

BrightWork

LIVE WEBINAR

Get Immediate Visibility With Cross-Project Reporting on SharePoint



presented by
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Customer Success Architect



hosted by
Micheál Clesham
Inbound Marketing Executive



QUICK POLL!

Are you looking to extend SharePoint
for Project and Portfolio Management

AGENDA

- ✓ About **BrightWork**
- ✓ Demonstration
 1. Create a Project Office to track multiple projects
 2. Drill down into the detail of selected projects
 3. Setup Portfolio reports that are personalized for your needs
 4. Configure dashboards using BrightWork Reporter
- ✓ 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 summary table for the project office, showing metrics for Health, Time, Cost, Quality, Issues, and Finish Date. The table includes a calendar view for the period Apr. 15-Aug. 11, 2018.
- Calendar View:** A Gantt chart view showing the project schedule, with tasks represented by bars and dates. The calendar view shows the period from April 15 to August 11, 2018.

BrightWork

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

The Amazon logo, featuring the word "amazon" in a bold, black, sans-serif font, with a curved orange arrow underneath it pointing from the 'a' to the 'z'.The Dimensional logo, featuring a red stylized icon of three nested chevrons pointing right, followed by the word "Dimensional" in a bold, black, sans-serif font.

Dimensional

The Camden National Bank logo, featuring a blue anchor icon above the word "Camden" in a large, blue, serif font, with "NATIONAL BANK" in a smaller, blue, sans-serif font below it.

Camden
NATIONAL BANK

The Siemens Healthineers logo, featuring the word "SIEMENS" in a teal, sans-serif font above the word "Healthineers" in an orange, sans-serif font, with a cluster of orange dots to the right.

SIEMENS
Healthineers

The AMSURG logo, featuring the word "AMSURG" in a large, blue, serif font.

