BrightWork for SharePoint 2010 Time Tracker v2 List

Contents

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Usage Instructions

Overview

This document is intended to provide a quick guide to using the BrightWork Time Tracker v2 List and Reports. This is a simple add-on intended to facilitate the rapid capture and reporting of individual time records using SharePoint datasheets and BrightWork Reporting.

BrightWork has always provided a means to track time against work items and report on it. However, some customers also wanted the capability to track time spent in a timesheet. Since SharePoint datasheets are a very powerful way of capturing information quickly in a browser it makes them the ideal means for the quick capture of time spent by people on projects and on other activities. This package can be used as a starting point to create your own easy to use, and easy to report on time sheet tracker. The approach outlined here is as follows: create a Time Tracker v2 list tailored for the rapid entry of time records in your environment, add this at the appropriate level in your project hierarchy and then point people at Time Tracker list(s).

Features include: rapid entry of data, extensive defaulting of values, minimum data entry, datasheets for data entry that is specifically targeted at making it easier for individuals to enter their data, cross site and cross list reports and this guide on how to set up the Time Tracker v2 and on how to use it.

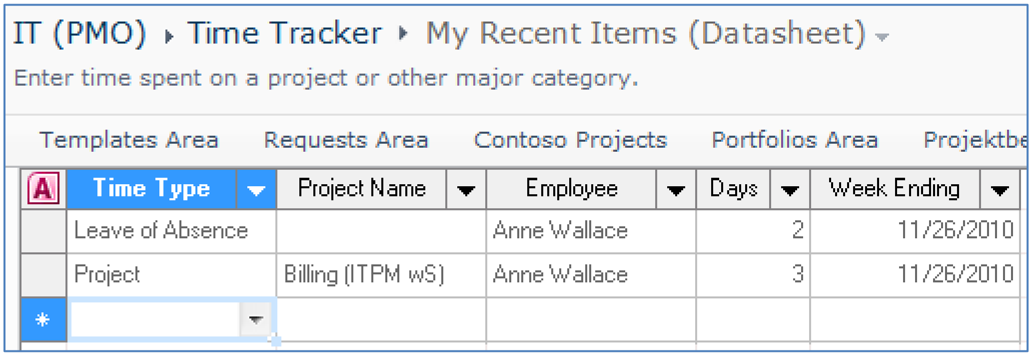
After you have completed the Setup Steps included in the Index at the end of this document you can:

1. Create new **Time Tracker v2** lists
2. Add new reporting web parts to a server running BrightWork

> A sample Time Tracker v2 list and some reports can be found in the BrightWork demo site Trial Zone by clicking here.

Time Tracker v2 List

After creating a **Time Tracker** list using the v2 template, individuals will see a 'My Recent Items (Datasheet)' with Time Tracker entries from the past 21 days and they are the named Employee. Below is an example of this datasheet.



Time Type	Project Name	Employee	Days	Week Ending
Leave of Absence		Anne Wallace	2	11/26/2010
Project	Billing (ITPM wS)	Anne Wallace	3	11/26/2010

To enter a value an individual should:

1. Open the Time Tracker list
2. Select the Time Type from the list of values. This will then default the Week Ending date to the Friday of the current week
3. Select a specific Project Name, if appropriate
4. Select their own name in the Employee column (note this is not defaulted due to the column type used)
5. Enter the number of Days spent. Days can be entered as a decimal also, e.g. 0.5 days or 1.5 days
6. Week Ending can be modified if appropriate
7. Repeat steps 1 to 6 until all the work for the week has been recorded

Time Tracker v2 List Columns

The following are the columns included in v2 of the Time Tracker list template. Note that this is highly customizable so it is likely that you will adapt this version to your local environment over time.

Column Name	**Description**	**Calculation/Default**	**Required**	**Hidden**
Open Item	Needed to access the item from a standard view	Defaults to **Click Here**	Yes	On Form
Employee[1]	Name of the person	*Blank*	No	No
Time Type	Choice of type of time tracked	Defaults to **Project**	No	No
Project Name	Choice of project	*Blank*	No	No
Days	Number of days[2] spent	*Blank*	Yes	No
Week Ending	Date used to indicate the last working date in the week	Defaults to Friday of the current week	Yes	No
Estimated Start	Calculated: 'Rough' start date. Note this is not very accurate but can be useful.	Week Ending minus the number of Days	N/A	No
Start Day	Calculated: Day value of Estimated Start	Estimated Start day value e.g. Monday	N/A	No
Finish Day	Calculated: Day value of Week Ending	Week Ending day value e.g. Friday	N/A	No
Week #	Calculated: Week number	Week number of Week Ending date	N/A	Yes
Week No.	Calculated: Display version of week number	"Week:" + Week No.	N/A	No
Work Hrs.	Calculated: Hours spent	Days * 8	N/A	No
Year/Week	Calculated: Year and Week for cross year reporting purposes	Year : Week #	N/A	Yes

Note: the other columns listed in the list settings are all hidden and are necessary but can be ignored for the purpose of the Time Tracker.

