

LIVE WEBINAR

Getting to Grips with BrightWork Reporter



presented by Traci Grassi BrightWork Customer Success Architect



hosted by Brona O'Donnell Customer Marketing Executive

QUICK POLL! Are you planning on upgrading your BrightWork to the latest release?



AGENDA

- What is BrightWork Reporter?
- The different types of reports
- Report Options and Navigation around the Reporter Ribbon

- Configure Reports
- How to Share Reports with Others
- ✓ Q&A



What is BrightWork Reporter?



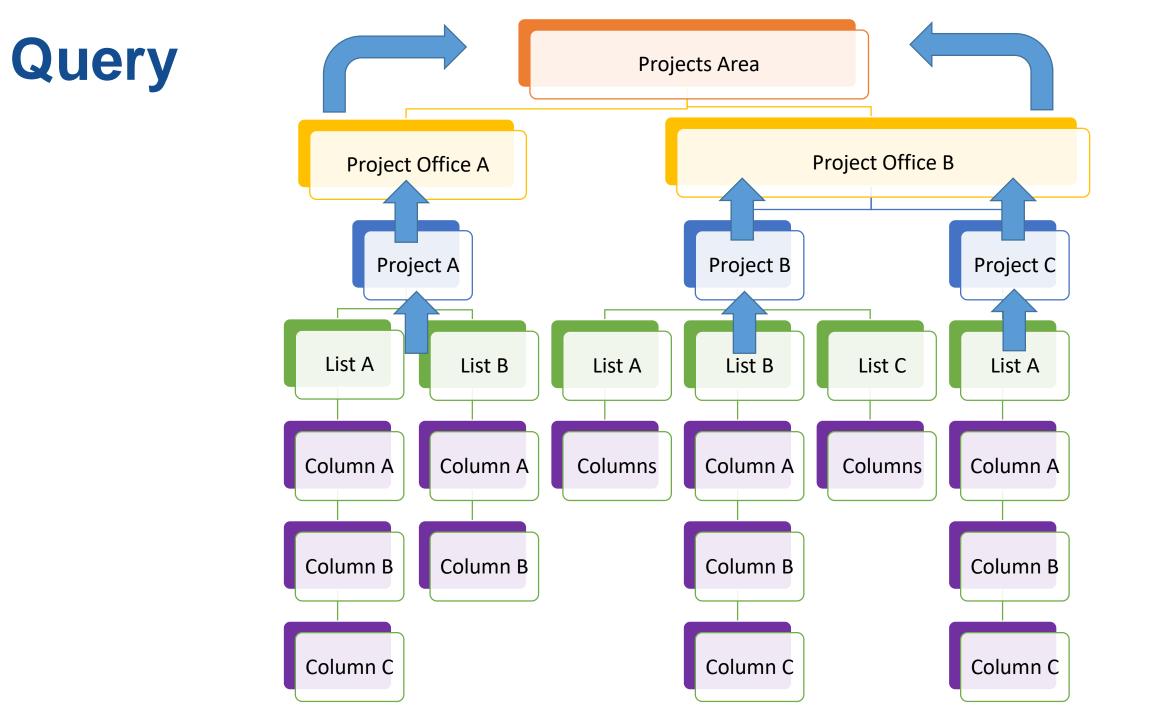
What is BrightWork Reporter?

BrightWork Reporter is highly configurable web part that lets you query multiple sites, sub-sites, and list and display the results in a single report. The reporter web part can be configured at any level in your Site Collection.

Includes multiple configuration options that let you:

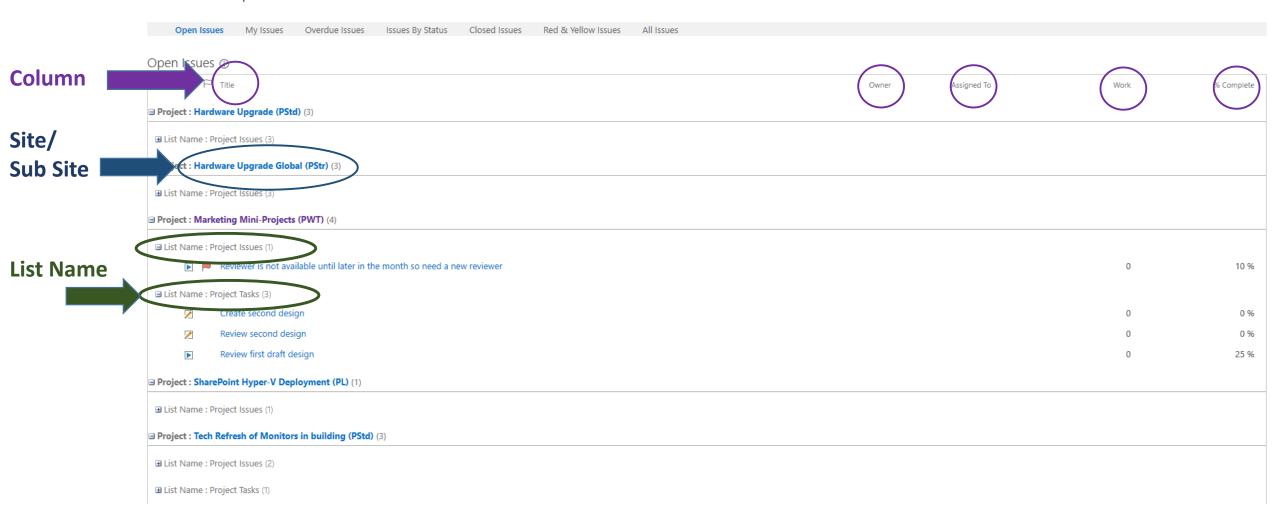
- Create personal reports
- ✓ Filter and sort the report data
- Create cross-list and cross-site report filters





Example of a List Report

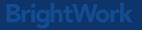
Issues - Open Items



Using Issues List from Sample Area



Report Types



Report Types

Chart Reports

- These reports render list data in charts (e.g. bar, line, pie, etc.)

Gantt Report

These reports render list data in a Gantt Style (similar to MS Project)

List item Report

These reports render list data in columns (similar to SharePoint Views)

Resource Usage Reports

 These reports allow you to report the amount of work assigned to a resource spread evenly across the period of time for the work to be completed



Chart Reports

Chart	Туреѕ					
Area	Stacked Area					
Bar	100% Stacked Area					
Column	Stacked Bar					
Doughnut	100% Stacked Bar					
Line	Stacked Column					
Pie	100% Stacked Column					
Spline	Step Line					

Gantt Reports

✓ Zooming

- Zoom in and zoom out on the time line
- 💦 To zoom in
- To zoom out
- ✓ Panning
 - Navigate the timeline to move earlier or later
 - To go back on the timeline
 - To move ahead on the timeline
- Paging
 - Paging is an optional way of limiting the number of items being displayed on the page at once

					<	Aua. 6.	2017 - F	eb. 15. 2	020					88	2
ļ	ΠP	⊐ Project	Start Date	Finish Date	Q3	Q4	Q1	02	018 Q3	Q4	Q1	2 02	019 Q3	Q4	_
	2	SharePoint Hyper-V Deployment (PL)		12/7/2018	~		~	. ~	~		~.	. ~		· ~	
	2	Website content review	8/11/2017	12/8/2017											
	/	Social media campaign	9/8/2017	10/9/2017											
		Web Site Build (PG)	12/19/2017	4/14/2018											
Ľ		Small Systems Projects	10/14/2018	12/29/2019							:				
		123													

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List Item Report

- Most Common type of report
- ✓ Similar to a view in SharePoint
- Organized in Columns

Can be grouped, sorted, and filtered

All Projects ① Health Time Cost Quality Priority Project Finish Date Due Date Project Status Status Indicator Project Manager Start Date Project Status : (1) Not Started (4) Priority : (2) Normal (4) (1) Not Started 12/7/2018 (2) Normal (1) On Schedule SharePoint Hyper-V Deployment (PL) \bigcirc \bigcirc (2) Normal (1) Not Started (1) On Schedule Website content review 8/11/2017 12/8/2017 \sim \bigcirc \bigcirc (2) Normal (1) Not Started (1) On Schedule Social media campaign 9/8/2017 10/9/2017 0 \bigcirc \bigcirc Hardware Upgrade Global (PStr) Scott Footlik 1/9/2020 1/9/2020 (2) Normal (1) Not Started (1) On Schedule 5/6/2019 Project Status : (2) In Progress (9) Priority : (1) High (4) 0 (1) High (2) In Progress (1) On Schedule Hardware Upgrade (PStd) Traci Grassi 9/23/2019 12/23/2019 \mathbf{x} \otimes \otimes \otimes 1/1/2019 (1) High (2) In Progress (1) On Schedule Training for Finance Dept. 12/9/2019 1/1/2019 Ø \bigcirc (1) High (2) In Progress (1) On Schedule Small Systems Projects 10/14/2018 12/29/2019 12/29/2019 \bigcirc \bigcirc \bigcirc \checkmark 12/29/2019 (1) High (2) In Progress (1) On Schedule Upgrade Hardware for Finance Dept 7/15/2019 11/1/2019 Priority: (2) Normal (5) \checkmark \bigcirc Tech Refresh of Monitors in building (PStd) Traci Grassi 2/14/2020 (2) Normal (1) On Schedule 8/1/2019 (2) In Progress (2) Normal (2) In Progress (1) On Schedule Web Site Build (PG) 12/19/2017 4/14/2018 4/14/2018 Ø \bigcirc Install new OS 12/30/2019 (2) Normal (2) In Progress (1) On Schedule 10/15/2019 12/30/2019 0 (2) Normal (2) In Progress (1) On Schedule Install new wireless network for IT 10/16/2019 12/31/2019 12/31/2019 (2) Normal (2) In Progress (1) On Schedule 10/14/2019 12/22/2019 1/3/2020 Hardware Inventory

