

BrightWork

LIVE WEBINAR

Demo: Optimize SharePoint 2013/2016 for Project and Portfolio Management with BrightWork

Wednesday | October 3rd

3pm BST | 11am EDT | 8am PDT



presented by
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BrightWork Solution Specialist



hosted by
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Inbound Marketing Executive



QUICK POLL!

Are you looking to extend SharePoint
for Project and Portfolio
Management?

AGENDA

- ✓ About BrightWork
- ✓ BrightWork Demo
 1. Start your projects quickly with easy to use standardized templates
 2. Get cross-project visibility with portfolio dashboards
 3. Consistently meet deadlines with automated reporting on open, late and upcoming work
- ✓ Q&A

BrightWork

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

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).
- Project Office Summary:** A table summarizing project performance across various metrics (Health, Time, Cost, Quality, Issues, Finish Date) for the period Apr. 15-Aug. 11, 2018. The table shows a mix of red (X) and green (checkmark) status indicators.
- Task List:** A section on the left side of the interface showing a list of tasks with checkboxes for completion. The tasks include: Hardware Upgrade Global, Project-Initiation, Identify-suppliers, Create-draft-budget-for-upgrade, Create-draft-plan-for-upgrade, Create-Business-Impact-Plan, (tag), Make-Proposal-Presentation, Project-Planning, and Get-Budget-Signoff.
- Calendar View:** A Gantt chart view on the right side of the interface showing project tasks and their durations. The tasks are listed as 'Anne Wallace' and 'Anne Walla' with dates ranging from 8/6/2018 to 8/10/2018.

Health	Time	Cost	Quality	Issues	Finish Date
✗	✗	✓	✗	!	8/10/2018

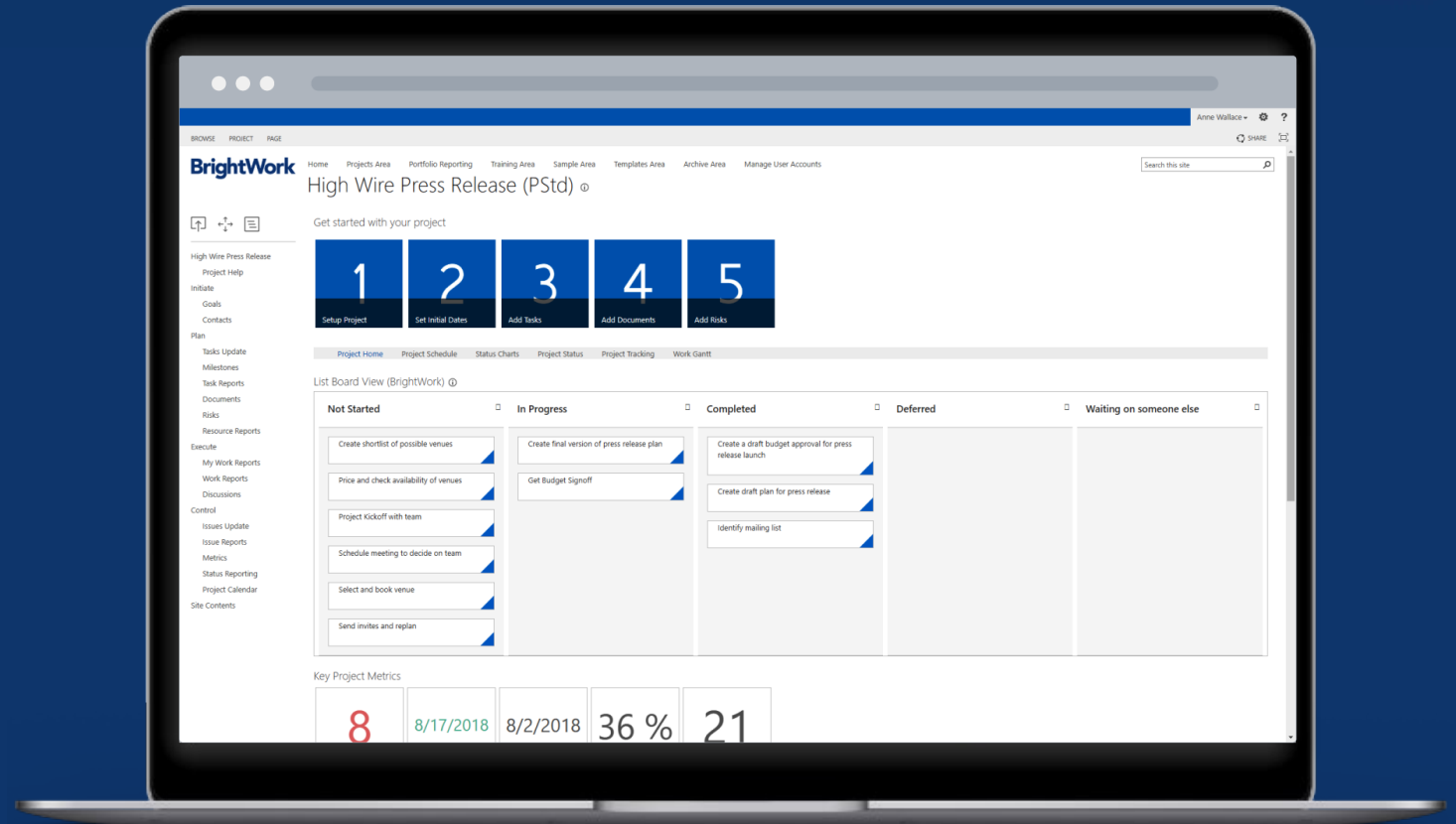
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Some of the companies we work with and have provided Project Management Solutions



