

**BrightWork**



**LIVE WEBINAR**

# Enhance Your Project Reports in SharePoint with Timesheet Management

**Thursday | July 11**

**4pm GMT | 11am EDT | 8am PDT**



**Ken Edwards**  
HMS Software



**Alan Morgan**  
BrightWork

A person is writing on a notepad with a yellow marker. In the background, a laptop is visible. The image is overlaid with a semi-transparent dark grey filter.

**QUICK POLL!**

Is your group currently using  
timesheets in SharePoint for project  
management?

# AGENDA

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1. See how to quickly get started managing projects and portfolios with SharePoint
2. Learn how to extend SharePoint for enterprise timesheets with TimeControl
3. Live demo of BrightWork and TimeControl working together
4. Q&A

# BrightWork

BrightWork is a SharePoint-based project management solution that includes best-practice templates with the flexibility to evolve and mature as needed.

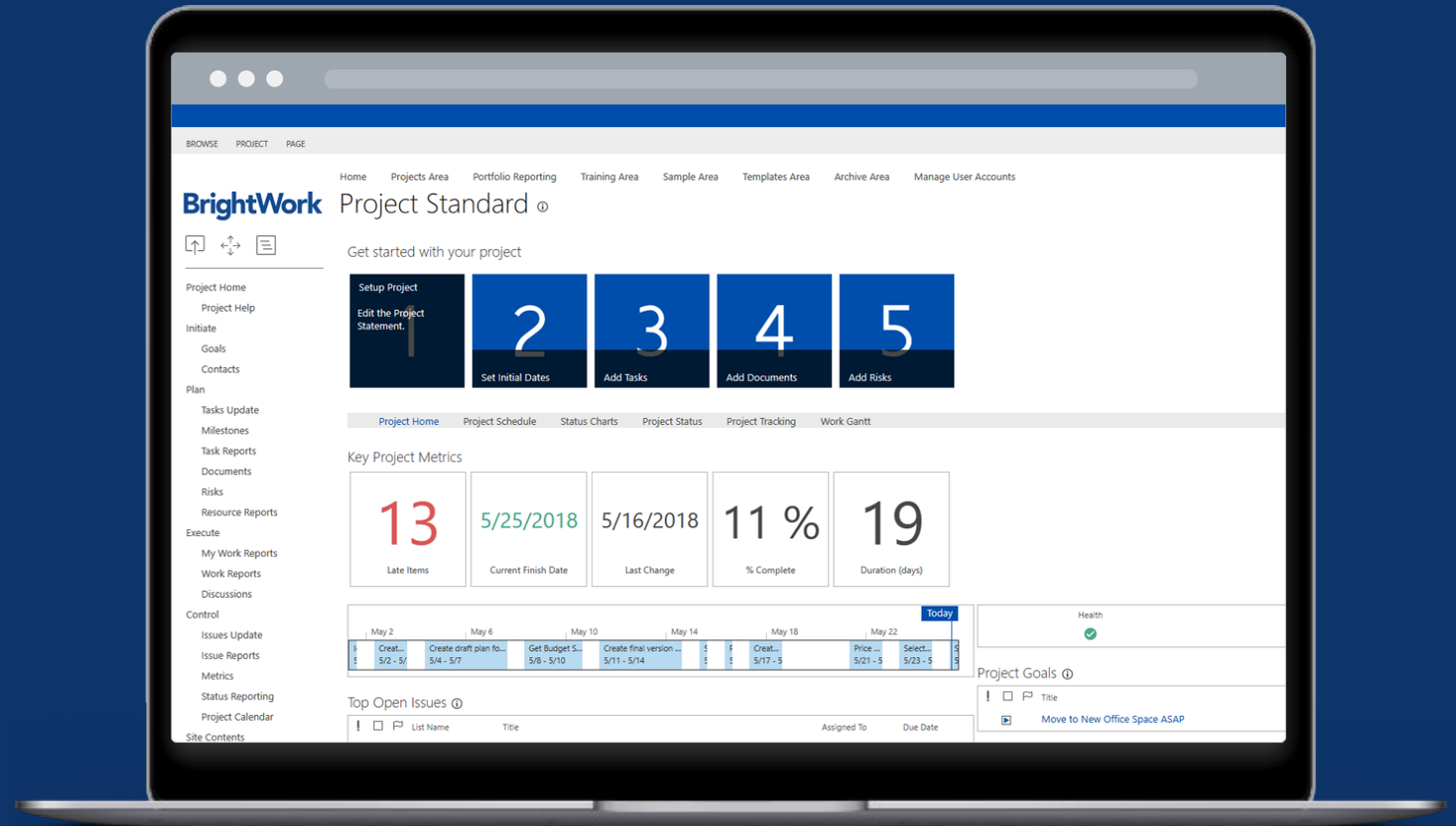
The screenshot displays the BrightWork web application interface, which is a SharePoint-based project management solution. The interface is divided into several sections:

- Navigation Bar:** Includes links for BROWSE, PROJECT, TASKS, and LIST. The main navigation area contains links for Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts.
- Project Office Home:** The main dashboard area for the 'Contoso Marketing (PO)' project. It includes a 'Get started' section with links to 'Projects Tracker' and 'New Project Site'. A 'Key Metrics' section shows '10 Late Items' and '2 Open Issues'. A 'Project Hierarchy' section lists the project structure: Contoso Marketing (PO) -> Free Template Site -> Marketing Mini-Projects (PWT) -> Web Site Build (PG).
- Task List:** A table of tasks for the 'Project Tasks' list. The tasks are organized by date (March 2018) and include columns for Task Name, Status, and Due Date.
- Project Office Summary:** A summary table for the project office, showing metrics for Health, Time, Cost, Quality, Issues, and Finish Date. The table includes a Gantt chart for the project timeline from April 15 to August 11, 2018.
- Gantt Chart:** A detailed Gantt chart showing the project schedule. The chart includes a timeline from April 15 to August 11, 2018, with tasks represented by bars and a legend for task names.

Task Name	Status	Due Date
Hardware Upgrade Global	<input type="checkbox"/>	
Project-Initiation	<input checked="" type="checkbox"/>	
Identify-suppliers	<input checked="" type="checkbox"/>	
Create-draft-budget-for-upgrade	<input checked="" type="checkbox"/>	
Create-draft-plan-for-upgrade	<input checked="" type="checkbox"/>	
Create-Business-Impact-Plan	<input checked="" type="checkbox"/>	
(tag)	<input checked="" type="checkbox"/>	
Make-Proposal-Presentation	<input checked="" type="checkbox"/>	
Project-Planning	<input checked="" type="checkbox"/>	
Get-Budget-Signoff	<input checked="" type="checkbox"/>	

Health	Time	Cost	Quality	Issues	Finish Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8/10/2018

# DEMO





TimeControl is a multi-purpose timesheet designed to integrated with multiple project management systems.

