

# BrightWork

LIVE WEBINAR

## Boost Your Project Reporting With Microsoft Project and SharePoint

Wednesday | April 10<sup>th</sup>



presented by  
**Alan Morgan**  
BrightWork Solution Specialist



hosted by  
**Micheál Clesham**  
Inbound Marketing Executive



**QUICK POLL!**

Are you using SharePoint and  
Microsoft Project?

# AGENDA

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- ✓ About **Microsoft Project** and **BrightWork**
- ✓ Demonstration
  1. Integrate and Sync Microsoft Project with BrightWork templates
  2. Simplify collaboration with your project team across multiple projects
  3. Get visibility with executive dashboards and individual reports
- ✓ 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).
- Task List:** A section titled 'Project Tasks' showing a list of tasks with checkboxes and dates. 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.
- Project Office Summary:** A section providing a summary of the project's health, time, cost, quality, issues, and finish date. It includes a table with columns for Health, Time, Cost, Quality, Issues, and Finish Date, and a row for the project's status and dates.
- Calendar:** A calendar view showing the project's timeline, with tasks and milestones plotted against dates.

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

# BrightWork

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



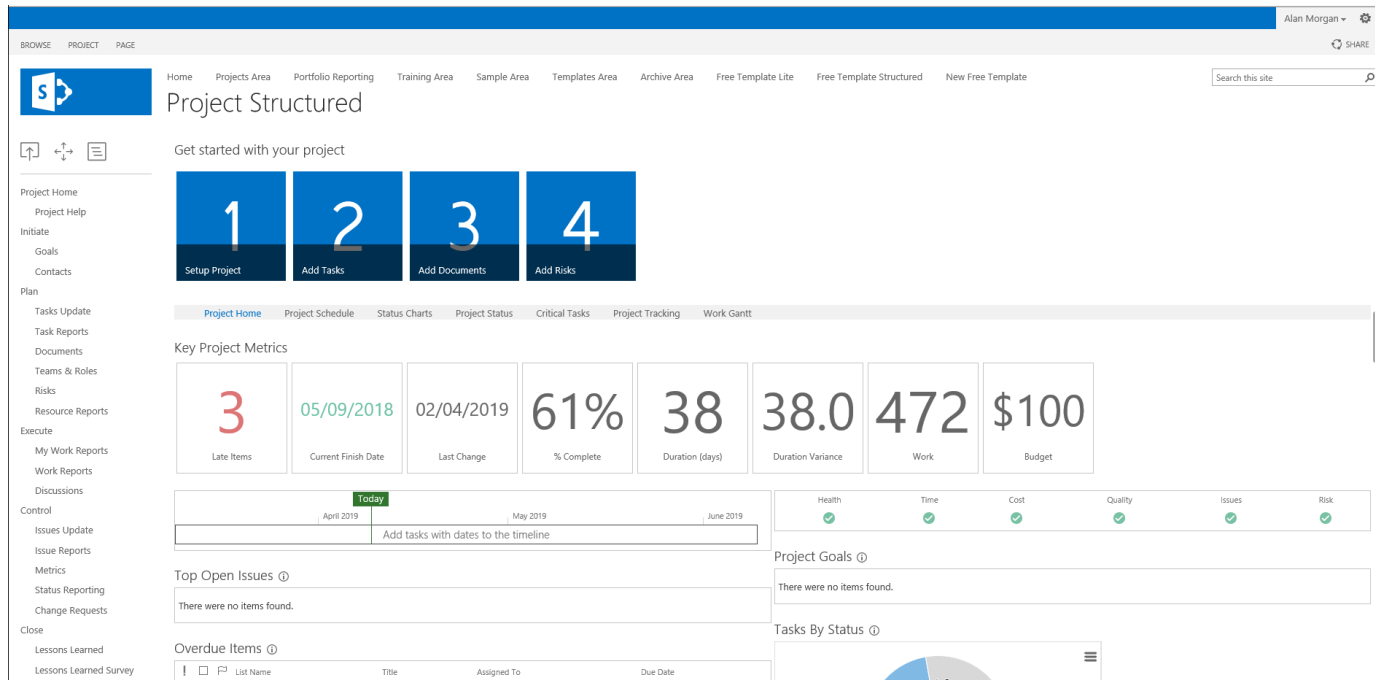
# BrightWork

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- Popular amongst Project Management Professionals (PMPs)
- Can be complex for team members
- Expensive for multiple licenses
- Does not accommodate non-project work
- Not suited to smaller, less formal projects.