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DEMO



A person is writing on a notepad with a yellow marker. The background is slightly blurred, showing a laptop and some papers. The text "QUICK POLL!" is overlaid in yellow.

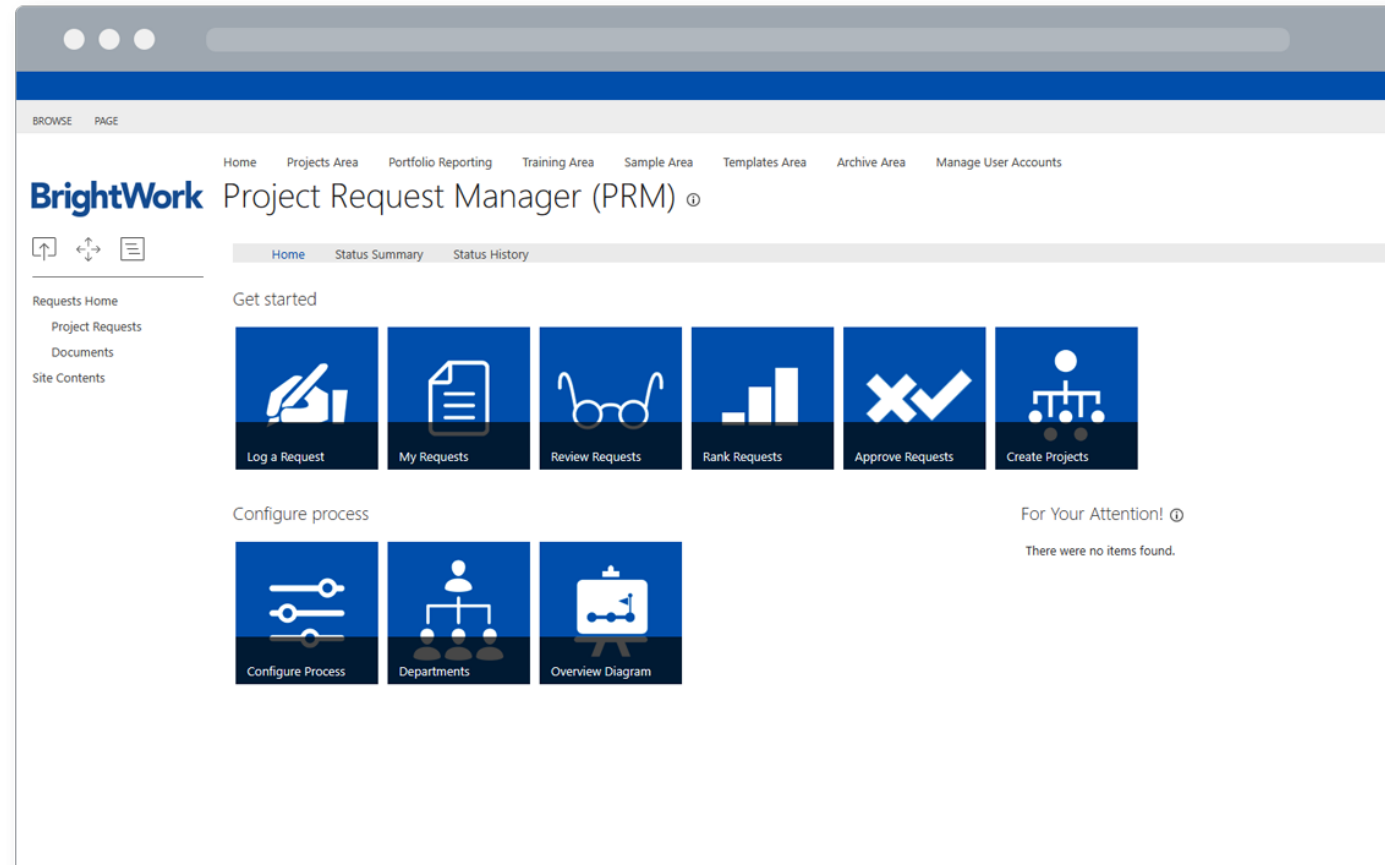
QUICK POLL!

What is the most important project management problem you have?

