(2) Report Type: Choose a report type from the predefined ones - *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.

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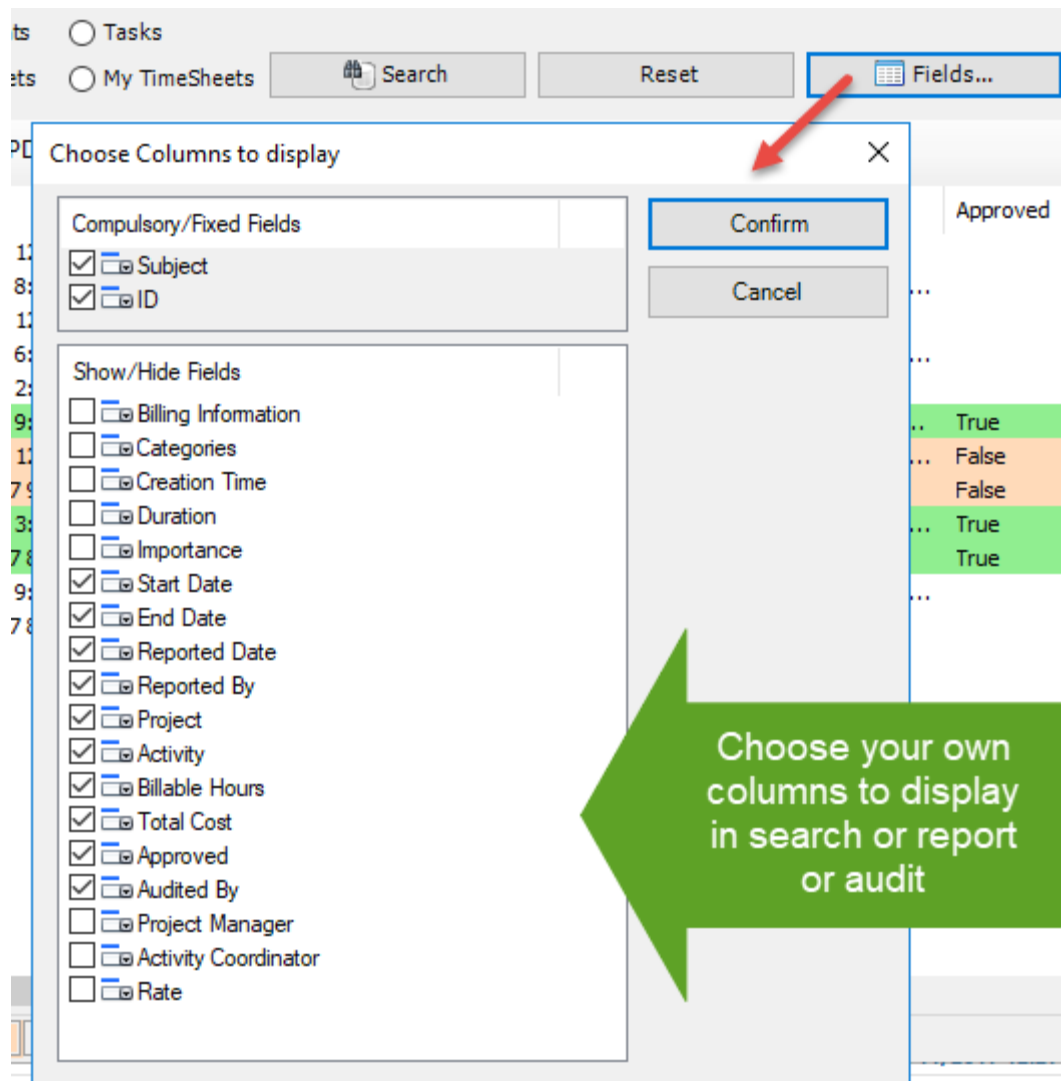
Detail Info button: Click this to view finer detail information of the selected timesheet (as available in the project database) in a new window.

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

There is however one problem if you are using Outlook 2002 or newer with a PST file and POP3/SMTP transport provider or Outlook 2000 installed in the Internet Only Mode: there is no way to flush the queues using Extended MAPI. That part of Outlook is simply broken. Note however that Outlook 2002/2003 (online) with an Exchange Server or Outlook 2000 C/W in any configuration are fine.

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.

7. TimeSheet Summary Reports

Team TimeSheet Manager > TimeSheet Summary Reports

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

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

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

Each timesheet in the search result is color coded to reflect the current state of the timesheet such as if it 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

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

The tool will remember your choice in subsequent runs.

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

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

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

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

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

| List | HTML | HTML Editable | Grid |

Report

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

TimeSheets : All Periods - 12 TimeSheets

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

Summary	Count
Approved	3
Declined	2
TimeSheets Pending Approval	7

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

| List | HTML | HTML Editable | Grid |

| **B** *I* U | Font Courier New ▼ | Size 7 (36 pt) ▼ | **A** | IndianRe ▼ | ab✓ | MediumTu ▼ |

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

Report

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

TimeSheets : All Periods - 12 TimeSheets

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

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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!

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8. TimeSheet Audit Manager

Team TimeSheet Manager > Audit Manager

With this auditing tool, supervisors and managers can review submitted timesheets and other project deliverables and make amendment to project, activity or cost and can approve or decline the reported timesheet. The interface and control sets remained the same with the new search/report tool (described in previous sections). The only additional features in Audit Manager tool being able to edit, delete, approve or decline timesheets published by your users.

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

2 **Edit** - Click this to edit the published timesheet. Depending on the permissions as set by the administrator under **Team TimeSheet Manager > Audit** Options panel, you can edit or make amendment to the published timesheets stored in the project database directly.

3 **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.

4 **Delete** – Click this to permanently remove the selected timesheets from SharePoint.

5 **Approve** – Click this to approve the published timesheets from users. Approved timesheets appear with a green back color for easy recognition. Based on the choice, the add-in may send an alert to the owner (user) of the timesheet informing about the approval.

This notification can be enabled from the 'Audit Options' settings.

☑ Notify member when reported task/appointment is approved
☐ Display the email before sending to the member

6 **Decline -** Click this to decline the published timesheets from users. Based on the choice, the add-in may send an alert to the owner (user) of the timesheet informing about the decline.

This notification can be enabled from the 'Audit Options' settings.

☑ Notify member when reported task/appointment is declined
☐ Display the email before sending to the member

Declined timesheet can also be removed permanently from the database, if it is enabled from the 'Audit Options'.

☑ Permanently remove declined data from the database

7 **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.

You can control what timesheet data are included in the exported files by customizing the **'Print'** template under **Team TimeSheet Manager > Templates Manager**.

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9. TimeSheet OLAP Statistics and Reporting