TimeControl®

Gail Robinson Dashboard My Account Logout Help

Home Timesheet Reports Tools Documentation

TimeRequest

List

Entry

Navigation

Actions

Previous

Next

Add

Delete

Release

Reject

Apply

Undo

Print

Entry

Toggle Menu

Employee Information

Robinson, Gail

Resource: Gail Robinson

Timesheet Information

Period8/20/2016 - 8/26/2016

Timesheet SourceGail Robinson

Timesheet StatusDRAFT

Timesheet OwnerGail Robinson

Last Owner releasing toTom Logan

AddCopyDeleteOptions

Timesheet Attachments

Timesheet Notes

Start Stop

Worksheet

		Project Name	Charge Code	Charge Description	Rate Code	Mon 8/22/2016	Tue 8/23/2016	Wed 8/24/2016	Thu 8/25/2016	Fri 8/26/2016	Total	ETC	Complete	Source
<input type="checkbox"/>	<input type="checkbox"/>	INTERNAL	INTERNAL.MEETINGS	General Meetings	STANDARD	4h					4h		<input type="checkbox"/>	Gail Robinson
<input type="checkbox"/>	<input type="checkbox"/>	INTERNAL	INTERNAL.TRAVEL	Travel for company business	S-GAILR	2h					2h		<input type="checkbox"/>	Gail Robinson
<input type="checkbox"/>	<input type="checkbox"/>	BOAT SHOW	BOAT SHOW.1.13	Exhibitor services request form	S-BS	4h	8h	8h	8h		28h		<input type="checkbox"/>	Gail Robinson
<input type="checkbox"/>	<input type="checkbox"/>	BOAT SHOW	BOAT SHOW.1.2	Determine tradeshow planning contact	S-BS						0h		<input type="checkbox"/>	Gail Robinson
<input type="checkbox"/>	<input type="checkbox"/>	BOAT SHOW	BOAT SHOW.1.4	Review booth resource number limitations	S-BS					4h	4h		<input type="checkbox"/>	Gail Robinson
<input type="checkbox"/>	<input type="checkbox"/>	POLAR	POLAR.13	Training Materials	STANDARD					2h	2h	120h	<input type="checkbox"/>	Gail Robinson

10h

8h

8h

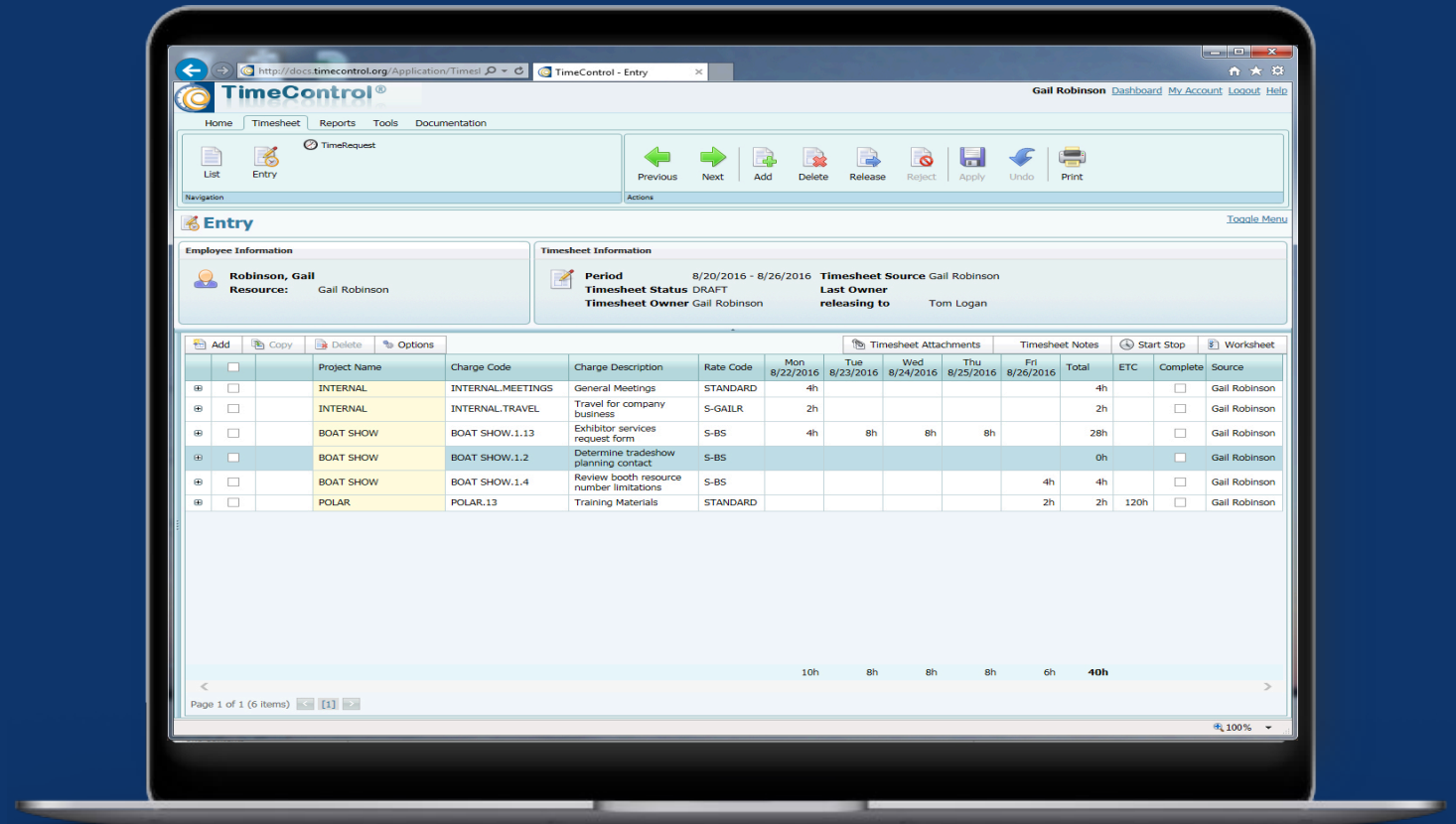
8h

6h

40h

Page 1 of 1 (6 items)

# DEMO



# QUESTIONS?

Use the questions pane in GoToWebinar to ask questions



# Thank you!

Please get in touch if you are interested in BrightWork or HMS

## BrightWork

### Custom Demo

[https://www.brightwork.com  
/product/demo-request](https://www.brightwork.com/product/demo-request)



### Free Trial

[freetrial.timecontrol.com](https://freetrial.timecontrol.com)