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Some common Project and Portfolio Management problems that BrightWork can solve

- Creating a Project Office
- Task Scheduling
- Reporting
- Configuring templates
- Project Request Management
- Template design sync



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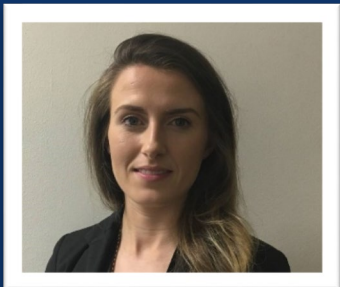
QUESTIONS?

Use the questions pane in GoToWebinar to ask questions



Thank you!

Talk to our Experts about your SharePoint needs



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APPENDIX

Bright work Model Explained

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 project management solution interface, which is built on a SharePoint-based framework.

Central Screenshot: Business Project Office (PO)

- Navigation:** Includes a top bar with 'BROWSE', 'PAGE', 'ITEMS', and 'LIST'. A secondary navigation bar lists areas: Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts.
- Project Office Home:** Features a 'Get started' section with 'Projects Tracker' and 'New Project Site' tiles. A 'Key Metrics' section shows '85 Late Items' and '9 Open Issues'.
- Project Office Summary:** A table showing project health across quarters (2017 Q3 and 2017 Q4) for projects like 'Contoso IT (PO)' and 'Contoso Marketing (PO)'. The table includes columns for Health, Time, Cost, Quality, Issues, and Finish Date.
- Project Summaries:** A detailed table listing projects such as 'Upgrade Hardware for ...', 'Small Systems Projects', 'Setup SharePoint Serve...', 'Training for Finance Dept.', and 'SharePoint Hyper-V De...'. It includes start and finish dates and a Gantt chart visualization.

Left Screenshot: Hardware Upgrade

- Navigation:** Similar to the central view, with a 'BROWSE' tab selected.
- Get started with your project:** Features two large numbered tiles: '1 Setup Project' and '2 Set Initial Data'.
- Key Project Metrics:** Shows '5 Late Items' and a date '12/13/2'.

Right Screenshot: Project - Status Charts

- Status:** A pie chart showing the distribution of project status.
- Late Items:** A section at the bottom showing a value of '0.00'.

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Control Portfolios of Projects

Successful portfolio management starts by having visibility into project statuses, resource allocation and new project requests



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.

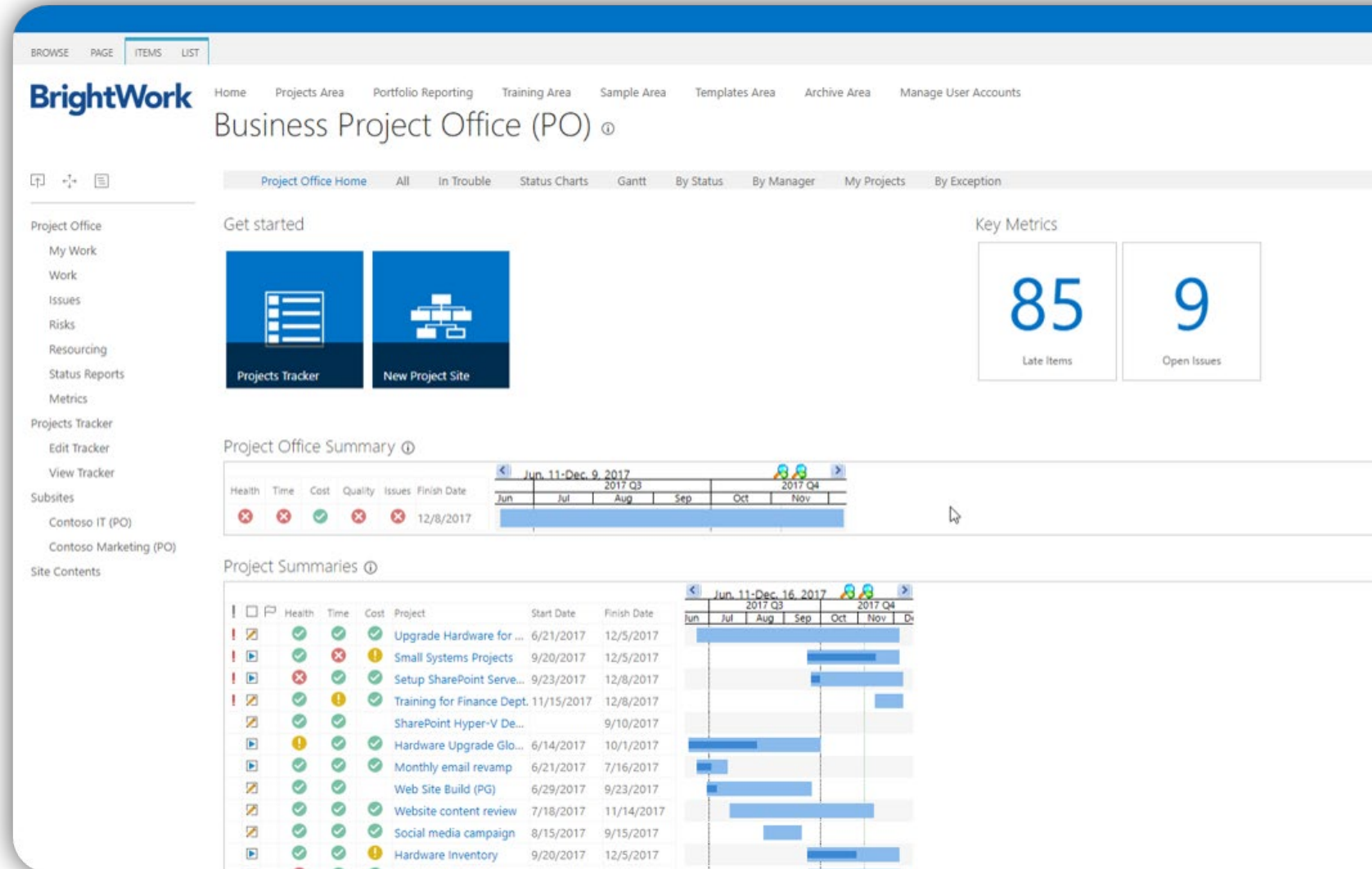
The screenshot displays the BrightWork 'New Project Requests' dashboard. The interface includes a top navigation bar with links to Home, Templates Area, Training Area, Sample Area, Projects Area, Portfolio Reporting, and Manage User Accounts. A left sidebar contains links for Requests Home, Project Requests, Documents, and Site Contents. The main content area is titled 'New Project Requests' and features a 'Get started' section with six tiles: 'Log a Request' (with a pencil icon), 'My Requests' (with a document icon), 'Review Requests' (with a magnifying glass icon), 'Rank Requests' (with a bar chart icon), 'Approve Requests' (with a checkmark icon), and 'Create Projects' (with a person icon). Below this is a 'Configure process' section with three tiles: 'Configure Process' (with a slider icon), 'Departments' (with a hierarchy icon), and 'Overview Diagram' (with a presentation board icon). On the right, a 'For Your Attention!' section shows a table of pending requests.

