Team TimeSheet for Outlook & SharePoint
Admin Installation and Configuration
('Per User Installation' and 'Per Machine Installation')

Team TimeSheet consists of two separate installs – **Admin** and **Client**. The managerial install is for project managers and administrators who would setup and configure projects and activities, and maintain drop down lists, templates, reporting settings etc. in a dedicated SharePoint list, which is accessible to all members of the team.

(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).

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

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

'Per Machine Installation': If you have the need to have a single install that serves all users of the system (i.e., the files will be installed under Program files folder and the add-in will be registered under HKEY_LOCAL_MACHINE registry hive rather than HKEY_CURRENT_USER), download the Citrix/Terminal Server version of the setups to perform a per machine installation.
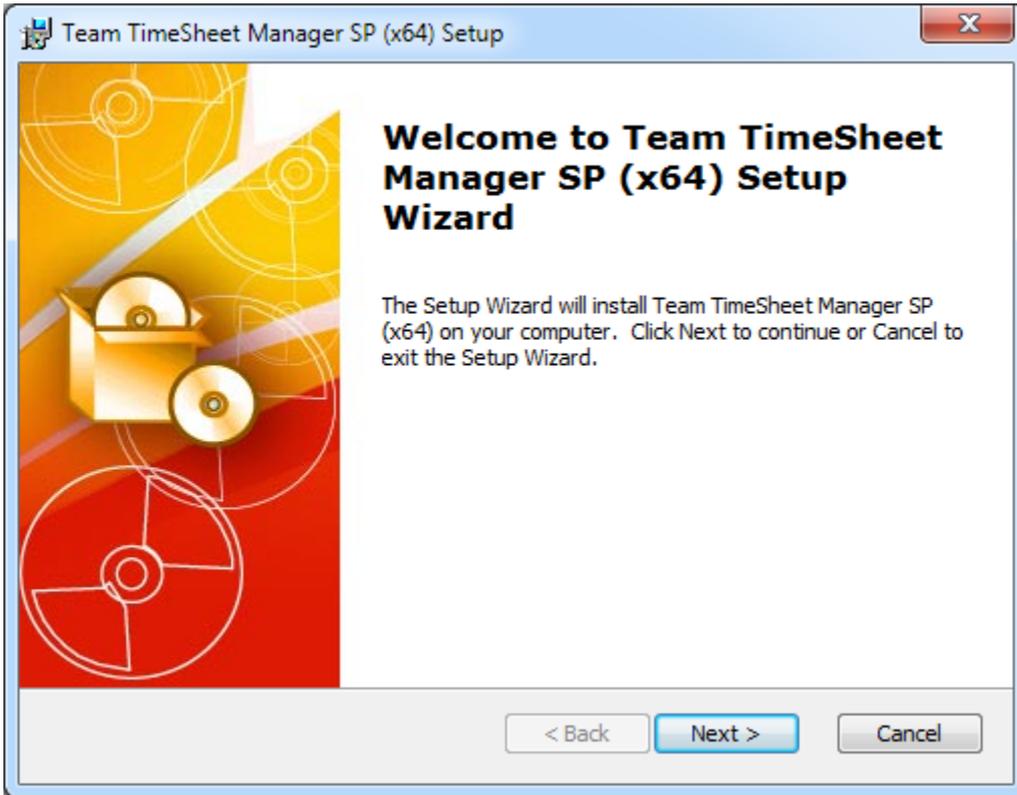
Requirements:
- *.NET framework 4.6 or above*
- *Outlook 2010, 2013, 2016, 2019 (both 32-bit and 64-bit versions are supported).*
- Any SharePoint version starting with WSS 2.0 to the latest SharePoint 2019 including online/cloud SharePoint such as Office 365.

