BPC Easy Timesheets

for SharePoint

Installation Guide

**v 2.0**

Contents

1.Introduction

This document will guide you through the installation and deployment of BPC Easy Timesheets for Microsoft SharePoint.

BPC Easy Timesheets supports Microsoft Office SharePoint Server 2007, WSS 3.0 (Service pack 2 must be deployed), Microsoft SharePoint 2010 and Microsoft SharePoint Foundation 2010 (Service pack 1 must be deployed). The installation process is completely the same for all supported editions and versions of SharePoint.

BPC Easy Timesheets requires BPC PowerForms for the Administration site. The installer will detect if you have BPC PowerForms installed and it will upgrade it to the minimum version required by BPC Easy Timesheets. If BPC PowerForms is not installed then the installer will deploy a limited version of BPC PowerForms that will only be available for the Administration site of BPC Easy Timesheets.

# 2.Installing BPC Easy Timesheets

1. Login to the server as a Farm administrator with administrative rights on the target site collection. Extract the installation archive to a local drive. Right click on the *BPC.EasyTimesheets.Setup.exe* and select *"Run as administrator"* to start the installation process.

2. Click "*Next*" on the Installation Wizard welcome page.
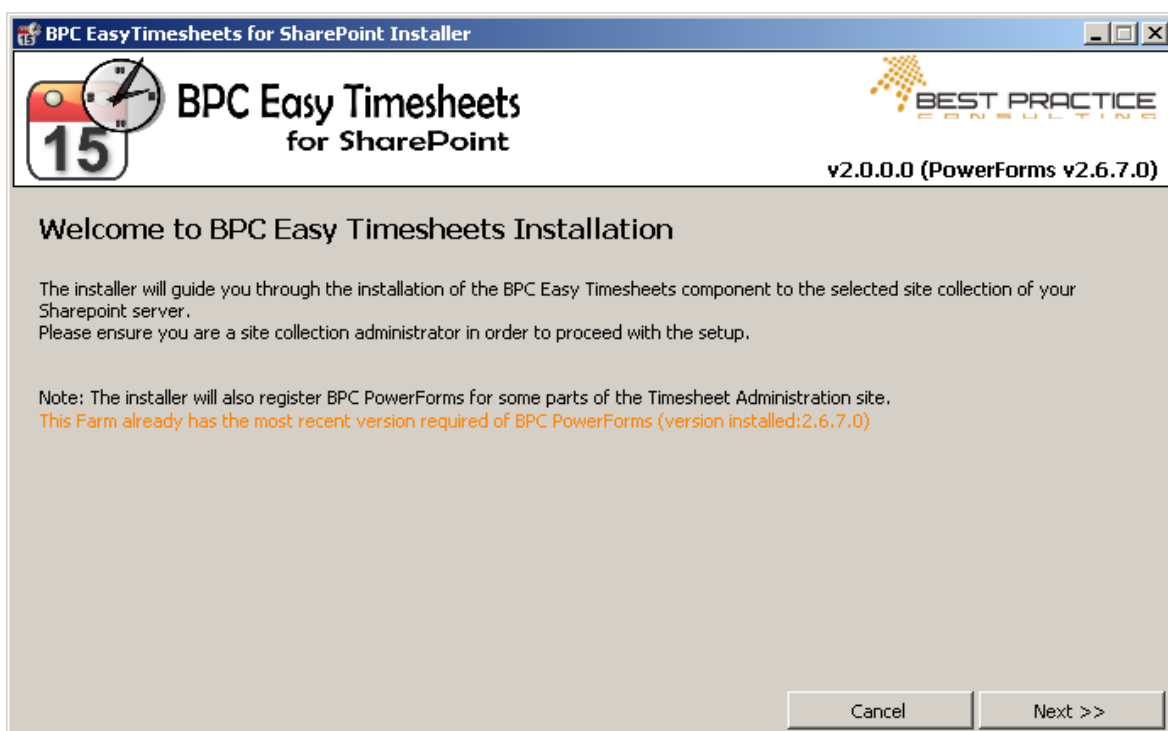
3. Read the End-User License Agreement carefully. You must check the "I have read, understand and agree with the above terms" checkbox for the installer to continue. Click "Next".
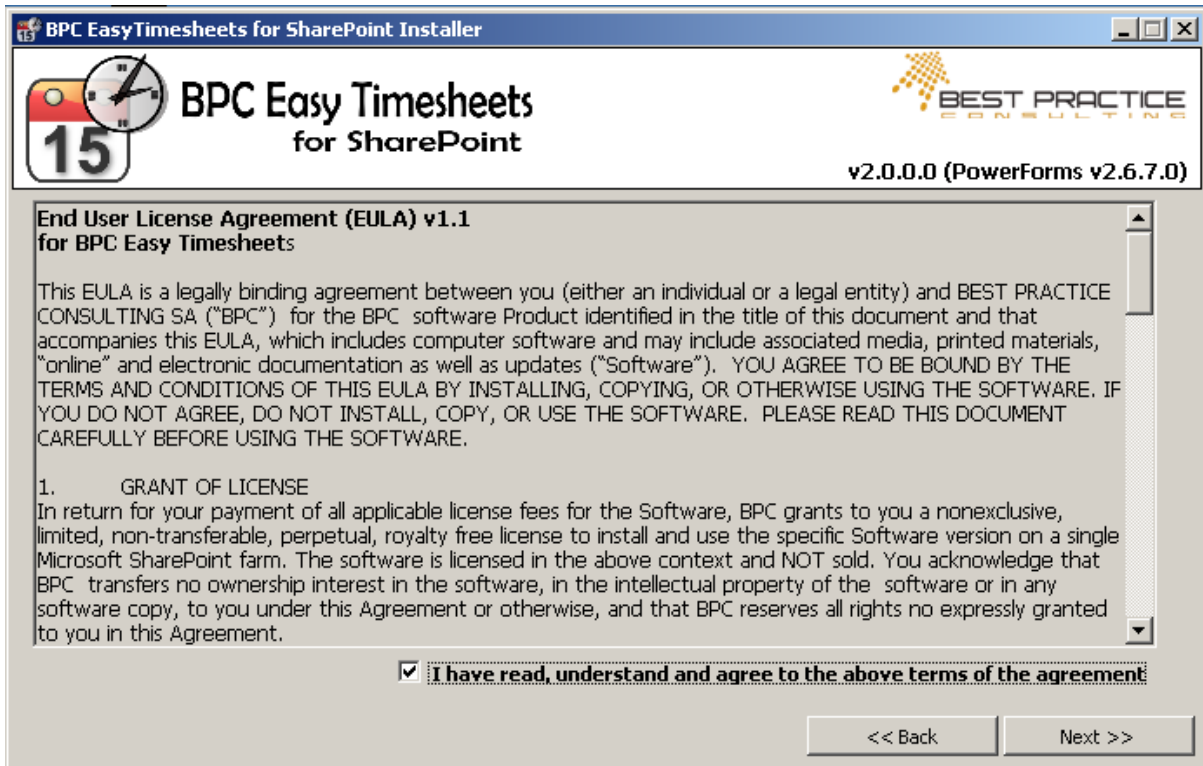

