

BrightWork

LIVE WEBINAR

Managing Projects and Portfolios With SharePoint On- Premises

What's New in BrightWork
15.12?



presented by
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QUICK POLL!

Is your group using SharePoint for
Project or Portfolio Management?

BrightWork

BrightWork is a SharePoint-based project management solution that includes best-practice templates with the flexibility to evolve and mature as needed.

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".
- Key Metrics:** Displays two key metrics: "10 Late Items" and "2 Open Issues".
- Project Hierarchy:** Shows a hierarchical view of the project structure, including "Contoso Marketing (PO)", "Free Template Site", "Marketing Mini-Projects (PWT)", and "Web Site Build (PG)".
- Project Office Summary:** A summary table for the project, showing various metrics and a timeline.
- Task List:** 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.
- Timeline:** A Gantt chart showing the project schedule, with tasks mapped out across a timeline from April to August 2018.

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

Timeline: Apr. 15-Aug. 11, 2018. 2018 Q2. Apr. May Jun Jul Aug.

BrightWork



Projects ●

Simplify project management and increase collaboration with best-practice templates.



Portfolios ●

Improve project delivery with complete control across portfolios of projects.



SharePoint ●

Accelerate user adoption and scale organizational project management on SharePoint.

BrightWork

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



AGENDA

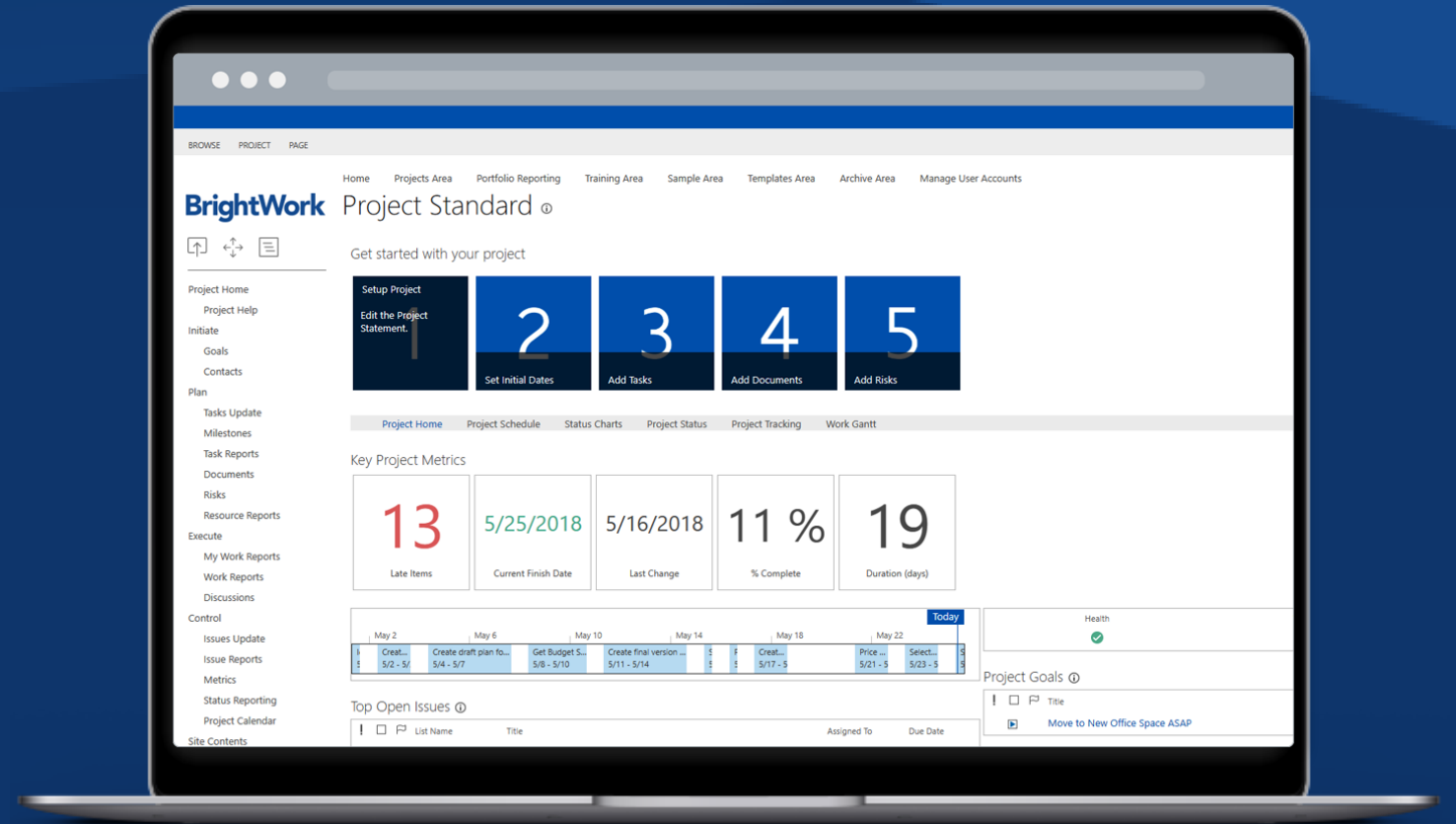
- ✓ Manage Projects with SharePoint: Latest BrightWork Capability Demo
 1. **More Adoptable:** Updates to Kanban Boards for at-a-glance updates
 2. **More Scalable:** Enhanced reporting capability with Project Cache Mapping
 3. **More Secure:** to US Government and Military Specs
- ✓ Q&A