[1] Employee is a Person lookup which allows you to select employees names from the 'All People' list for the site
[2] Days can be entered as decimals e.g. quarter of a day is 0.25

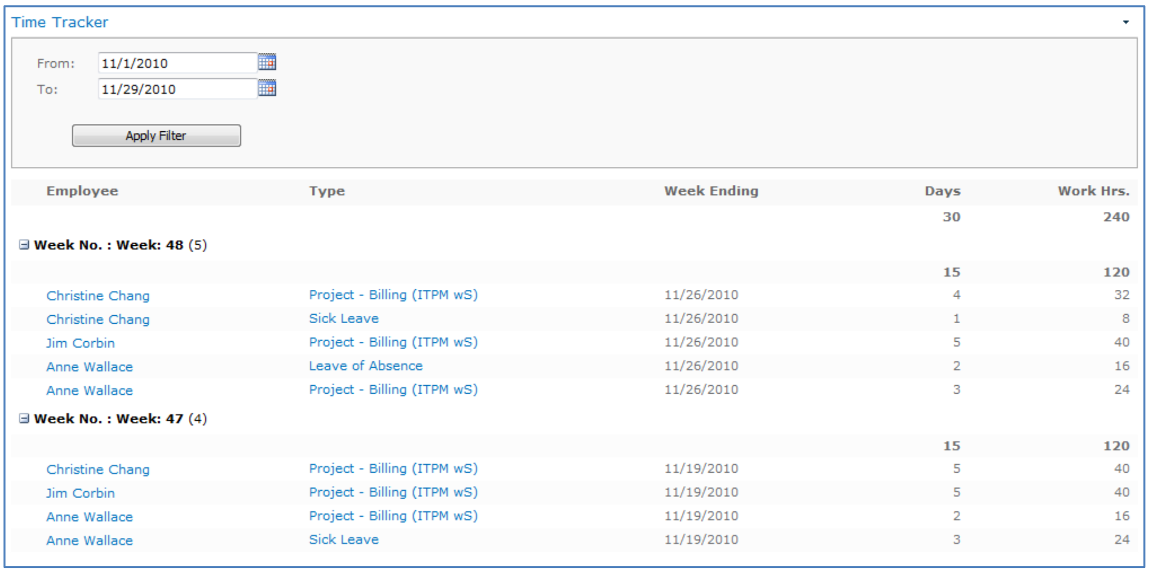
Time Tracker v2 Reports

The three Reporter Definition XML files supplied should be regarded as samples and should be either configured in Reporter web parts or tailored using the Report Editor feature in the BrightWork Reporter Library to create versions more closely aligned to local requirements.

Time Tracking Between Dates

This report reports on Time Tracker v2 lists (only) with a Week Ending date on or between the dates selected. Here are some screenshot examples of this report rendering as a List Item Report, Charts, a Gantt and a Resource Report.

1. Time Tracker List Item Report

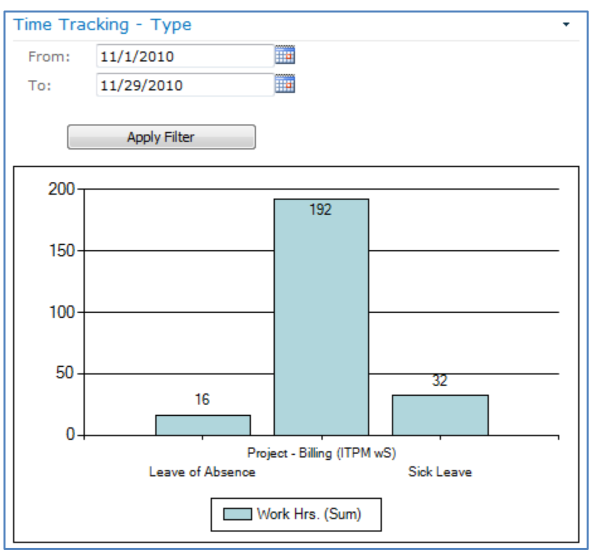


Time Tracker

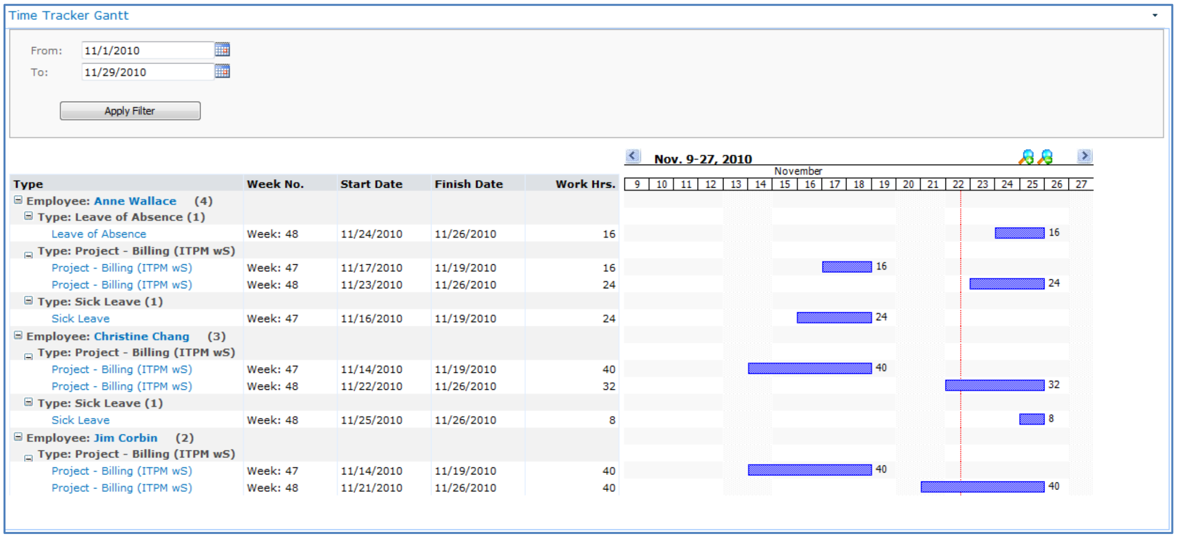
From: 11/1/2010
To: 11/29/2010
Apply Filter

