

# BrightWork

LIVE WEBINAR

## Managing a Project with the Free SharePoint Project Management Template from BrightWork

Wednesday | November 7<sup>th</sup>



presented by  
**Traci Grassi**  
BrightWork Solution Specialist



hosted by  
**Micheál Clesham**  
Inbound Marketing Executive

A person is sitting at a desk, writing on a small notepad with a yellow highlighter. A laptop is visible in the background. The image is overlaid with a semi-transparent dark grey filter.

**QUICK POLL!**

Have you installed the BrightWork  
Free Template?

# AGENDA

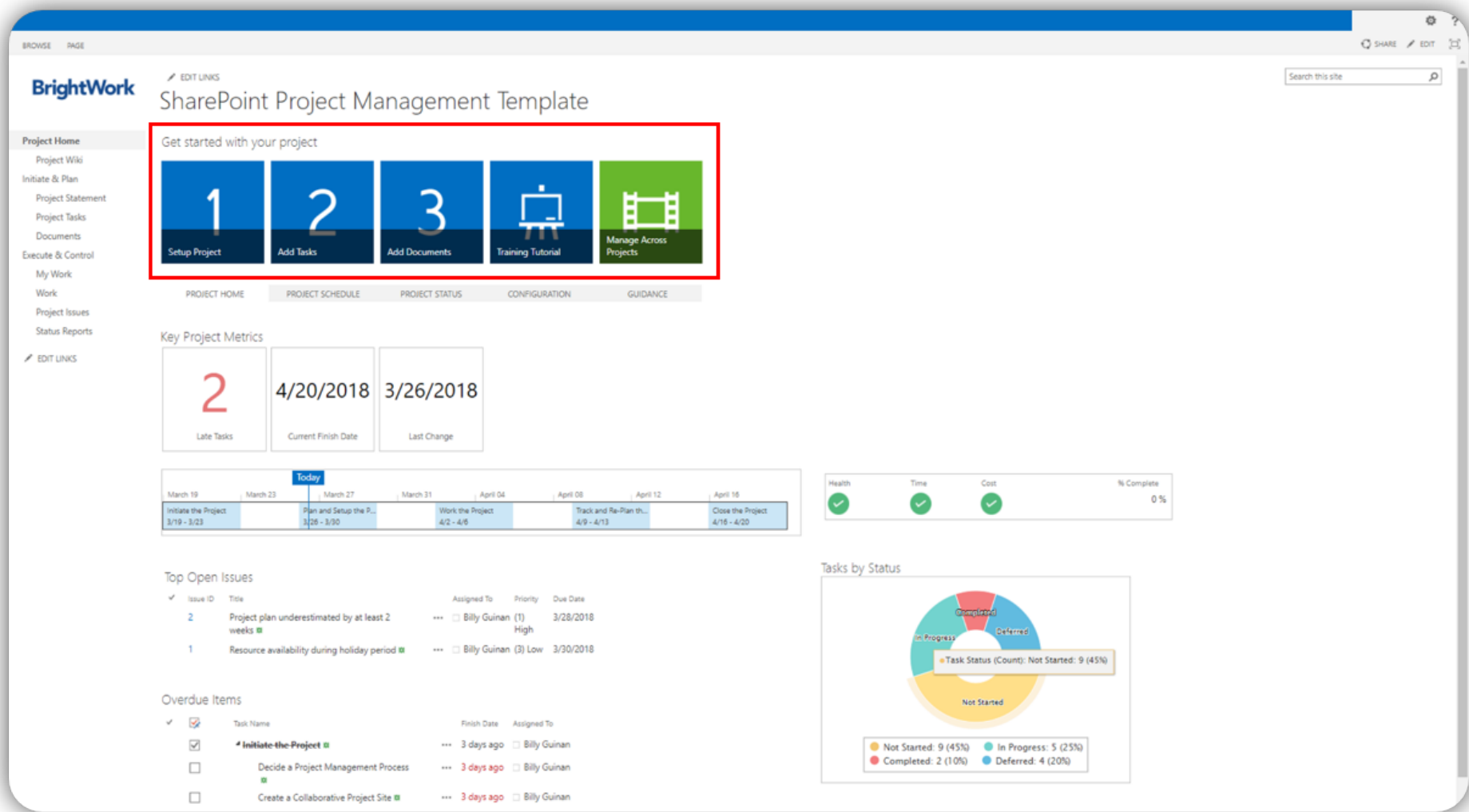
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- ✓ What's included in the Free Template
- ✓ Managing a project with the Free Template
  - Download and install the template
  - Initiate the project (create project site)
  - Plan the project
  - Track the Project
  - Re-plan the project
- ✓ Q&A