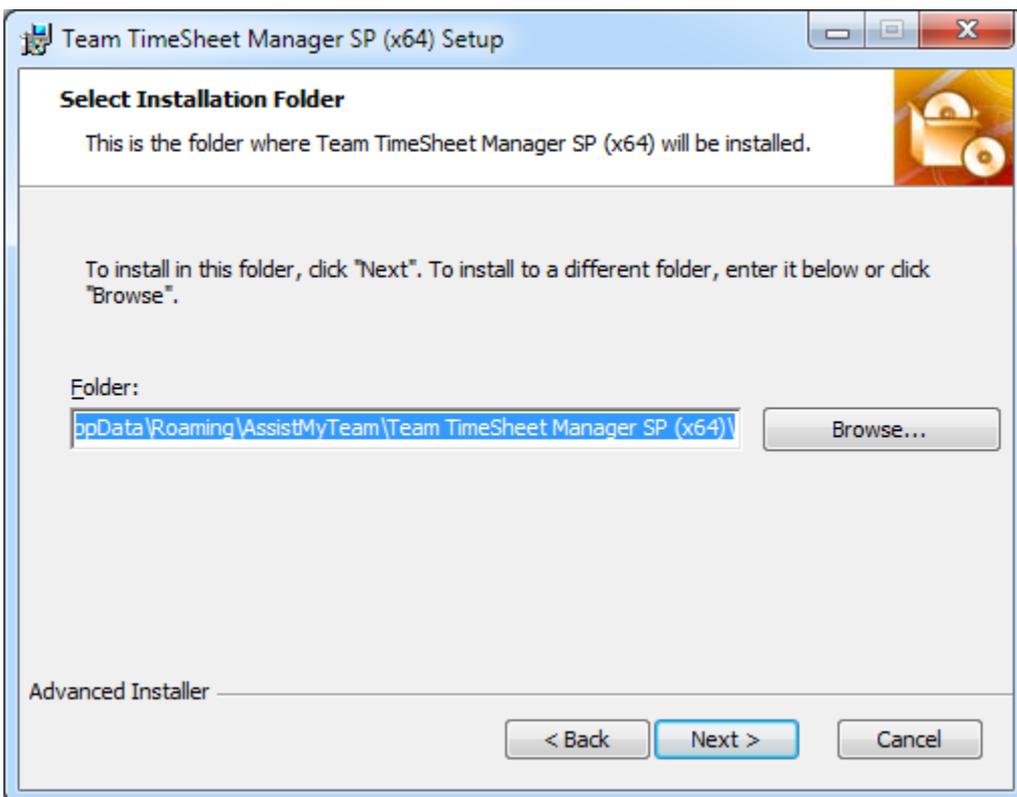There are 3 sections in Administrative installation:
 a) **Files Installation,** b) **Project Data Source Configuration,** c) **Fields Mapping between Outlook and SharePoint**
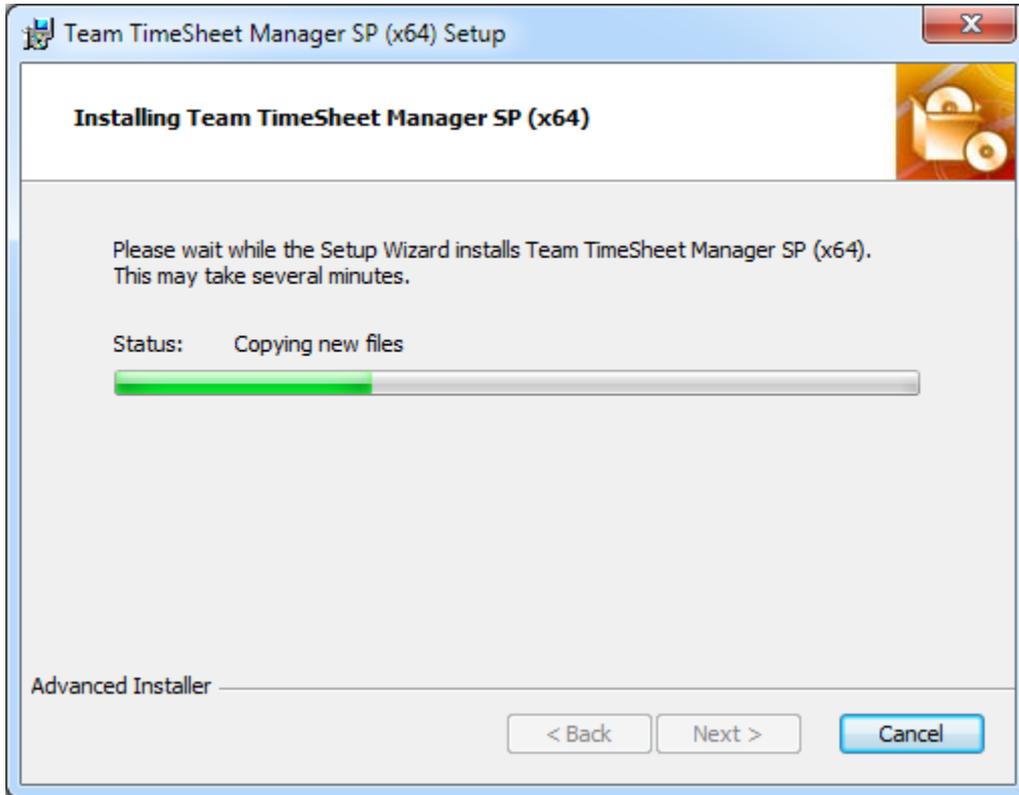
a) Files Installation