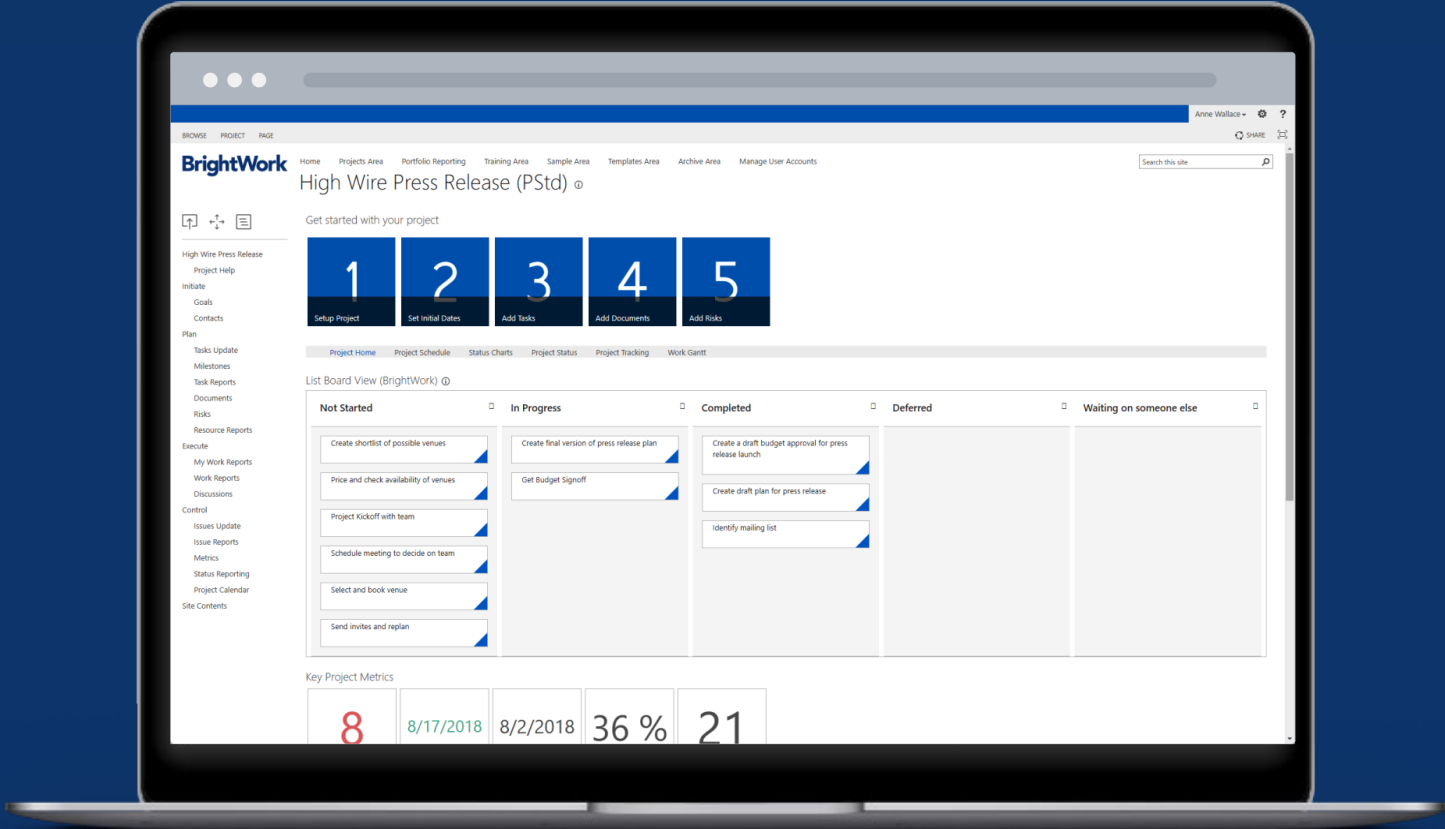
AMSURG

The Ascend Performance Materials logo, featuring a stylized blue and yellow 'A' icon above the word "ASCEND" in a large, blue, serif