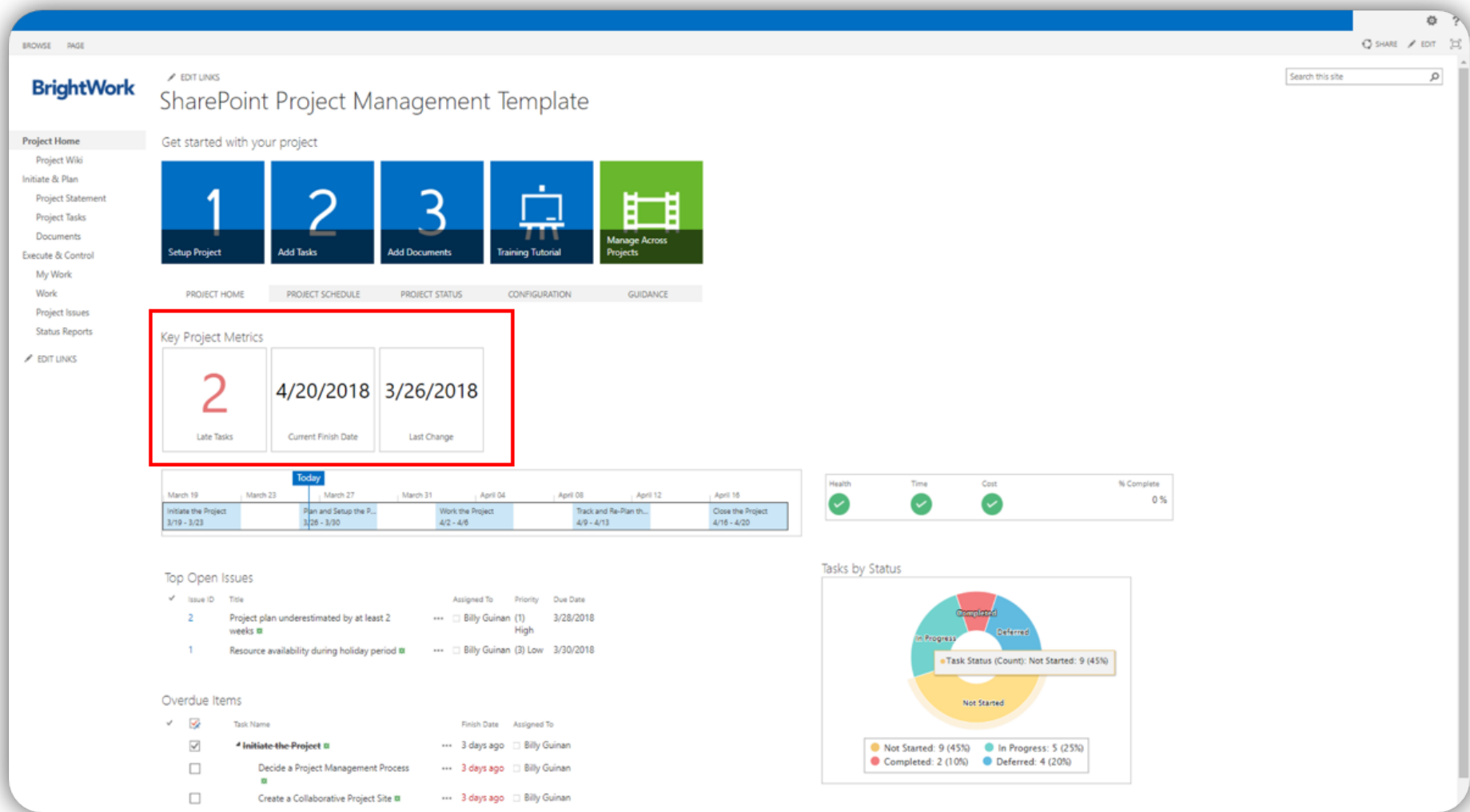
**BrightWork**

**What's in the free  
template!**

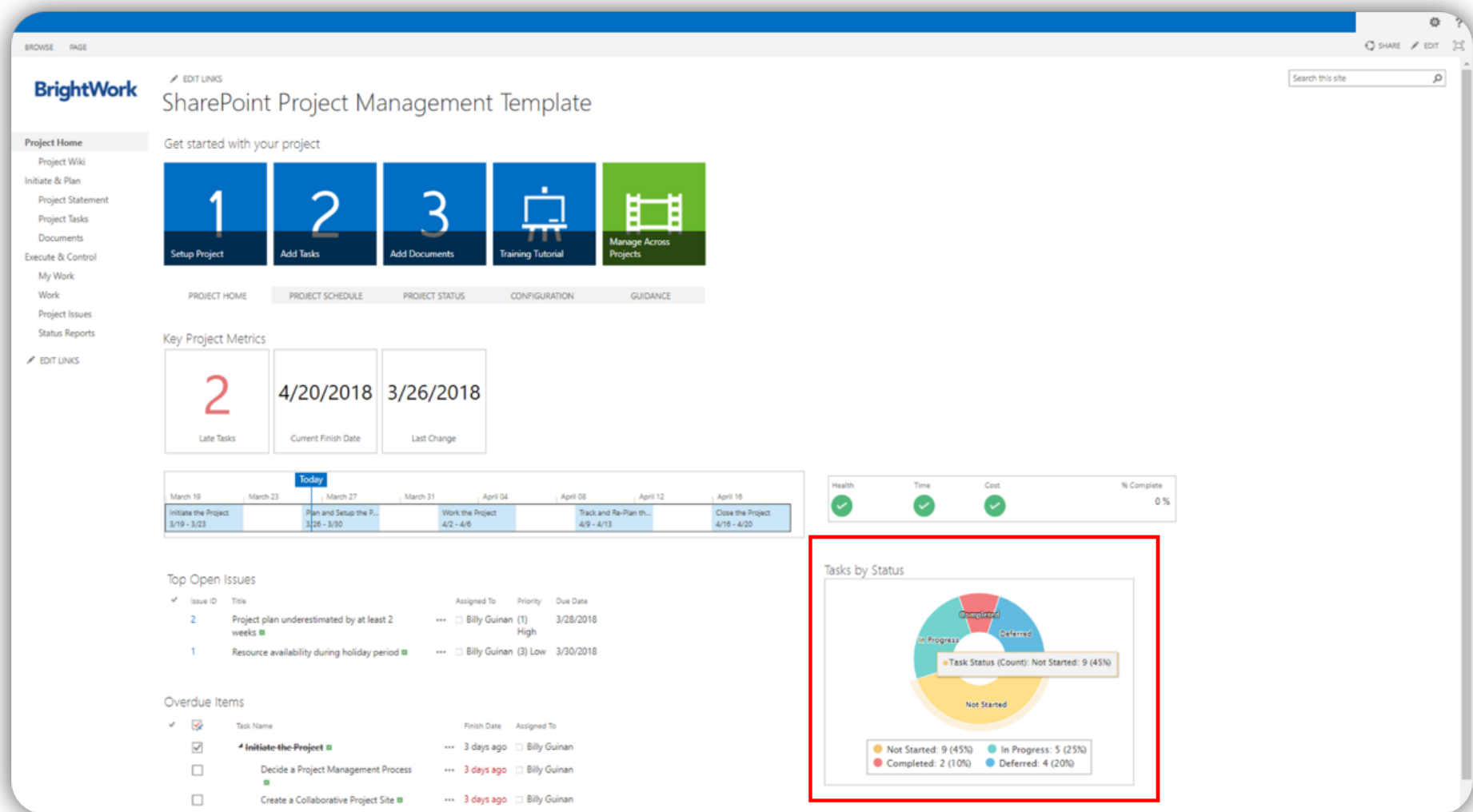
# Getting Started Tiles



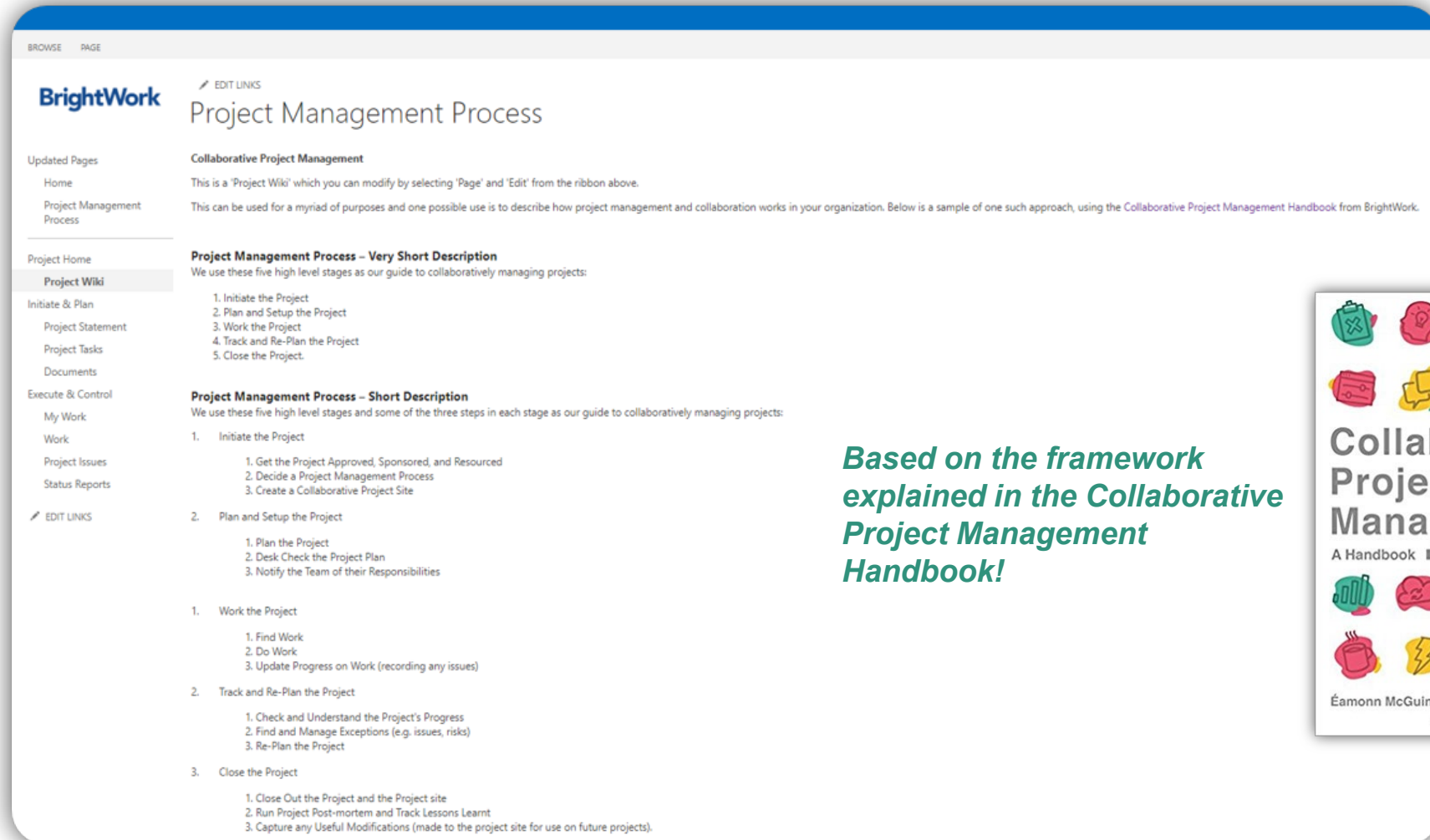
# Key Project Metric Tiles



# Tasks By Status Chart



# Project Management Guidance Included in the Wiki



The screenshot shows a web interface for the BrightWork Wiki. The page title is "Project Management Process". On the left, there is a sidebar with a "Project Wiki" section containing links to "Project Home", "Project Statement", "Project Tasks", "Documents", "Execute & Control", "My Work", "Work", "Project Issues", and "Status Reports". The main content area is titled "Project Management Process" and includes an "EDIT LINKS" button. Below the title, there is a section for "Collaborative Project Management" with a brief description. This is followed by a "Project Management Process – Very Short Description" section, which lists five high-level stages: 1. Initiate the Project, 2. Plan and Setup the Project, 3. Work the Project, 4. Track and Re-Plan the Project, and 5. Close the Project. The final section is "Project Management Process – Short Description", which provides more detail on each stage, including sub-steps like "Get the Project Approved, Sponsored, and Resourced" and "Find and Manage Exceptions (e.g. issues, risks)".

**Project Management Process**

**Collaborative Project Management**

This is a 'Project Wiki' which you can modify by selecting 'Page' and 'Edit' from the ribbon above.

This can be used for a myriad of purposes and one possible use is to describe how project management and collaboration works in your organization. Below is a sample of one such approach, using the [Collaborative Project Management Handbook](#) from BrightWork.

**Project Management Process – Very Short Description**

We use these five high level stages as our guide to collaboratively managing projects:

1. Initiate the Project
2. Plan and Setup the Project
3. Work the Project
4. Track and Re-Plan the Project
5. Close the Project.