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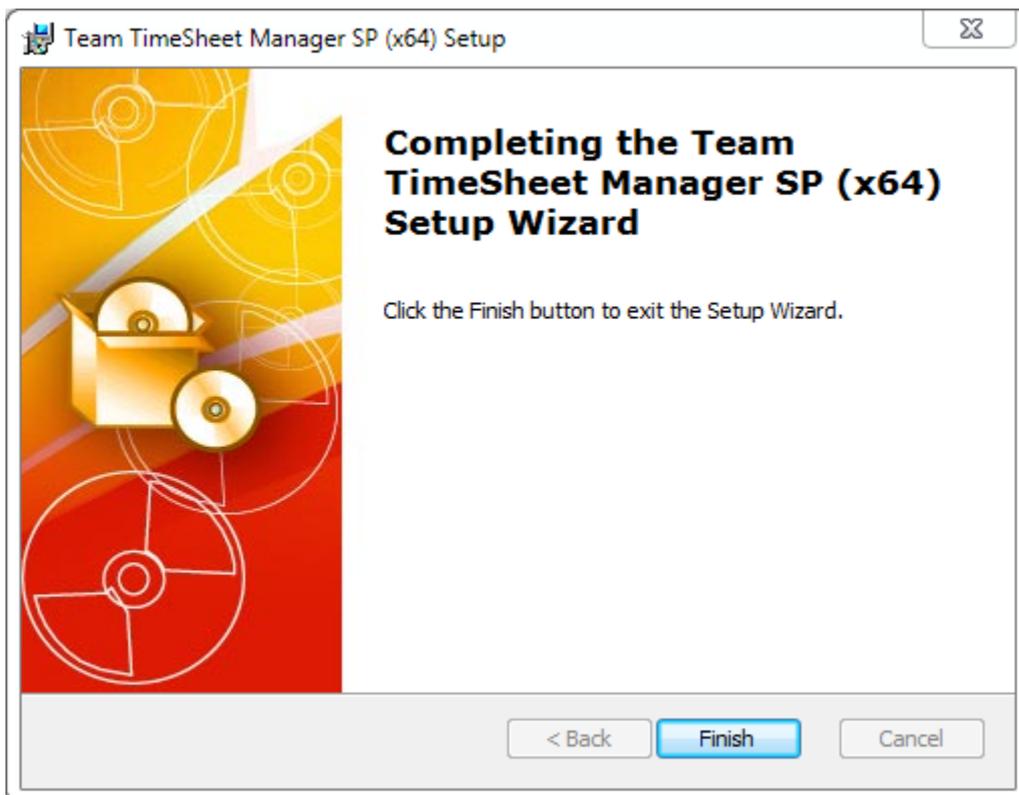
Step 2. Select the appropriate destination folder where the application files will be installed. If you change the default folder path, please make sure you have appropriate permission.

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

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

Now start Microsoft Outlook.

b) Project Data Source Configuration

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 such as project/activity lists, notification options, email templates, members list, reporting settings etc. as performed by the administrator.