Reference	Title
PR-0004	New Marketing Automation Software
PR-0005	Develop New Employee Onboarding Program
PR-0006	Go Green at the Office Initiative



Track with Real-Time Portfolio Dashboards

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





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					3/6/2017	3/13/2017
	1/31/2017	2/7/2017	2/14/2017	2/21/2017	2/28/2017		
<input type="checkbox"/> Assigned To : <input type="checkbox"/> Alex Hankin (7)					100.00		
<input type="checkbox"/> List Name : Project Risks (4)							
<input type="checkbox"/> List Name : Project Tasks (3)					100.00		
<input type="checkbox"/> Assigned To : <input type="checkbox"/> Anne Wallace (13)	46.67	13.33	24.00	8.00			
<input type="checkbox"/> Assigned To : <input type="checkbox"/> Christine Chang (3)							
<input type="checkbox"/> Assigned To : <input type="checkbox"/> Dan Bacon (1)							

<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
Assigned To : <input type="checkbox"/> Alex Hankin (7)									100.00		
List Name : Project Risks (4)											
List Name : Project Tasks (3)									100.00		
Assigned To : <input type="checkbox"/> Anne Wallace (13)					46.67	13.33	24.00	8.00			
Assigned To : <input type="checkbox"/> Christine Chang (3)											
Assigned To : <input type="checkbox"/> Dan Bacon (1)											