Employee	Type	Week Ending	Days	Work Hrs.
			30	240
Week No. : Week: 48 (5)				
			15	120
Christine Chang	Project - Billing (ITPM wS)	11/26/2010	4	32
Christine Chang	Sick Leave	11/26/2010	1	8
Jim Corbin	Project - Billing (ITPM wS)	11/26/2010	5	40
Anne Wallace	Leave of Absence	11/26/2010	2	16
Anne Wallace	Project - Billing (ITPM wS)	11/26/2010	3	24
Week No. : Week: 47 (4)				
			15	120
Christine Chang	Project - Billing (ITPM wS)	11/19/2010	5	40
Jim Corbin	Project - Billing (ITPM wS)	11/19/2010	5	40
Anne Wallace	Project - Billing (ITPM wS)	11/19/2010	2	16
Anne Wallace	Sick Leave	11/19/2010	3	24

2. Time Tracker Chart



3. Time Tracker Gantt



Time Tracker Gantt

From: 11/1/2010

To: 11/29/2010

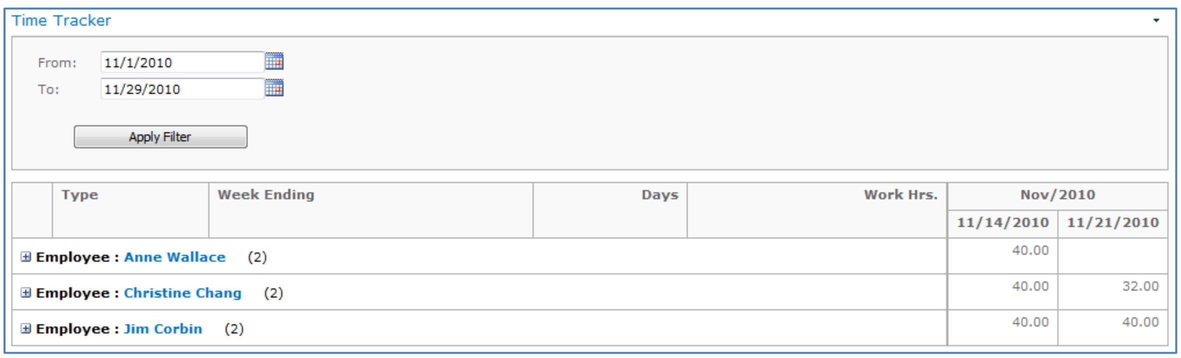
Apply Filter

Nov. 9-27, 2010

November

Type	Week No.	Start Date	Finish Date	Work Hrs.
Employee: Anne Wallace (4)				
Type: Leave of Absence (1)				
Leave of Absence	Week: 48	11/24/2010	11/26/2010	16
Type: Project - Billing (ITPM wS)				
Project - Billing (ITPM wS)	Week: 47	11/17/2010	11/19/2010	16
Project - Billing (ITPM wS)	Week: 48	11/23/2010	11/26/2010	24
Type: Sick Leave (1)				
Sick Leave	Week: 47	11/16/2010	11/19/2010	24
Employee: Christine Chang (3)				
Type: Project - Billing (ITPM wS)				
Project - Billing (ITPM wS)	Week: 47	11/14/2010	11/19/2010	40
Project - Billing (ITPM wS)	Week: 48	11/22/2010	11/26/2010	32
Type: Sick Leave (1)				
Sick Leave	Week: 48	11/25/2010	11/26/2010	8
Employee: Jim Corbin (2)				
Type: Project - Billing (ITPM wS)				
Project - Billing (ITPM wS)	Week: 47	11/14/2010	11/19/2010	40
Project - Billing (ITPM wS)	Week: 48	11/21/2010	11/26/2010	40

4. Time Tracker Resource Report



Time Tracker

From: 11/1/2010

To: 11/29/2010

Apply Filter

Type	Week Ending	Days	Work Hrs.	Nov/2010	
				11/14/2010	11/21/2010
Employee : Anne Wallace (2)				40.00	
Employee : Christine Chang (2)				40.00	32.00
Employee : Jim Corbin (2)				40.00	40.00

Time Tracking Report

The Time Tracking Report reports on Time Tracker v2 lists (only) but does not filter on any criteria. Therefore it will return all items from all Time Tracker lists. These reports can also be rendered using List Item Reports, Charts, Gantts or Resource Reports.