Resource Reports

- These reports allow you to report on the amount of work required and/or assigned, spread evenly across the period of time allowed for the work to be completed
- How much work has been assigned and allocated in a configurable calendar-like view
- Shows the hours allocated to a particular item and to the grouping(s) (e.g. Assigned To, Role, List Name, Project Name)

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Resource reports can also highlight when work is over-allocated

By default items are highlighted in yellow

Resource Reports

To calculate this data the report uses:

✓ Start date, Finish date and amount of hours allocated to each work item

- MS Project Calendar
 - The project calendar is used to define exception days.
 - There are two types of exception days:
 - (1) Working Time
 - (2) Non-Working Time
 - Example exception days include a working day that is a holiday (e.g. public holidays) or a non-working day that is actually working day (e.g. a weekend day).
- Working hours per day
- ✓ Working Week
 - The working week is defined in the site's regional settings

Scenario

Imagine a scenario with a work item, with 10 hours allocated to it, due to start on a Monday and finish on the subsequent Friday. The workplace is a normal Monday to Friday one. The user (resource) assigned this item would have 2 hours per day allocated to it and this would display in the report. Now the user is assigned a similar work item (i.e. 10 hours allocated to it, due to start on a Monday and finish on the subsequent Friday). This means the user would have 4 hours work assigned per day, and this would also display in the report.

If the 'Working Hours per Day' number was 4, then all would be well as the resource would not be over-allocated. However, now imagine that one of the days in the week is a holiday. The project manager marks this day as a non-working day in the project calendar. Now the resource has 5 hours work per day allocated and this would trigger the over-allocation alert.

Examples of different report types

List Item Report

All Pro	jects (i										
Health	Time	Cost	Quality	Priority	Project Status	Status Indicator	Project	Project Manager	Start Date	Finish Date	Due Date	
•				(1) High	(2) In Progress	(1) On Schedule	Hardware Upgrade (PStd)	Traci Grassi	9/23/2019	12/23/2019		
8	8	8	\otimes	(1) High	(2) In Progress	(1) On Schedule	Training for Finance Dept.		12/9/2019	1/1/2019	1/1/2019	
				(1) High	(3) Completed	(1) On Schedule	Setup SharePoint Server Farm		10/17/2018	1/1/2019	1/2/2019	
		•		(1) High	(2) In Progress	(1) On Schedule	Small Systems Projects		10/14/2018	12/29/2019	12/29/2019	
				(1) High	(2) In Progress	(1) On Schedule	Upgrade Hardware for Finance Dept.		7/15/2019	11/1/2019	12/29/2019	
				(2) Normal	(1) Not Started	(1) On Schedule	SharePoint Hyper-V Deployment (PL)			12/7/2018		

Gantt Report

Project Tasks - All Items Gantt 🗊

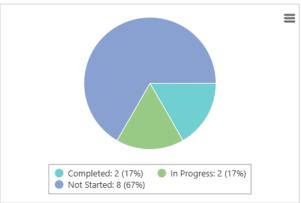
					Sep. 22, 2019 - Jan. 4, 2020	0 2019 Q4	<u>8,8</u>		
! 🗆 F		Task Name	Start Date	Finish Date	Oct	Nov	Dec	+	
5	<u>/</u>	🖻 Summary Line	9/23/2019	12/31/2019					
		Create draft budget for upgrade	9/23/2019	9/24/2019	Sott Footlik				
		Create draft plan for upgrade	9/25/2019	9/25/2019	→ Seott Footlik				
		Identify suppliers	9/25/2019	9/25/2019	🕂 Traci Grassi				
	/	Get Budget Signoff	9/26/2019	10/2/2019	Traci Grassi				
5	2	Create final version of upgrade plan	11/26/2019	12/31/2019		\sim		⇒	
5	2	Schedule meeting to decide on suppliers	11/26/2019	11/27/2019			aci Grassi		
5	2	Create report outlining needs for each department	11/28/2019	12/2/2019			- Tr aci Grassi		
5	/	Create shortlist of possible suppliers	12/3/2019	12/9/2019			Traci Grassi		
5	/	Upgrade hardware in sale dept	12/10/2019	12/17/2019			Traci Gras	si	
5	2	Upgrade hardware in marketing dept	12/18/2019	12/20/2019			- Traci Gi	rassi	
5	2	Upgrade hardware in finance dept	12/23/2019	12/23/2019			Trac	i Gra	