**Project Management Process – Short Description**

We use these five high level stages and some of the three steps in each stage as our guide to collaboratively managing projects:

1. Initiate the Project
  1. Get the Project Approved, Sponsored, and Resourced
  2. Decide a Project Management Process
  3. Create a Collaborative Project Site
2. Plan and Setup the Project
  1. Plan the Project
  2. Desk Check the Project Plan
  3. Notify the Team of their Responsibilities
1. Work the Project
  1. Find Work
  2. Do Work
  3. Update Progress on Work (recording any issues)
2. Track and Re-Plan the Project
  1. Check and Understand the Project's Progress
  2. Find and Manage Exceptions (e.g. issues, risks)
  3. Re-Plan the Project
3. Close the Project
  1. Close Out the Project and the Project site
  2. Run Project Post-mortem and Track Lessons Learnt
  3. Capture any Useful Modifications (made to the project site for use on future projects).

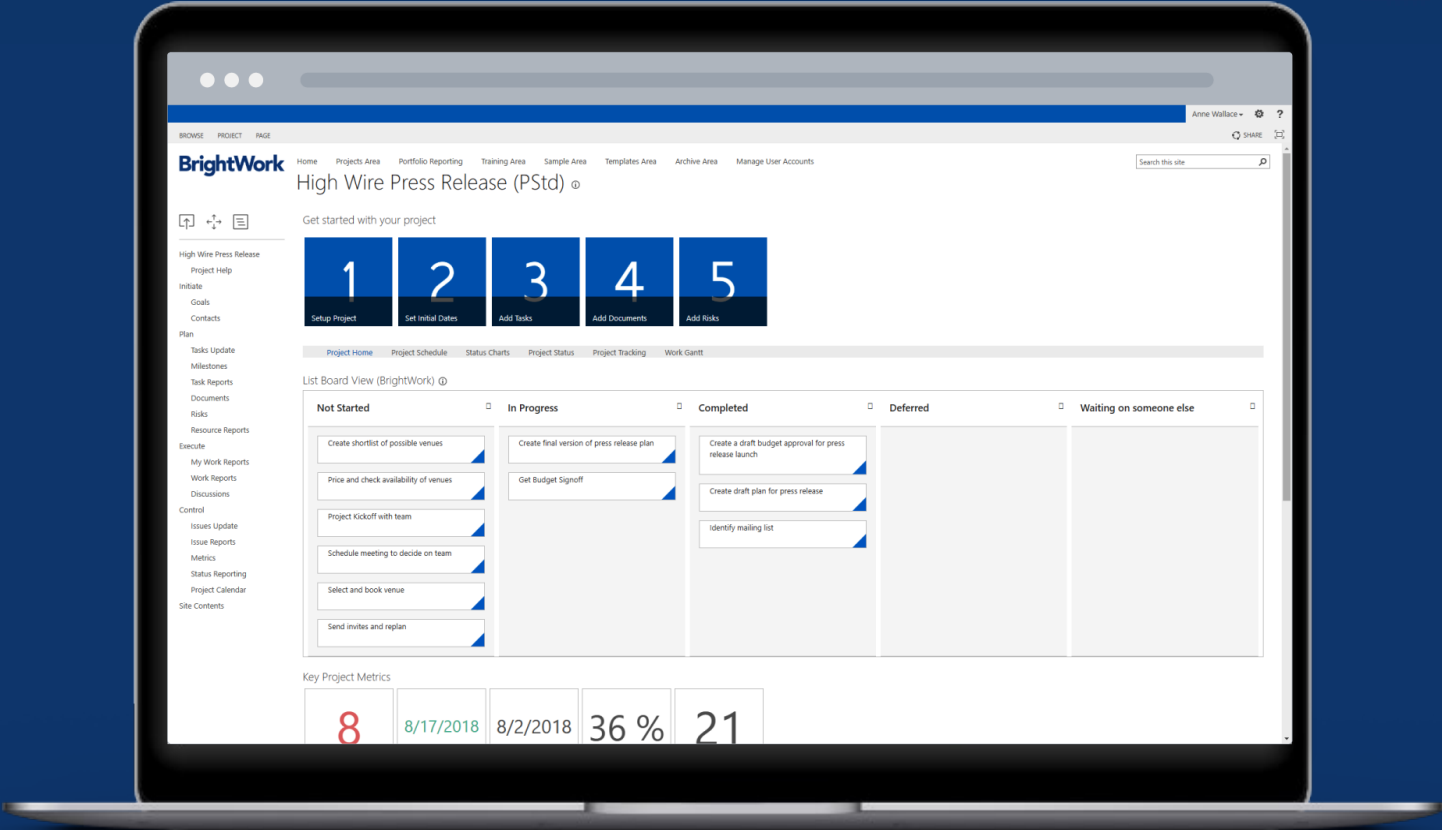
*Based on the framework explained in the Collaborative Project Management Handbook!*





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DEMO



# BrightWork

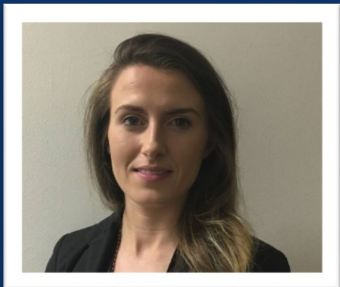
## QUESTIONS?