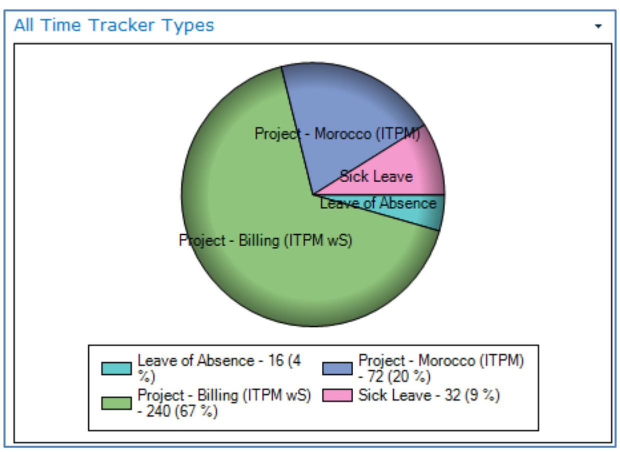
1. List Item Report

Charts Gantt Resource Standard

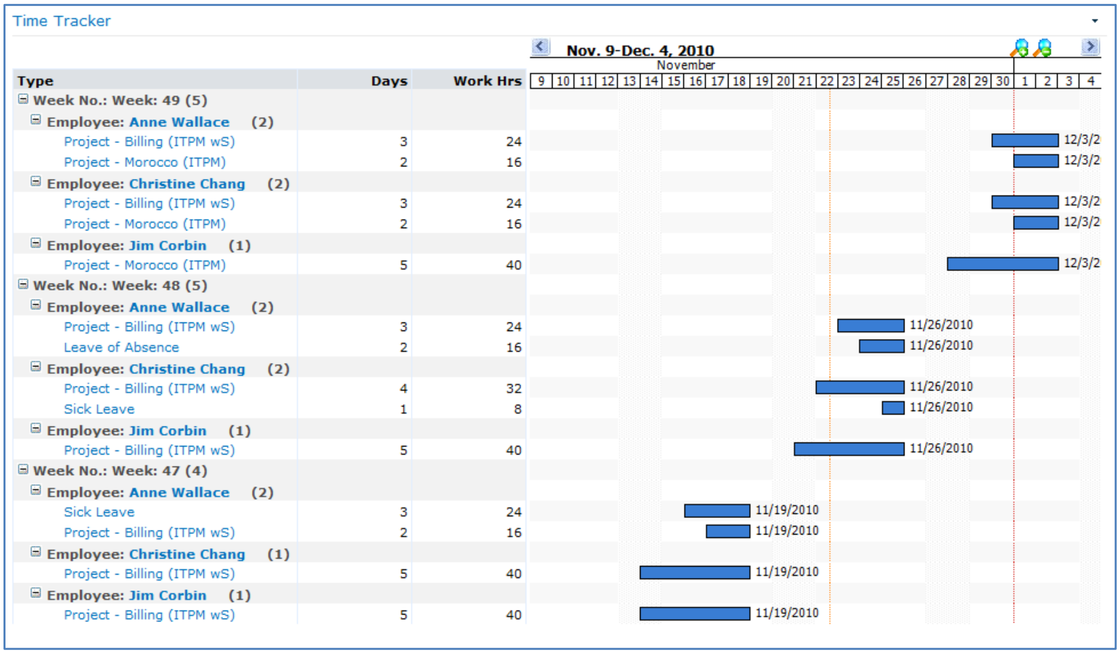
Time Tracker

Type	Employee	Start Date	Finish Date	Days	Work Hrs
				45	360
Week No. : Week: 49 (5)					
				15	120
Project - Billing (ITPM wS)	Christine Chang	11/30/2010	12/3/2010	3	24
Project - Morocco (ITPM)	Christine Chang	12/1/2010	12/3/2010	2	16
Project - Morocco (ITPM)	Jim Corbin	11/28/2010	12/3/2010	5	40
Project - Morocco (ITPM)	Anne Wallace	12/1/2010	12/3/2010	2	16
Project - Billing (ITPM wS)	Anne Wallace	11/30/2010	12/3/2010	3	24
Week No. : Week: 48 (5)					
				15	120
Project - Billing (ITPM wS)	Christine Chang	11/22/2010	11/26/2010	4	32
Sick Leave	Christine Chang	11/25/2010	11/26/2010	1	8
Project - Billing (ITPM wS)	Jim Corbin	11/21/2010	11/26/2010	5	40
Leave of Absence	Anne Wallace	11/24/2010	11/26/2010	2	16
Project - Billing (ITPM wS)	Anne Wallace	11/23/2010	11/26/2010	3	24
Week No. : Week: 47 (4)					
				15	120
Project - Billing (ITPM wS)	Christine Chang	11/14/2010	11/19/2010	5	40
Project - Billing (ITPM wS)	Jim Corbin	11/14/2010	11/19/2010	5	40
Project - Billing (ITPM wS)	Anne Wallace	11/17/2010	11/19/2010	2	16
Sick Leave	Anne Wallace	11/16/2010	11/19/2010	3	24

2. Charts



3. Gantt



Time Tracker

Nov. 9-Dec. 4, 2010

November

Type	Days	Work Hrs	
⊟ Week No.: Week: 49 (5)			
⊟ Employee: Anne Wallace (2)			
Project - Billing (ITPM wS)	3	24	12/3/2
Project - Morocco (ITPM)	2	16	12/3/2
⊟ Employee: Christine Chang (2)			
Project - Billing (ITPM wS)	3	24	12/3/2
Project - Morocco (ITPM)	2	16	12/3/2
⊟ Employee: Jim Corbin (1)			
Project - Morocco (ITPM)	5	40	12/3/2
⊟ Week No.: Week: 48 (5)			
⊟ Employee: Anne Wallace (2)			
Project - Billing (ITPM wS)	3	24	11/26/2010
Leave of Absence	2	16	11/26/2010
⊟ Employee: Christine Chang (2)			
Project - Billing (ITPM wS)	4	32	11/26/2010
Sick Leave	1	8	11/26/2010
⊟ Employee: Jim Corbin (1)			
Project - Billing (ITPM wS)	5	40	11/26/2010
⊟ Week No.: Week: 47 (4)			
⊟ Employee: Anne Wallace (2)			
Sick Leave	3	24	11/19/2010
Project - Billing (ITPM wS)	2	16	11/19/2010
⊟ Employee: Christine Chang (1)			
Project - Billing (ITPM wS)	5	40	11/19/2010
⊟ Employee: Jim Corbin (1)			
Project - Billing (ITPM wS)	5	40	11/19/2010