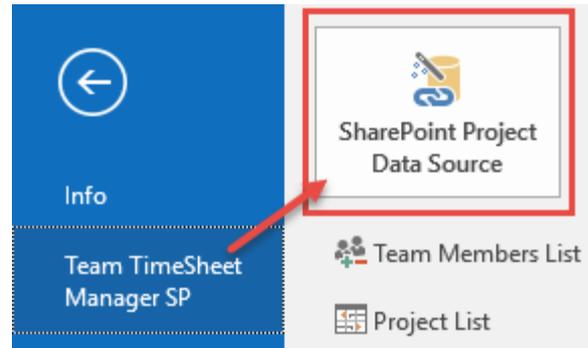**Why store the project metadata settings in a special SharePoint list?**
Because your users can be scattered in different geographical locations, and might not have access to the company's local network remotely, using a network database or shared folder won't be feasible. Instead, in Team TimeSheet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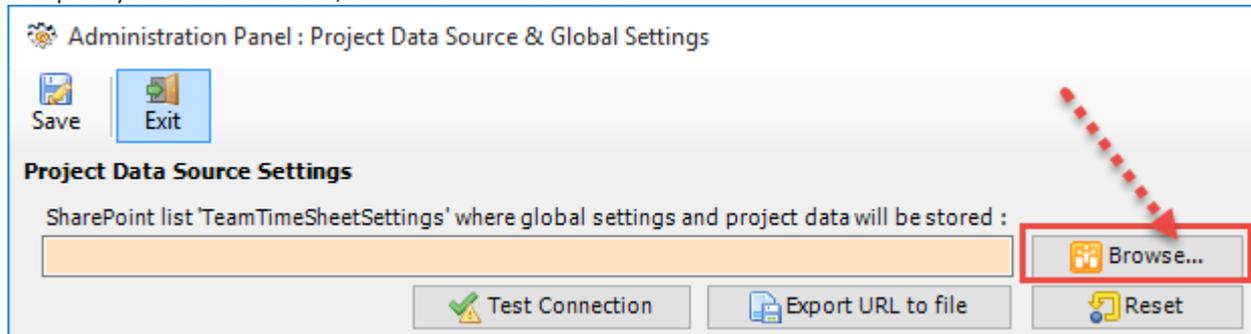
In short, these are global settings that streamline the behavior on how all members work, track and publish their timesheets in Outlook.

If you have just installed the Team TimeSheet Managerial tool, you will get to see this '**Project Data Source**' Settings dialog when you start Outlook.
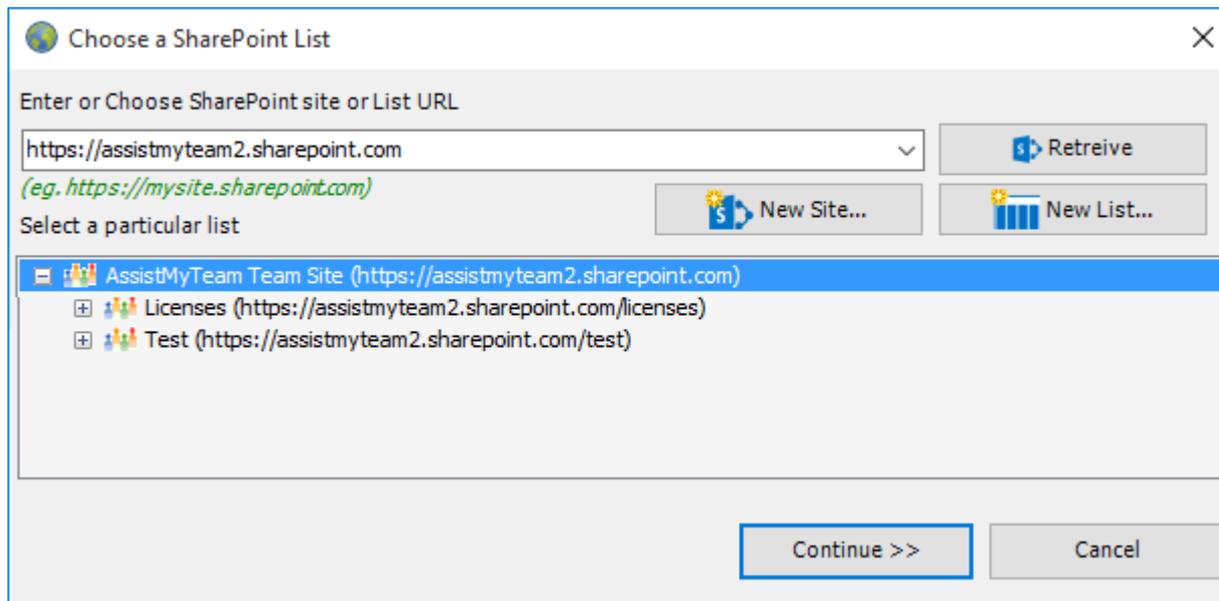
Alternatively, you can invoke this dialog box from **Outlook > the backstage File > Team TimeSheet Manager SP > Project Data Source** button.