Resource Report

Open	Open Work 🛈												
		T 141-	Charle Date	Finite Date		Q4, 2019		Q1, 2020					
		Title	Start Date	Finish Date	Work	Oct/2019	Nov/2019	Dec/2019	Jan/2020	Feb/2020			
🗄 Assig	ned	To : (not ass	igned) (106)										
🗄 Assig	ned	To : Scott Fo	ootlik (5)										
🗄 Assig	Assigned To : Sean O'Shea (8)						4.00	36.00					
B Assigned To : Traci Grassi (17)							295.33	189.67	129.00	27.00			

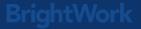
Chart Report

Tasks - Status 🛈





Report Options



Report Options

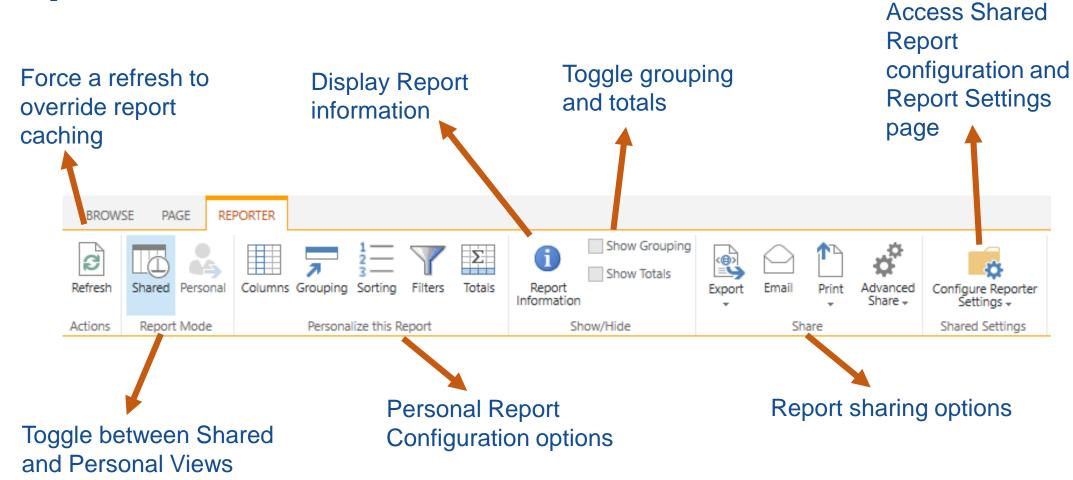
Shared Report

- Visible to all users
- Changes affect all users
- Includes a report filtering dialog
- Access to report editor

Personal Report

- Quickly personalize reports
- Only available to you
- ✓ No report filtering dialog
- Cannot change the report definition
- Default if Personal report is set
- ✓ Will remember on next login

Reporter Ribbon





Reporter Ribbon

Personalize this Report

- Users can create their own version of a report and set it up the way they want. The personal report is saved and users can toggle between the default shared report and the personal report.
- Personal setup options include:
 - Columns
 - Grouping
 - Sorting
 - Filters
 - Totals



Report Information

The BrightWork Report Information Window displays information about the currently viewed report, such as the Report Mode, Data Source and any Report Filters applied

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To access the Report Information Window:

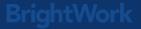
or

Click in the header of the report and then click the Reporter tab to make the Reporter ribbon appear

Click the Report Information 1 \checkmark × Report Information Report Title: **Report Mode** All Projects Tells you whether the report is shared or personal Description: This report displays information from both the Project Statement and Projects Tracker lists. Scope: Data Source Current Site and sub-sites Tells you whether the report is using a report data source or if the report is using the cache Report Mode: Shared Shared Filters: No Filters specified. Data Source: Definition File BrightWork Reporter Library Location: Name: Gallery/All Project Summaries OPEN HELP