4. Resource Report

Time Tracker Resource Report

Type	Start Date	Finish Date	Work Hrs	Nov/2010		
				11/14/2010	11/21/2010	11/28/2010
⊟ Employee : Anne Wallace (6)				40.00	40.00	40.00
⊟ Week No. : Week: 49 (2)						40.00
Project - Billing (ITPM wS)	11/30/2010	12/3/2010	24			24.00
Project - Morocco (ITPM)	12/1/2010	12/3/2010	16			16.00
⊞ Week No. : Week: 48 (2)					40.00	
⊞ Week No. : Week: 47 (2)				40.00		
⊞ Employee : Christine Chang (5)				40.00	40.00	40.00
⊞ Employee : Jim Corbin (3)				40.00	40.00	40.00

Time Tracking My Items Between Dates

Time Tracking per Week report reports on Time Tracker v2 lists (only). This report allows you to filter the Time Tracker items with a Week Ending date on or between the dates selected and by the name selected, which defaults to the logged in user. These reports can be rendered using List Item Reports, Charts, Gantts or Resource Reports. Note that this does not filter by year.

1. List Item Report

My Time Tracker Items

User: Anne Wallace
From: 1/20/2012
To: 9/17/2012

Apply Filter

Year/Week	Type	Week Ending	Days	Work Hrs.
			15	**120**
2012: 23	Project - Morocco (ITPM)	5/7/2012	2	16
2012: 23	Project - Billing (ITPM wS)	5/7/2012	3	24
2012: 22	Leave of Absence	4/30/2012	2	16
2012: 22	Project - Billing (ITPM wS)	4/30/2012	3	24
2012: 21	Project - Billing (ITPM wS)	4/23/2012	2	16
2012: 21	Sick Leave	4/23/2012	3	24

2. Resource Report

User: Anne Wallace
From: 5/2/2012
To: 9/17/2012

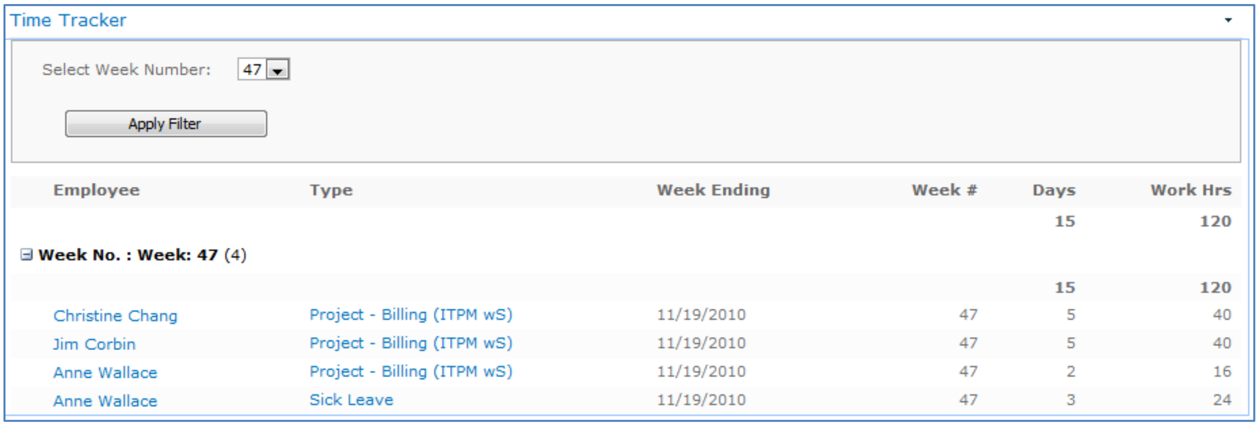
Apply Filter

Type	Start Date	Week Ending	Work Hrs.	May/2012	
				4/29/2012	5/6/2012
Week No. : Week: 23 (2)				1.50	3.50
Project - Morocco (ITPM)	5/5/2012	5/7/2012	16		2.00
Project - Billing (ITPM wS)	5/4/2012	5/7/2012	24	1.50	1.50

Time Tracking Per Week

Similarly, the Time Tracking Per Week report reports on Time Tracker v2 lists (only). This report allows you to filter the Time Tracker items returned by selecting their week number. As before, these reports can be rendered using List Item Reports, Charts, Gantts or Resource Reports. Note that this does not filter by year.