Team TimeSheet Manager > TimeSheet OLAP Statistics

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

Advantage of OLAP

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

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

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

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

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

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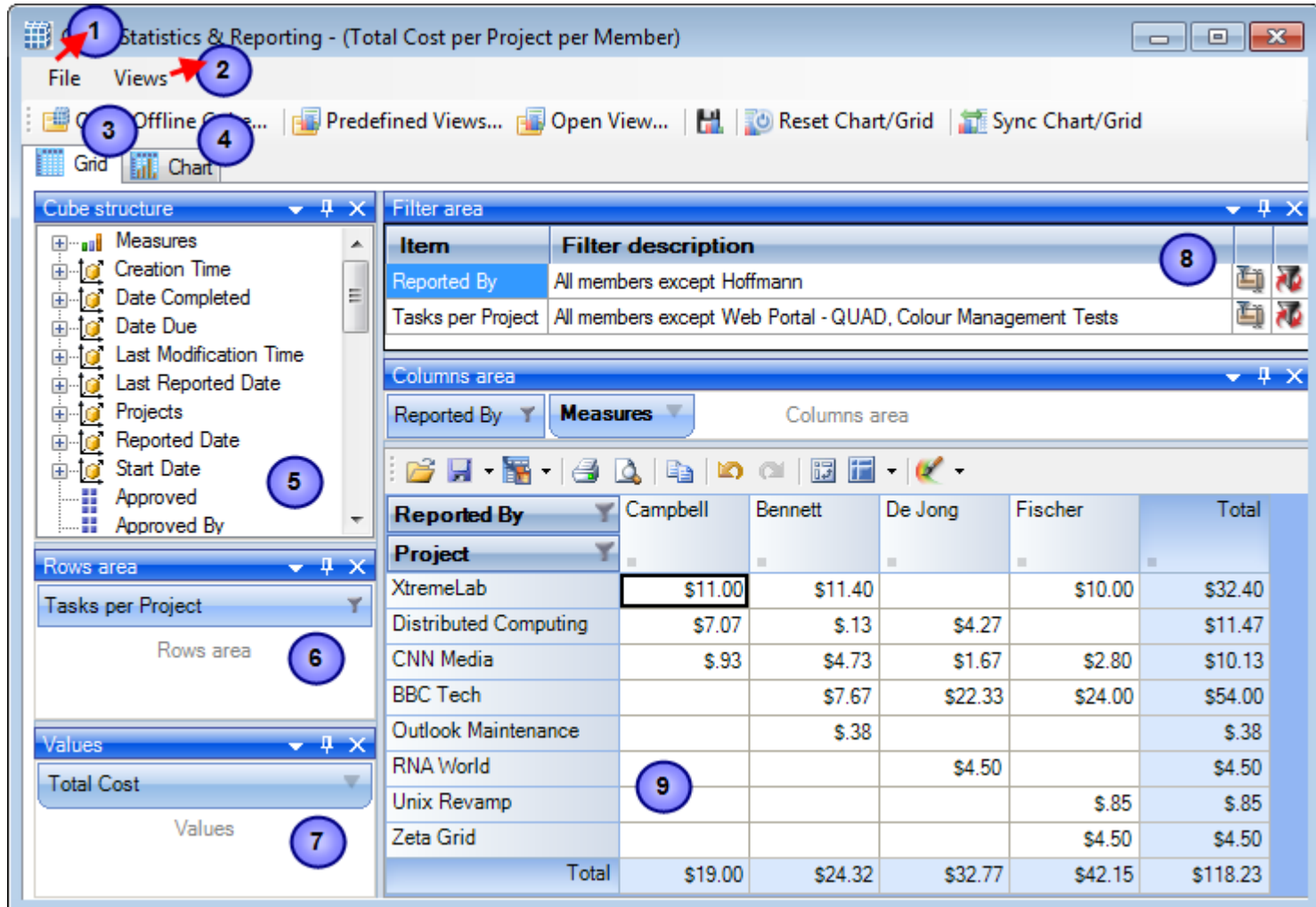
This statistical tool presents an easy-to-use interface for operating an OLAP-slice. The basic data is displayed in the working area. The environment tools for managing the content and characteristics of the slice are placed on the pivot panels. You can set the panels' layout the way you like. To drag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

The File menu

The file menu consists of the following commands:
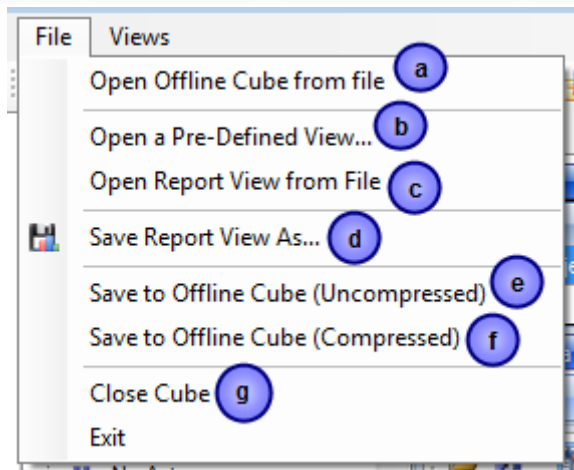
a) **Open Offline Cube from file** - While generating a live cube from the timesheets database provides the advantage of analyzing live data, often, you might be away or disconnected from the network.

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 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).
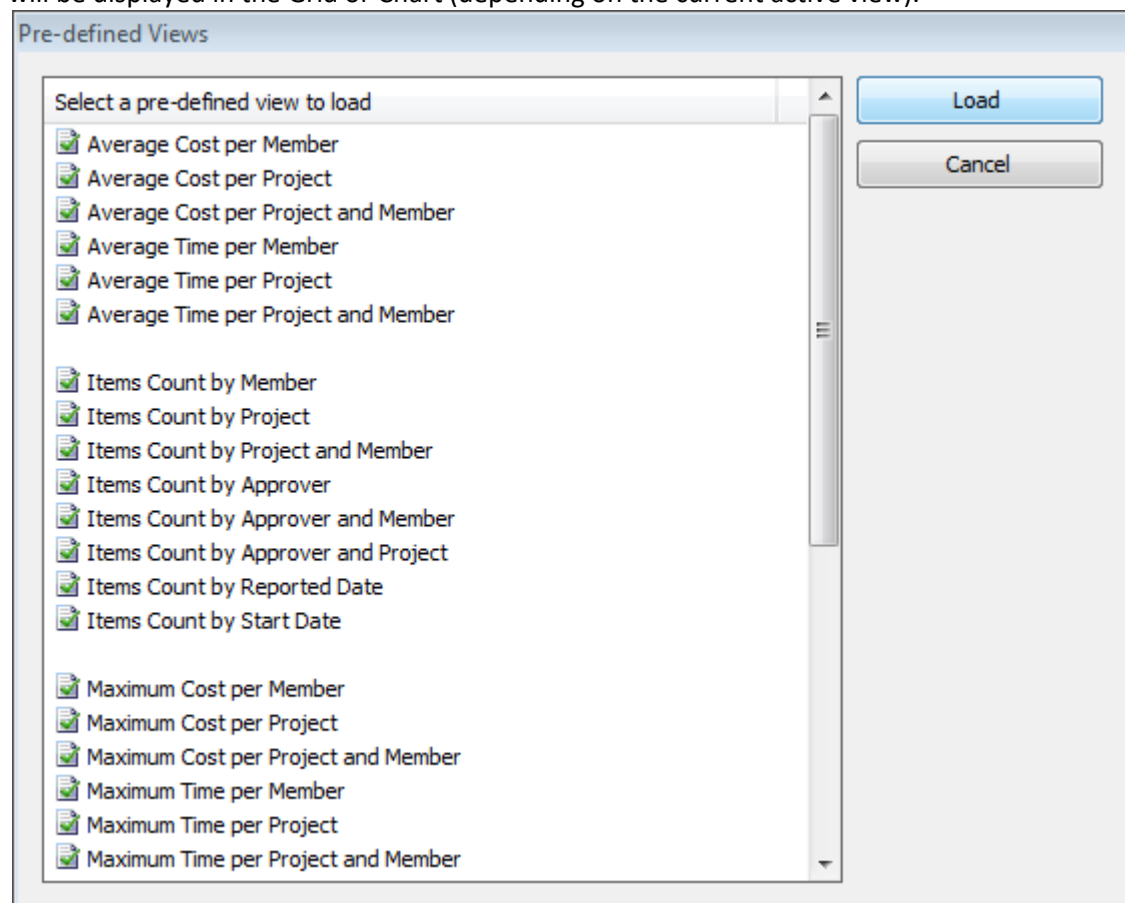
c) **Open report view from file** - Once a particular snapshot of the statistics is achieved, you may want to save it for future reference or share it among your team members. A report view is the current state of the statistics in the Grid/Chart working area, with specific member fields on the pivot panels (Rows and Column areas) and measure fields in the values area. It has a file extension '*.olapreport*'.
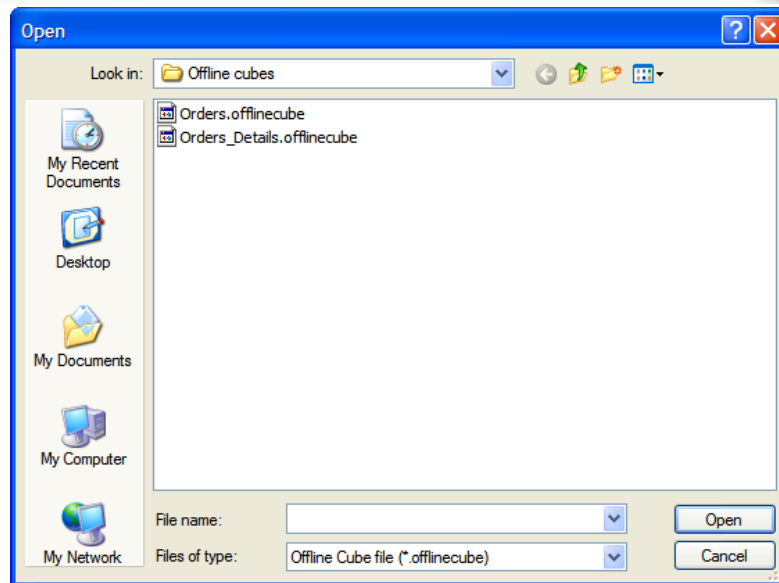
d) **Save report view as** - If you want to share a report view with others, you can simply save the current report (state of the statistics along with the pivot details) to a file folder of your choice - could be a network folder also.
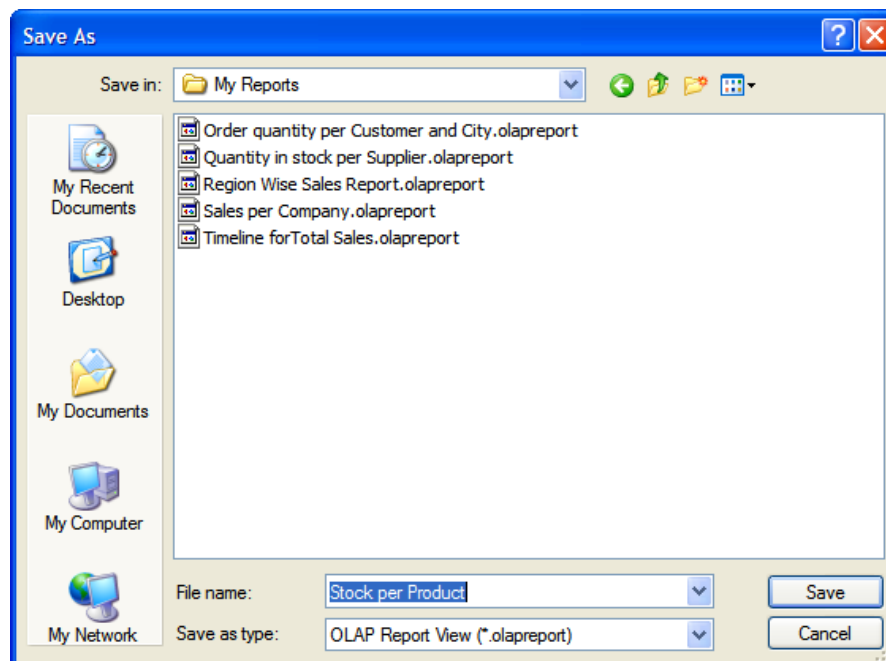
e) **Save to offline Cube** – Once you have loaded a live cube from the timesheets database, you have the option to save the entire cube data to a file (with the extension *.offlinecube*) for offline use, when you are disconnected from the network. Offline cube can be saved in compressed or uncompressed 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.