BrightWork

# APPENDIX

## BrightWork Model Explained

# About HMS Software

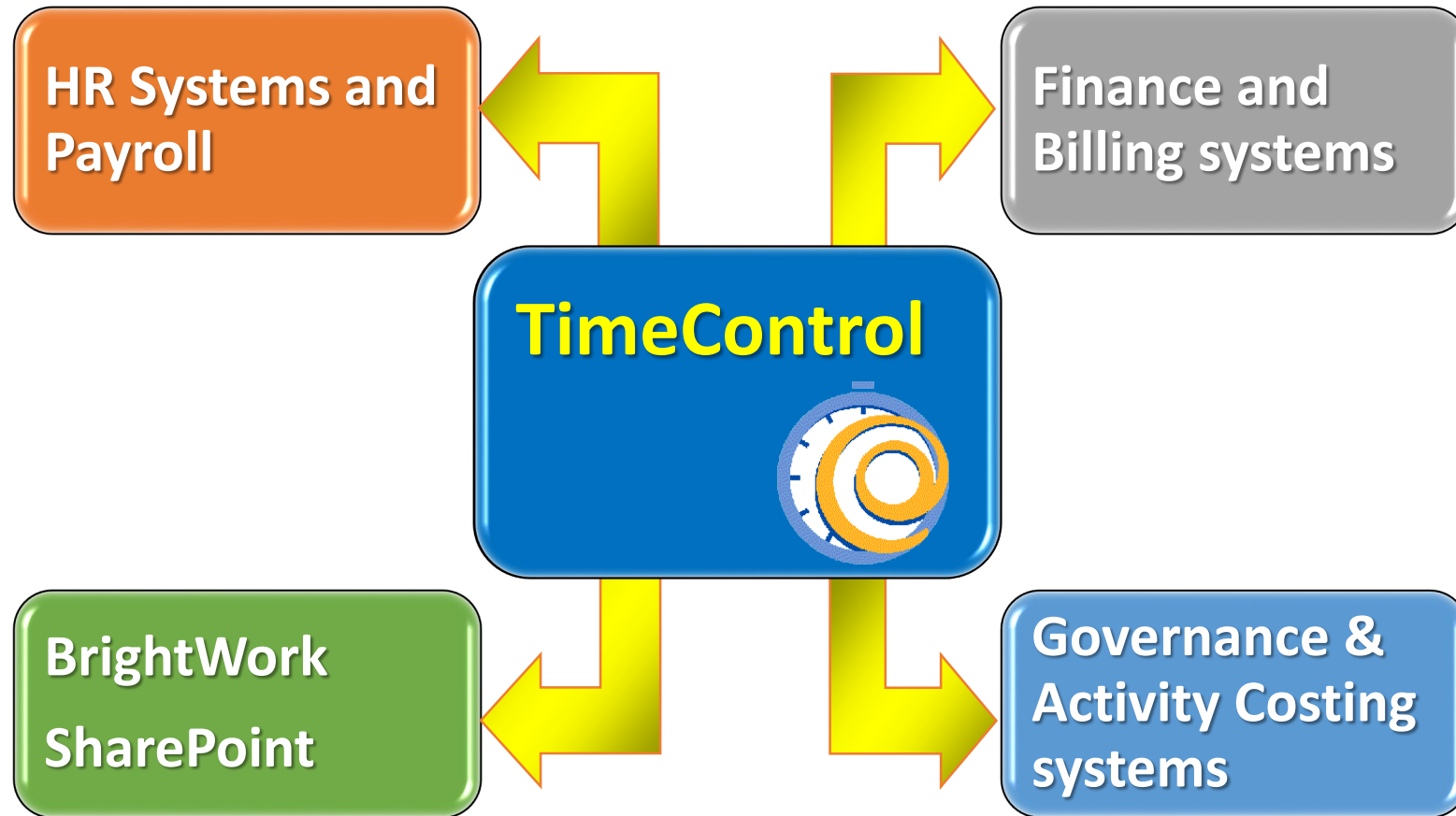
- HMS: Founded in 1984
- TimeControl released to market in 1994
- Partners with:
  - Microsoft since 1995
  - Oracle-Primavera since 1997
  - Deltek (Welcom) since 1985
  - Hard Dollar (InEight) since 2012
  - Version One since 2014
  - BrightWork since 2017

LOGICIEL  
**HMS**  
SOFTWARE

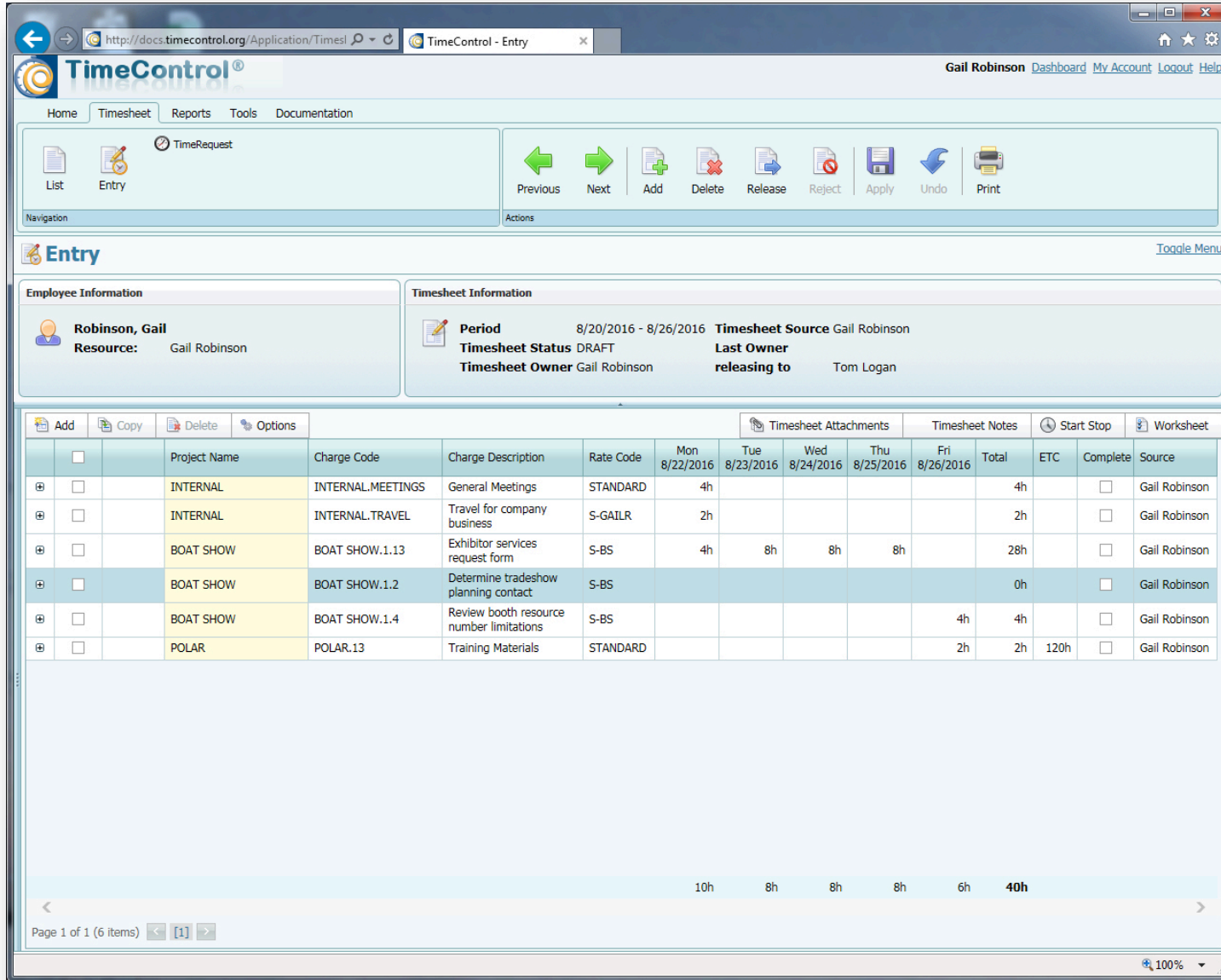
# Benefits of TimeControl

- Single entry for all your time capture requirements
  - Project Control, HR / Payroll, Vacation tracking, Billing
- Ability to connect to all of your corporate systems
- Robust approval process
  - Matrix Approval Process, missing timesheet tracking & notification
- There are links to multiple products to support a mixed environment
- Fully auditable correction process

# TimeControl



# TimeControl Interface on its own



# TimeControl within SharePoint

Browser tabs: http://2013.brightworkdemo.com/sites/connex... Hardware Upgrade (PStd) - ...