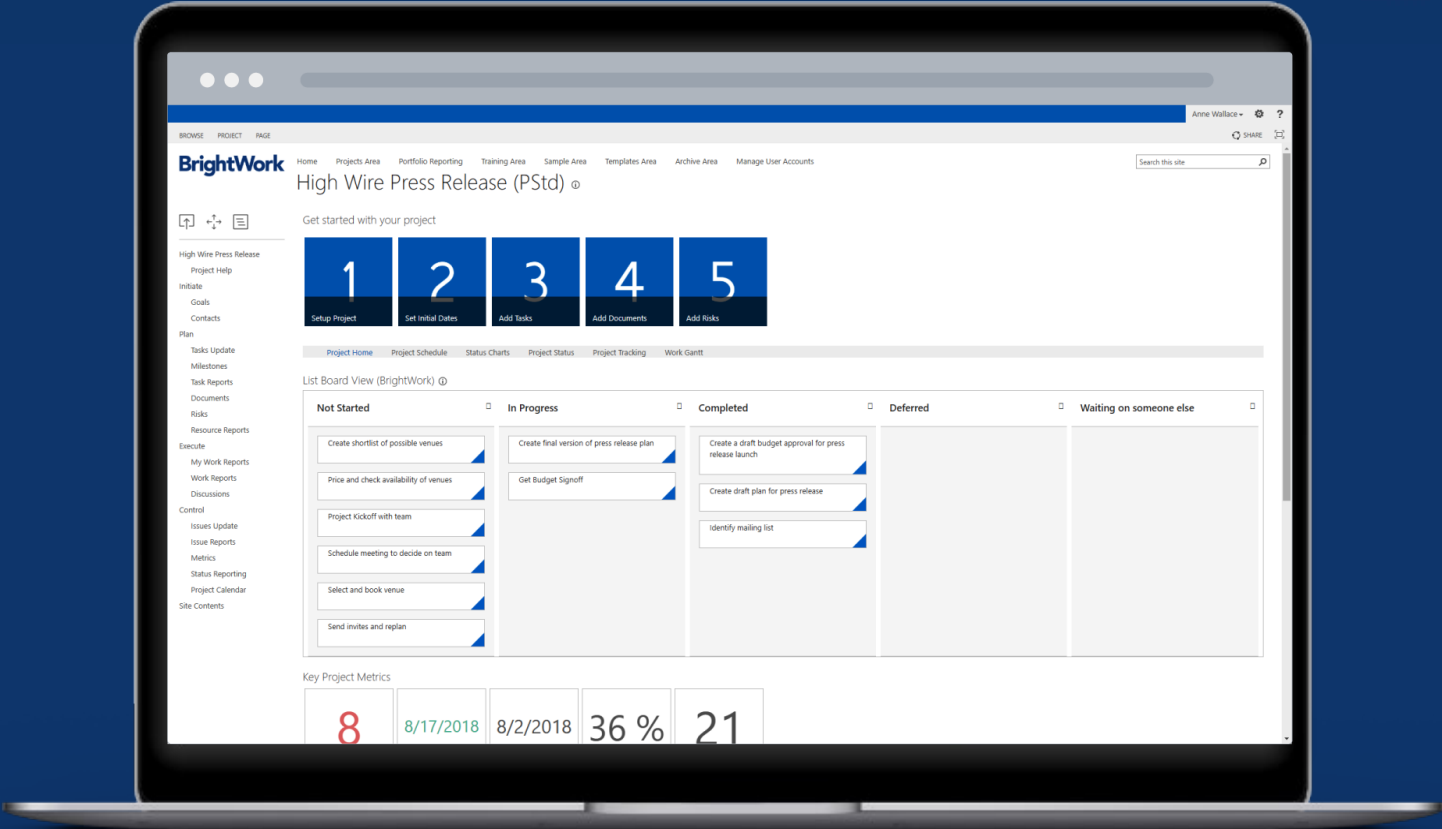
# BrightWork



- The **Project Structured** template is available out-of-the-box in the full BrightWork project.
- Supports bi-directional synchronization between BrightWork and Microsoft Project (Professional version)
- BrightWork Macro

BrightWork

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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# BrightWork

## **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 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:** Project Help, 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.
- 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.
- Project Home:** Project Schedule, Status Charts, Project Status.
- Status:** Pie chart showing project status distribution.
- Late Items:** Table showing late items.