View Menu

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

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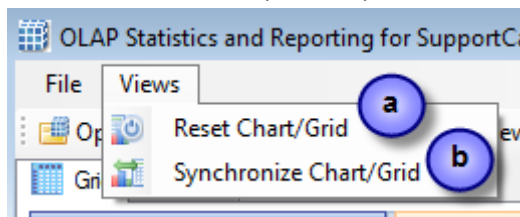
a) **Reset Chart/Grid** - Empty all the member fields from the pivot as well as the data from the working area of the chart/grid. This is useful if you want to start over on a new report view.

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 build 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.
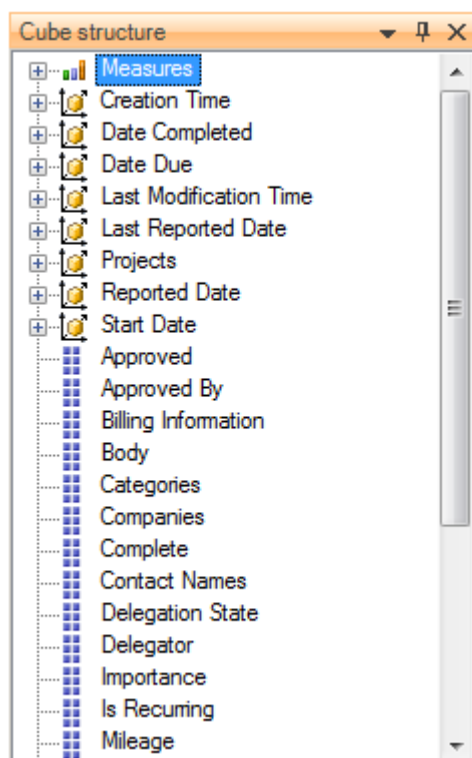
▪ – Measure
▫ – Dimension
▦ – Attribute hierarchy
▦ – Multilevel hierarchy

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.
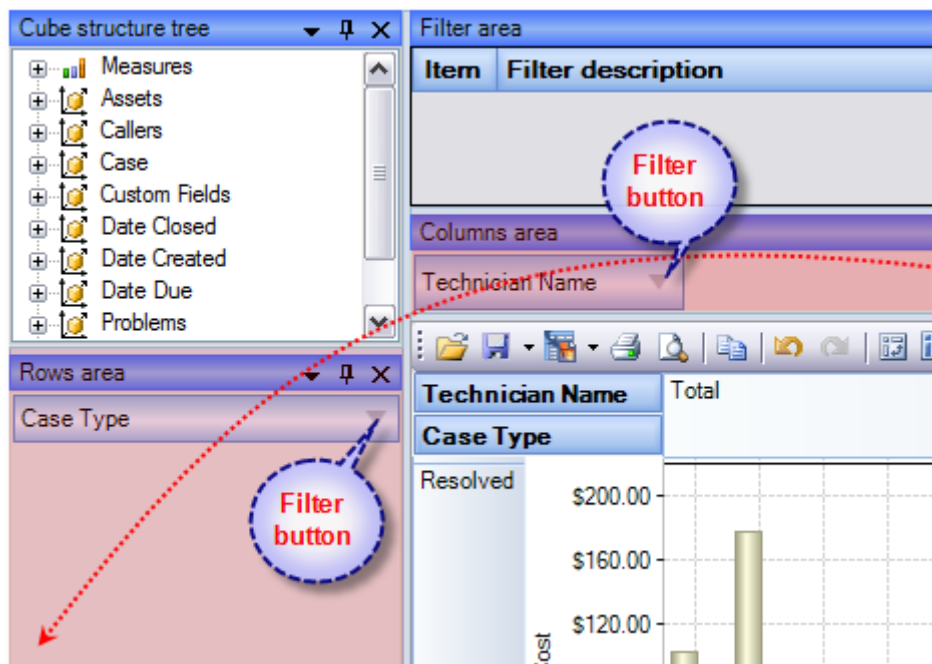
7 **Measure panel**

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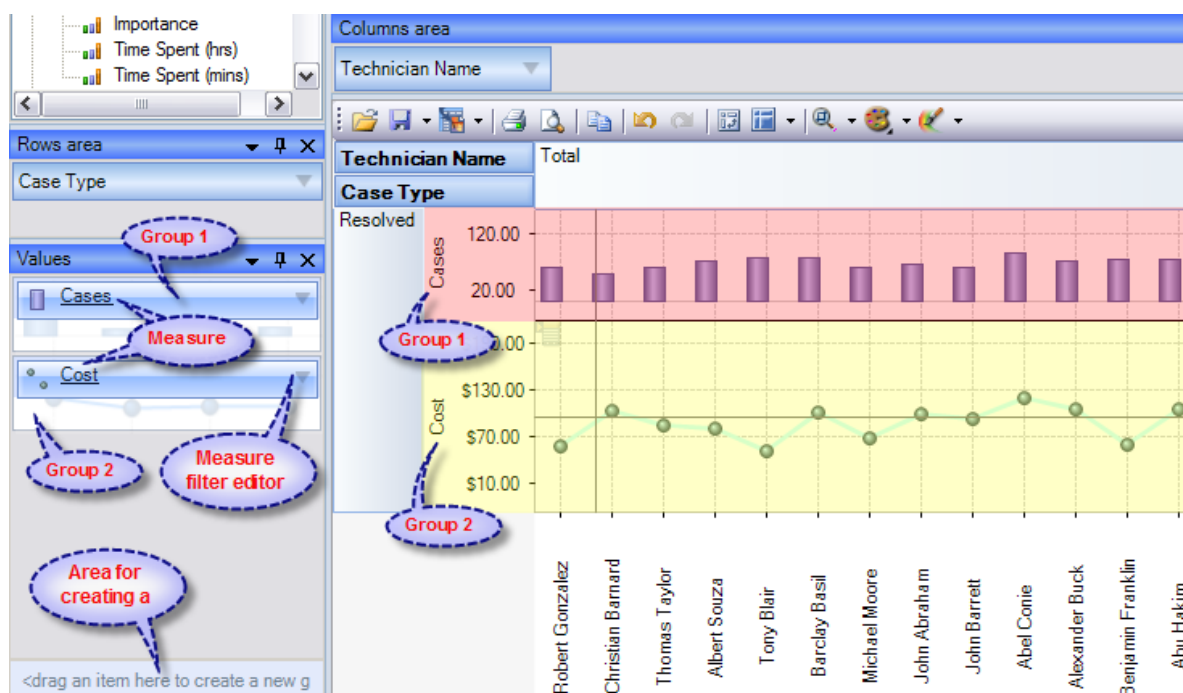
You can drag measures from one group to another, or extract measures from groups to delete them. To create a new group, you need to drag a measure to a place on the panel not occupied by another group or to the <drop an item to create a new group> panel.