4. Select the target SharePoint Version for the installation from the "*Target Server*" combo box. Choose your license info between trial and commercial licenses.
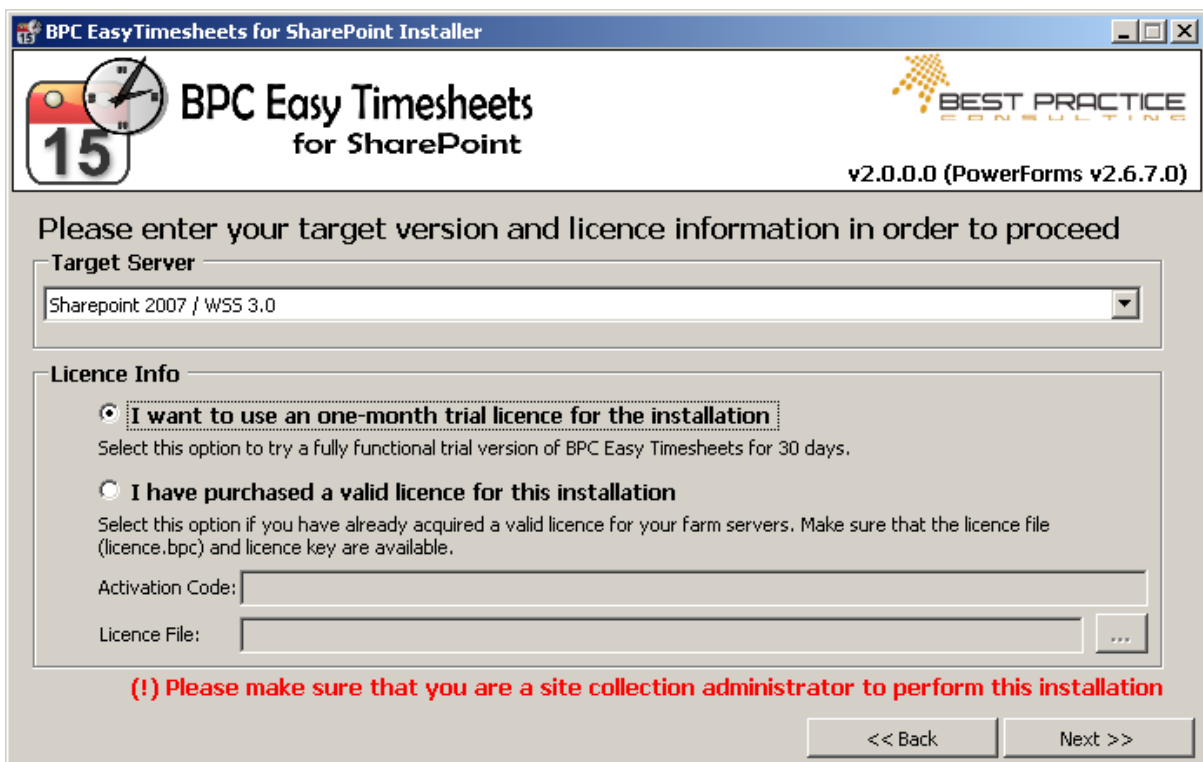
If you select trial, the installer will configure for you a fully functional trial version that will remain operational for 30 days.