# BrightWork

## 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.

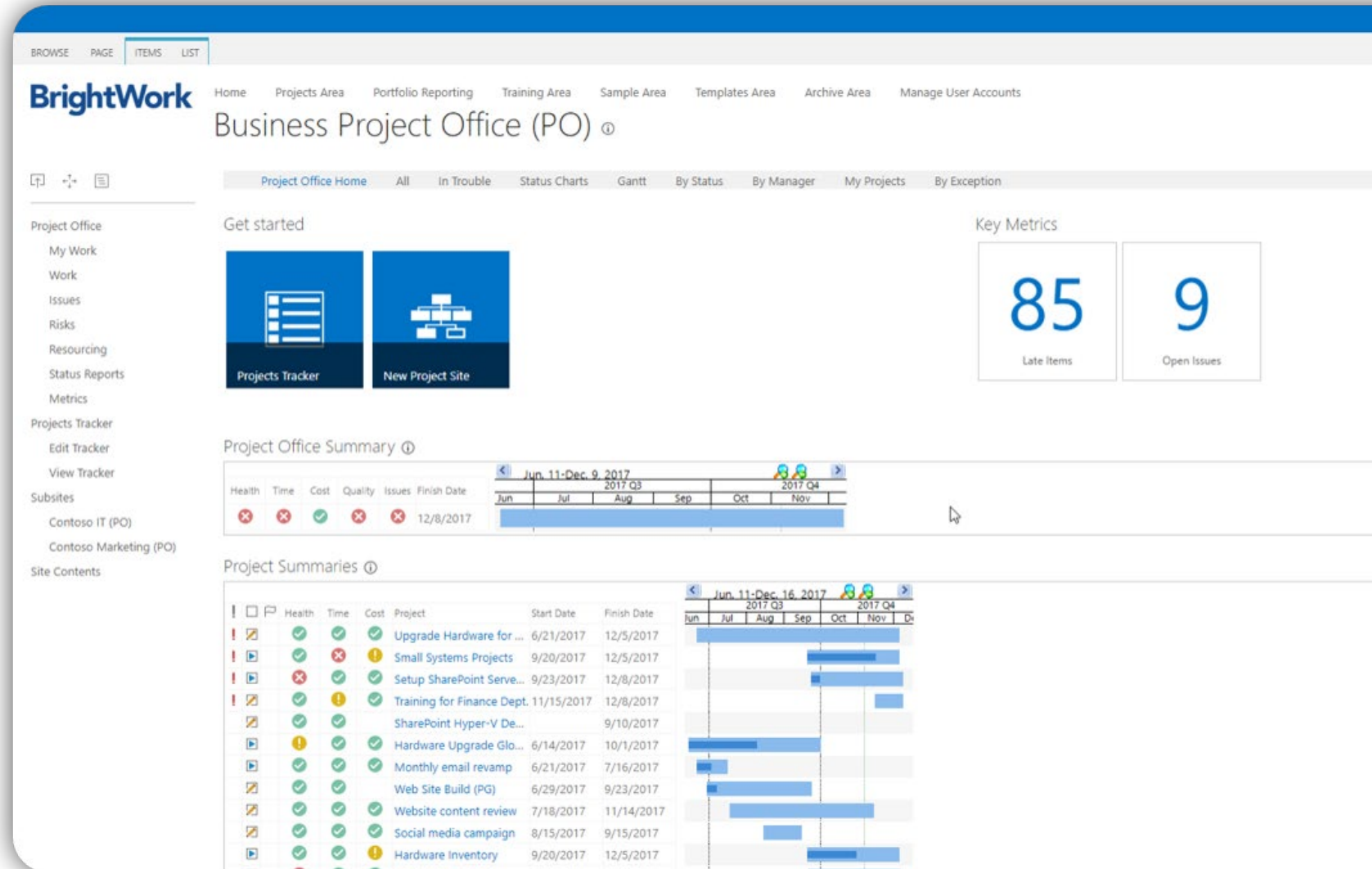
The screenshot shows the BrightWork 'New Project Requests' dashboard. The interface includes a top navigation bar with links like 'Home', 'Templates Area', 'Training Area', 'Sample Area', 'Projects Area', 'Portfolio Reporting', and 'Manage User Accounts'. A left sidebar contains 'Requests Home', 'Project Requests', 'Documents', and 'Site Contents'. The main content area is titled 'New Project Requests' and has sub-tabs for 'Home', 'Status Summary', and 'Status History'. Under the 'Get started' section, there are six blue 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												
<b>Open Work ⓘ</b>																	
	<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							
[-] 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)																	