BrightWork

DEMO

What's New in BrightWork 15.12





Adoptable: Kanban Boards

Kanban boards enable project managers to move through work quickly, addressing risks, tasks, and issues in a visual, modern way.

With **column configuration**, Users will have the ability to customize the column captions and default a column to be collapsed, simplifying task management.



Scalable: Project Cache Mapping

A new feature has been added that simplifies mapping a column from the **Projects Tracker** to the **Project Cache**.

The Project Cache is a powerful enterprise reporting tool and this new functionality makes it more accessible and customizable to even more BrightWork users.



Secure: **Government** **compliant**

To maintain our 100% clean Record with FedRAMP compliance, a number of updates to BrightWork have been applied.

By being 100% compliant with U.S. Federal and State security requirements, BrightWork's Project Office Jumpstart is the ideal solution for U.S. Federal Civilian, DoD, and NatSec customers.

A person is writing on a 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!

Would you now consider using
SharePoint for Project Management

BrightWork

QUESTIONS?

Use the questions pane in GoToWebinar to ask questions



Thank you!

Talk to our Solution Specialists about your project management needs



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APPENDIX

BrightWork Model Explained

BrightWork

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

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

Business Project Office (PO)

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
✖	✖	✔	✖	✖	12/8/2017

Project Summaries

Health	Time	Cost	Project	Start Date	Finish Date
✔	✔	✔	Upgrade Hardware for ...	6/21/2017	12/5/2017
✔	✔	✖	Small Systems Projects	9/20/2017	12/5/2017
✔	✔	✔	Setup SharePoint Serve...	9/23/2017	12/8/2017
✔	✔	✔	Training for Finance Dept.	11/15/2017	12/8/2017
✔	✔	✔	SharePoint Hyper-V De...	9/10/2017	