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 'Continue'.

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'**.

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.

C) Fields Mapping between Outlook and SharePoint

There are two types of Outlook items that can be reported or published to an administrator specified SharePoint list, namely **Appointment** or **Task** items. 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 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).
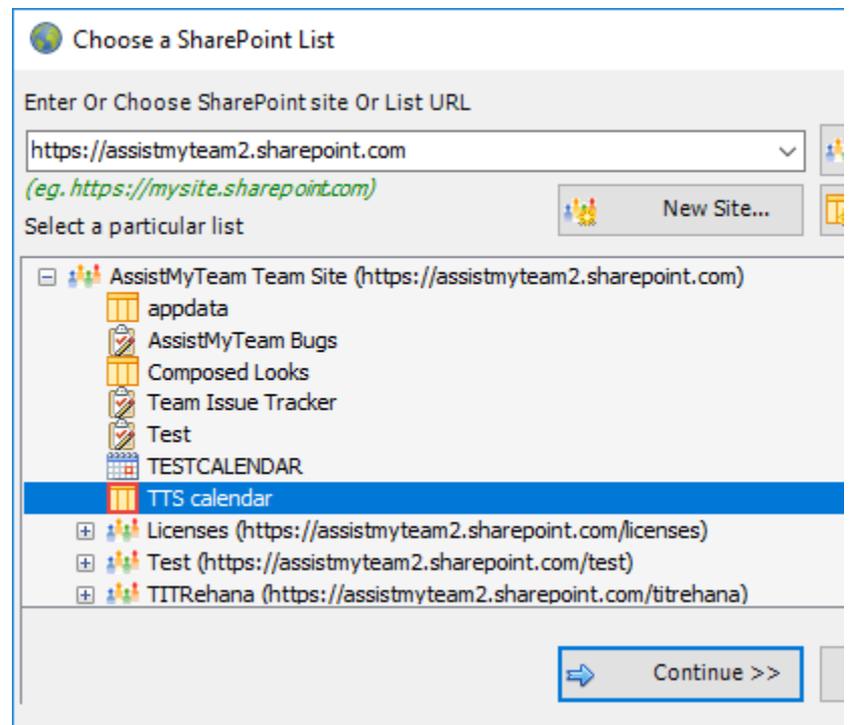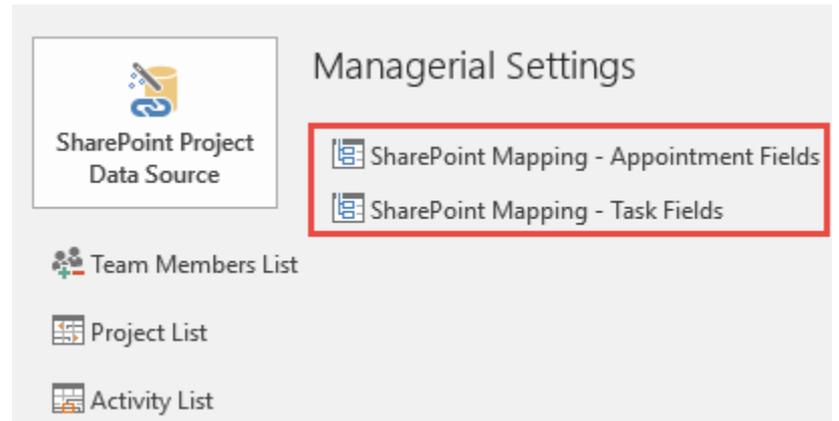
To start mapping the fields, go to **Team TimeSheet Manager SP > Appointments Fields Mapping/ Tasks Fields Mapping.**