# BrightWork

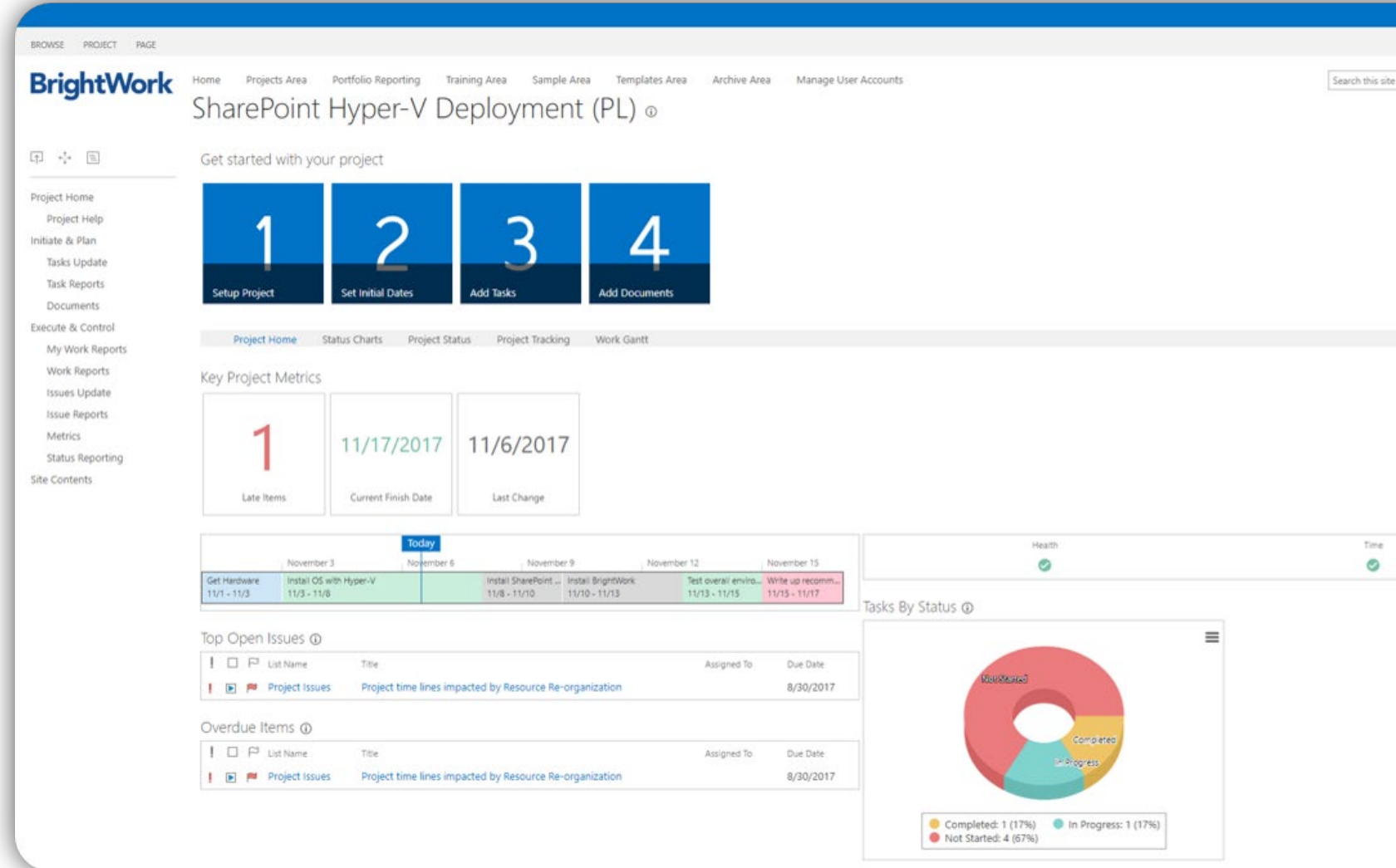
## Manage Projects Successfully

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 '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 timeline view shows tasks scheduled across dates from August 28 to September 27. The main task list is displayed below the timeline, with columns for 'Task Name', 'Duration', 'Start Date', 'Finish Date', 'Predecessors', and '% Complete'. The 'Start Date' column is highlighted, and a date picker is open, showing the current date as 'Yesterday' (August 22, 2017). The date picker also shows the current date as 'Tuesday, August 23, 2017'.

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 suppliers	



# 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	
!	▶		✖	✔	✔		<a href="#">Setup SharePoint Server Farm</a>	8/6/2017	10/21/2017	10/22/2017	<div></div>
	▶		⚠	✖	✔	✖	<a href="#">Hardware Upgrade Global (PStr)</a>	4/27/2017	8/12/2017	8/14/2017	<div></div>
	▶		✖	✔	✔		<a href="#">Install new OS</a>	8/4/2017	10/19/2017	10/19/2017	<div></div>
	▶		⚠	✔	✖		<a href="#">Install new wireless network for IT</a>	8/5/2017	10/20/2017	10/20/2017	<div></div>