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.

expense, billing, task, timesheet
reporting from Outlook to
SharePoint made easier
for your team members!

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:
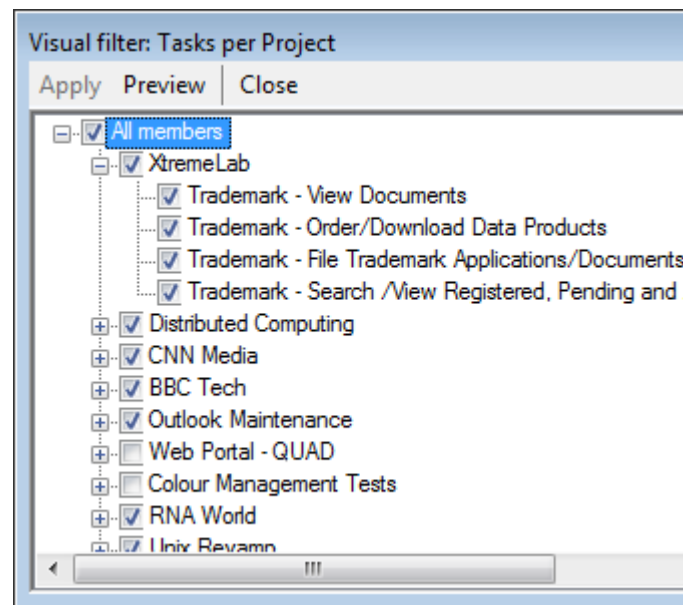
In the Filter panel, you can call the Filtered Element Editor individually for each element.
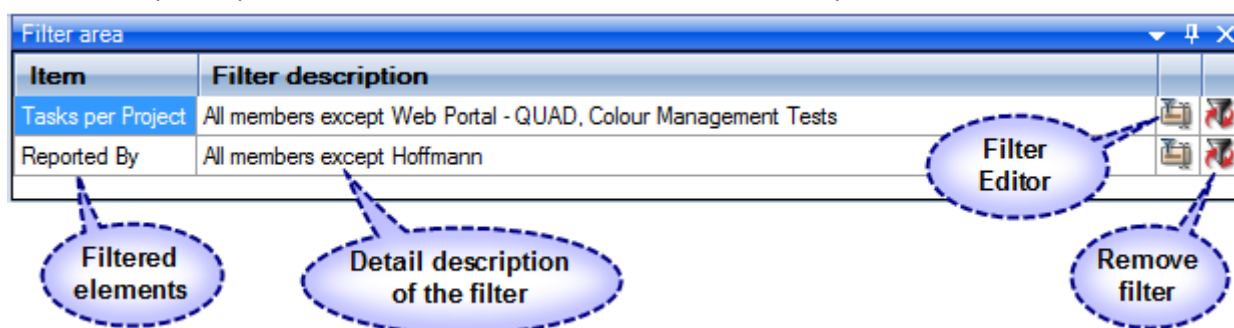
9 **Working Area**

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

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Reported By	Campbell	Bennett	De Jong	Fischer	Total
Project					
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
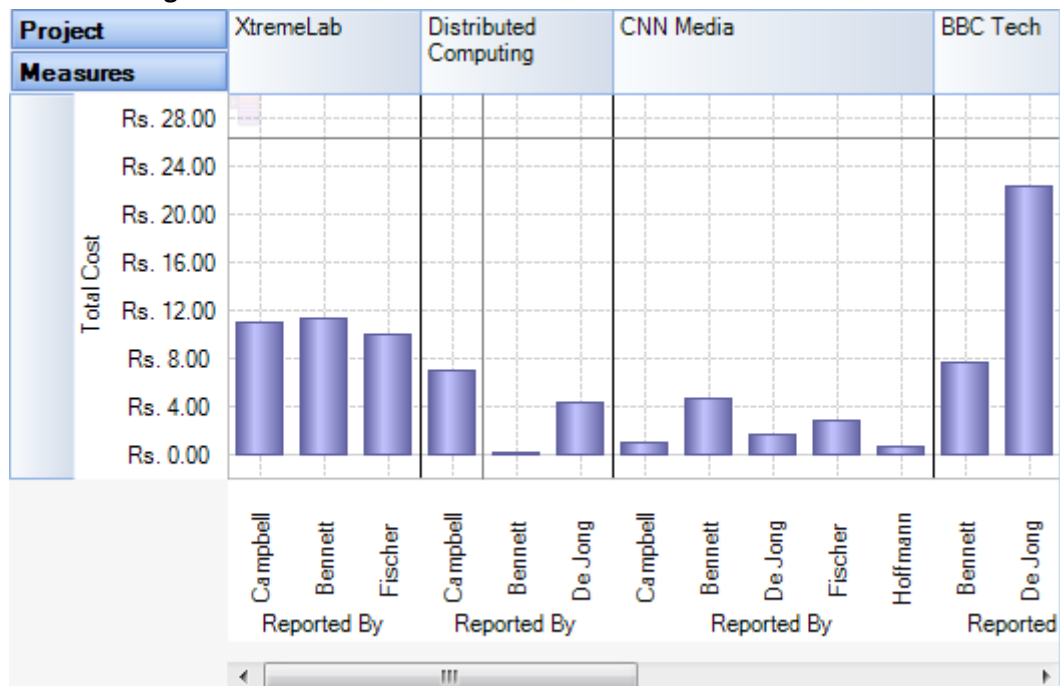
9.2 Working with the OLAP grid

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

Additionally, the OLAP Grid view allows 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

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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.

Case Type		Resolved
	Show totals first	
Problem Ca	✓ Show totals last	
Accessories	Don't show totals	25.82
		19.90
	✓ Default sorting	17.15
	Sort ascending	16.42
	Sort descending	16.07
		95.35
	Aggregate all hierarchy members	
Services	✓ Aggregate visible members only	91.55
Applications	Drill all down ▶	84.45
Music Players	Drill all up	20.57
		20.40
	Clear filter	18.65
	Filter on captions ▶	18.62
	Show empty cells	78.23
Notebooks	Create new group…	14.83
		14.82
	Copy selection	13.73
	Conditional formatting ▶	43.38

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Hierarchy levels' menu

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

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

Hierarchy members' menu

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

Command	Function

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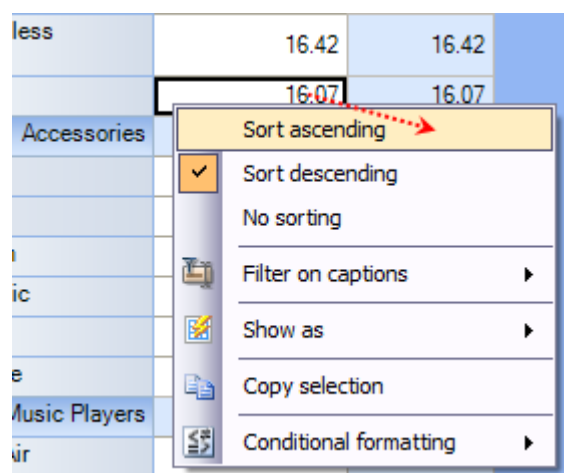|	
Drill down to the next hierarchy	Open the node up to the next hierarchy in the current area, ignoring all the lower levels of the current hierarchy
Hide this member	Hide the member
Hide all members except this	Hide all the members of the hierarchy, except the selected one
Hide all members above this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

The menu for groups of hierarchy members

The context menu that appears above the group cell.