Menu: File Edit View Favorites Tools Help

User: Jean-François Couturier

# TimeControl

- BROWSE PROJECT PAGE
- Updated Pages
  - TimeControl
  - How To Use This Library
  - Home
- Project Home
  - TimeControl
- Initiate
  - Goals
  - Contacts
- Plan
  - Tasks Update
  - Task Reports
  - Documents
  - Risks
  - Resource Reports
- Execute
  - My Work Reports
  - Work Reports
  - Discussions
- Control
  - Issues Update
  - Issue Reports
  - Metrics
  - Status Reporting
- Site Contents

**TimeControl®**

Home Timesheet Reports Tools Documentation

Navigation: List Entry Batch release TimeRequest Line Item Approval

Actions: Previous Next Add Delete Release Reject Apply Undo Print

**Entry** [Toggle Menu](#)

Employee Information		Timesheet Information	
	<b>Logan, Tom</b> Resource: Tom Logan	<b>Period</b> 7/1/2017 - 7/7/2017 <b>Timesheet Status</b> DRAFT <b>Timesheet Owner</b> Tom Logan	<b>Pay Periods</b> Pay Period 6 (7/1/2017 - 7/15/2017) <b>Timesheet Source</b> Tom Logan <b>releasing to</b> TimeControl Administrator

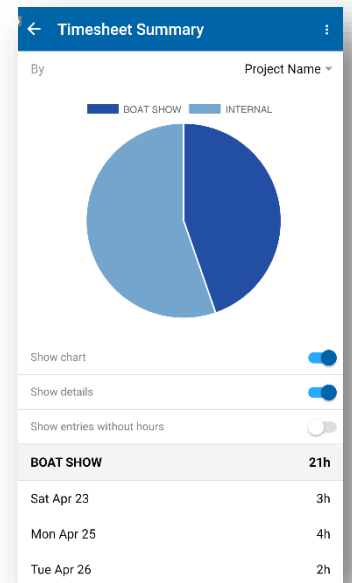
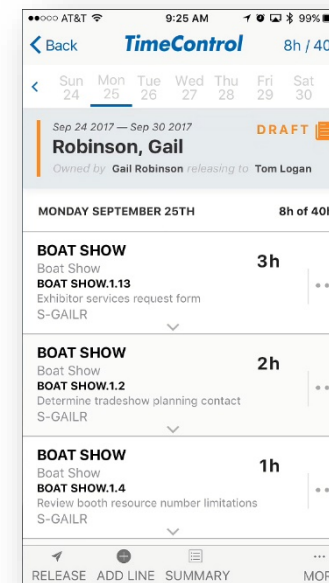
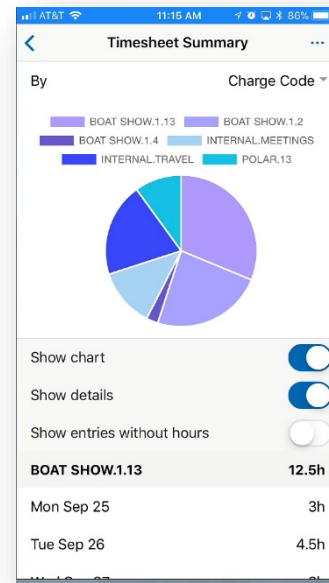
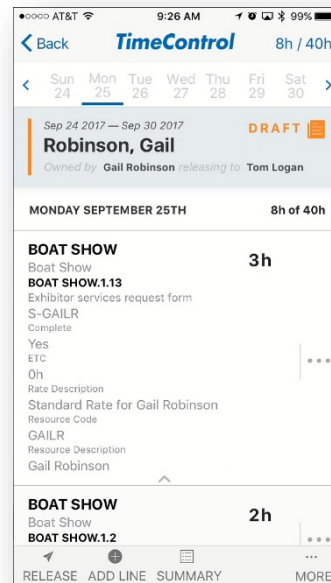
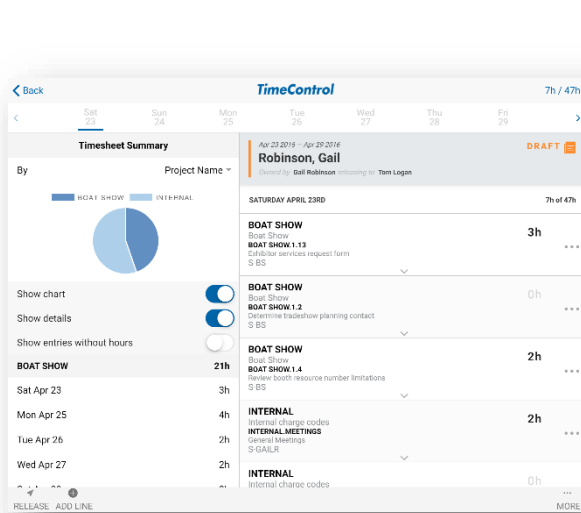
Add	Copy	Delete	Options	Timesheet Attachments				Timesheet Notes		Worksheet
				Mon	Tue	Wed	Thu	Fri	Total	ETC
<input type="checkbox"/>	<input type="checkbox"/>			Project Description	Charge Description	Rate Code				
<input checked="" type="checkbox"/>	<input type="checkbox"/>			Hardware Upgrade	Create draft plan for upgrade	STANDARD	7h	7h	7h	7h
							7h	7h	7h	35h

Page 1 of 1 (1 items)



# TimeControl Mobile App

- A free Mobile App supporting Android and Apple devices
- Links to your instance of TimeControl



# Benefits of TimeControl

- Not having to write a timesheet
- You don't need multiple timesheets
- You can use a single source for actuals
- There are links to multiple products to support a mixed environment
- Actuals become auditable
- Past timesheet data can be corrected in a managed fashion

# Functional Benefits

- **Auditable Historical data**

TimeControl includes historical data on all timesheet data regardless of what changes or deletions were made in the planning system. This means that if a task is deleted or moved, the actuals are not changed

- **Track controllable edits to posted timesheet data**

TimeControl allows audited Debit/Credit changes to previous timesheets which are tracked as changes to the original timesheet

- **Automated business validation rules**

TimeControl includes unlimited automated validation Rules which allows an organization to define what makes an acceptable timesheet. This can include simple rules such as “no more than 24 hours per day” or complex rules such as “no overtime unless you are a wage employee and have done at least 8 hours of regular time today”.

# Functional Benefits

- **Unlimited Rates**

TimeControl allows an unlimited number of rates per employee. Each rate maintains multiple values.

- **Project and Non-project time**

TimeControl can track both project items from the scheduling system and non-project items such as overhead types.

- **Unlimited user-defined fields**

TimeControl allows an unlimited number of user defined fields to be added to any table (such as the employee list or task items).

- **Multilingual**

TimeControl includes multiple languages by default.

- **Expense Reporting**

TimeControl tracks non-labor entries such as expense reports

# Functional Benefits

- **DCAA Compliance**

TimeControl is DCAA (Defense Contract Audit Agency) compliant

- **Sarbanes-Oxley Compliance**

TimeControl is a powerful tool for Sarbanes-Oxley compliance in order to conform to SEC rules for internal software development and deployment for any company publicly traded in the US

- **Other Government requirements**

TimeControl complies also with numerous government standards including the “European Work Rules”, FMLAs and “California Work Rules” along with many others

- **Matrix Approvals**

TimeControl supports HMS Software’s unique “Matrix Approval Process for Labor Actuals™” which allows timesheet data to be approved by both line or resource managers and projects managers

# Functional Benefits

- **Resource assignment options**

TimeControl supports individual, role and group resource identification which can be unique per line.

- **Hierarchical display for high data volume**

TimeControl displays projects, rates and tasks in a hierarchical tree format.

- **Links for Payroll, Invoicing, Job Costing**

TimeControl's financial-quality data is ideally suited for invoicing and TimeControl's Link module allows output to be sent to virtually any corporate finance or ERP system

- **Multiple project management system links**

TimeControl supports multiple project management links simultaneously. A project environment which includes both Microsoft Project, Project Server, Project Online, SharePoint, Primavera Pro, Primavera EPPM, Deltek Open Plan and Cobra, VersionOne, Hard Dollar and, of course, BrightWork. End-users simply see a list of tasks

# TimeControl Key Features

- Easy web interface
- Multi-browser support
- Multilingual
- Flexible architecture
  - SQL Server
  - Oracle
  - MySQL
- Expense tracking
- Matrix Approvals
- Automated Approvals
- Vacation Requests
- Flexible Reporting
- Links to Project Mgt
  - VersionOne
  - Microsoft Project, Project Server, BrightWork, SharePoint, Oracle-Primavera P6, Hard Dollar HD, Deltek OpenPlan, Deltek Cobra
- Links to ERP/Finance
  - Dynamics, SAP, Oracle...
  - Others...
- Government compliance
  - DCAA
  - European Time Directives
  - SOX, FMLA, Others...