If you select the commercial license, you will need to have available your activation code and the license file (in a folder accessible from the server). Type your activation code in the *"Activation Code"* text box. Find your license file by using the "..." button next to the *"License File"* textbox. Click "*Next*".

5. Select the target site collection for this installation from the "Select the target site Collection" combo box and then from the tree view window select the installation site.
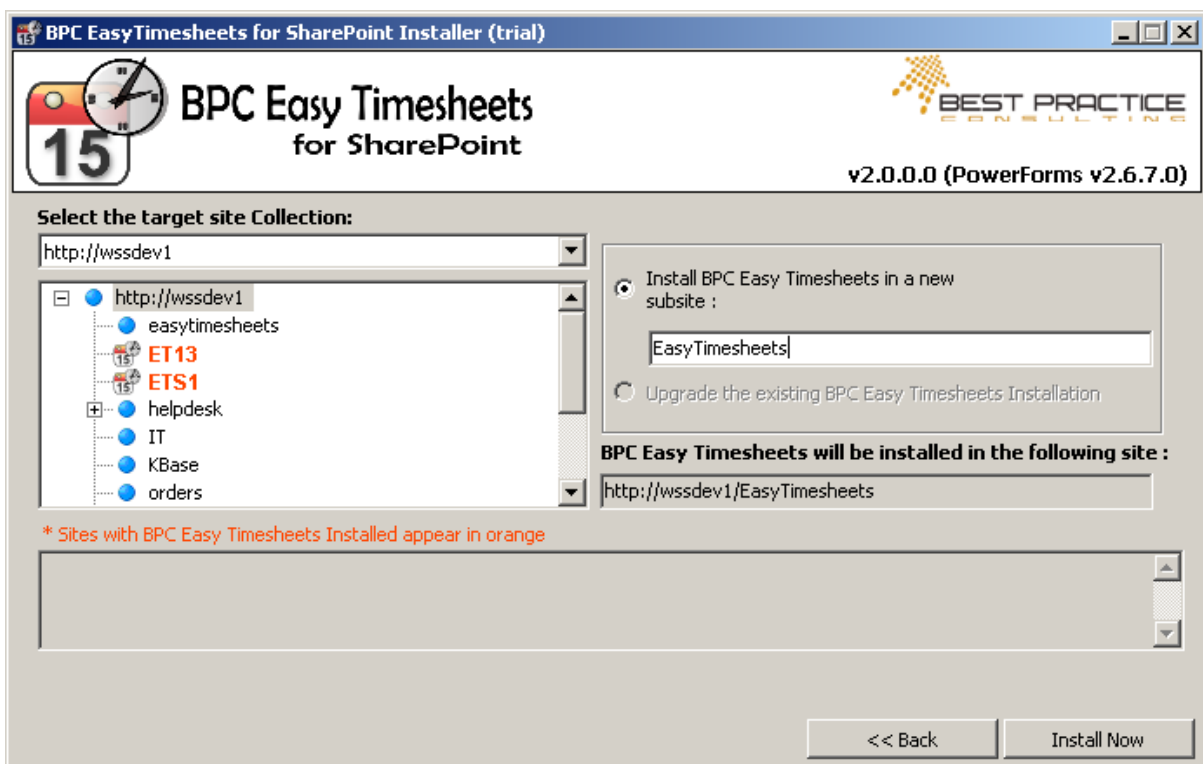
If the selected site already contains a deployment of BPC Easy Timesheets then the installer will detect it and only allow an in place product upgrade to the latest version.

If the selected site does not contain a deployment of BPC Easy Timesheets then the installer will create the Administration site in a new subside as inputted in the *"Install BPC Easy Timesheets in a new subsite"* text box.

Click *"Install Now"* for the installation to begin.