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

Measure values' menu

The context menu that appears above the group cell:

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

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

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

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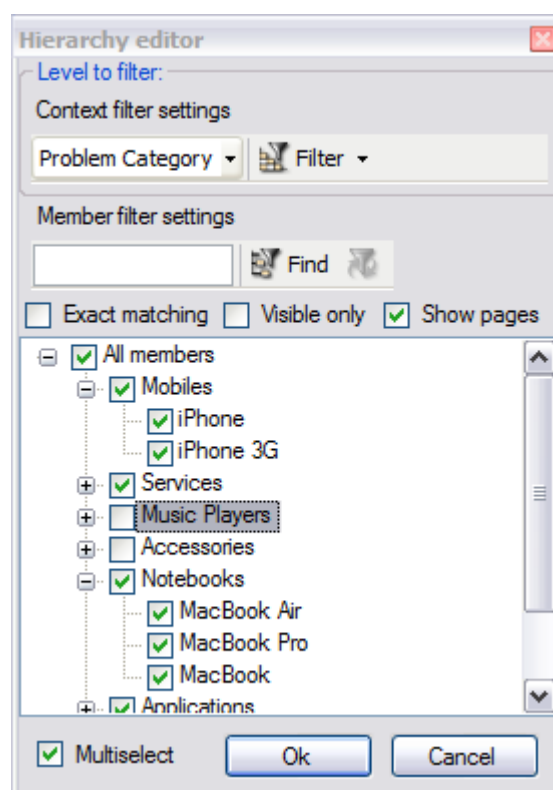

6. Setting the columns' width - You can change the width of columns in the data display area by dragging the right boundary with the mouse. If possible, these changes will be saved during other operations with the table (like drilling, sorting, etc.) To return to the original width, double click the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

9.3 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.
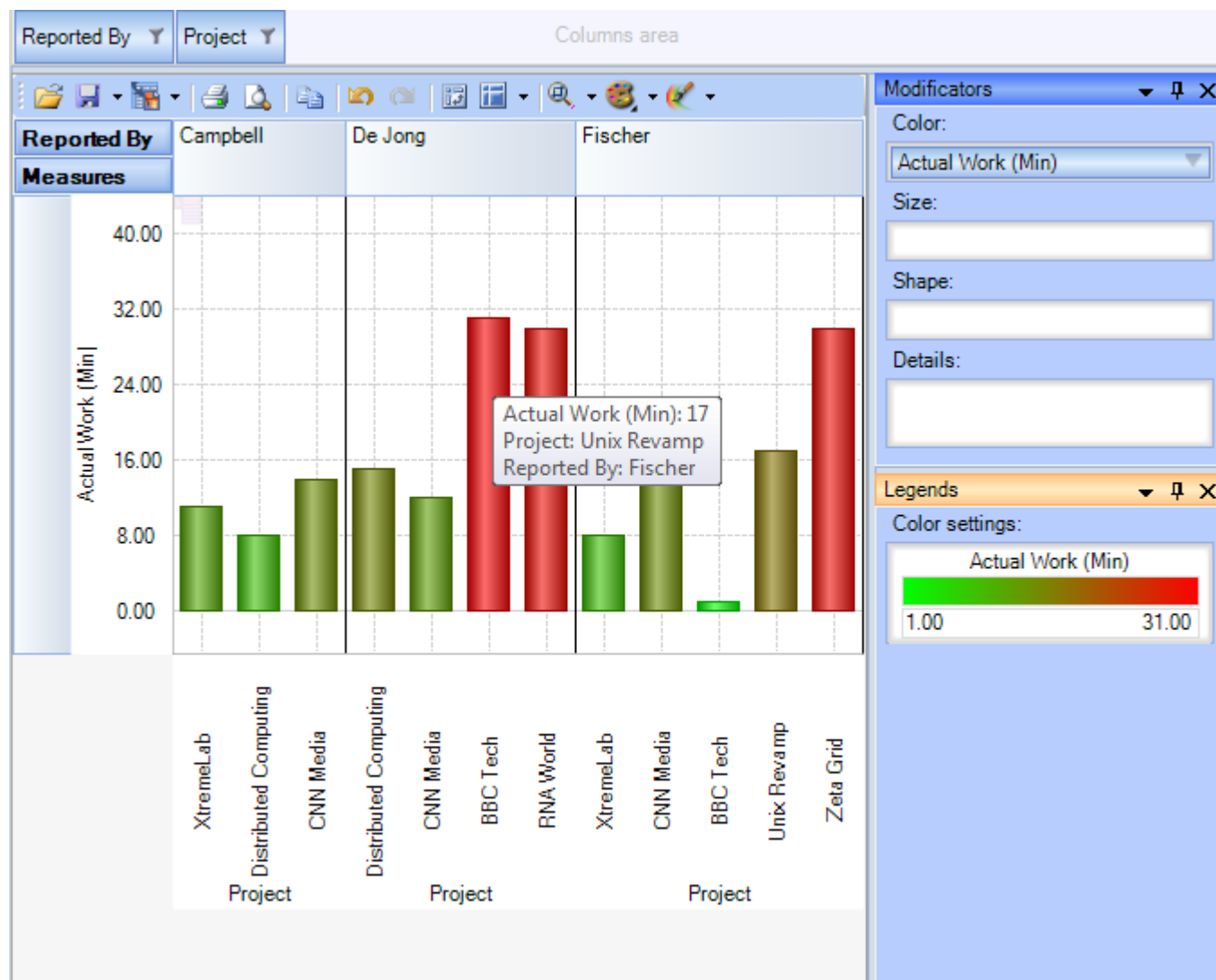
Tools panel

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.
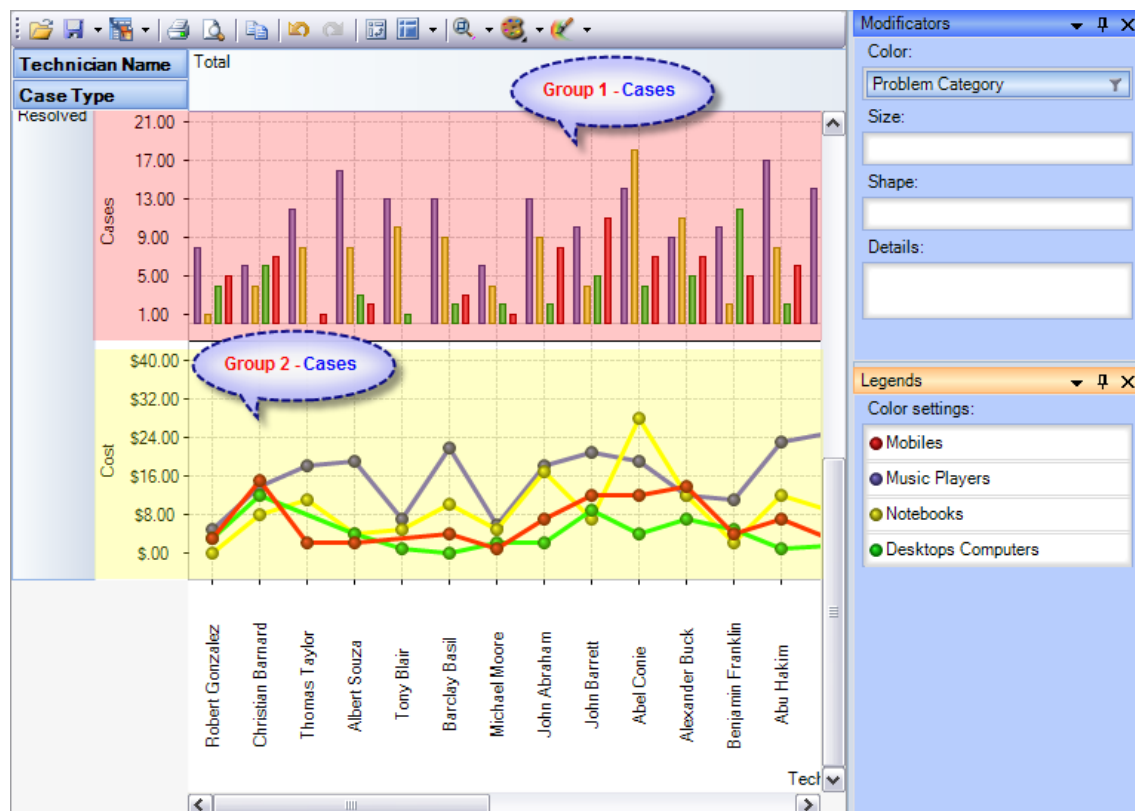
The layout of panels and hierarchies on the Modifier panel allows you to change the appearance of the displayed slice. When an element is placed to the modifier panel (except for Details), its legend will contain the display parameters. If you modify the color and shape of an element, the appropriate 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.
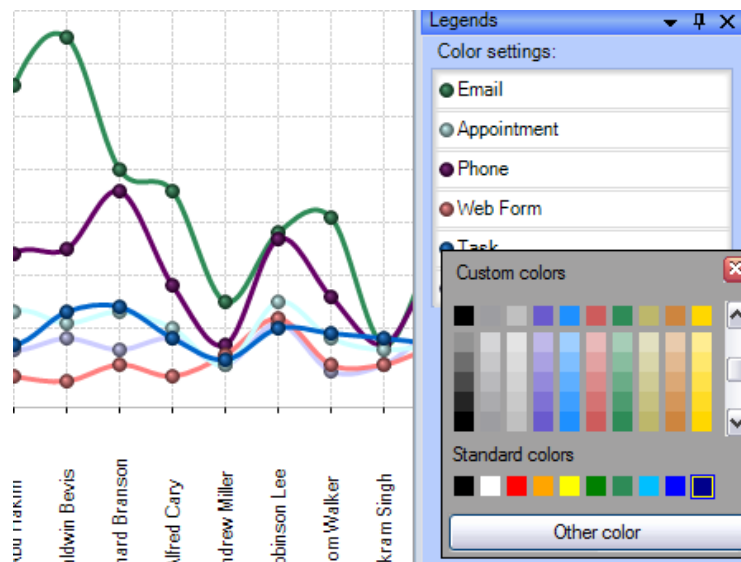
Setting the Gradient legend
To edit the gradient, double-click the element and tune the settings in the editor. In the Gradient Editor there are:

- 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;
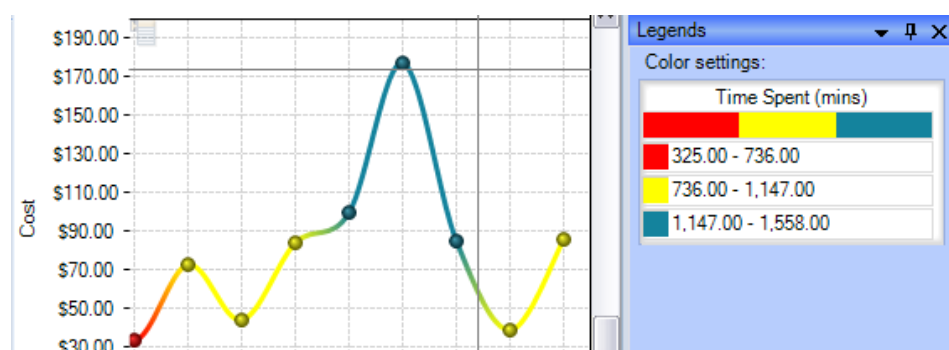
Selecting threshold color option.
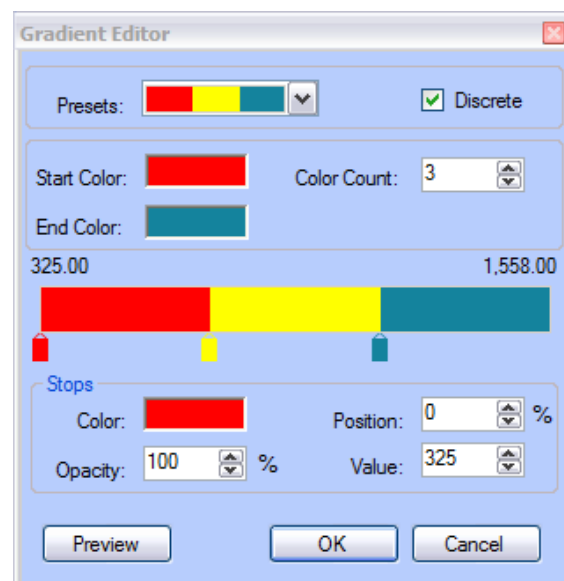
Setting the Shape legend

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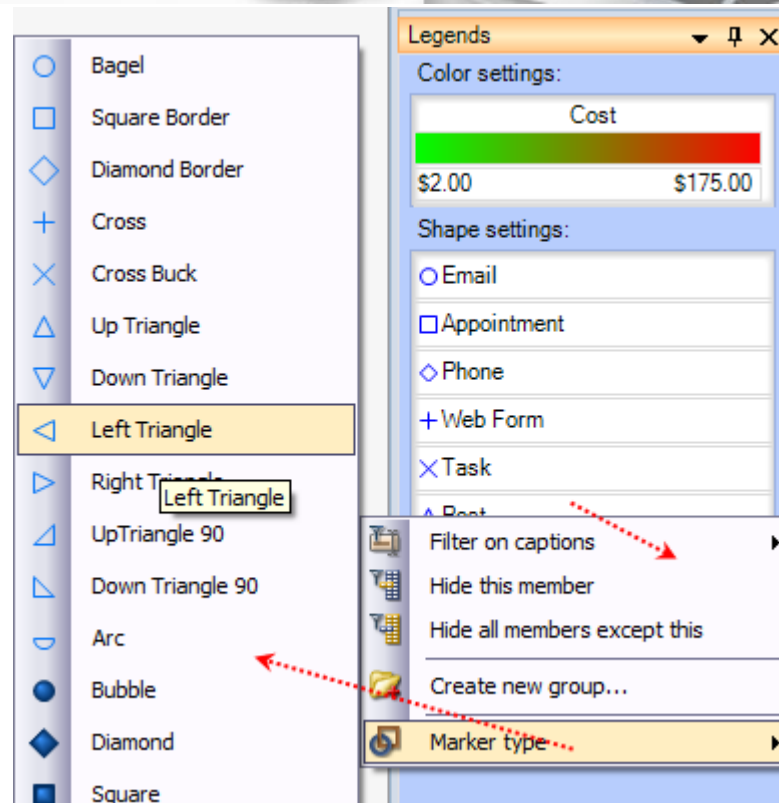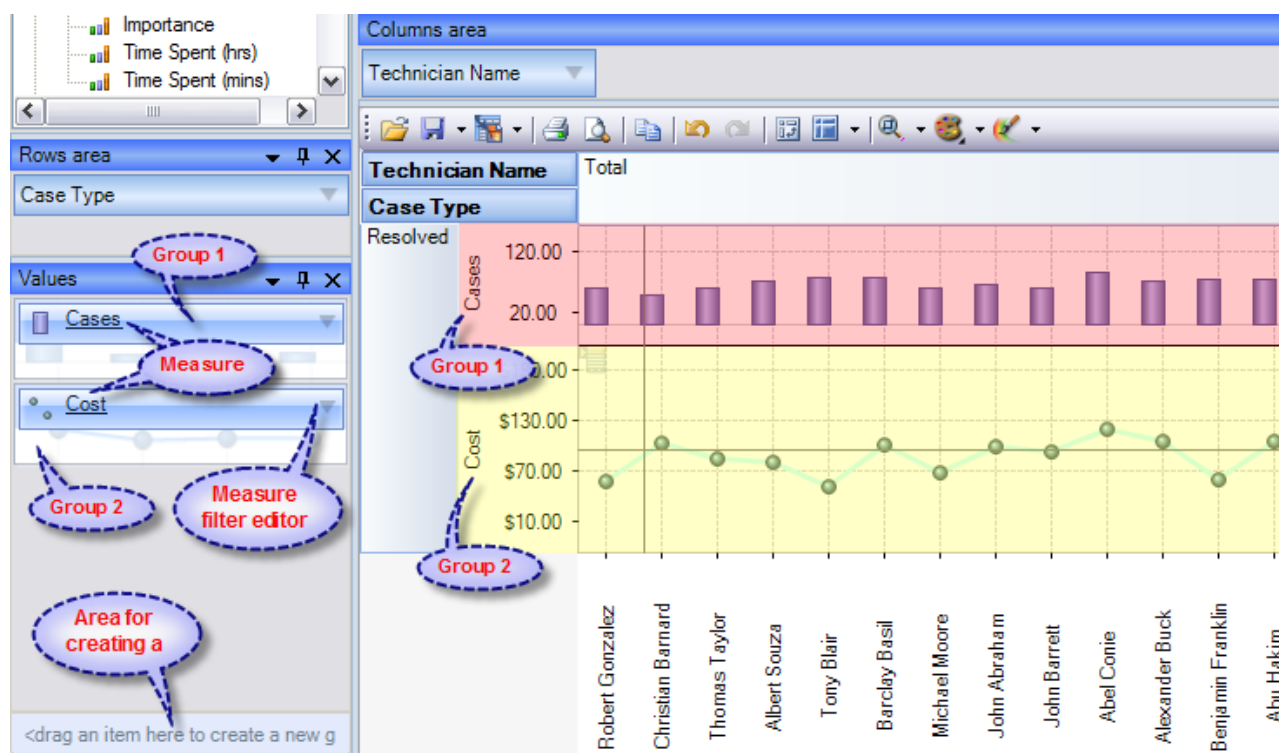
Chart Panes

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

Measure groups with corresponding Charts in the working area

Chart Type

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

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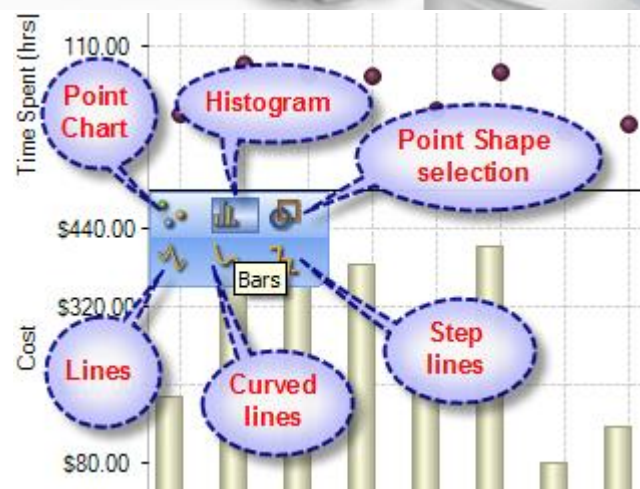
Chart type menu