**“TimeControl, timesheet software so flexible you’ll think we wrote it just for you.”**







## FOR MORE INFORMATION:

To find out more about TimeControl:

[www.timecontrol.com](http://www.timecontrol.com)

To find out more about TimeControl and Brightwork:

<https://www.brightwork.com/partners/solution>

To try TimeControl for free:

[freetrial.timecontrol.com](http://freetrial.timecontrol.com)

To find out about HMS Software:

[www.hms.ca](http://www.hms.ca)

To reach HMS Software:

[info@hms.ca](mailto:info@hms.ca)

# TimeControl works in many industries

## Engineering/Construction

Aegion  
Andritz  
EXFO  
Foster Wheeler  
Groupe Canam  
Hamon Daltak  
OPAL-RT  
Reebok  
Siemens  
SCX  
Steven Winter Associates  
Tennant

## Gas / Utilities

Entegrus  
Enerkem  
Karridale  
Koch Business Solutions  
Husky Oil

## Manufacturing

Progress Rail  
Tennant  
Tractor Supply  
Volvo Novabus

## Defense / Aerospace

Boeing  
CAE Electronics  
Esterline  
General Dynamics  
Rolls Royce

## Government

Government of Quebec  
Government of Saskatchewan  
Conservation Ontario  
State of Idaho  
Highlands County, Florida  
Minnestoa Land Trust  
Regie des Batiments de Quebec

## Technology

Accedian  
Cogiscan  
CRIM  
Invetech  
March Consulting  
Northforge  
Oce Graphics  
Ricoh  
Safran  
Scisys

## Services

Pontoon  
Kelly Services

## Financial

Ascendant Group  
CPA Quebec  
MCAP  
Residential Mortgage  
Segic  
US Properties  
Vancity  
Value Recovery

## Health/Pharmaceutical

CADTH  
logen  
Sandoz  
Zoetis

# BrightWork

BrightWork is a SharePoint-based project management solution that includes a range of best-practice templates and configurable cross-project reporting.

The image displays three overlapping screenshots of the BrightWork software interface, illustrating its project management capabilities.

**Central Screenshot: Business Project Office (PO)**

- Navigation:** BROWSE, PAGE, ITEMS, LIST. Top menu: Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, Manage User Accounts.
- Project Office Home:** All, In Trouble, Status Charts, Gantt, By Status, By Manager, My Projects, By Exception.
- Get started:** Projects Tracker, New Project Site.
- Key Metrics:** 85 Late Items, 9 Open Issues.
- Project Office Summary:** Health, Time, Cost, Quality, Issues, Finish Date. Table for 2017 Q3 and 2017 Q4.
- Project Summaries:** Table with columns: Health, Time, Cost, Project, Start Date, Finish Date. Includes projects like 'Upgrade Hardware for ...', 'Small Systems Projects', 'Setup SharePoint Serve...', 'Training for Finance Dept.', and 'SharePoint Hyper-V De...'.

**Left Screenshot: Hardware Upgrade**

- Navigation:** BROWSE, PROJECT, PAGE.
- Get started with your project:** Setup Project (1), Set Initial Data (2).
- Key Project Metrics:** 5 Late Items, 12/13/2017 Current Finish.

**Right Screenshot: Project - Status Charts**

- Navigation:** Home, Projects Area, Portfolio Reporting, Templates Area, Project Status.
- Status Charts:** Project Home, Project Schedule, Status Charts, Project Status.
- Status:** Pie chart showing project status distribution.
- Late Items:** Table with columns: Project, Status, Due Date, Late Items.

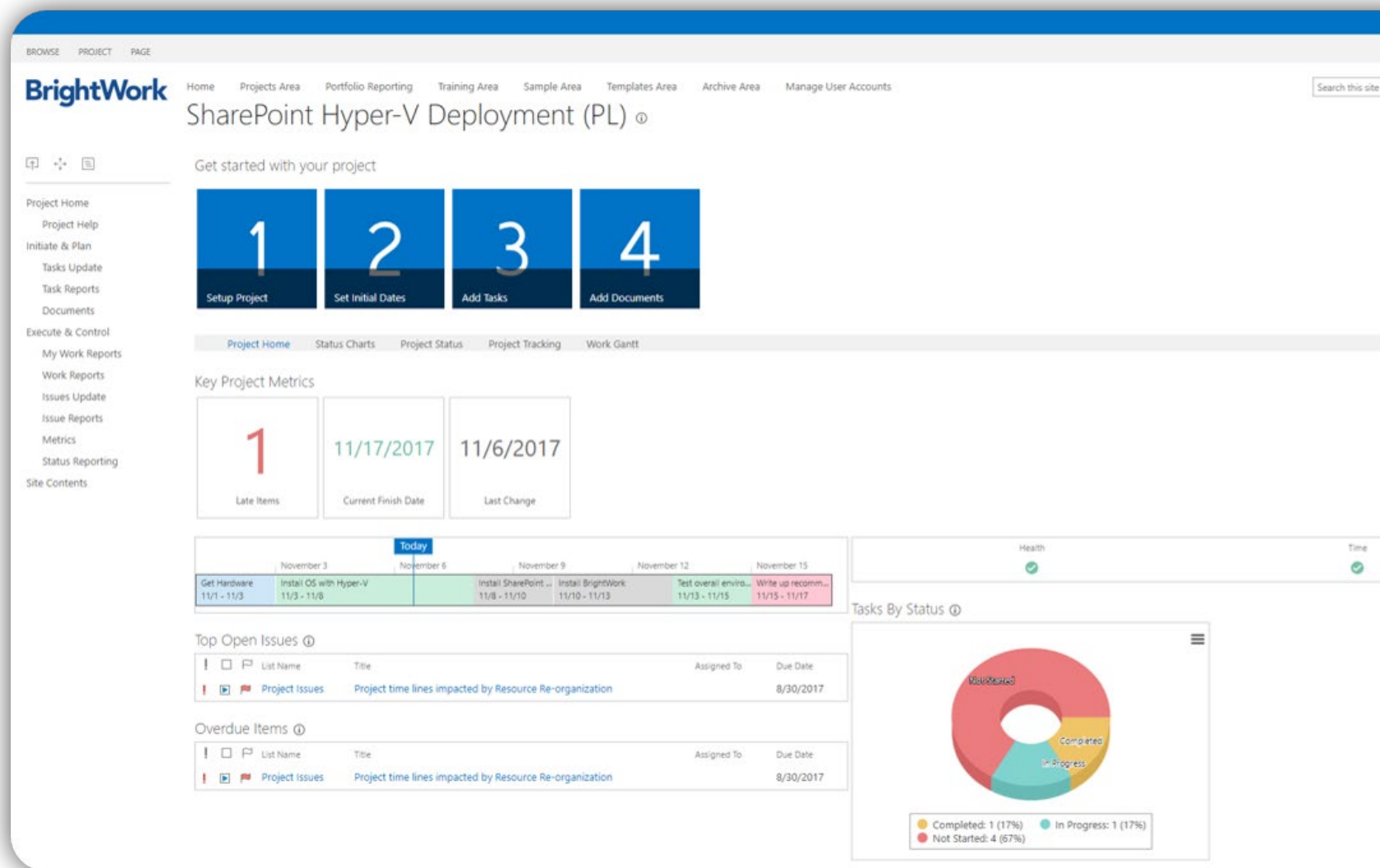
# Manage Projects Successfully

Simplify project processes, engage stakeholders,  
and increase collaboration with one project  
management tool.