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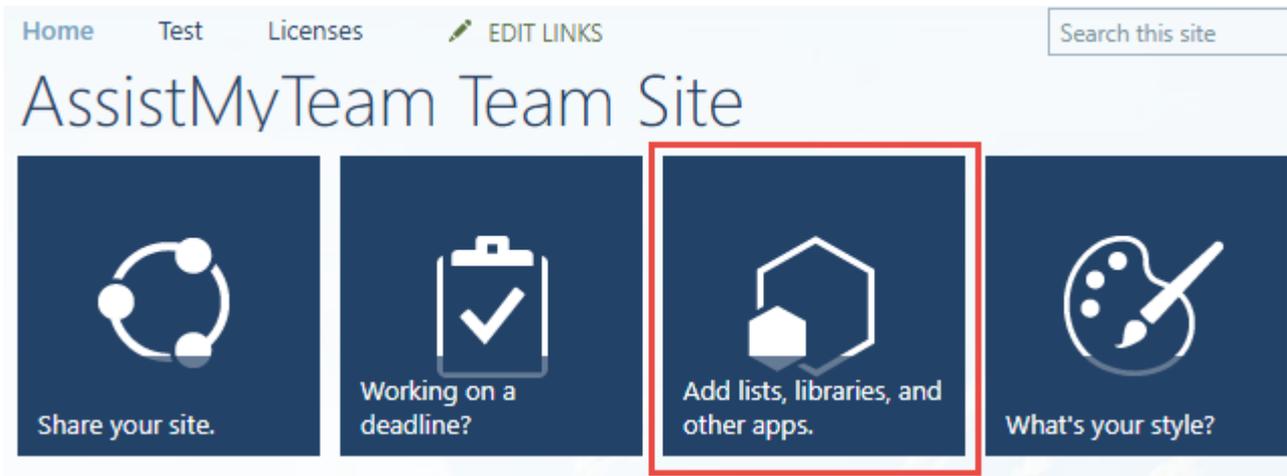
You can choose any existing SharePoint list, Calendar or task lists or a bare bone custom list in which case, you would need to add the required columns.

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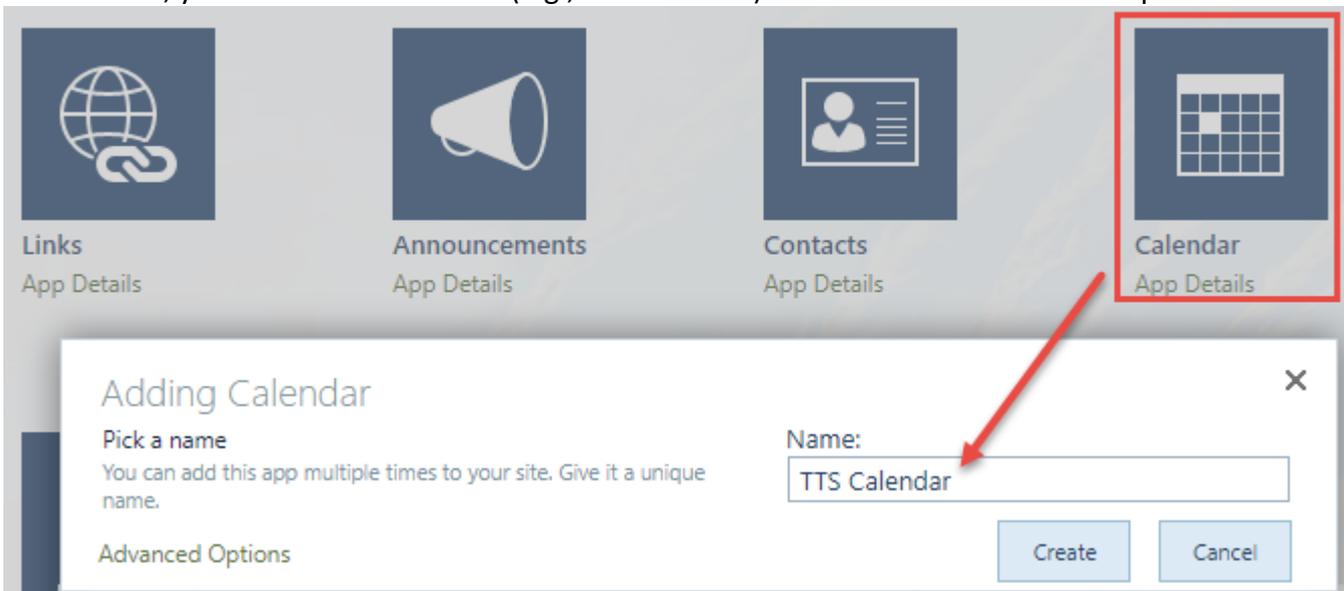
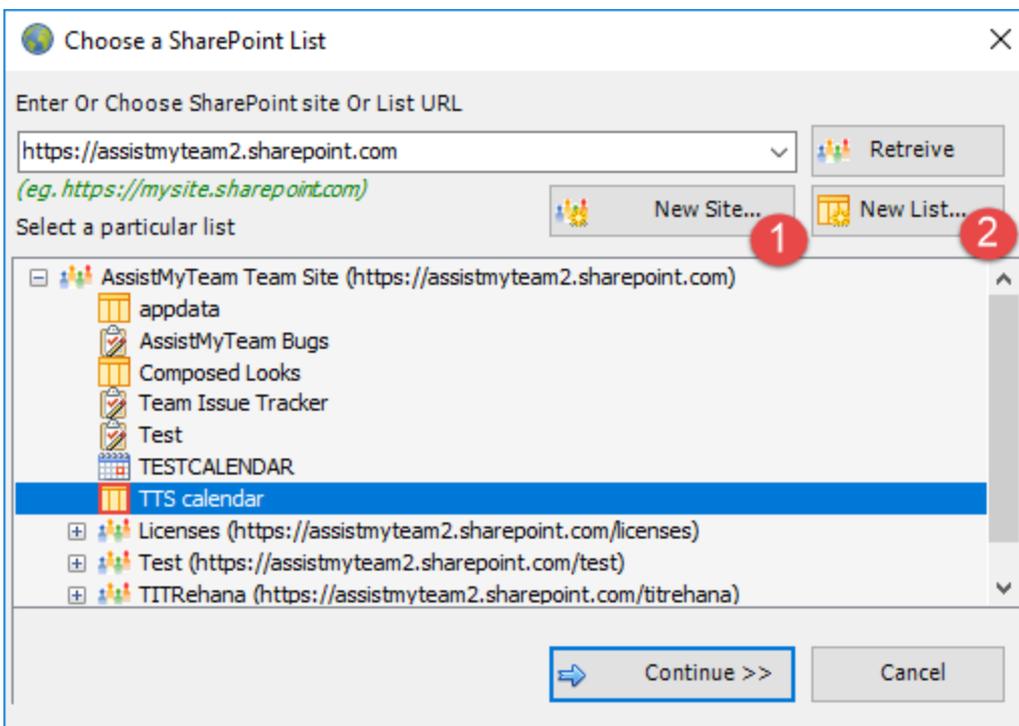Alternatively, you can choose to create new one for this purpose.