Use the questions pane in GoToWebinar to ask questions



# Thank you!

## Talk to our Experts about your SharePoint needs



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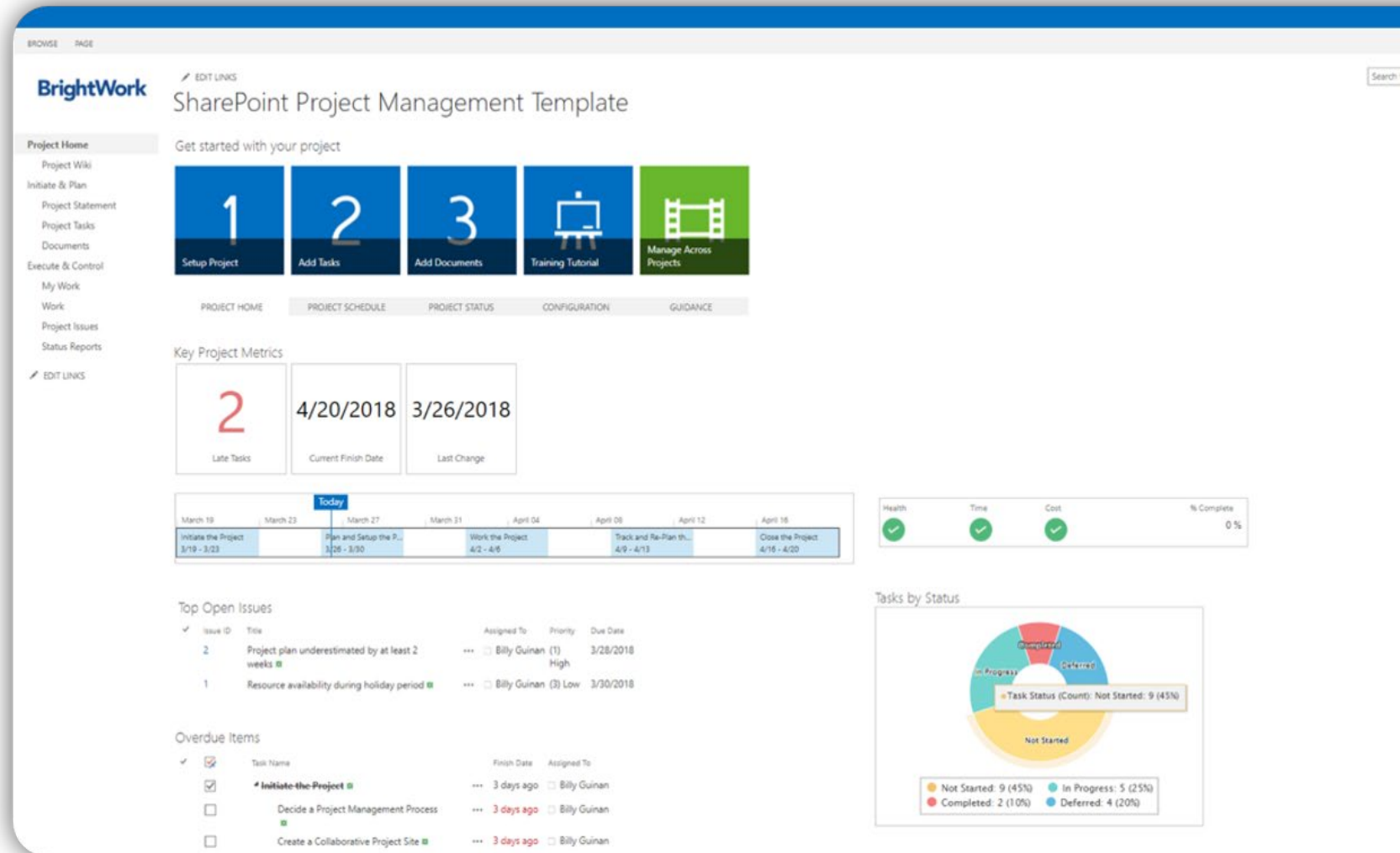
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## APPENDIX

Free Template Explained

# About The Free Template

The **Free SharePoint Project Management Template** is a SharePoint template that is pre-configured to manage a project collaboratively with your team.