font, with "PERFORMANCE MATERIALS" in a smaller, blue, sans-serif font below it.

ASCEND
PERFORMANCE MATERIALS

BrightWork

DEMO





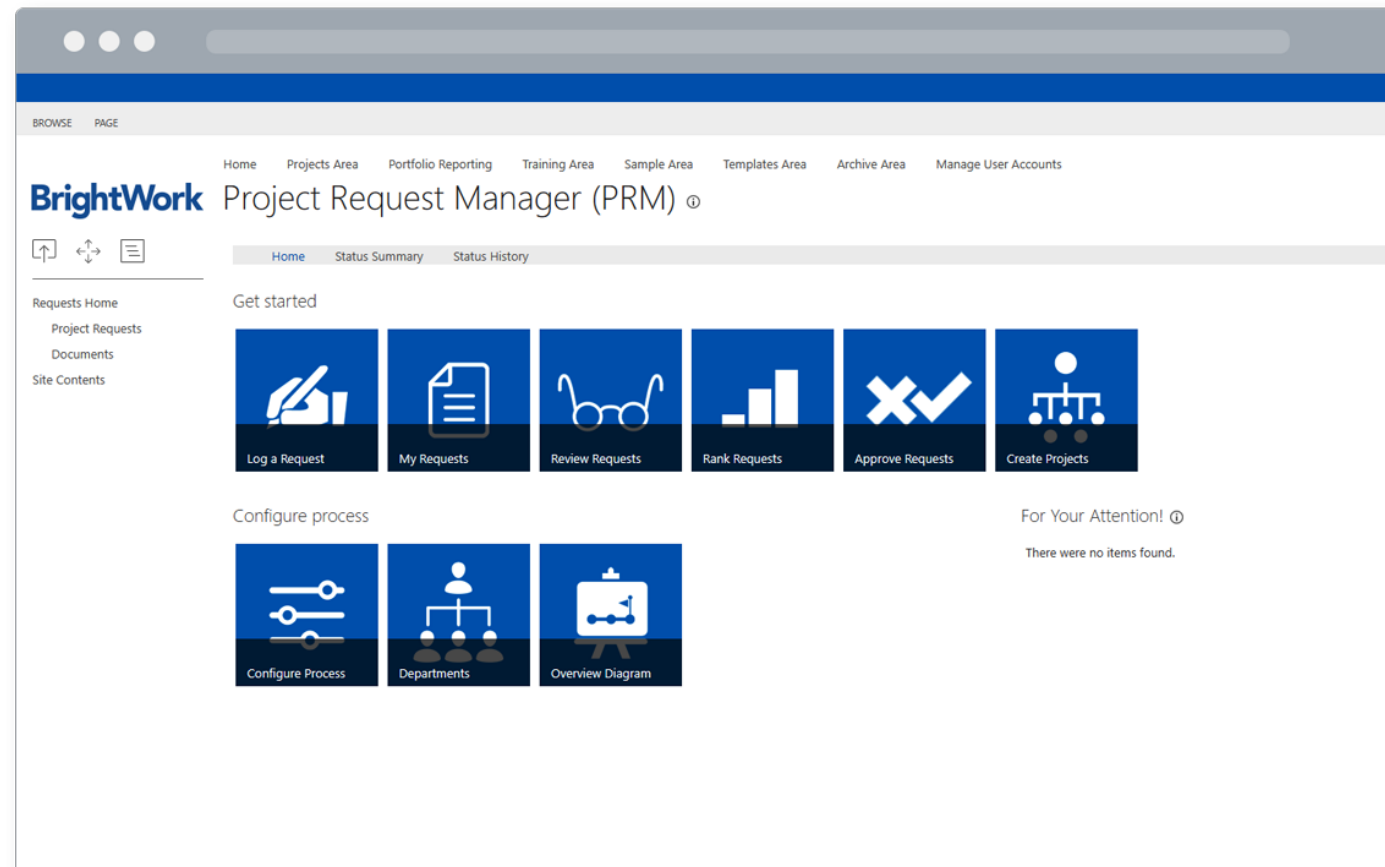
QUICK POLL!