1. List Item Report



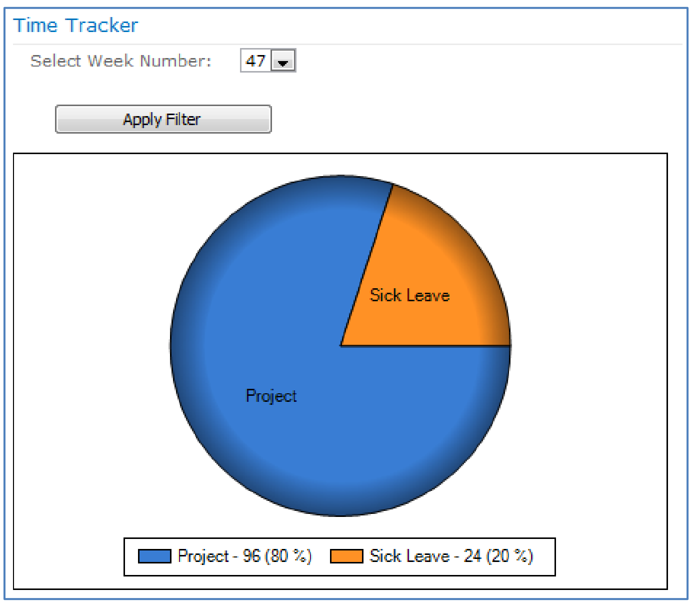
Time Tracker

Select Week Number: 47

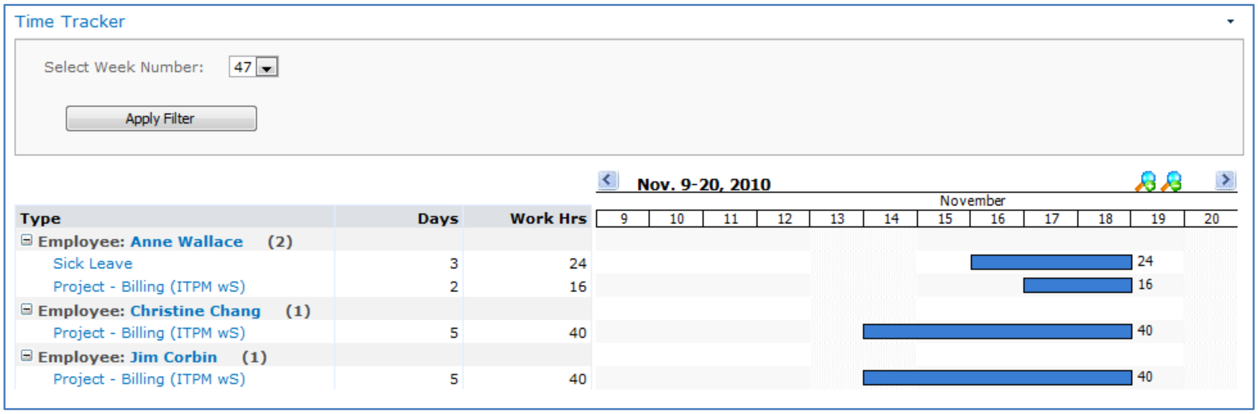
Apply Filter

Employee	Type	Week Ending	Week #	Days	Work Hrs
				15	120
Week No. : Week: 47 (4)					
				15	120
Christine Chang	Project - Billing (ITPM wS)	11/19/2010	47	5	40
Jim Corbin	Project - Billing (ITPM wS)	11/19/2010	47	5	40
Anne Wallace	Project - Billing (ITPM wS)	11/19/2010	47	2	16
Anne Wallace	Sick Leave	11/19/2010	47	3	24

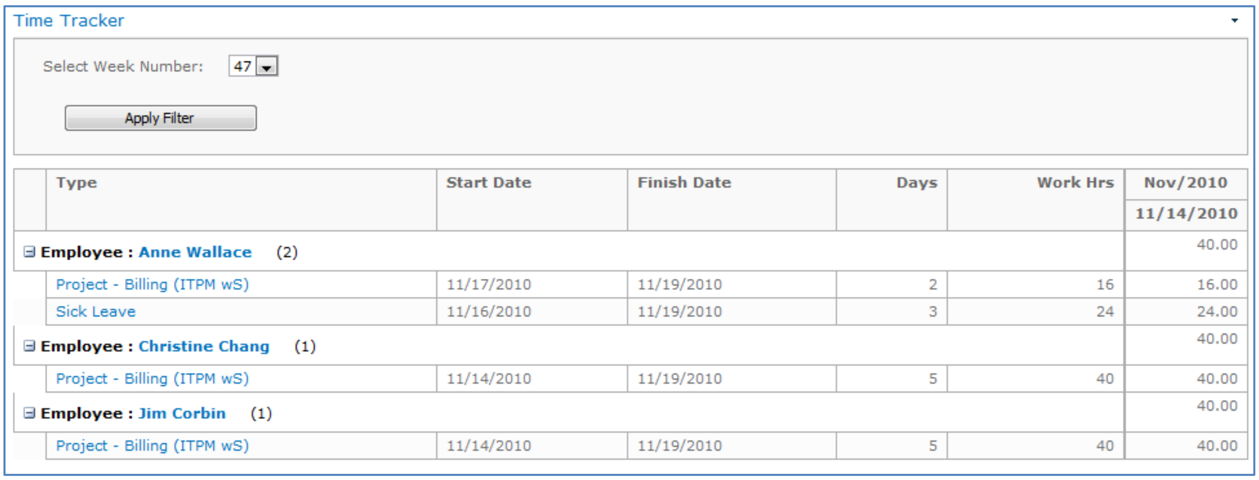
2. Chart



3. Gantt



4. Resource Report



Appendix I: Setup

This section describes how to add the Time Tracker v2 List template to a BrightWork Site Collection. This topic assumes you have a BrightWork Site Collection created.