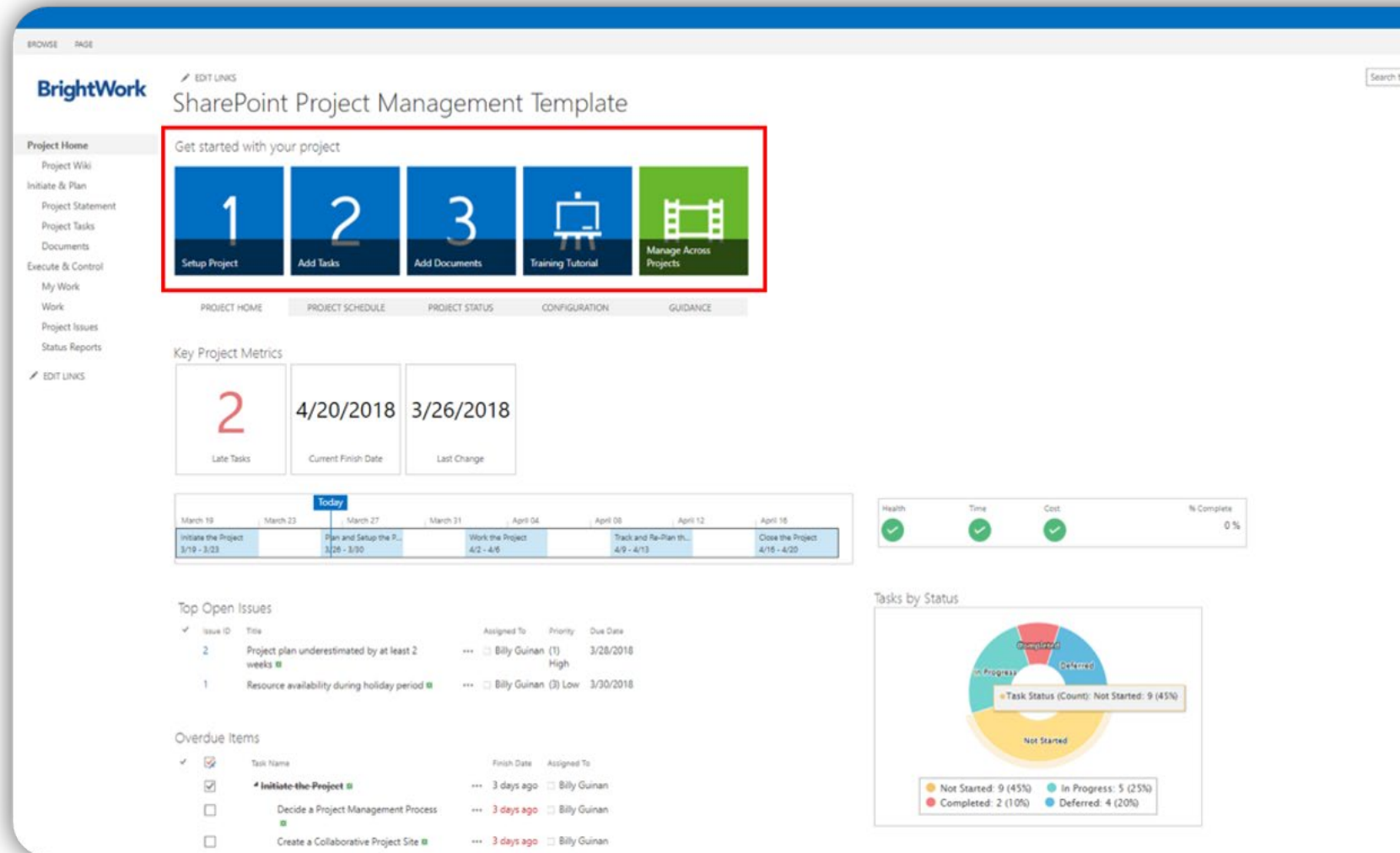


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# **Setup Your Collaborative Project Site**

# Getting Started Tiles

The **Getting Started Tiles** guide you through the project management process, including updating the Project Statement, adding tasks, and managing deliverables.





# Update the Project Statement


**Update the Project Statement** so your team knows the goals and objectives of the project.

BROWSE

EDIT

Commit

Clipboard

Actions

Project Home

Project Wiki

Initiate & Plan

Project Statement

Project Tasks

Documents

Execute & Control

My Work

Work

Project Issues

Status Reports

EDIT LINKS

Project Name \*

Description

Customer Organization

Project Manager

Project Type

Status

Date Due

Project Assumptions

New Website Design Project

Design and implement a new website with new visual identity.

Marketing

Billy Guinan x

Marketing

(2) In Progress

4/20/2018

Created at 3/26/2018 11:48 AM by Rory Martin

Last modified at 3/26/2018 11:48 AM by Rory Martin

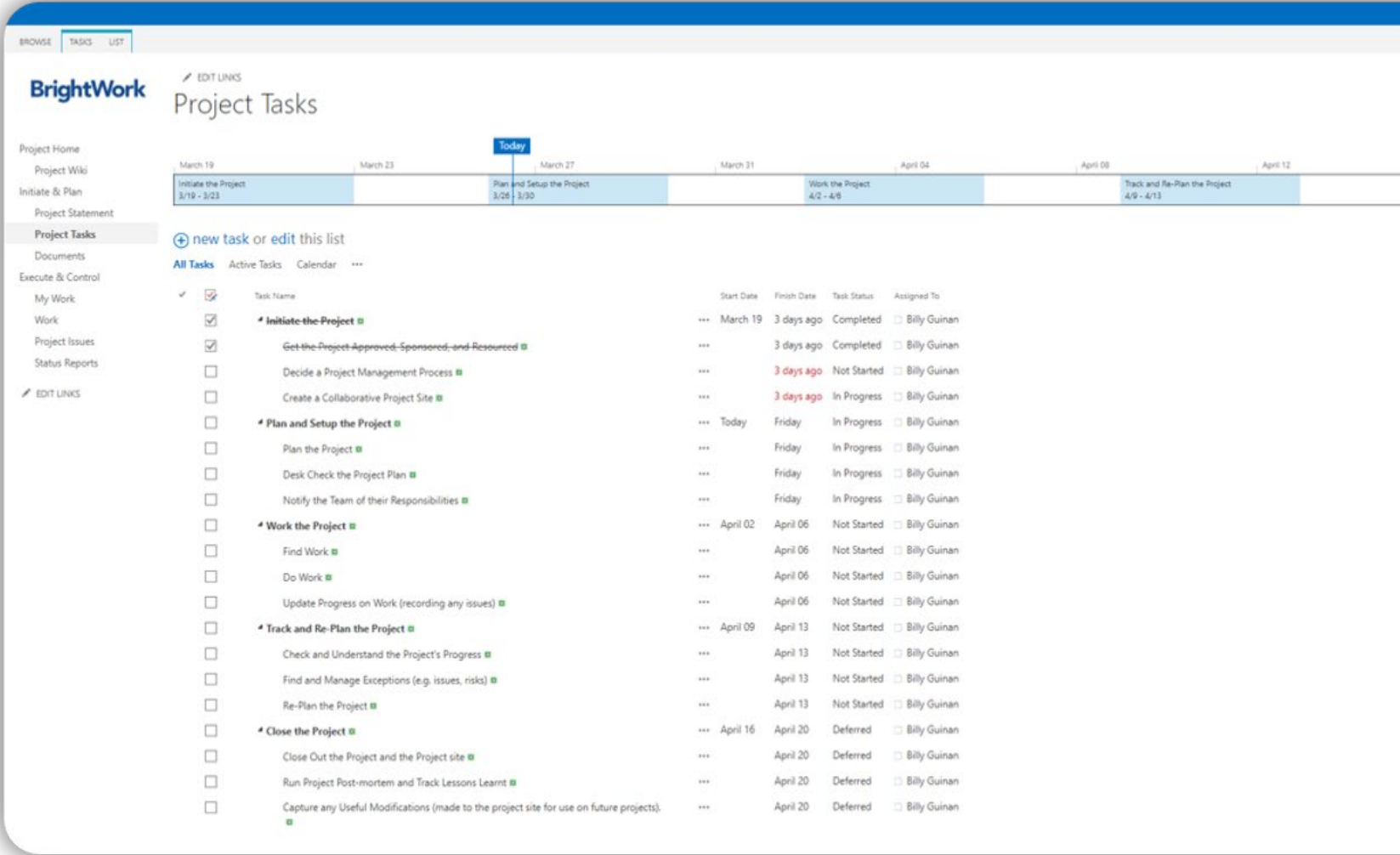
Save

Cancel



# Plan the Project Schedule

Use the **Project Tasks List** to build your project schedule.