# Start with Standardized Project Management Templates

BrightWork includes a range project management templates that help you get projects started the right way every time, with the right amount of project management for the project and team in question.





# Collaborate with a Team-focused Project Site

Team members can find, do and report on their work in a team-focussed project site with BrightWork.

Manage your schedule with instant visibility into project and non-project tasks

The screenshot displays the BrightWork software interface. At the top, there's a navigation bar with tabs for BROWSE, PROJECT, TASKS, and LIST. Below this is a toolbar with various icons for task management, including 'New Item', 'View Item', 'Edit Item', 'Delete Item', 'Version History', 'Shared With', 'Insert', 'Outdent', 'Indent', 'Move Up', 'Move Down', 'Outline', 'Add to Timeline', 'Attach File', 'Calculate Schedule', 'Move Schedule', 'Alert Me', 'Export List Data', 'Import List Data', 'Workflows', and 'Approve/Reject'.

The main content area shows a project site with a sidebar on the left containing links like 'Project Home', 'Project Help', 'Initiate', 'Goals', 'Contacts', 'Plan', 'Tasks Update', 'Task Reports', 'Documents', 'Risks', 'Resource Reports', 'Execute', 'My Work Reports', 'Work Reports', and 'Discussions'. The central part of the screen displays a task list with columns for Task Name, Duration, Start Date, Finish Date, and Predecessors. A calendar view is overlaid on the task list, showing dates from August 28 to September 27. The calendar highlights the current date, August 23, 2017, which is a Tuesday. The task list includes tasks such as 'Identify suppliers', 'Create draft budget for upgrade', 'Create draft plan for upgrade', 'Get Budget Signoff', 'Create final version of upgrade plan', 'Schedule meeting to decide on suppliers', and 'Create report outlining needs'.





# Track and Share Progress with Automated Reports

Project Managers spend too much time on administration instead of the project itself!

BrightWork templates come with automated reporting and dashboards to provide project visibility to the people who need it.

The screenshot displays the BrightWork Reporter interface. At the top, there's a blue header bar with the user name 'Anne V'. Below it, a navigation bar includes 'VIEW', 'PAGE', and 'REPORTER' (which is active). The 'REPORTER' section contains several toolbars: 'Report Mode' with 'Shared' and 'Personal' (selected) buttons; 'Personalize this Report' with icons for Columns, Grouping, Sorting, Filters, and Totals; 'Show/Hide' with 'Show Grouping' and 'Show Totals' checkboxes; 'Share' with 'Export', 'Email', and 'Print' buttons; and 'Shared Settings' with a 'Configure Reporter Settings' button. Below the navigation bar, a secondary bar shows various views: 'Project Office Home', 'By Exception', 'All', 'In Trouble' (selected), 'Status Charts', 'Gantt', 'By Status', 'By Manager', and 'My Projects'. The main content area is titled 'Projects in Trouble' with an information icon. It contains a table with the following data:

!	□	🚩	Health	Time	Cost	Issues	Project Link	Start Date	Finish Date	Due Date	
!	▶		✖	✔	✔		Setup SharePoint Server Farm	8/6/2017	10/21/2017	10/22/2017	<div></div>
	▶		⚠	✖	✔	✖	Hardware Upgrade Global (PStr)	4/27/2017	8/12/2017	8/14/2017	<div></div>
	▶		✖	✔	✔		Install new OS	8/4/2017	10/19/2017	10/19/2017	<div></div>
	▶		⚠	✔	✖		Install new wireless network for IT	8/5/2017	10/20/2017	10/20/2017	<div></div>

# Control Portfolios of Projects

Improve organizational performance with complete control of portfolios and resources in one place.

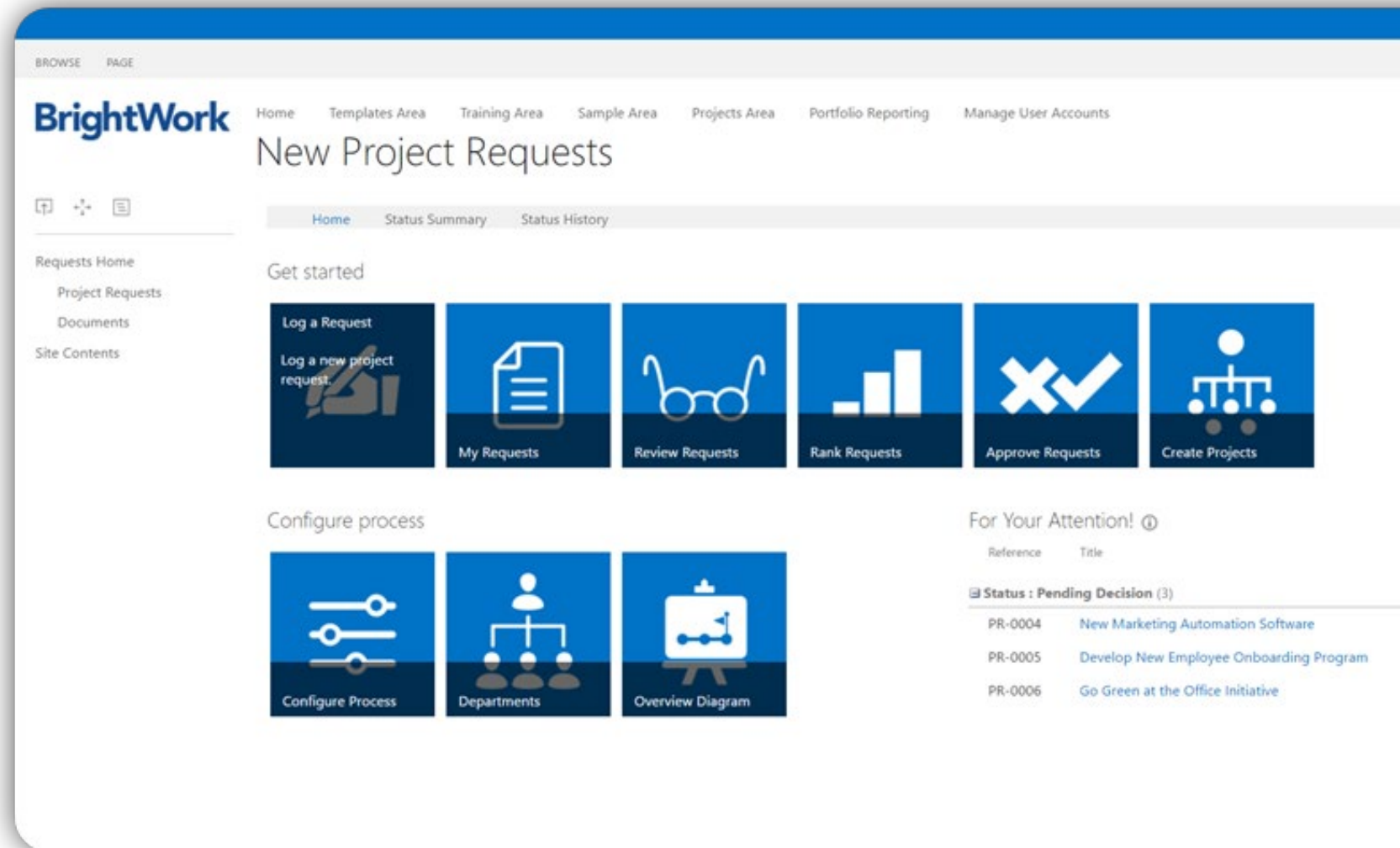




# Approve with Scalable Project Request Management

BrightWork gives you a simple process for deciding which projects get approved and automatically creates the new project site.