What is the most important project management problem you have?

BrightWork

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, illustrating its various features and reporting capabilities.

Central Screenshot: Business Project Office (PO)

- Navigation:** Includes tabs for BROWSE, PAGE, ITEMS, and LIST. A top menu bar lists areas like 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.
- Key Metrics:** Displays two large tiles: "85 Late Items" and "9 Open Issues".
- Project Office Summary:** A table showing project health across quarters (2017 Q3, 2017 Q4) with columns for Health, Time, Cost, Quality, Issues, and Finish Date.
- Project Summaries:** A detailed table listing projects with columns for Health, Time, Cost, Project, Start Date, and Finish Date, accompanied by Gantt charts.

Left Screenshot: Hardware Upgrade Project

- Navigation:** Similar to the central view, with a left sidebar menu.
- Get started with your project:** Includes "Setup Project" and "Set Initial Data" tiles.
- Key Project Metrics:** Displays "5 Late Items" and "12/13/2017 Current Finish".

Right Screenshot: Project - Status Charts

- Status Chart:** A pie chart showing the distribution of project status.
- Late Items:** A section for tracking late items, showing a value of "0.00".

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.

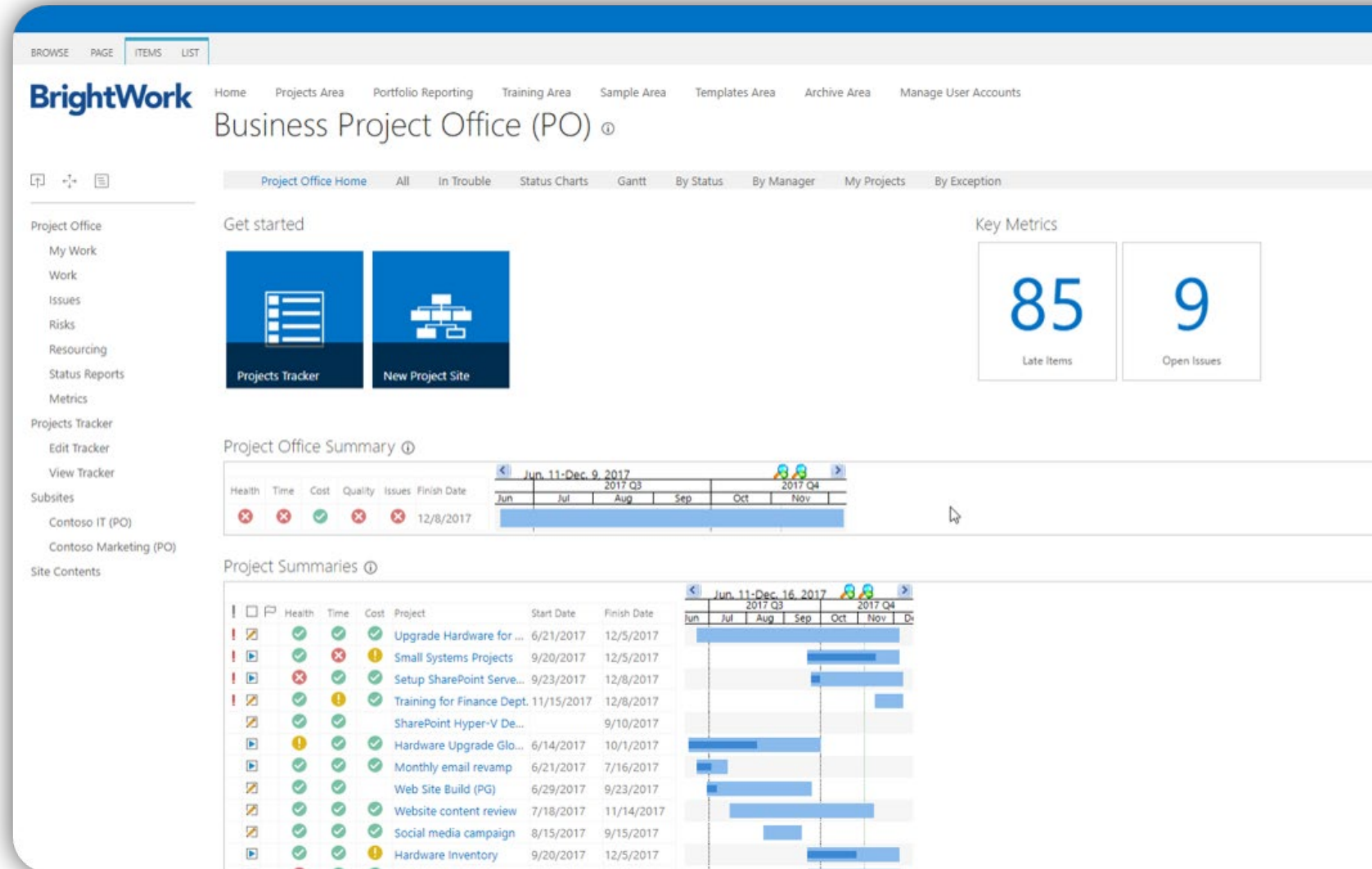
The screenshot shows the BrightWork interface for managing project requests. The top navigation bar includes links for Home, Templates Area, Training Area, Sample Area, Projects Area, Portfolio Reporting, and Manage User Accounts. The main heading is 'New Project Requests'. Below this, there are tabs for Home, Status Summary, and Status History. The 'Get started' section contains 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). The 'Configure process' section contains three tiles: 'Configure Process' (with a slider icon), 'Departments' (with a hierarchy icon), and 'Overview Diagram' (with a presentation board icon). On the right, there is a 'For Your Attention!' section with 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							
[-] 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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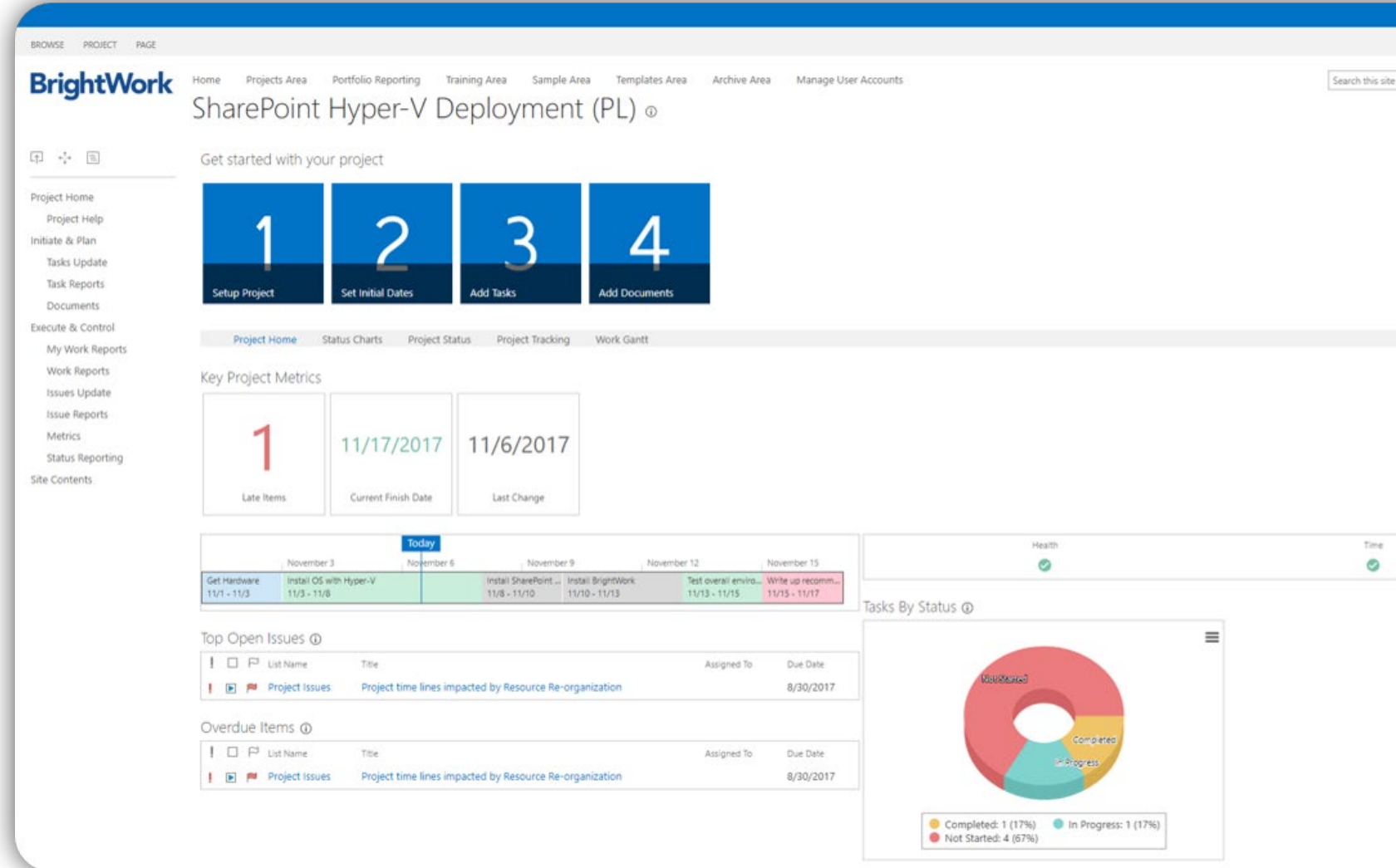
Manage Projects Successfully