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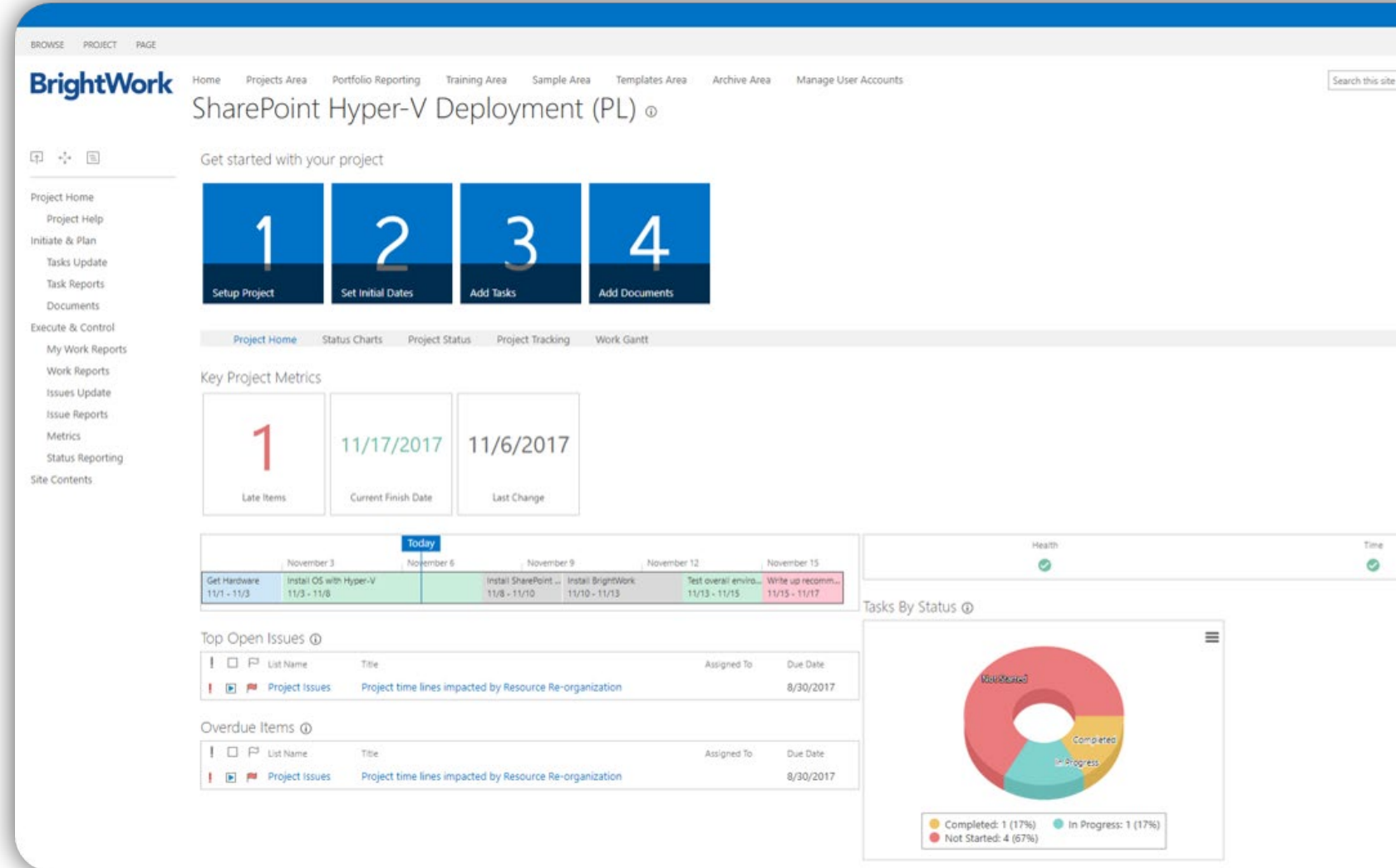
Manage Projects Successfully

Increase project success and deliver on expectations with collaborative project management templates and automated reporting.



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.





Manage with a Collaborative Toolset

The collaborative project management features in BrightWork make it as easy as possible to see what is going on in the project and keep stakeholders informed.

The screenshot displays the BrightWork project management interface. The top navigation bar includes tabs for BROWSE, PROJECT, TASKS, and LIST. The TASKS tab is active, showing 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.

Below the toolbar, a calendar view shows tasks scheduled across a timeline from August 28 to September 27. Tasks include 'Create...', 'Get Budget Signoff', 'Create final...', 'Sc...', 'Create report outlinin...', 'Cre...', and 'Upgrade hardware in s...'. A task titled 'Stop editing this list' is highlighted.

The main task list table is visible, showing columns for Task Name, Duration, Start Date, Finish Date, Predecessors, and % Complete. The first task is 'Identify suppliers' with a duration of 1.00, starting 'Yesterday' and finishing 'Yesterday'. A calendar popup is open for August 2017, showing the dates 22 and 23 highlighted.

Task Name	Duration	Start Date	Finish Date	Predecessors	% Complete
<input type="checkbox"/> Identify suppliers	1.00	Yesterday	Yesterday		
<input type="checkbox"/> Create draft budget for upgrade	2.00			Identify suppliers	
<input type="checkbox"/> Create draft plan for upgrade	3.00			Create draft budget for upgrade	
<input type="checkbox"/> Get Budget Signoff	3.00			Create draft plan for upgrade	
<input type="checkbox"/> Create final version of upgrade plan	4.00			Get Budget Signoff	
<input type="checkbox"/> Schedule meeting to decide on suppliers	2.00			Create final version of upgrade plan	
<input type="checkbox"/> Create report outlining needs				Schedule meeting to decide on	



Inform with Automated Reporting

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

Anne V

VIEW PAGE **REPORTER**

Report Mode: Shared Personal Columns Grouping Sorting Filters Totals Report Information Show Grouping Show Totals Export Email Print Configure Reporter Settings Shared Settings

Project Office Home All **In Trouble** Status Charts Gantt By Status By Manager My Projects