Configure Reports



Configure Reports

✓ Use the Reporter ribbon

The options available depend on the report type

- Chart
 - Available options: Chart Type; Filters
- ✓ Gantt
 - Available options: Columns; Grouping; Sorting; Filterers
- List item
 - Available options: Columns; Grouping; Sorting; Filters; Totals
- Resourcing
 - Available options: Columns; Grouping; Sorting; Filters
- ✓ Once you create a personal report, it becomes the default display for your account

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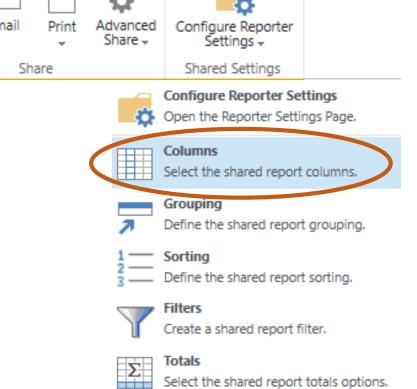
• Toggle back by clicking Shared on the Reporter Ribbon

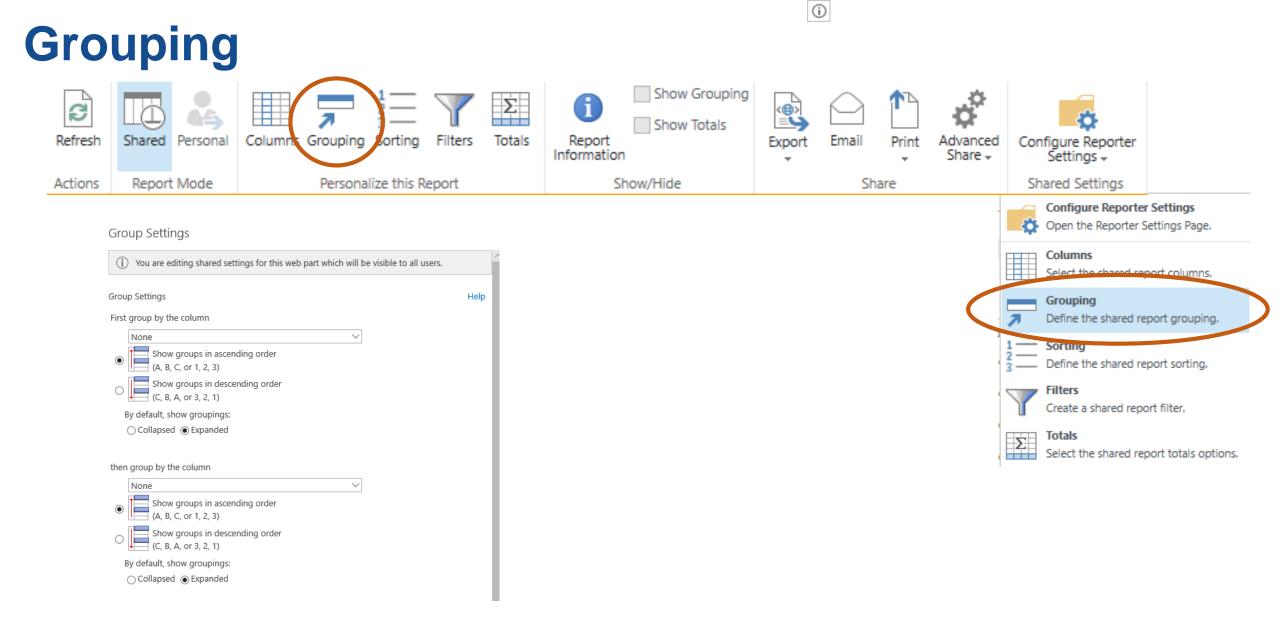


i Columns Show Grouping 0 6 Σ C Show Totals Refresh Shared Personal Grouping Sorting Filters Totals Report Email Columns Advanced Export Print Information Share + Ŧ -Actions Report Mode Personalize this Report Show/Hide Share