The installer will create the BPC Easy Timesheets administration site, will deploy the necessary binaries, features and web part and after a while the *Installation Completed* message will appear.

Depending on your farm configuration and load this may take several minutes.

Click the "*Close*" button to conclude the installation.

2. Configuring BPC Easy Timesheets

2.1 BPC Easy Timesheets Administration site

Before using BPC Easy Timesheets the application global settings must be configured and data should be entered in the basic entities like resources and projects. All of the above are modeled as SharePoint custom lists deployed by the installer in the BPC Easy Timesheets administration site.
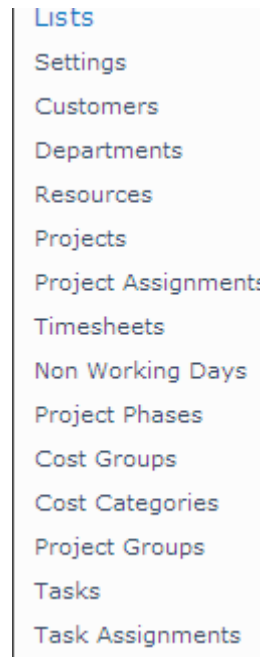
The lists are accessible through the site's quick launch and more details about them can be found in the BPC Easy Timesheets User Manual.

The Administration site also contains the BPC Easy Timesheets Web Part with all the view modes enabled so that it can be either used by administrators or for easily checking product features in trial installations. (more about view modes in 2.2 BPC Easy Timesheets Web Part and the User Manual).

Note: BPC Easy Timesheets licensing validates against the Resources list, the number of items in this list must be equal (or less) than the available CALs, see 3.BPC Easy Timesheets licensing.

The BPC Easy Timesheets administration site also contains three special SharePoint User Groups that must be populated before the application can be used for time reporting.

ETS Administrators: User accounts with administrative rights. These users can edit all application settings and basic entities through the BPC Easy Timesheets administration site.

ETS Project Managers: User accounts that will have the Project Owner Role for one or more projects.

ETS Users: All user accounts that must submit timesheets.

The groups can be populated with the standard SharePoint Interface accessible via *Site Actions->Site Settings->People & Groups*.

Note: The user account which performed the installation is by default member of all the above groups

This site should only be accessible to members of the ETS Administrators group so the appropriate measures must be taken like hiding the site from global navigation etc.

Integrity of data in the core lists is protected by event receivers that allow data entry, editing and deletion by authorized users and via the BPC Easy Timesheets Web Part only.

2.2 BPC Easy Timesheets Web Part

The BPC Easy Timesheets Web Part contains all the user facing views of the application. It can be used on any page within the same SharePoint farm where the BPC Easy Timesheets administration site resides (site collections hosting a mysite provider are not supported).

To add the BPC Easy Timesheets Web Part to any web part page in the SharePoint Farm:

- Navigate to the page you want to add the web part to

- Go to *Site Actions->Edit Page*

- Select an appropriate place in the page and select the *add a web part* option

- From the Miscellaneous web part category select the BPC Easy Timesheets Web Part

- Ignore any initial configuration error messages and navigate to the web part options page (via the *Edit web part* option)
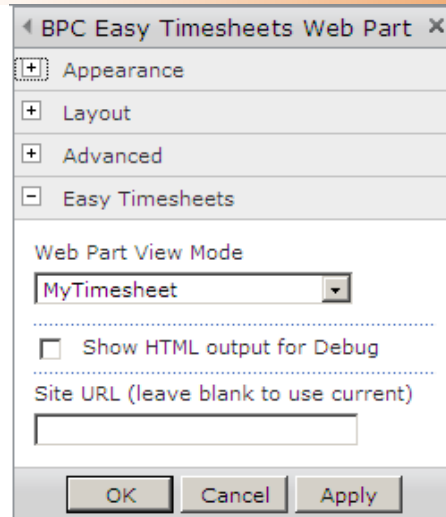
- In the Easy Timesheets Option Area select the appropriate web part view mode (more details about the view modes are available in the User Manual)

- And at the *Site URL* text box input the absolute or relative URL of the BPC Easy Timesheets administration site.

- Click on *Apply* and OK and the BPC Easy Timesheets Web Part is ready for use.

3.BPC Easy Timesheets Licensing

PC Easy Timesheets licensing is straight forward. A license is required for each SharePoint farm where BPC Easy Timesheets is going to be deployed. A resource CAL license is required for each user/resource using BPC Easy Timesheets for time reporting or Timesheet monitoring.

The initial farm license price includes user/resource CALS (see below), as well as one year of Basic (email based) Support and Software Assurance (free upgrades to all minor and major versions released during the year). Additional years of Software Assurance and Basic Support can be bought after the bundled year ends.

The Standard license includes 25 user CALS. The Enterprise license includes unlimited user CALS.