By Exception

Projects in Trouble ⓘ

!	☐	🚩	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>

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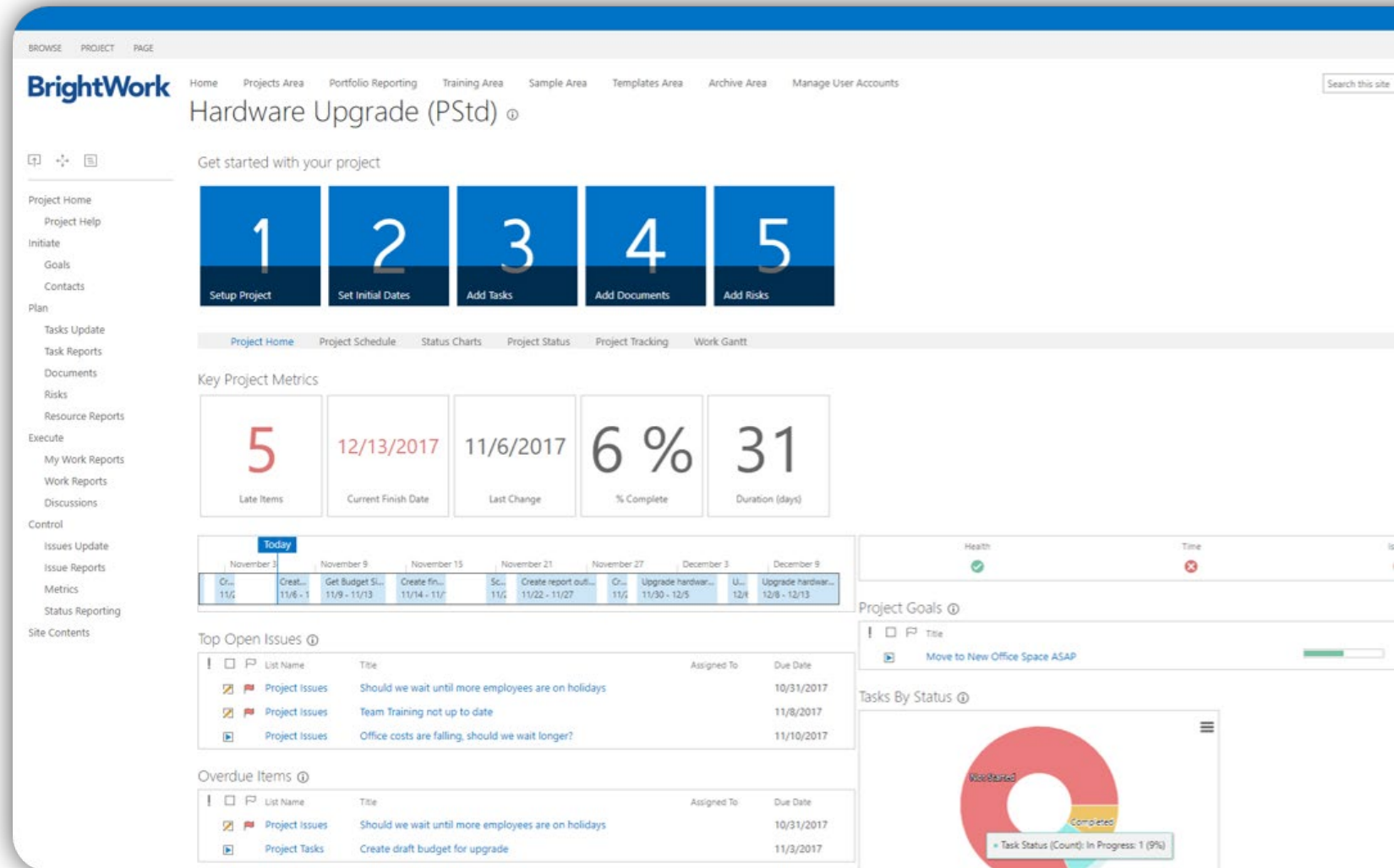
Contribute to Project Success

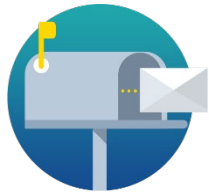
Quickly and easily contribute to project success with the simple work management system and collaborative project site.



Understand with a Team-Focused Project Site

BrightWork project sites bring all project information together in one place, so you always know what's happening on the project and never lose sight of the big picture.





Deliver with a Work Management System

BrightWork gives you a simple work management system to manage tasks and track your progress, including work that occurs outside of projects.

The screenshot displays the 'My Open Work' interface in BrightWork. At the top, there are navigation tabs: 'My Work' (selected), 'My Work Due Soon', 'My Overdue Work', 'My Gantt', and 'My Change History'. Below the tabs, the section is titled 'My Open Work' with an information icon. A dropdown menu shows the user 'Anne Wallace' and an 'Apply Filter' button. The main content area lists tasks and projects. The first project is 'Hardware Upgrade (PStd)' with 4 items. Under 'List Name : Project Goals (1)', there is a task 'Move to New Office Space ASAP' assigned to Anne Wallace with a green progress bar. Under 'List Name : Project Issues (3)', there are three tasks: 'Should we wait until more employees are on holidays' (red progress bar), 'Team Training not up to date' (red progress bar), and 'Office costs are falling, should we wait longer?' (green progress bar). The second project is 'Marketing Mini-Projects (PWT)' with 9 items. Under 'List Name : Project Issues (1)', there is a task 'Reviewer is not available until later in the month so need a new reviewer' assigned to Anne Wallace with a red progress bar.