# BrightWork

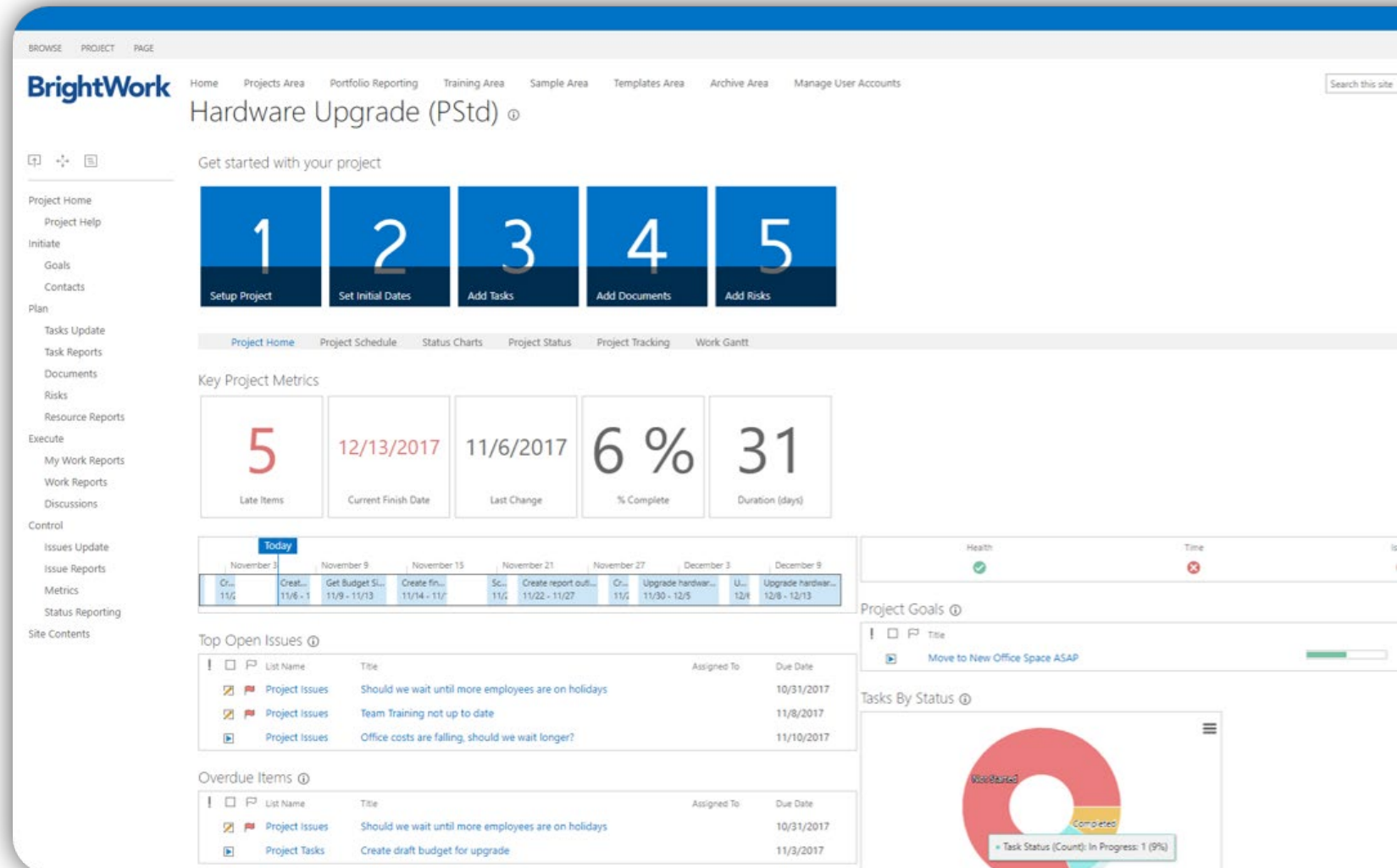
## Contribute to Project Success

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.

[My Work](#) [My Work Due Soon](#) [My Overdue Work](#) [My Gantt](#) [My Change History](#)

My Open Work ⓘ

User: Anne Wallace ▼

Apply Filter

! □ 📄 Title	Owner	Assigned To
Project : <b>Hardware Upgrade (PStd)</b> (4)		
List Name : Project Goals (1)		
▶ Move to New Office Space ASAP		<input type="checkbox"/> Anne Wallace <div></div>
List Name : Project Issues (3)		
🚧 🚩 Should we wait until more employees are on holidays		<input type="checkbox"/> Anne Wallace <div></div>
🚧 🚩 Team Training not up to date	<input type="checkbox"/> Anne Wallace	<input type="checkbox"/> Anne Wallace <div></div>
▶ Office costs are falling, should we wait longer?		<input type="checkbox"/> Anne Wallace <div></div>
Project : <b>Marketing Mini-Projects (PWT)</b> (9)		
List Name : Project Issues (1)		
▶ 🚩 Reviewer is not available until later in the month so need a new reviewer	<input type="checkbox"/> Anne Wallace	<div></div>





# 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".



# BrightWork

## 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 options for report management, including 'Refresh', 'Shared', 'Personal', 'Columns', 'Grouping', 'Sorting', 'Filters', 'Totals', 'Report Information', 'Show Grouping', 'Show Totals', 'Export', 'Email', 'Print', and 'Configure Reporter Settings'. The main content area shows a report titled 'Open Issues' for the 'Project : Hardware Upgrade (PStd)'. The report displays a table of issues with columns for Title, Owner, and Assigned To. The table shows two issues: 'Should we wait until more employees are on holidays' and 'Team Training not up to'. The 'Open Issues' section is expanded, showing a list of issues for the 'Project : Hardware Upgrade (PStd)'. The interface is familiar and easy to use, ensuring successful user and organizational adoption.

Title	Owner	Assigned To
Should we wait until more employees are on holidays	Anne Wallace	
Team Training not up to	Anne Wallace	Anne Wallace