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	✕

⑤ 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

* Mandatory Fields   [Create]   [Cancel]

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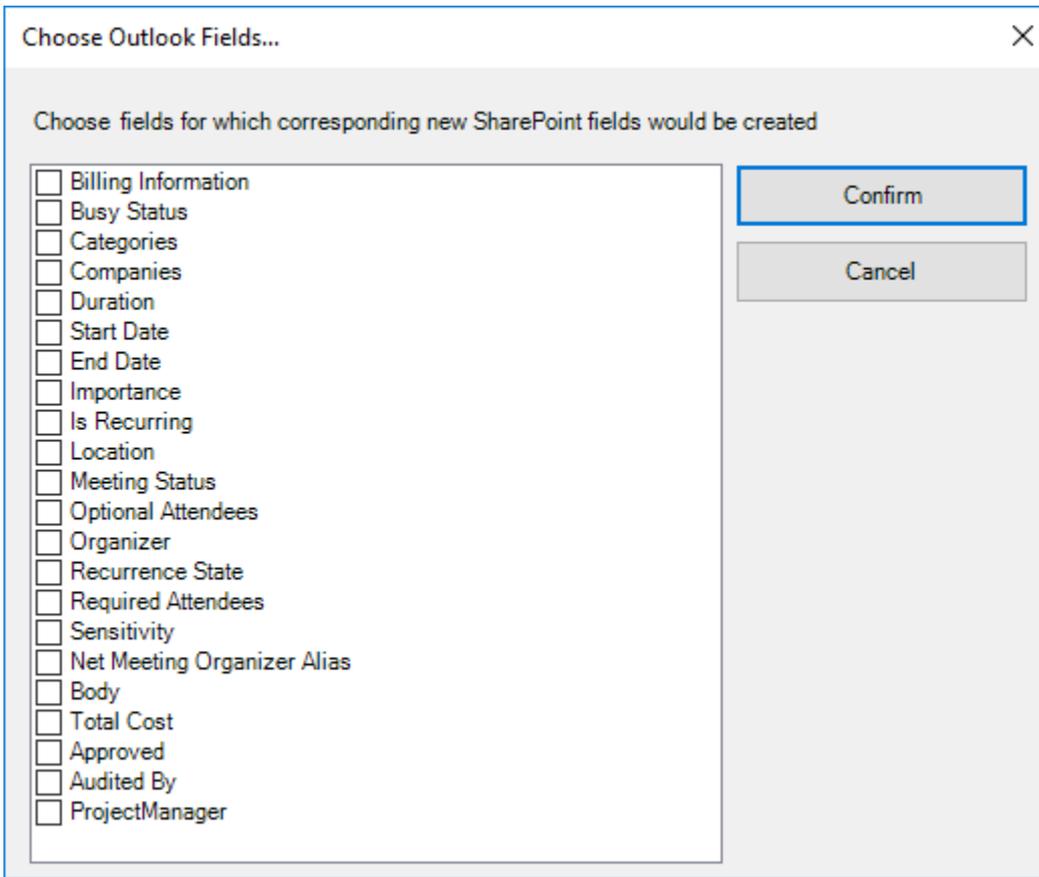
1 **For mandatory unmapped fields** - Click this option under the *'Auto Create & Map fields'* menu to create the mandatory timesheet fields in the chosen SharePoint list on the fly and automatically complete the mapping. Mandatory fields are marked/colored in light red.