Develop a transparent ranking process to ensure alignment with business objectives

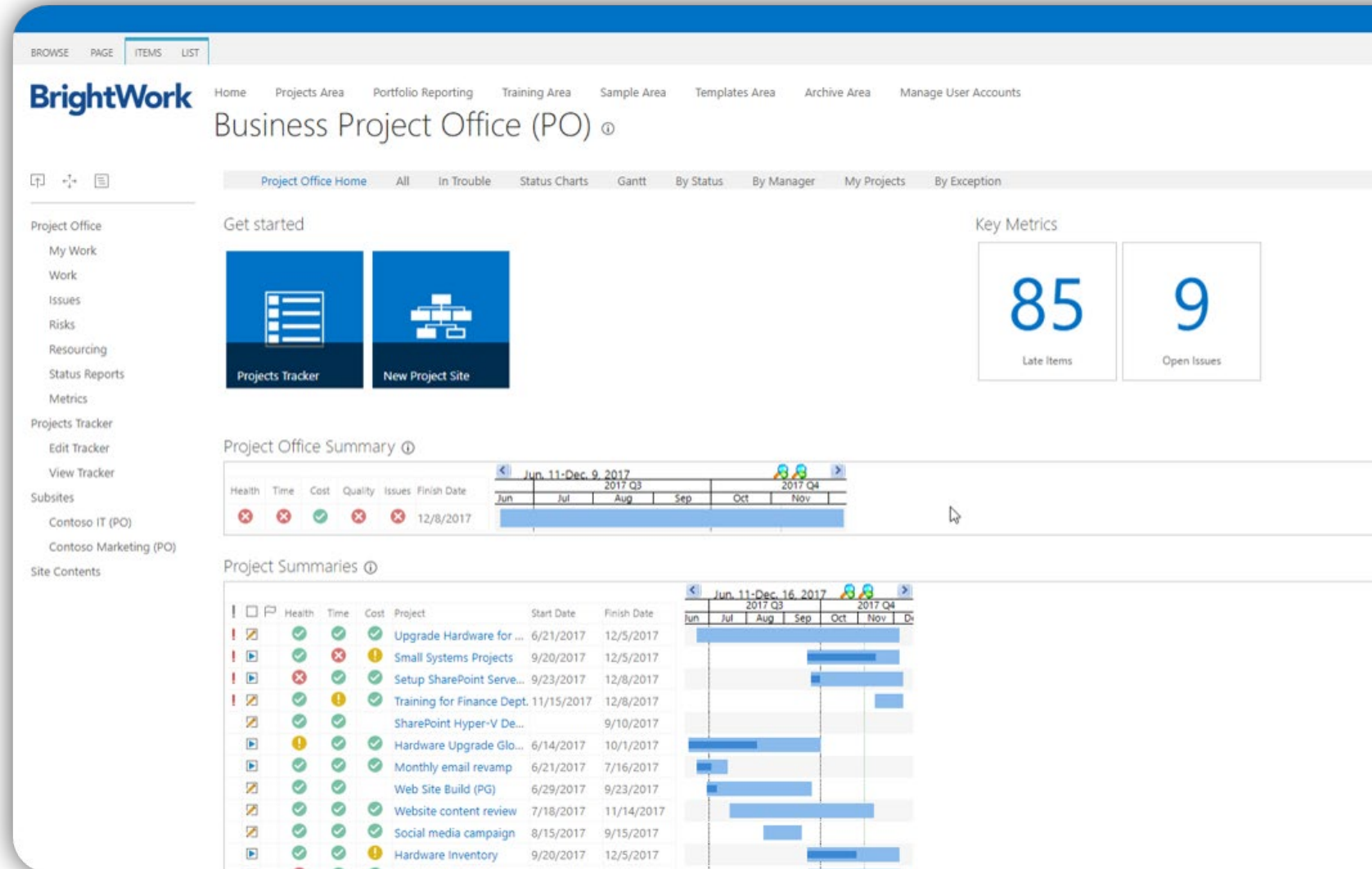




# Track with Real-Time Portfolio Dashboards

BrightWork reporting dashboards allow you to quickly track the health and progress of all projects across the organization.

Get visibility and drill into the detail of specific projects.





# Allocate with High-Visibility Resource Management

Simple resource reports help you track and forecast resource allocation to make sure you have optimal resource utilization across projects.

BROWSE PROJECT PAGE											
Assigned To My Work Due Soon Work Completed Unassigned Export All											
Open Work ⓘ											
<input type="checkbox"/>	Title	Start Date	Finish Date	Work	Feb / 2017						
					1/31/2017	2/7/2017	2/14/2017	2/21/2017	2/28/2017	3/6/2017	3/13/2017
<input checked="" type="checkbox"/>	Assigned To : <input type="checkbox"/> Alex Hankin (7)								100.00		
<input checked="" type="checkbox"/>	List Name : Project Risks (4)										
<input checked="" type="checkbox"/>	List Name : Project Tasks (3)								100.00		
<input checked="" type="checkbox"/>	Assigned To : <input type="checkbox"/> Anne Wallace (13)				46.67	13.33	24.00	8.00			
<input checked="" type="checkbox"/>	Assigned To : <input type="checkbox"/> Christine Chang (3)										
<input checked="" type="checkbox"/>	Assigned To : <input type="checkbox"/> Dan Bacon (1)										

# Leverage your SharePoint investment

Accelerate user adoption, support project teams, scale performance on your existing infrastructure.



# Deploy with a Low IT Burden

As BrightWork is built on the industry SharePoint platform, organizations can leverage existing and investments in infrastructure and training.

**BrightWork Reporter Interface**

**Navigation:** BROWSE | PAGE | **REPORTER**

**Actions:** Refresh | **Shared** | Personal

**Report Mode:** Columns | Grouping | Sorting | Filters | Totals

**Personalize this Report:** Report Information | Show Grouping | Show Totals

**Show/Hide:** Export | Email | Print

**Share:** Configure Reporter Settings

**Open Issues** | Red & Yellow Issues | Overdue Issues | My Issues

**Open Issues** ⓘ

**Project : Hardware Upgrade (PStd) (3)**

**List Name : Project Issues (3)**

!	□	🚩	Title	Owner	Assigned To
✎	🚩		Should we wait until more employees are on holidays		<input type="checkbox"/> Anne Wallace
✎	🚩		Team Training not up to		<input type="checkbox"/> Anne Wallace <input type="checkbox"/> Anne Wallace

**Configure Reporter Settings**

- Columns:** Select the shared report columns.
- Grouping:** Define the shared report grouping.
- Sorting:** Define the shared report sorting.
- Filters:** Create a shared report filter.
- Totals:** Select the shared report totals option.

8/23/2017 8/26/2017 8/29/2017



# Start with local, best-practice templates and BrightWork Assistance.

Taking a template based approach to projects makes it easy to improve project standards.

Reduce resistance to change with training resources for new project managers and team members.