Task/Project	Owner	Assigned To	Progress
Project : Hardware Upgrade (PStd) (4)			
List Name : Project Goals (1)			
Move to New Office Space ASAP	Anne Wallace		Green
List Name : Project Issues (3)			
Should we wait until more employees are on holidays	Anne Wallace		Red
Team Training not up to date	Anne Wallace	Anne Wallace	Red
Office costs are falling, should we wait longer?	Anne Wallace		Green
Project : Marketing Mini-Projects (PWT) (9)			
List Name : Project Issues (1)			
Reviewer is not available until later in the month so need a new reviewer	Anne Wallace		Red



Collaborate with the Microsoft SharePoint Platform

Since BrightWork is built on SharePoint, your team can leverage the powerful collaboration and document management features in SharePoint to move work forward.

The screenshot displays the BrightWork application interface, which is built on the Microsoft SharePoint platform. The top navigation bar includes tabs for BROWSE, FILES, and LIBRARY. The main header area shows the BrightWork logo and navigation links: Home, Templates Area, Training Area, Sample Area, Projects Area, Portfolio Reporting, and Manage User Accounts. The page title is "Project Documents". Below the title, there is a prompt to "new document or drag files here" and a link to "All Documents". A list of documents is displayed, including "Candidate Graphics", "House Style Guide", "Implementation Rollout Strategy" (which is selected), "Information Architecture Template", "Requirements Gathering", "Training Guide", and "Website Data". A context menu is open for the selected document, showing options: "Implementation Rollout Strat...", "Changed by you on 8/23/2017", "Shared with Workflow Account", "Hosting Support. and", "BrightWork Support", and a URL "https://bwo2.sharepoint-cloud.net/BW2597C". At the bottom of the context menu, there are buttons for "OPEN", "SHARE", and a list of actions: "View Properties", "Edit Properties", "Check Out", "Workflows", and "Download a Copy".

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Flexible Project Management

Support the successful adoption and continuous improvement of project management in your organization.



Deploy with a Low IT Burden

The familiar SharePoint interface and easy deployment options help ensure successful user and organizational adoption.

The screenshot displays the SharePoint Reporter interface, which is designed for easy deployment and use. The interface features a top navigation bar with tabs for 'BROWSE', 'PAGE', and 'REPORTER'. The 'REPORTER' tab is currently selected, showing a ribbon with various report management options. The main content area displays a report titled 'Open Issues' for the project 'Hardware Upgrade (PStd)'. The report shows a list of issues with columns for Title, Owner, and Assigned To. A sidebar on the left provides navigation links for different sections of the application. A 'Configure Reporter Settings' dropdown menu is open on the right, allowing users to customize the report's appearance and data.

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.

!	□	🚩	Title	Owner	Assigned To
Project : Hardware Upgrade (PStd) (3)					
List Name : Project Issues (3)					
✎	🚩		Should we wait until more employees are on holidays	□ Anne Wallace	<div></div>
✎	🚩		Team Training not up to	□ Anne Wallace □ Anne Wallace	<div></div> 8/23/2017 8/26/2017 8/29/2017



Coordinate with Best-Practice Project Management Templates

With the BrightWork templates, processes do not have to be reinvented for every project. They are embedded right into the template out-of-the-box and can be adjusted as needed.

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 screenshot displays the BrightWork web application interface for managing project requests. The top navigation bar includes links for BROWSE, PAGE, and various functional areas: Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts. The main heading is 'New Project Requests' with an information icon. Below this, a sub-navigation bar shows 'Home', 'Status Summary', and 'Status History'. The left sidebar contains a 'Requests Home' section with links to 'Project Requests', 'Documents', and 'Site Contents'. The main content area is divided into two sections: 'Get started' and 'Configure process'. The 'Get started' section features six blue-tinted icons with labels: 'Log a Request' (pencil and document), 'My Requests' (document with lines), 'Review Requests' (glasses), 'Rank Requests' (bar chart), 'Approve Requests' (checkmark and X), and 'Create Projects' (organizational chart). The 'Configure process' section includes three icons: 'Configure Process' (gear and document), 'Departments' (organizational chart), and 'Overview Diagram' (screen with chart). On the right side, a 'For Your Att' section shows a 'Reference' table with a 'Status : Draft' filter and two entries: 'PR-0001' and 'PR-0002'.