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

Navigation

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

Selecting Data

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

Selecting and filtering parts of Charts
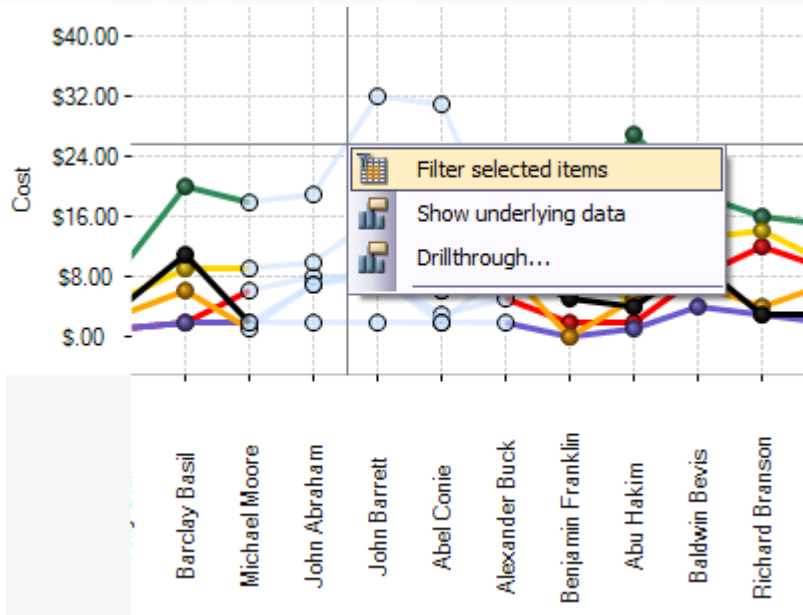
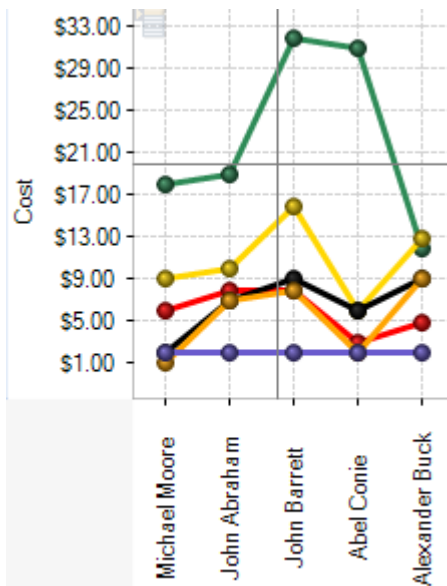*a. Selecting some of the Chart points*
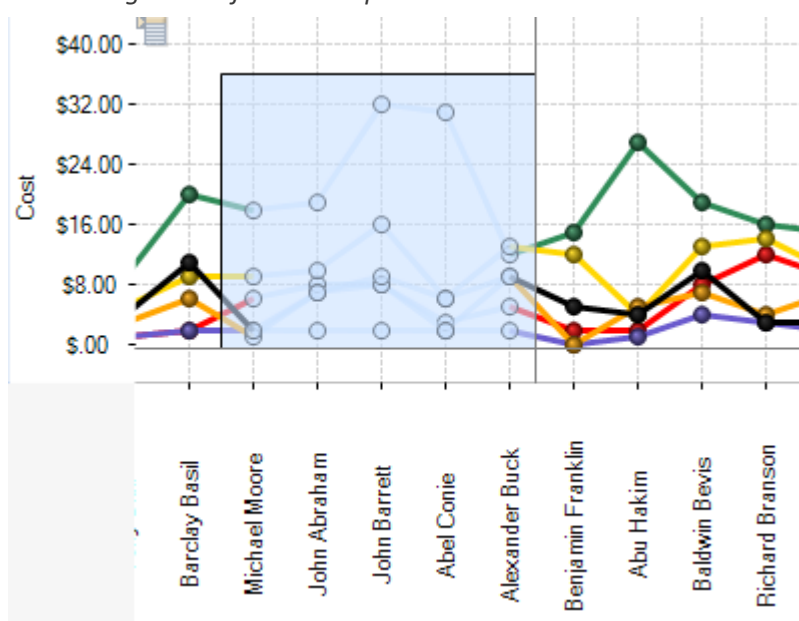
b. Selecting the Filter command

c. The result

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

Filtering hierarchies

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

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

Filter on hierarchy level

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

Filtering hierarchy members

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

Filtering a single member of a hierarchy

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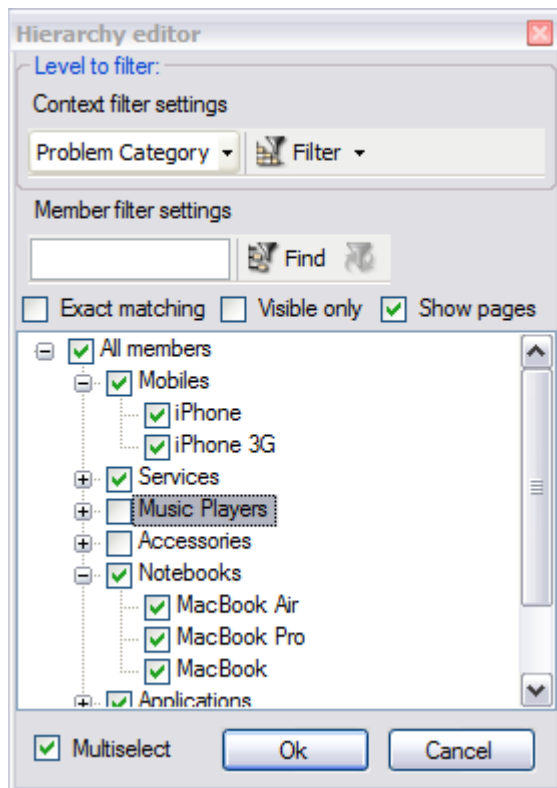
Filtering measures

There is a number of available parameters for filtering measures. In the same Editor, you can clear the filter.
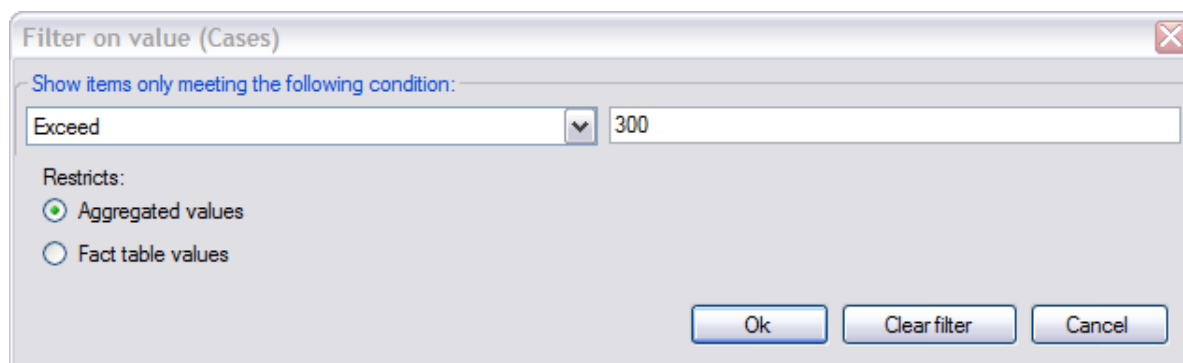
9.4 Printing, exporting statistical data and charts

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.
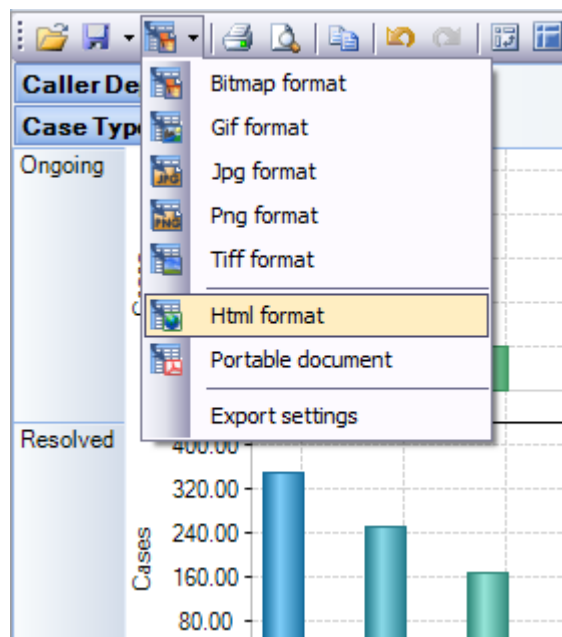