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 'Identify suppliers' is highlighted, and a calendar popup is visible, showing the date 'Yesterday' (August 22, 2017) selected.

The main task list table is as follows:

Task Name	Duration	Start Date	Finish Date	Predecessors
<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.

VIEWPAGEREPORTER

SharedPersonalColumnsGroupingSortingFiltersTotalsReport InformationShow GroupingShow TotalsExportEmailPrintConfigure Reporter Settings

Report ModePersonalize this ReportShow/HideShareShared Settings

Project Office HomeAllIn TroubleStatus ChartsGanttBy StatusBy ManagerMy ProjectsBy 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>

BrightWork

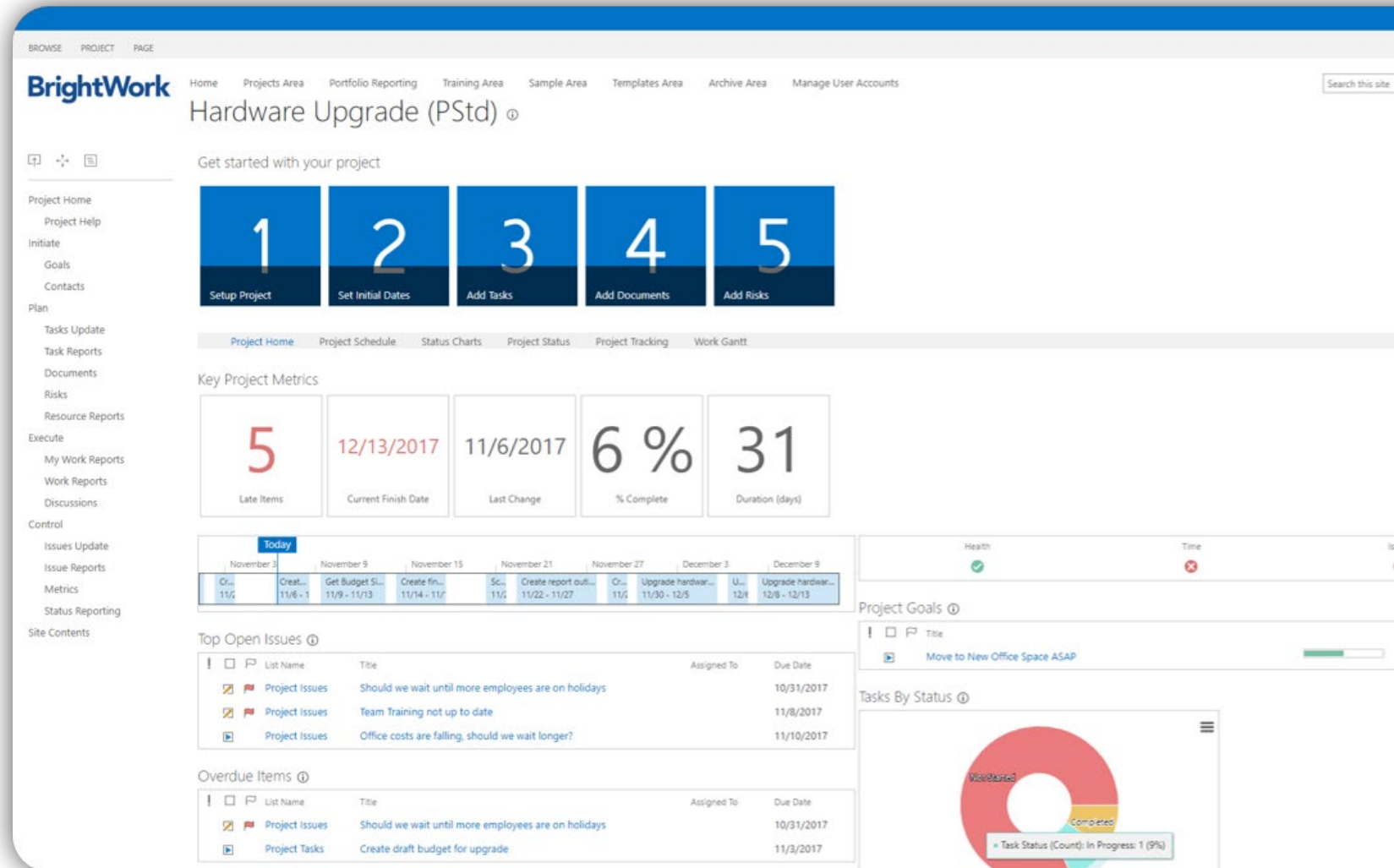
Contribute to Project Success

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.

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 filter section shows 'User: Anne Wallace' with a dropdown arrow and an 'Apply Filter' button. The main content area is a table with columns for 'Title', 'Owner', and 'Assigned To'. The table lists tasks and projects assigned to Anne Wallace, including progress bars.

! □ 📄 Title	Owner	Assigned To
Project : Hardware Upgrade (PStd) (4)		
List Name : Project Goals (1)		
▶ Move to New Office Space ASAP	□ Anne Wallace	<div><div></div></div>
List Name : Project Issues (3)		
🚩 Should we wait until more employees are on holidays	□ Anne Wallace	<div><div></div></div>
🚩 Team Training not up to date	□ Anne Wallace	<div><div></div></div>
▶ Office costs are falling, should we wait longer?	□ Anne Wallace	<div><div></div></div>
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	<div><div></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 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: OPEN, SHARE, View Properties, Edit Properties, Check Out, Workflows, and Download a Copy. The "Check Out" option is highlighted.

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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, revealing a ribbon with various report management options. These options include '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 'Hardware Upgrade (PStd)' project. The report is displayed in a table format with columns for 'Title', 'Owner', and 'Assigned To'. The table lists 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 'Hardware Upgrade (PStd)' project.

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 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 paper), 'My Requests' (document icon), 'Review Requests' (glasses icon), 'Rank Requests' (bar chart icon), 'Approve Requests' (checkmark and X icon), and 'Create Projects' (organizational chart icon). The 'Configure process' section includes three icons: 'Configure Process' (gear and key icon), 'Departments' (organizational chart icon), and 'Overview Diagram' (screen with chart icon). On the right side, there is a 'For Your Att' section with a 'Reference' link and a 'Status : Draft' indicator, followed by a list of request IDs: 'PR-0001' and 'PR-0002'.