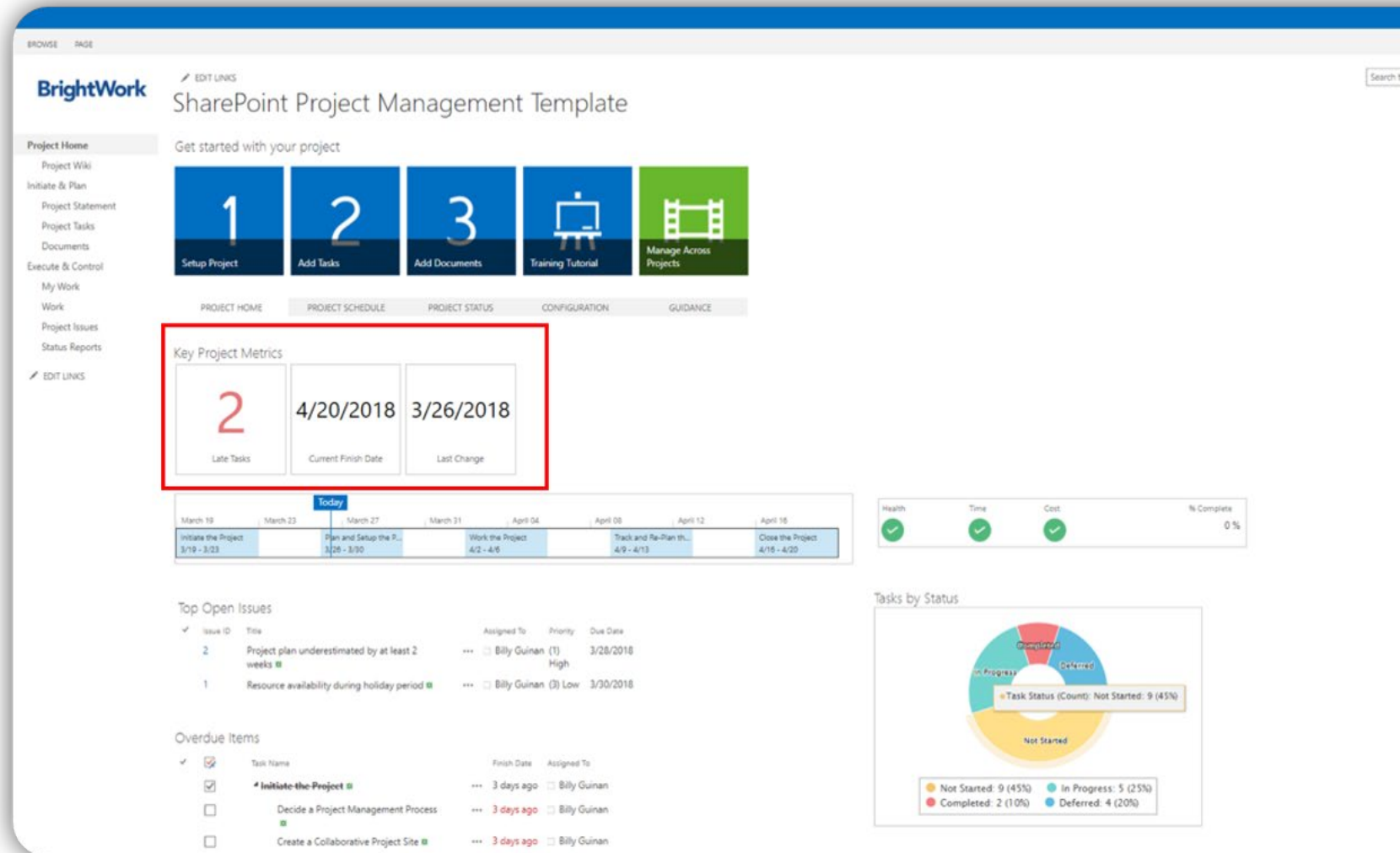


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# **Track and Manage a Project**