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Home Projects Area Portfolio Reporting Training Area Sample Area Templates Area Archive Area Manage User Accounts

New Project Requests ⓘ

BROWSE PAGE

Home Status Summary Status History

Get started

- Log a Request
- My Requests
- Review Requests
- Rank Requests
- Approve Requests
- Create Projects

Configure process

- Configure Process
Configure the project request management process.
- Departments
- Overview Diagram

For Your Att

Reference

Status : Draft

PR-0001

PR-0002

The BrightWork Approach



Start

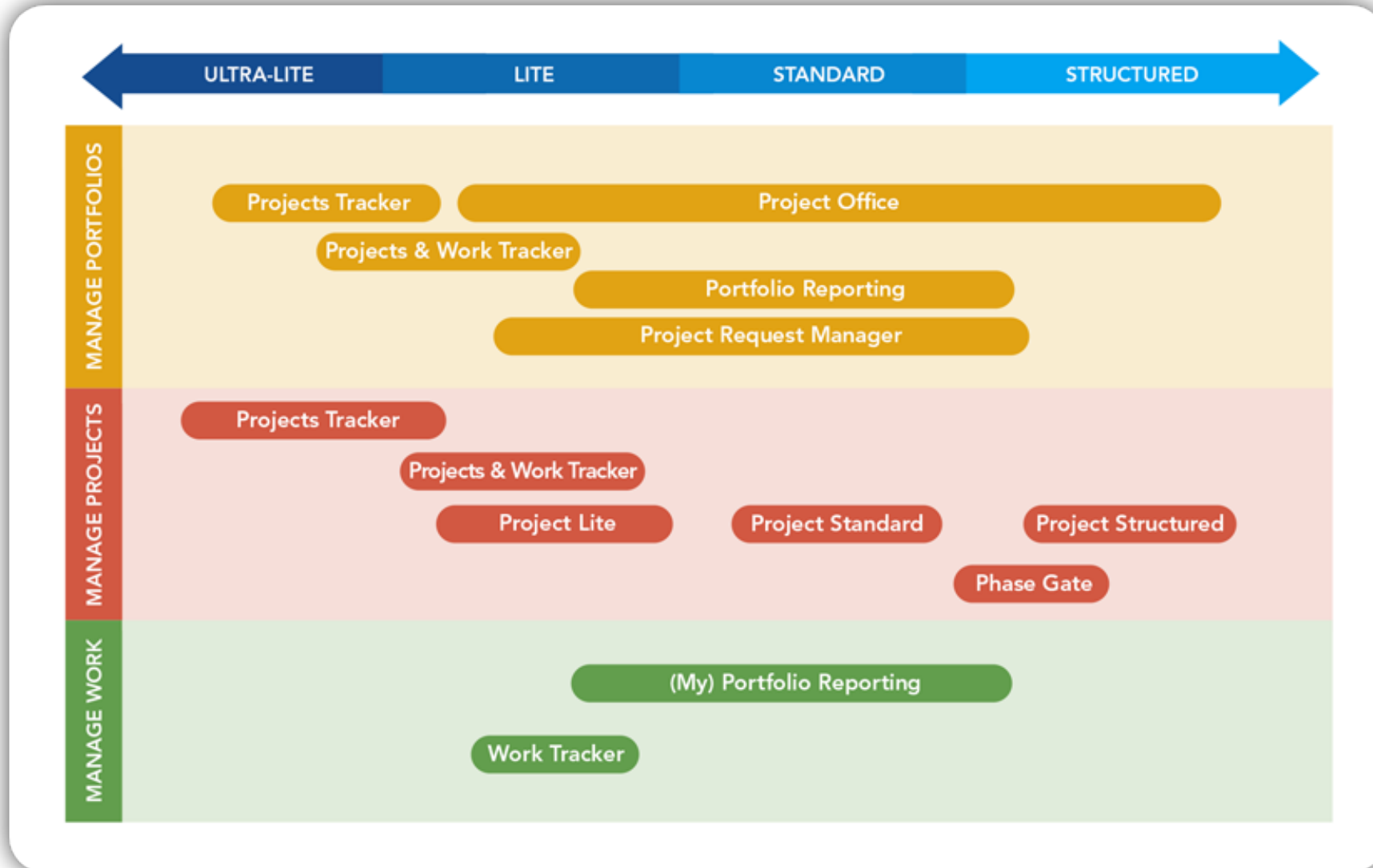
**Deliver Immediate
Visibility & Control**



Evolve

**Grow Organizational
Project Management**

BrightWork Templates Spectrum

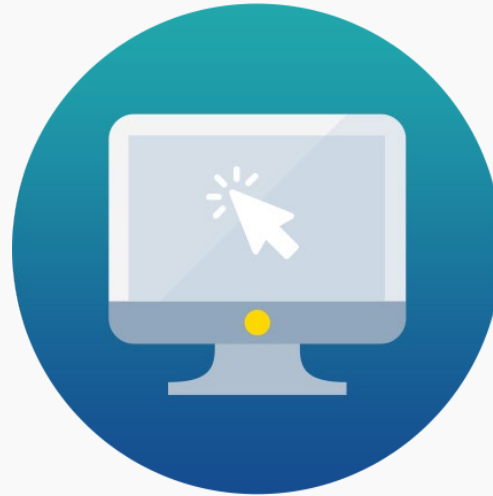


Learn More About BrightWork



Start Free Trial

Test-drive the full BrightWork solution with our free 30-day trial.



Schedule a Demo

Talk to a BrightWork Solution Specialist about your specific needs.



Learn

Read about the BrightWork framework for collaborative project management.

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www.brightwork.com