The BrightWork Approach



Start

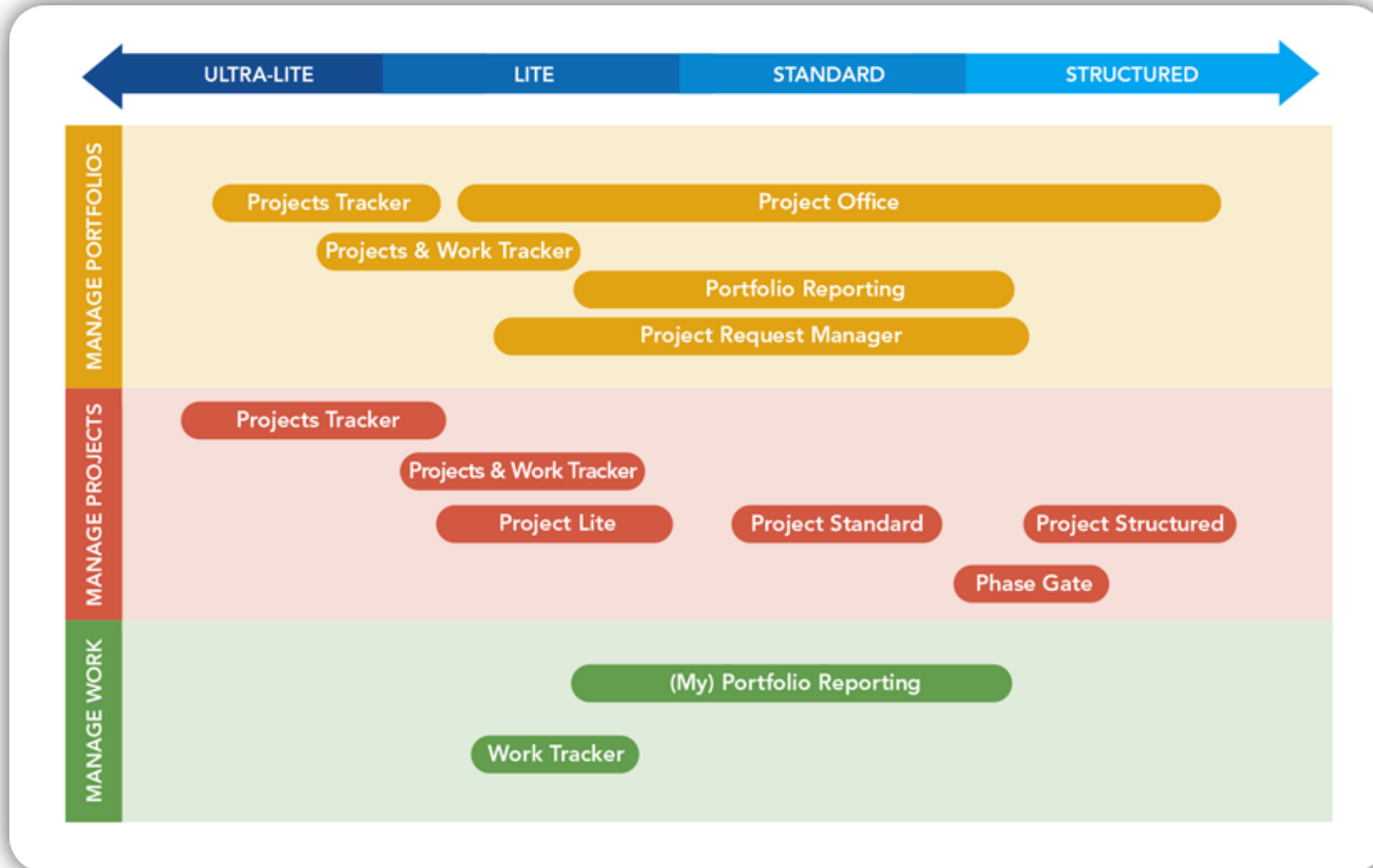
**Deliver Immediate
Visibility & Control**



Evolve

**Grow Organizational
Project Management**

BrightWork Templates Spectrum

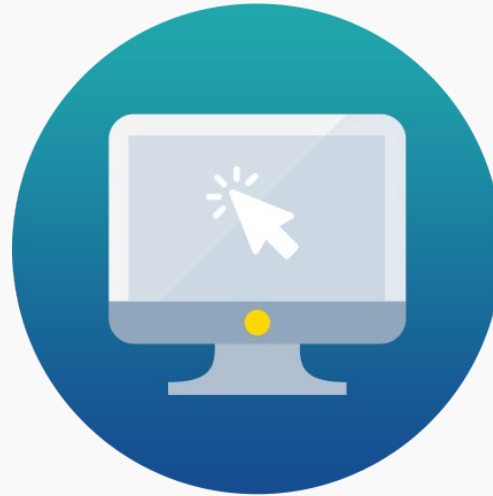


Learn More About BrightWork



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