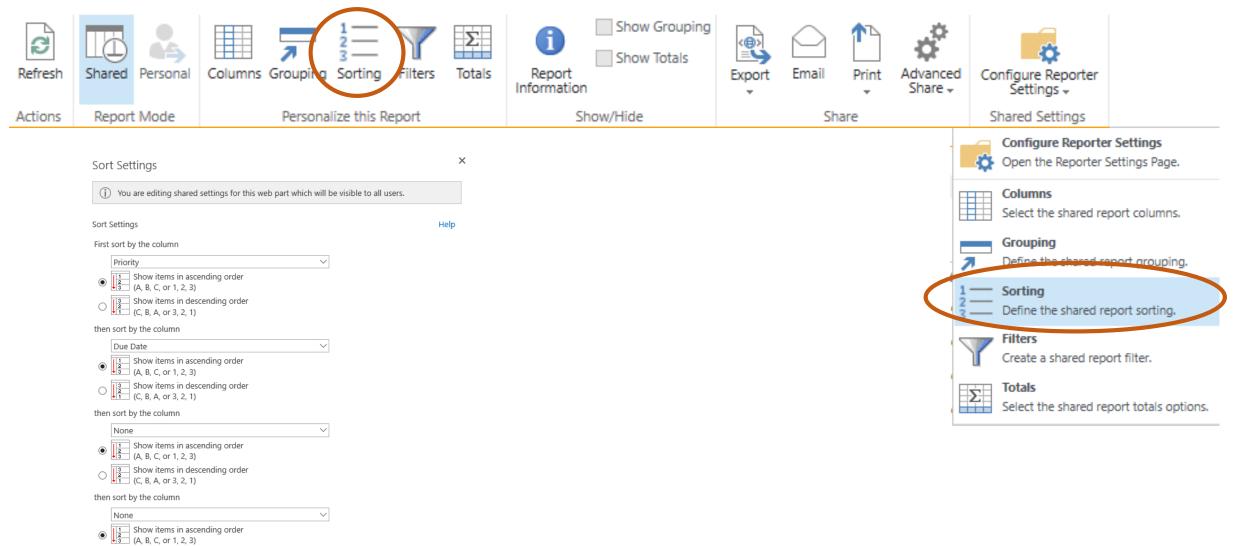
Column Settings

lumi	n Settings			H
				OK Can
	Display	Column Name	Туре	Position from L
	\checkmark	Priority (Icon)	lcon	1 🗸
	\checkmark	Status (Icon)	lcon	2 🗸
	\checkmark	Status Indicator (Icon)	lcon	3 🗸
	\checkmark	Title	Single line of text	4 🗸
	\checkmark	Owner	Person or Group	5 🗸
	\checkmark	Assigned To	Person or Group	6 🗸
	\checkmark	Progress Indicator Bar (Icon)	lcon	7 🗸
	\checkmark	Start Date	Date and Time	8 🗸
	\checkmark	Finish Date	Date and Time	9 🗸
	\checkmark	Due Date	Date and Time	10 🗸
	\checkmark	Planned Work	Number	11 🗸
	\checkmark	% Complete	Number	12 🗸
		% Work Complete	Number	13 🗸
		Actual Cost	Currency	14 🗸
		Actual Duration	Number	15 🗸
		Actual Finish	Date and Time	16 🗸
		Actual Start	Date and Time	17 🗸
		Actual Work	Number	18 🗸
		Category	Choice	19 🗸
		Company	Choice	20 🗸
		Content Type	Single line of text	21 🗸
		Cost	Currency	22 🗸





Sort



 (A, B, C, Ol 1, Z, S)

 (A, B, C, Ol 1, Z, S)

 (B)

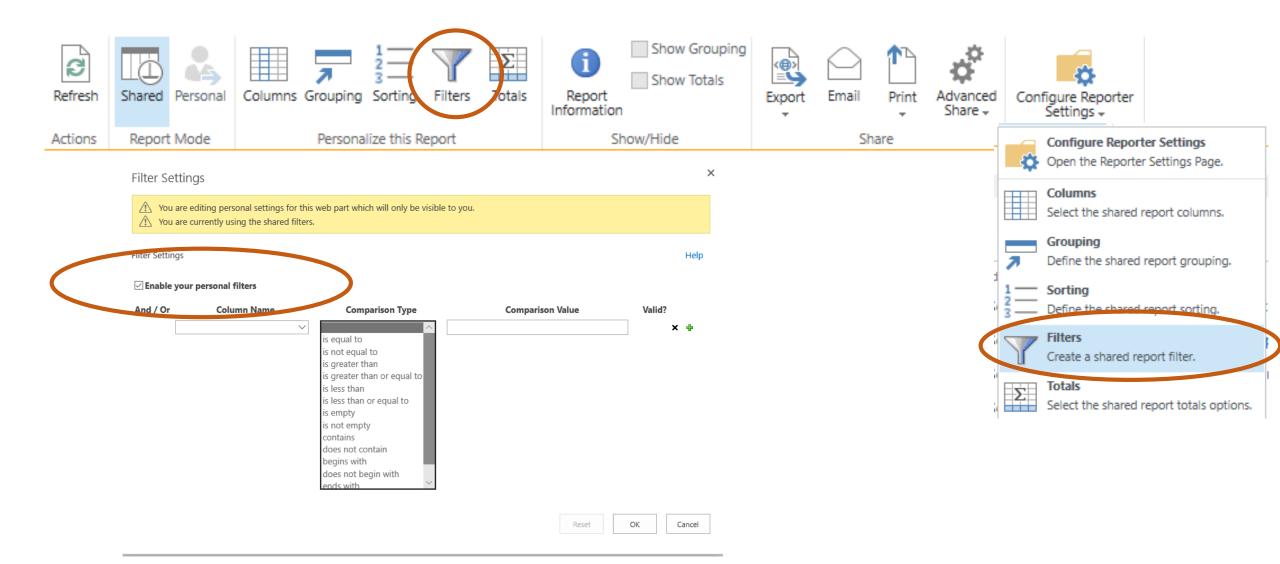
 (C, B, A, or 3, 2, 1)