It is useful to see the setup as a series of distinct high-level tasks that should be performed in the following sequence:

1. Obtain the Necessary Files.
2. Add Report Definition Files to BrightWork Reporter Library.
3. Add the STP File to List Template Gallery.

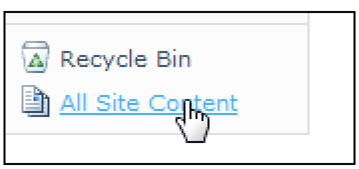
Obtain the Necessary Files

Download and unzip the 'BrightWork Time Tracker v2 List Sample Template.zip' to a suitable location on your desktop. Files contained in the zip include:

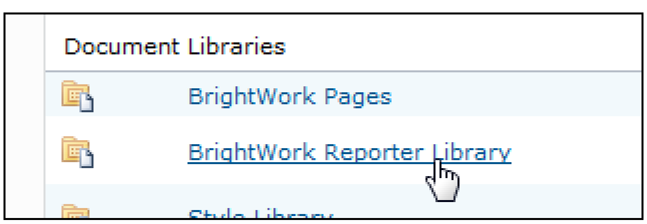
1. Time Tracker v2.stp
   This is a list template intended for capturing individual time.
2. BrightWork for SharePoint 2010 Time Tracker v2 Overview.pdf (this document).
3. Four Report files
   Reporter web part files customized for the Time Tracker list.

Add Report Definition Files to BrightWork Reporter Library

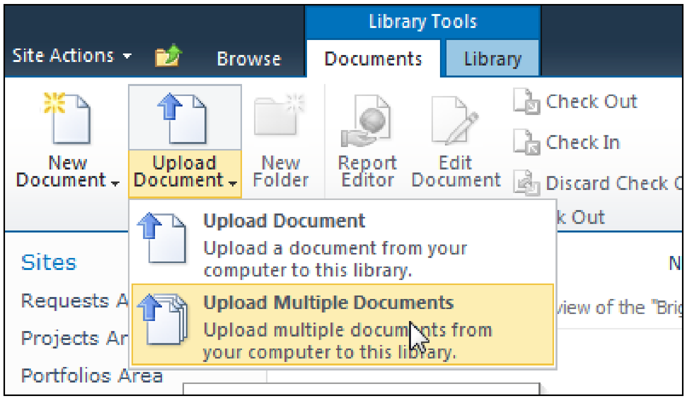
1. Navigate to the root of the BrightWork site collection and click **All Site Content** on the site collection home page.

2. Click **BrightWork Reporter Library**.

3. Click **Documents | Upload Document | Upload Multiple Documents**.



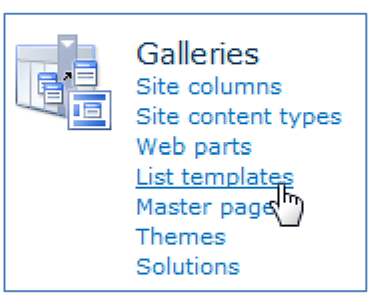
4. Click **Browse** and navigate to the location where you unzipped the files.
5. Click the **Reports** folder.
6. Select all the files and click **Open**.
7. Click **OK**.

Custom Reporter Definition Files included are:

1. Time Tracking Between Dates.xml
2. Time Tracking My Items Between Dates.xml
3. Time Tracking Per Week.xml
4. Time Tracking Report.xml

Add the STP to the List Template Gallery

1. Click **Site Actions | Site Settings** on the BrightWork site collection home page.
2. Under the Galleries section select **List templates**.

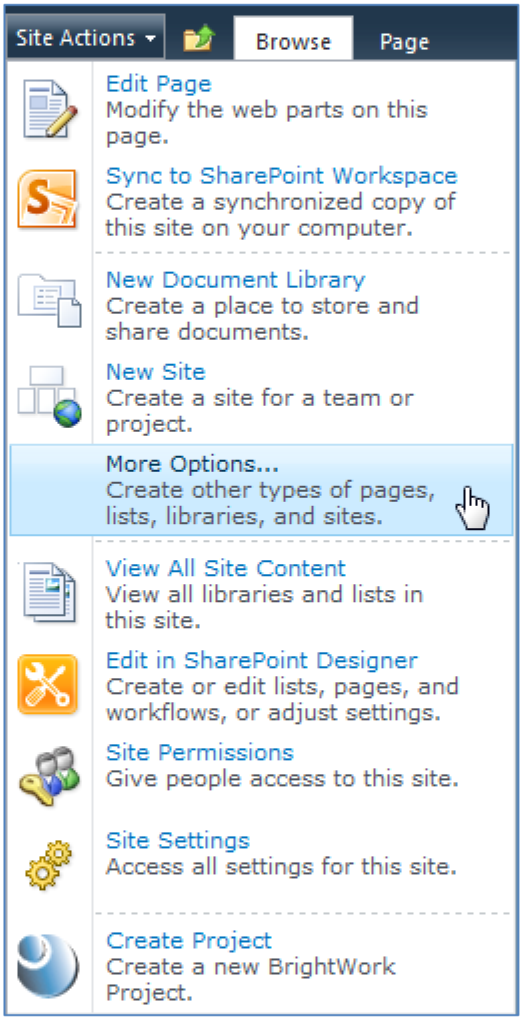


3. Select the **Documents** tab and click **Upload Document**.
4. Click **Browse** and navigate to the location where you unzipped the download file.
5. Select the **Time Tracker v2.stp** file and click **Ok**.