Available export formats in Chart View
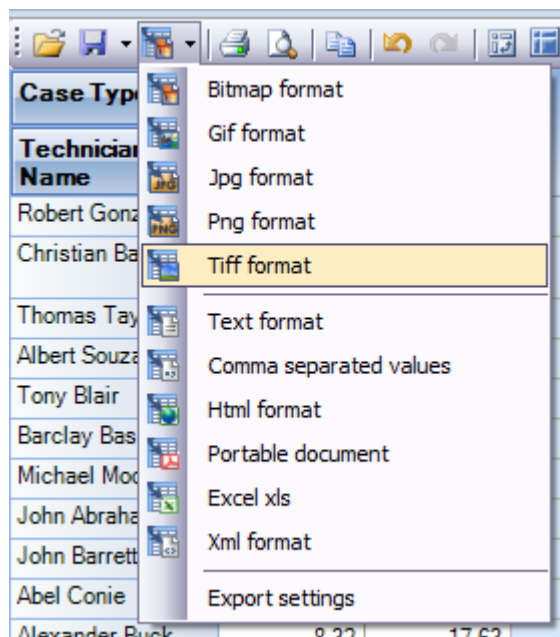
Available export formats in Grid View

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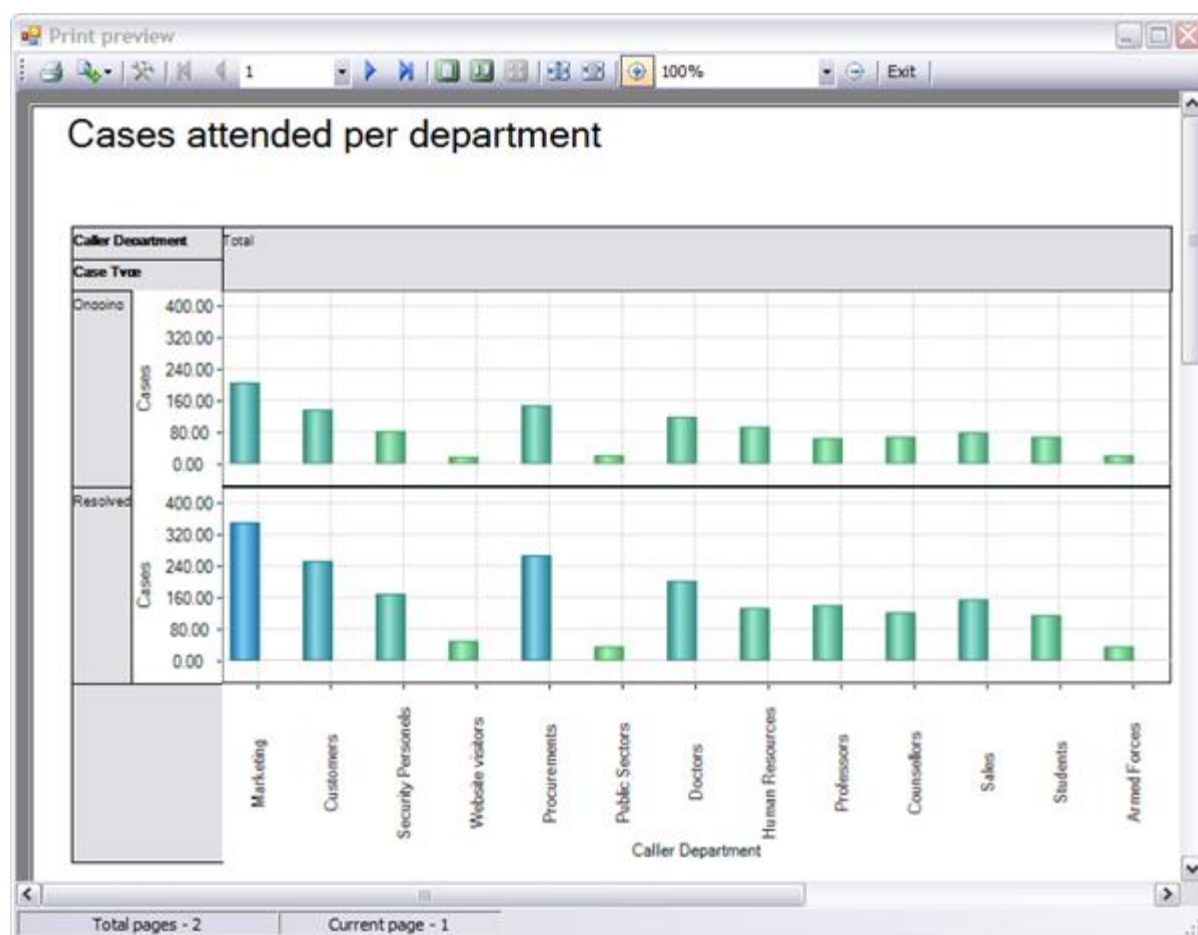
Export Settings -This tool allows you to customize the appearance of the reports to be printed or saved to a file format. You can specify the page size, orientation, headers & footers and color of the fonts and page background.
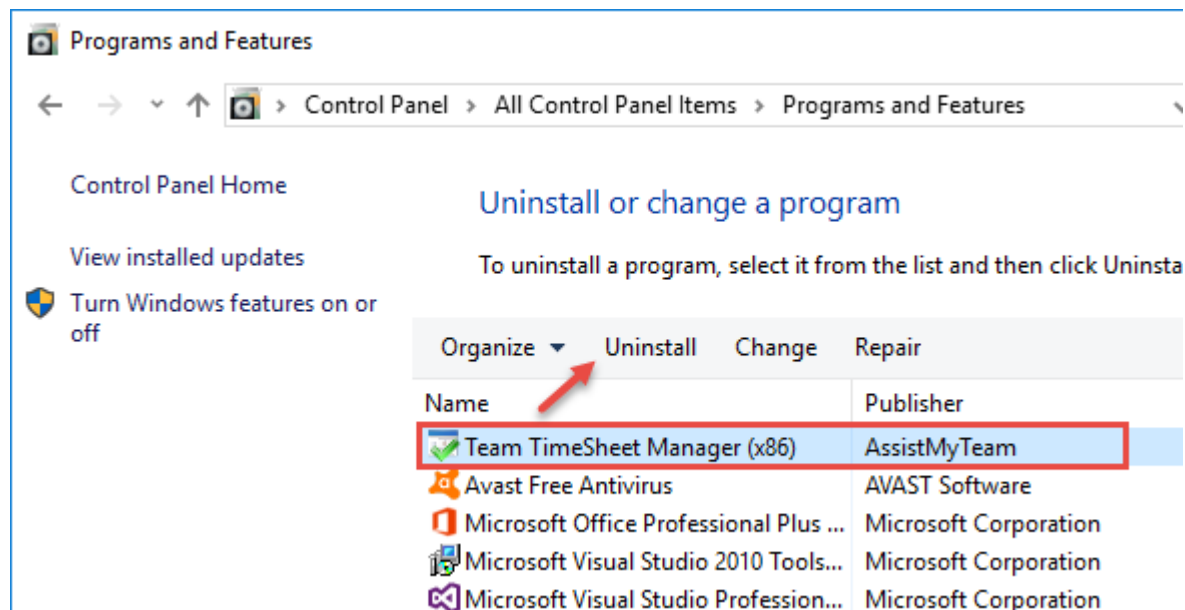
AssistMyTeam

10. Uninstalling Team TimeSheet Manager add-in

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

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

Step 2: A dialog confirmation follows asking for confirmation. Click **Yes**.
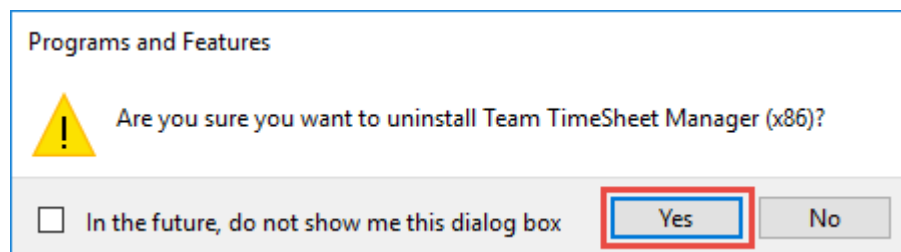
Step 3: The Team TimeSheet setup will now start the un-installation process. Make sure that Microsoft Outlook is not running (even under the task manager).

11. 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.

[Knowledgebase articles](#)
Looking for an in-depth understanding of this application? Browse through a series of knowledge base articles on Team TimeSheet online.

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

[Submit an online support ticket](#)
Use this web form to create a ticket with AssistMyTeam Technical Support.

AssistMyTeam