OK Cancel



(i)

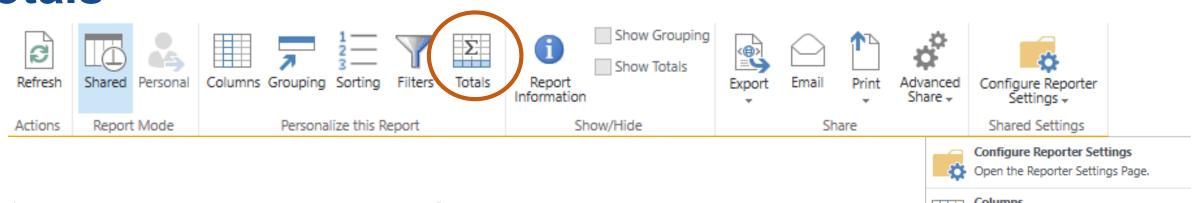
Filter



BrightWork

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Totals



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 You are editing shared settings 	for this web part which will be visible to al	l users.
Totals Settings		Help
Display Captions		
Column Name	Totals	
Title	None 🗸	
Owner	None 🗸	
Assigned To	None 🗸	
Start Date	None 🗸	
Finish Date	None 🗸	
Due Date	None 🗸	
Planned Work	None 🗸	
% Complete	None	
	Average	
	Count Maximum	OK Cancel
	Minimum	
	Std Deviation	

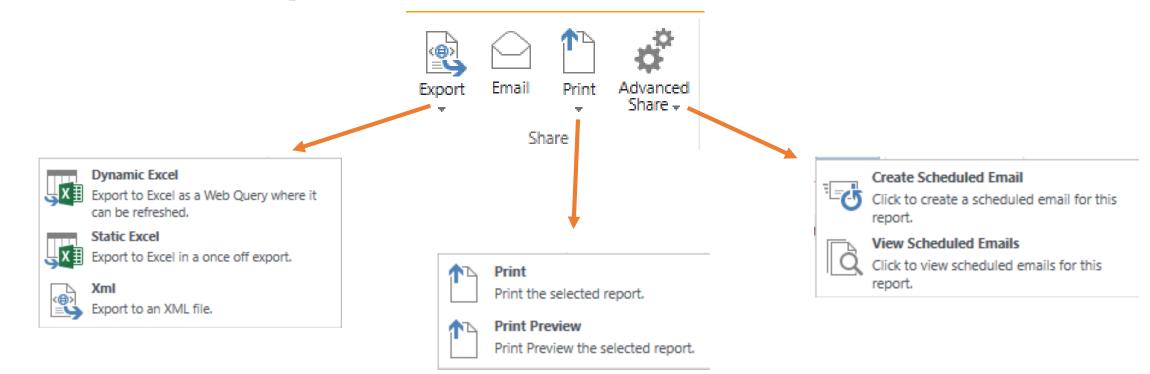
¢	Configure Reporter Settings Open the Reporter Settings Page.
	Columns Select the shared report columns.
7	Grouping Define the shared report grouping.
1 2 3	Sorting Define the shared report sorting.
Y	Filters Create a shared report filter
Σ	Totals Select the shared report totals options.