# 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](#)

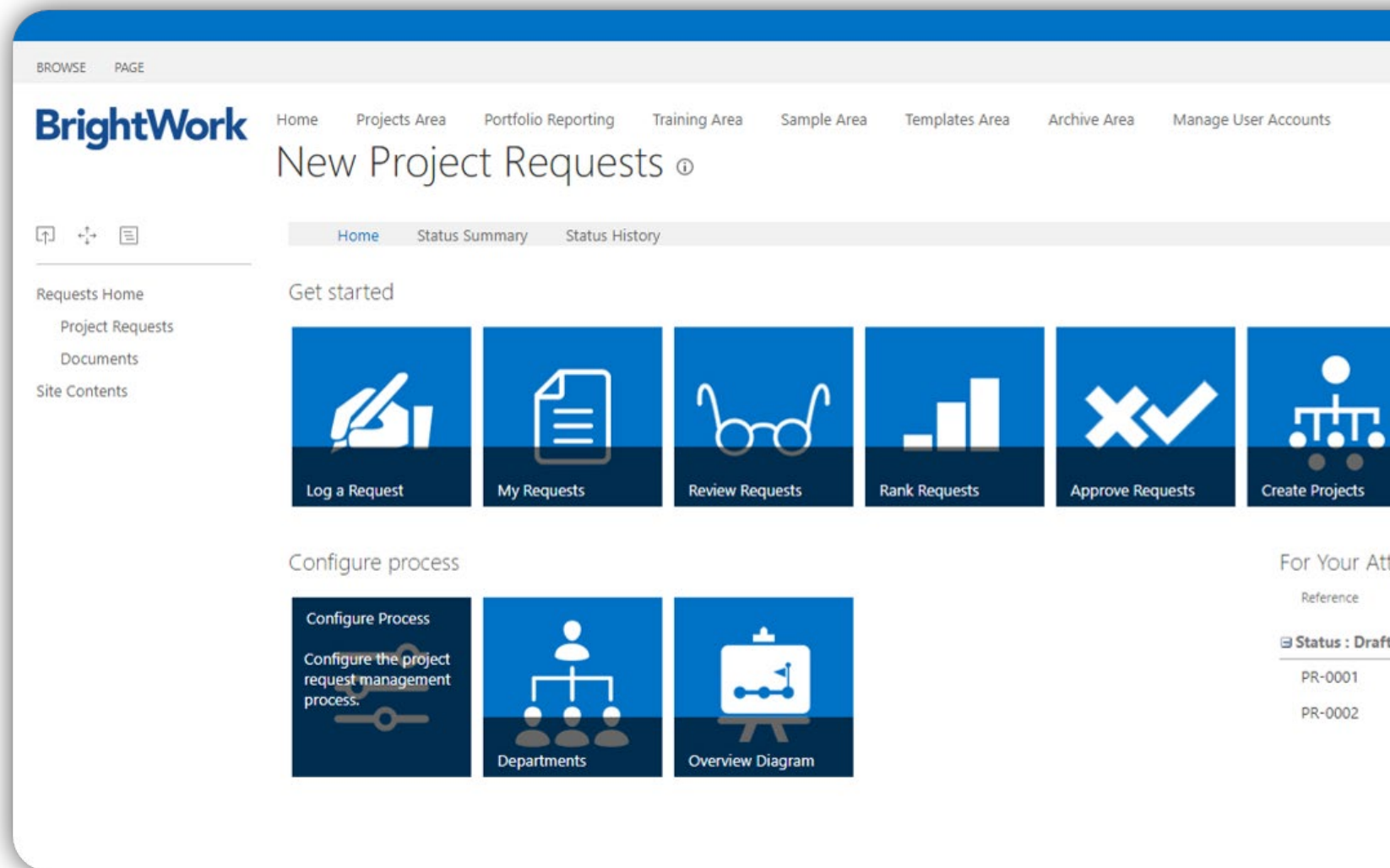
**New Template Site**  
Create a new Template site.