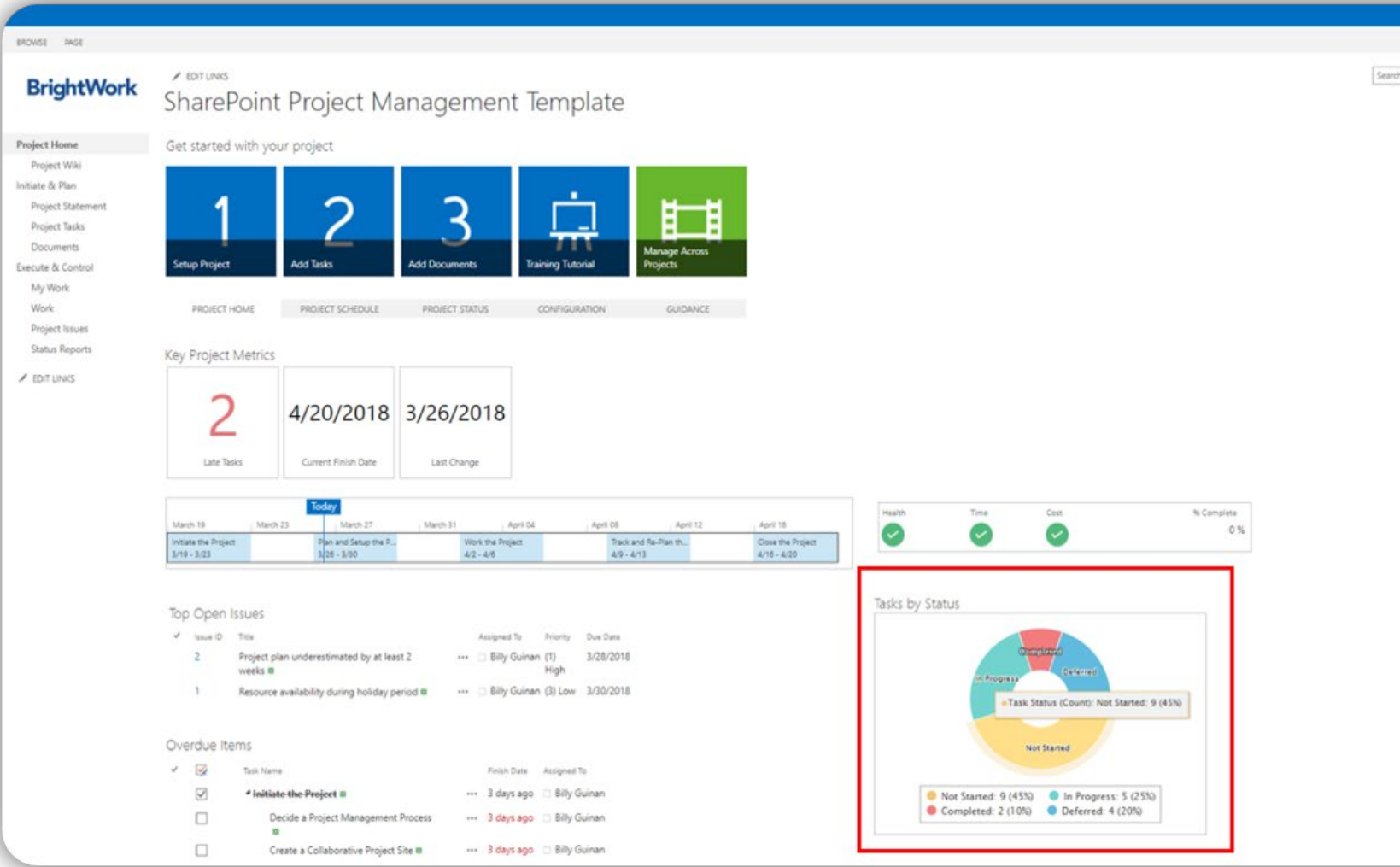
# Key Project Metrics

The **Key Project Metrics** provide an at-a-glance view of late tasks, as well as current finish date and the date when the project site was last updated.



# Task Status Chart

The **Tasks by Status chart** provides a high-level snapshot of the progress of tasks.



# Manage Issues

The **SharePoint** list for **issue management** keeps you on top of possible project roadblocks.

BROWSEITEMSLIST

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EDIT LINKS

Project Issues

+ new item or edit this list

Active IssuesActive Items (Datasheet)All Issues...

Title	Start Date	Due Date	% Complete	Status	Priority	Assigned To
Project plan underestimated by at least 2 weeks	3/26/2018	3/28/2018	50 %	In Progress	(1) High	Billy G
Resource availability during holiday period	3/26/2018	3/30/2018	15 %	In Progress	(3) Low	Billy G

EDIT LINKS

# Work Reports

**Work Reports** help all team members manage their tasks and priorities on the project.

BROWSEPAGETASKSLIST

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EDIT LINKS

Open Work

Project Home

Project Wiki

Initiate & Plan

Project Statement

Project Tasks

Documents

Execute & Control

My Work

Work

Project Issues

Status Reports

EDIT LINKS

OVERDUE WORKWORK DUE SOONOPEN WORKCLOSED WORKUNASSIGNED WORK

Open Tasks

+ new task or edit this list

✓	✗	Task Name	Finish Date	Assigned To
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Initiate the Project	3 days ago	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Decide a Project Management Process	3 days ago	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Create a Collaborative Project Site	3 days ago	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Plan and Setup the Project	Friday	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Plan the Project	Friday	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Desk Check the Project Plan	Friday	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Notify the Team of their Responsibilities	Friday	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Work the Project	April 06	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Find Work	April 06	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Do Work	April 06	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Update Progress on Work (recording any issues)	April 06	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Track and Re-Plan the Project	April 13	Billy Guinan
<input type="checkbox"/>	<input type="checkbox"/>	Check and Understand the Project's Progress	April 13	Billy Guinan

Open Iss

+ new ite

✓ Title

Project

Resou

# Track the Project Status

**Project Status Reports** capture the health and progress of the project at a point in time.

ST

Home Projects Area Portfolio Reporting Templates Area

Project Status Reports ⓘ

⊕ new item

All Items Current Report ...

✓	Title		For Period Ending	Health	Time	Issues	Risk	Current Finish Date	% Complete
	Project Status	...	3/23/2018	!	✓	✓	!	4/13/2018	7 %
	Project Status ✱	...	3/30/2018	✓	✗	✓	✓	4/20/2018	25%

**BrightWork**

**Manage Across  
Projects with  
BrightWork**



# 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. 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. Jun 11-Dec 9, 2017. 2017 Q3, 2017 Q4.
- Project Summaries:** Jun 11-Dec 16, 2017. 2017 Q3, 2017 Q4.

**Left Screenshot: Hardware Upgrade**

- Navigation:** BROWSE, PROJECT, PAGE.
- Project Home:** Get started with your project. Setup Project, Set Initial Data.
- 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:** 0.00.

# The BrightWork Approach



## Start

**Deliver Immediate  
Visibility & Control**



## Evolve

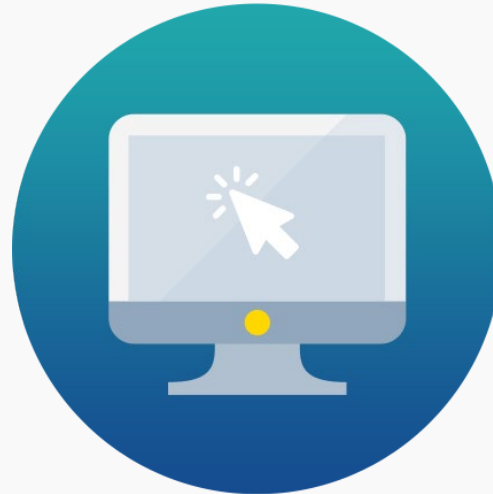
**Grow Organizational  
Project Management**

# 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.

# BrightWork

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