Distribute Reports



Distribute Reports



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Export to Excel

✓ Dynamic

- BrightWork Reporter allows you to create an .iqy file for the purposes of creating a refreshable data connection.
- Click **Export | Dynamic Excel** on the Reporter ribbon.
- Click Open on the File Download dialog
- Click Open on the Opening Query dialog
- Static
 - BrightWork Reporter can export directly to Microsoft Excel with report formatting (including Grouping) intact. This allows you to manipulate the report data in Excel and to share report data with individuals who do not have access to the project site where the report is displayed.
 - To export to Excel, **click Export | Static Excel** on the Reporter ribbon.
 - This will open the File dialog where you will have the option of either opening the Excel file directly or saving it to your hard-drive.
 - Please note that Reporter Filters are not supported when exporting report data
 BrightWo

Print a Report to PDF

- ✓ Not available out of the box
- ✓ Workaround available
- Print report to PDF

All Projects - Displays the BrightWork Report based on the query selected by the user Print													
Printer													
Microsoft Print to PDF						<		1 / 1	\rightarrow	Ľ	3		
Canon MG5300 series Printer													
GneNote		0	Cont Q		(1)	Project Status (2) In Progress	Status Indicator (1) On Schedule	Project Handware Upgrade (PStd)	Project Hanager Traci Grassi		Reish Dete 12/23/2019	Due Dete	
Microsoft XPS Document Writer	•		•			(2) In Progress	(1) On Schedule	Training for Finance Dept.		12/9/2019		1/1/2019	
Gend To OneNote 16		0	0		High	(3) Completed (2) In	(1) On Schedule	Setup ShareRoint Server Farm Small		10/17/2018	12/2019	1/2/2019	
		-	-	-	High	Progress (2) In	Schedule (1) On	Systems Projects Upgrade			11/1/2019		
Canon MG5300 series Printer WS					High	Progress	Schedule	Upgrade Hardware for Finance Dept.		1/15/2019	101/2019	12/28/2019	
+ Add a printer	•	0			(2) Normal	(1) Not Started	(1) On Schedule	SharePoint Hyper-V Deployment (PL)	Traci Granai		12/7/2018		
En. All pages	•	0				(2) In Progress	(1) On Schedule	Tech Refresh of Monitons In building (Pind)	Ted Gentl	8/1/2019	2/14/2020		
The whole document	•	0	0			(3) Completed	(1) On Schodule	Monthly email revemp		7/15/2017	8/9/2017		
5l-	0	0	0		(2) Normal	(1) Net Started	(1) On Schedule	Website content review		8/11/2017	12/8/2017		
Scale	0	0	0	0		(1) Not Started	(1) On Schodule	Social media compolgn		9/8/2017	10/0/2017		
Shrink to fit	0	0	_			(2) In Progress	(1) On Schedule	Web Site Build (PG)			4/14/2018		
L	°	-	-	-		(2) In Progress	(1) On Schedule	Install new OS			12/30/2019		
Margins		0		•	(2) Normal	(2) In Progress	(1) On Schedule	install new wireless network for IT		10/16/2019	12/31/2019	12/31/2019	
Normal	0	0	•	0	(2) Normal	(2) In Progress	(1) On Schedule	Hardware Inventory		10/14/2019	12/22/2019	1/3/2020	
	•	0	0		(Z) Normal	(1) Net Started	(1) On Schedule	Hardware Upgrade Globel (PStr)	Scott Foetlik	5/6/2019	1/9/2020	1/3/2020	
Headers and footers													
Off ~													

Why Schedule a Report?

Some examples:

- Sending all users a weekly email of their overdue work
- Sending all users a weekly email of recently added items
- Sending a single user a list of all overdue work
- Send managers a weekly email of projects in trouble



Advanced Share

- ✓ Missing?
 - Feature needs to be Activated
- Activate Scheduled Email Feature
 - Go to the site where you want the feature enabled
 - Settings | Site Settings
 - Click Manage Site Features
 - Activate the "BrightWork Scheduled Report Email"

The Scheduled Report Email Timer Job must be activated in Central Administration. If it is not activated, you will see a message when you try to create a scheduled report email.

Points to Note

- ✓ Gantt and Chart reports cannot be emailed
- ✓ Users require Full Control permission in the site to create scheduled report emails
- The Email Scheduler is security smart
 - user emails will only include items from the sites and lists that users have been granted access to. What they
 will get in their email is what they would see if they logged onto the page with the report
- ✓ The Scheduled Report Email site feature must be activated on a site by site basis
- All the scheduled report emails you add to a project site can be viewed and managed from the Scheduled Report Email list that is added when you activate the Scheduled Report Email site feature
 - To access the Scheduled Report Email list, click Site Contents | Scheduled Report Email
- Scheduled report emails can only be added to Project sites and cannot be added to the top site in BrightWork site collections, Template or Portfolio sites.
- ✓ The content of the Scheduled Report Email list is not included in BrightWork Site Copy
- All emails are sent on Server Time
 - If you are using a hosted solution, you should be aware of your servers local time when scheduling emails

GUICK POLLI For future Webinars what report types would you like to learn more about?





Thank you for Attending

QUESTIONS?

Use the questions pane in GoToWebinar to ask questions