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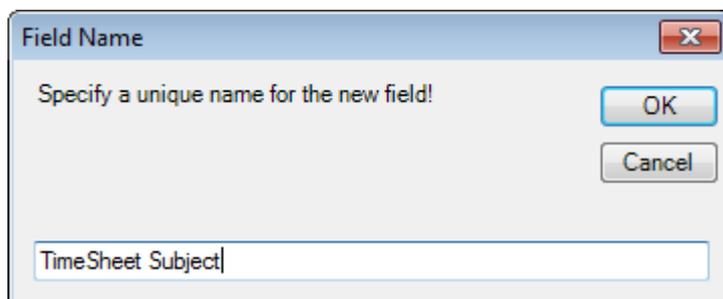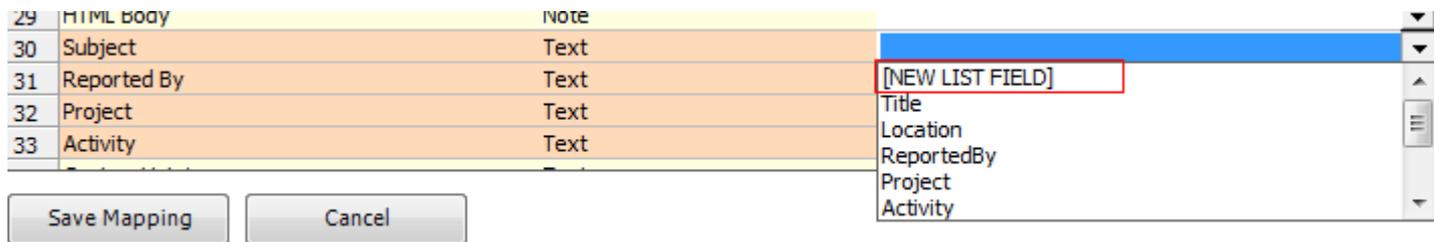
3 **For the following fields** – Click this option under the *'Auto-Create & Map fields'* menu to choose specific timesheet fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.

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	▼

Calendar - Painting shows it all

View   Custom Commands

Edit Item   Version History   Manage Permissions   Delete Item   Alert Me

Manage   Actions

Title	Painting shows it all
Location	
Start Time	12/26/2010 8:30 AM
End Time	12/28/2010 8:30 AM
Description	Hi! John's answering machine is broken. This is his refrigerator. P speak very slowly, and I'll stick your message to myself with one these magnets. **Mileage:** 714 **Organizer:** AssistMyTeam Support **Recurrence State:** Appointment Not Recurring
ReportedBy	John K
Project	XtremeLab
Activity	Trademark - Search/View Assignments of Ownership
TotalCost	$192.00
Client Name	Adrien Silva

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

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

You can also download the full PDF help manual directly from this link.

---- End of Admin Install Guide