**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 BrightWork Approach



## Start

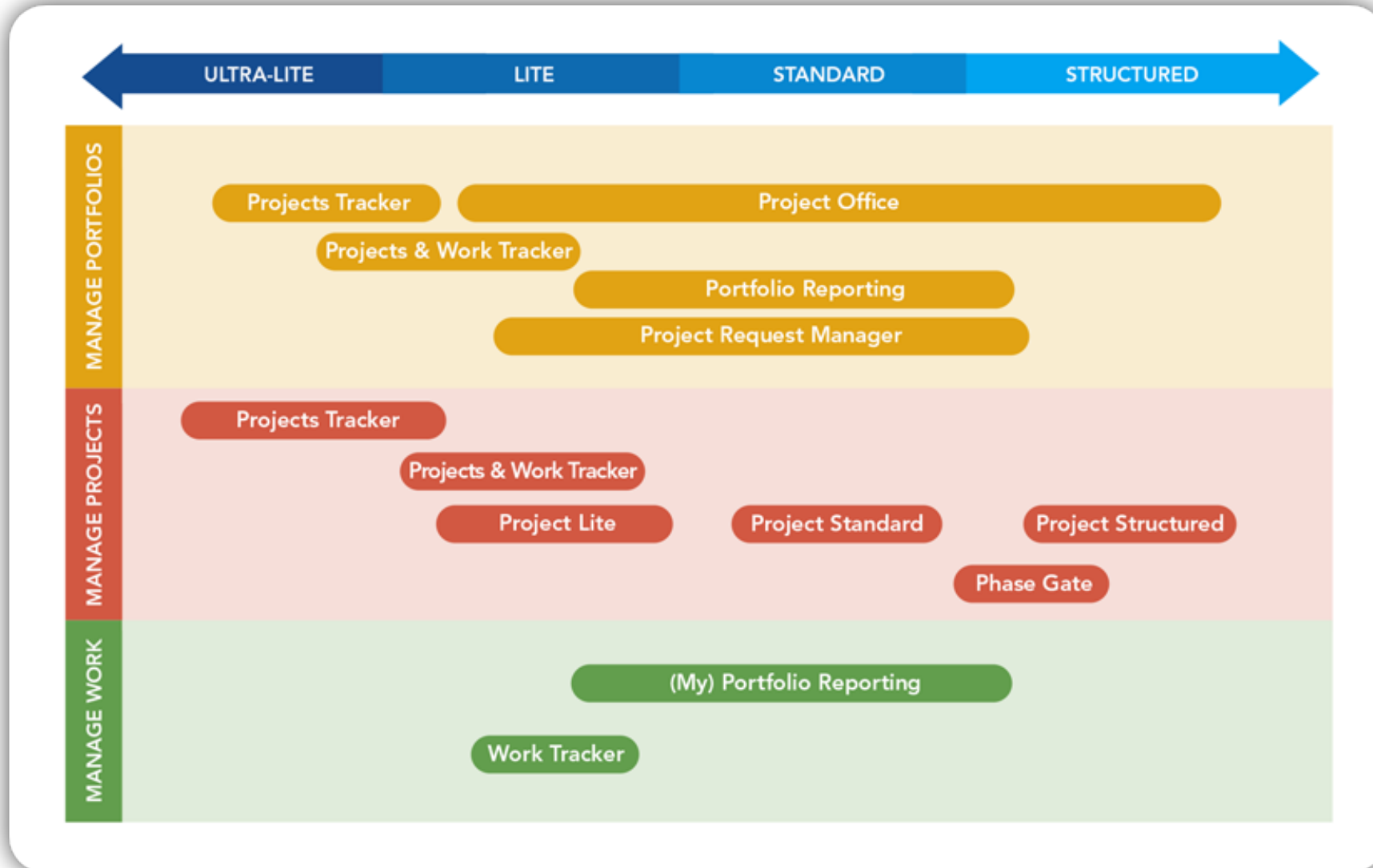
**Deliver Immediate  
Visibility & Control**



## Evolve

**Grow Organizational  
Project Management**

# BrightWork Templates Spectrum

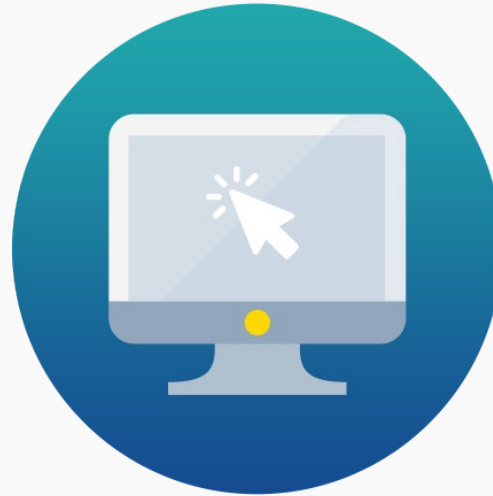


# Learn More About BrightWork



## 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.

# BrightWork

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