Home Projects Area Portfolio Reporting **Templates Area** Project Area 2

## Templates Area ⓘ

**2 New templates** ✕  
Each project is based on a template. New templates can be built from the ground up to your exact specifications.  
[Back](#) [Next](#)

**New Template Site**  
Create a new Template site.

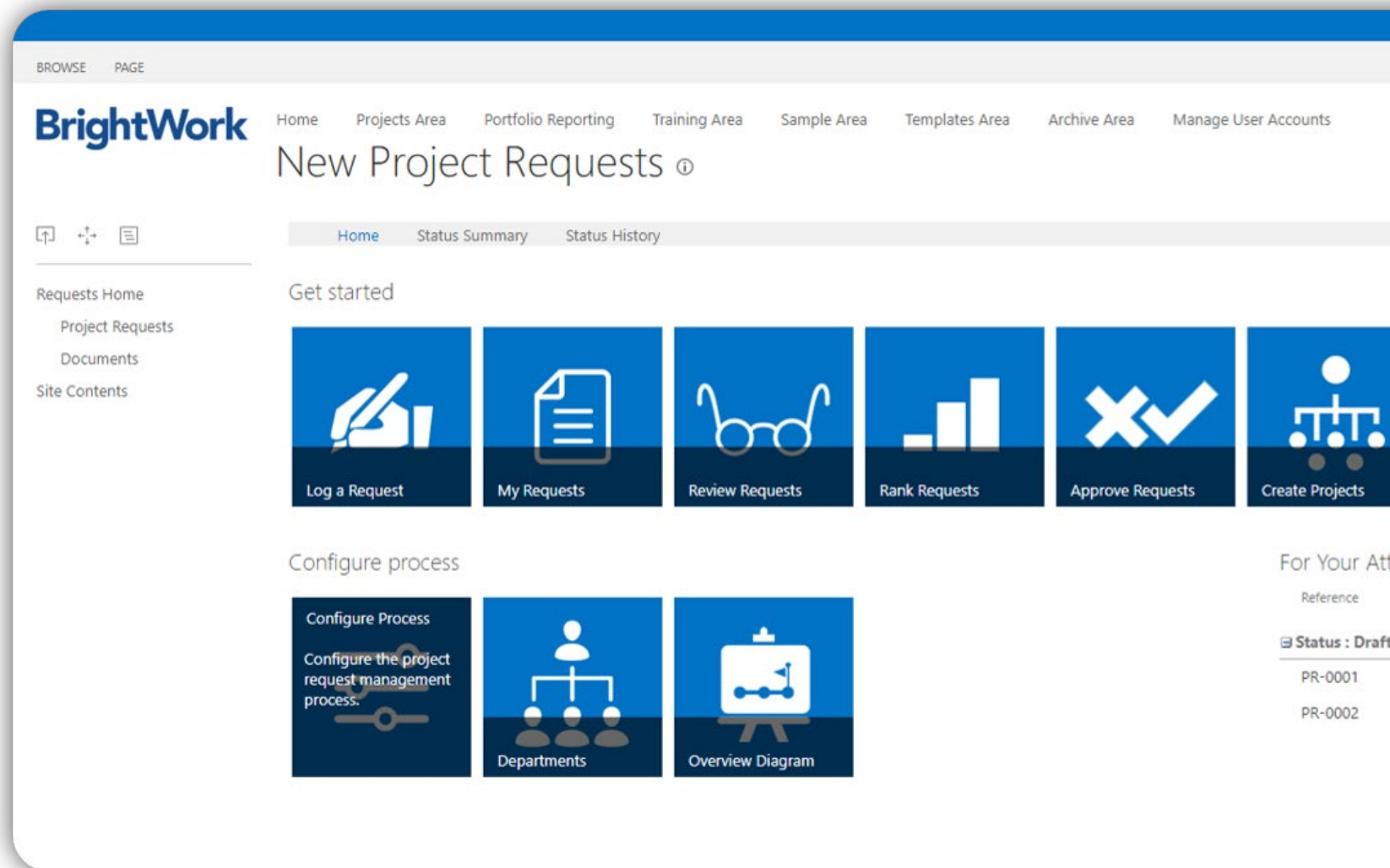
**Template Usage**





# Evolve with Easy-to-Configure Templates

The BrightWork template management system makes it easy to capture, reuse and deploy new processes. You can even roll them out to live projects to support the continuous improvement of organizational project management.



# The BrightWork Approach



## Start

**Deliver Immediate  
Visibility & Control**



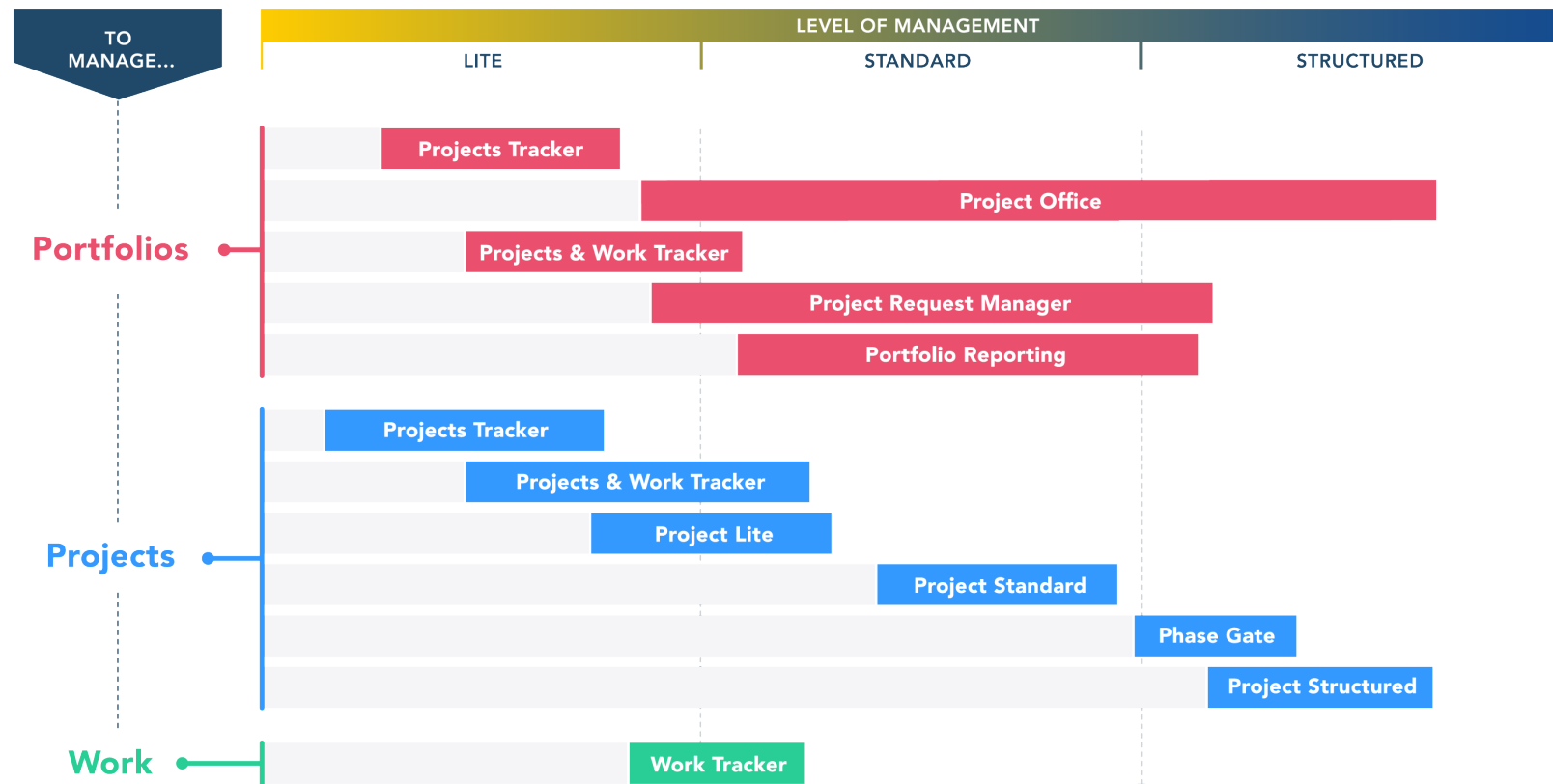
## Evolve

**Grow Organizational  
Project Management**



# BrightWork Templates Spectrum

## TEMPLATE SPECTRUM BrightWork



# BrightWork

[www.brightwork.com](http://www.brightwork.com)