Appendix II: Creating a Time Tracker v2 List

To create a new Time Tracker list:

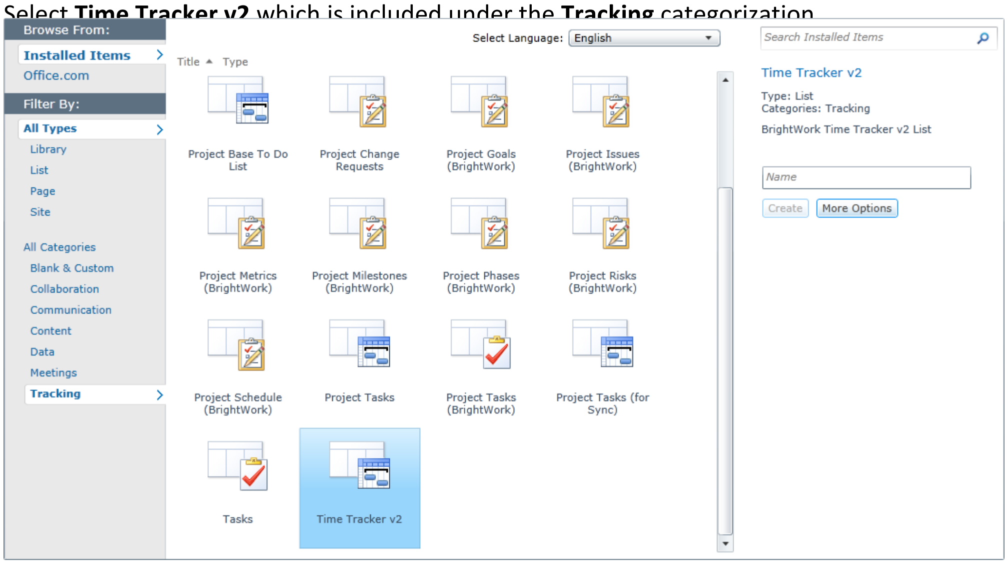
1. Open a BrightWork site. This can be a BrightWork template, a project office[3] or a project.
2. Click **Site Actions** | **More Options …** to open the Create page.



Note that depending on whether or not Silverlight is installed you may get a different user interface.

[3] See the section below on *Project Office Reporting*

3. Select **Time Tracker v2** which is included under the **Tracking** categorization.



4. Enter the list **Name** of **Time Tracker** and click on **Create.**

Note: It is recommended especially at the beginning that you name the list **Time Tracker.** This is because the reports provided are configured to look for this list by name. If you choose to use an alternative name you should update the reports to look for the alternative name using the **Report Editor**.

Configuring a Time Tracker List

Once created, it is very easy to further customize a Time Tracker list using the native SharePoint list features. For instance, it is possible to add/modify/remove fields (columns), add/modify/remove views and datasheet views and it is also possible to add background columns that can be calculated and hidden which can be very convenient for reporting purposes.

Recommended Changes

The Time Tracker v2 has some default values that should be examined in the context of your own environment. The following are the steps and columns that should be examined for local relevance.

1. First, modify the Time Tracker list by selecting **List | List Settings** in the ribbon.
2. Select the **Time Type** choice column and add appropriate values for your environment. Out of the box values are:
   - Leave of Absence
   - Project
   - Sick Leave

- Training
- Vacation

3. Select the **Project Name** choice column and add projects as appropriate.
   NOTE: if you want to have a central location for managing the list of projects you need to replace this column with a site column and manage the values there. Note that the columns internal name should be set to *ProjectName*.
4. Consider if **Estimated Start** is calculating to a value that works in your environment. You may prefer to have a start date entered manually.
5. The **Work Hrs.** column is calculated at Days * 8, so it assumes a working week of 40 hours and 8 hours per day. This can vary in different environments and this formula should be updated to reflect that if Work Hrs. is to be reported on.

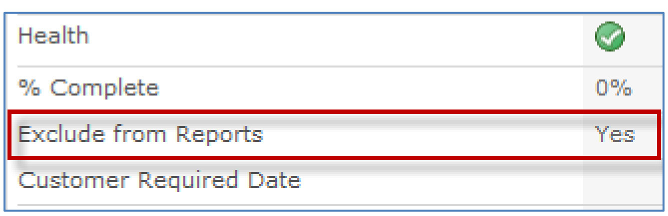
TIP: If you update the Time Tracker list design you can re-use the changes by deleting the version in the List Template Gallery and adding your new one.

Reporting on Time Tracker v2 Lists

BrightWork has extensive help on the 'Reporter Web Part' and you should reference it if you are unsure of how to add Reporter web parts to web part pages and on how to configure the Reporter web part. Specifically a description of how to use the BrightWork Reporter Library can be found in the **About the BrightWork Reporter Library** help topic.

Project Office Reporting

If Time Tracker information, entered into a list in a Project Office site, is not rendering in reports then it is likely that the Project Office's Project Statement item has its **Exclude from Reports** flag set to **Yes**.



This setting is used to exclude items in the site from reports. To change this setting and allow Time Tracker information to appear in reports:

1. In the Project Office site, open the **Project Statement** list
2. Edit the item and uncheck the **Exclude from Reports** checkbox
3. Save and close

The Time Tracker information should now be appearing in the report. If it is not appearing, then please reference the BrightWork Help for other possibilities for the cause or use the Report Profiler tool to analyse the report.