Time Tracking Solution Setup

Setup

A basic knowledge of how to administer SharePoint and how to set up CorasWorks web parts will be helpful in making the changes specified below. If more instruction is needed, refer to the CorasWorks Capabilities Guide.

Task	Description
Create Site	Create the site from the CorasWSC.TimeTracking.v8.0.1 template.
Configure Chained Actions	Go to the Tech Admin | Actions Wizard tab. **If using Central Configuration:** • Click Maintain Global Links • Add a Global Link with the Name [TimeTrack]. For the URL, use the complete URL of the current site. • Click Submit **If NOT using Central Configuration:** • Edit the action named Reject time entry and notify. In the configure action definition section, set Action 1 to Reject time entry. Set Action 2 to Email rejection notification.
If Not Using MS Excel, Remove Enter Time Charge Values Here	*Complete this step **only** if your users do not have MS Excel* On the My Time | Enter My Time page, there is an MS Datasheet view web part. If your users do not have MS Excel, remove this web part because it won't work.

Security Setup

Task	Description
Time Tracking Site groups	Set the permissions on the site as follows: • **Contributor:** People who will use this system to enter time, and managers and others such as HR or Payroll who will approve it.. • **Administrator:** Assign at least two people, one to be the primary administrator and one as a backup. These people will maintain site permissions and have access to make any other changes to the site.
Projects List	Optional. You may wish to change security on the Projects list so that only the people in charge of maintaining it can add or update projects. Make sure that everyone else can still read this list.
Admin Navigation List	Change permissions on the Admin Navigation list as follows: • Remove all existing groups or users • If needed, add anyone who is not a Site Administrator but who should see the Tech Admin pages named in the Admin Navigation list

Additional Implementation Options

Integrate with the Project Management solution.

The Projects list in the Time Tracking solution is designed with some of the same columns as the Project Workspace Directory list in the Project Dashboard of the Project Management solution. This means that you can simply update the Available Projects web part on the "My Time | Maintain My Available Projects to Charge" page to be Selective and see values from the Project Workspace Directory list in your Project Dashboard site. Then, all the projects in the dashboard will also be available for Time Charging.

Other

Add a new list that contains time charging options that are not projects, such as departments, types of work, or other codes. This would be set up the same as the Projects list, and you can modify the web parts that show Projects to also show items from this new list. People can then add these items to their Projects to Charge, and the Time Tracking system will work with these values the same way it does with projects.

Create new pages and views under the Reports tab as needed by your organization.

Technical Reminders

Assumption: Your organization has imported users name and email addresses to the SharePoint user information. If not, some of the automated emails in this solution will not work.