Project - Status Charts

Status

Late Items

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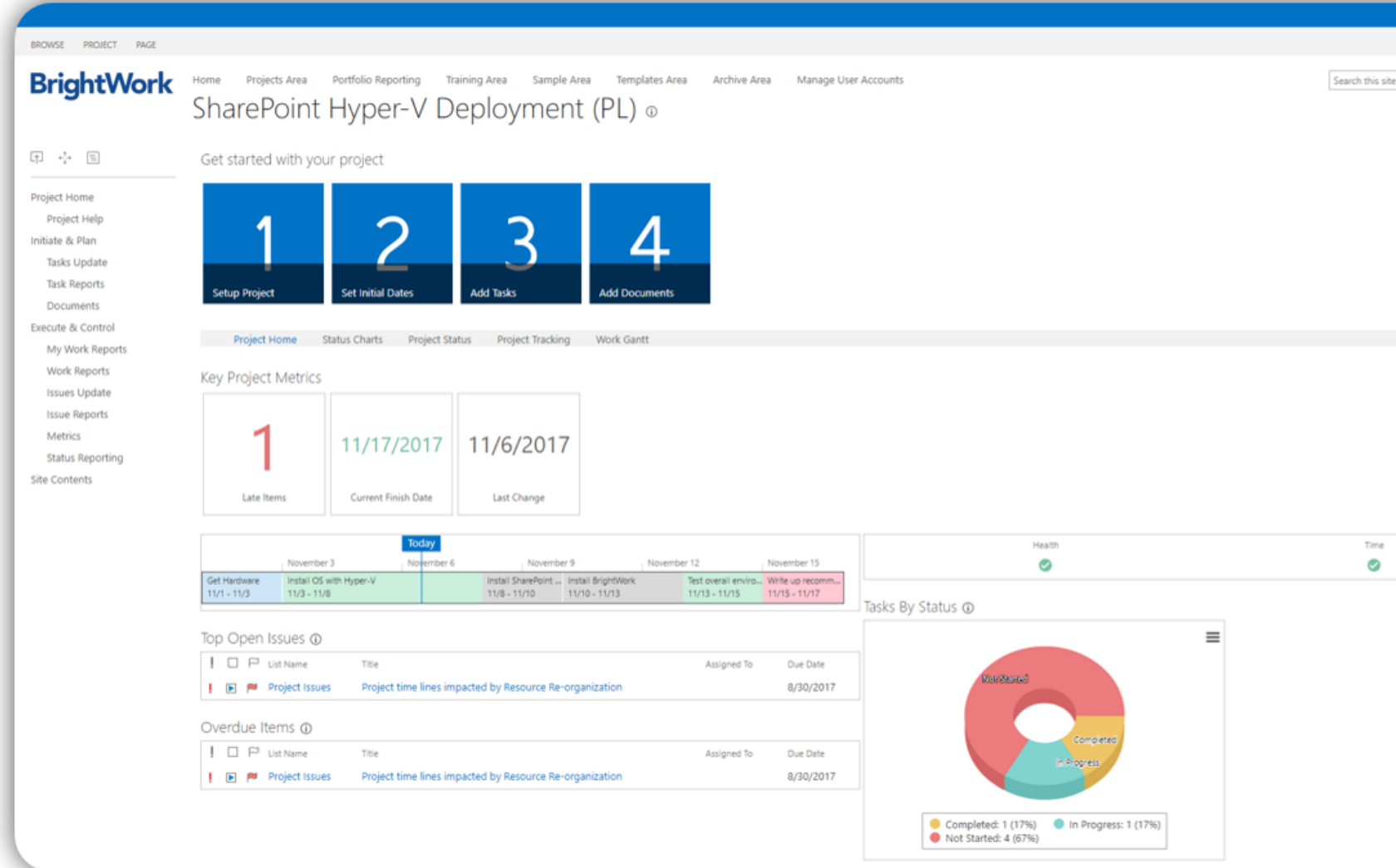
Manage Projects Successfully

Simplify project processes, engage stakeholders, and increase collaboration with one project management tool.



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.





Collaborate with a Team-focussed Project Site

Team members can find, do and report on their work in a team-focussed project site with BrightWork.

Manage your schedule with instant visibility into project and non-project tasks

The screenshot displays the BrightWork project site 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 timeline view shows tasks scheduled across a period from August 28 to September 27. Tasks include 'Create...', 'Get Budget Signoff', 'Create final...', 'Sc...', 'Create report outlin...', 'Cre...', and 'Upgrade hardware in...'. A task titled 'Identify suppliers' is highlighted with a red box, and a calendar pop-up is visible, showing the date 'Yesterday' (August 22, 2017) selected.

The main content area displays a list of tasks under the heading 'Stop editing this list'. The tasks are listed in a table with columns for Task Name, Duration, Start Date, Finish Date, Predecessors, and % Complete. The tasks are:

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



Track and Share Progress with Automated Reports

Project Managers spend too much time on administration instead of the project itself!

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

REPORTER

Shared

Personal

Columns

Grouping

Sorting

Filters

Totals

Report Information

Show Grouping

Show Totals

Export

Email

Print

Configure Reporter Settings

Project Office Home

All

In Trouble

Status Charts

Gantt

By Status

By Manager

My Projects

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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Control Portfolios of Projects

Improve organizational performance with complete control of portfolios and resources in one place.



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.

Develop a transparent ranking process to ensure alignment with business objectives

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 action 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.

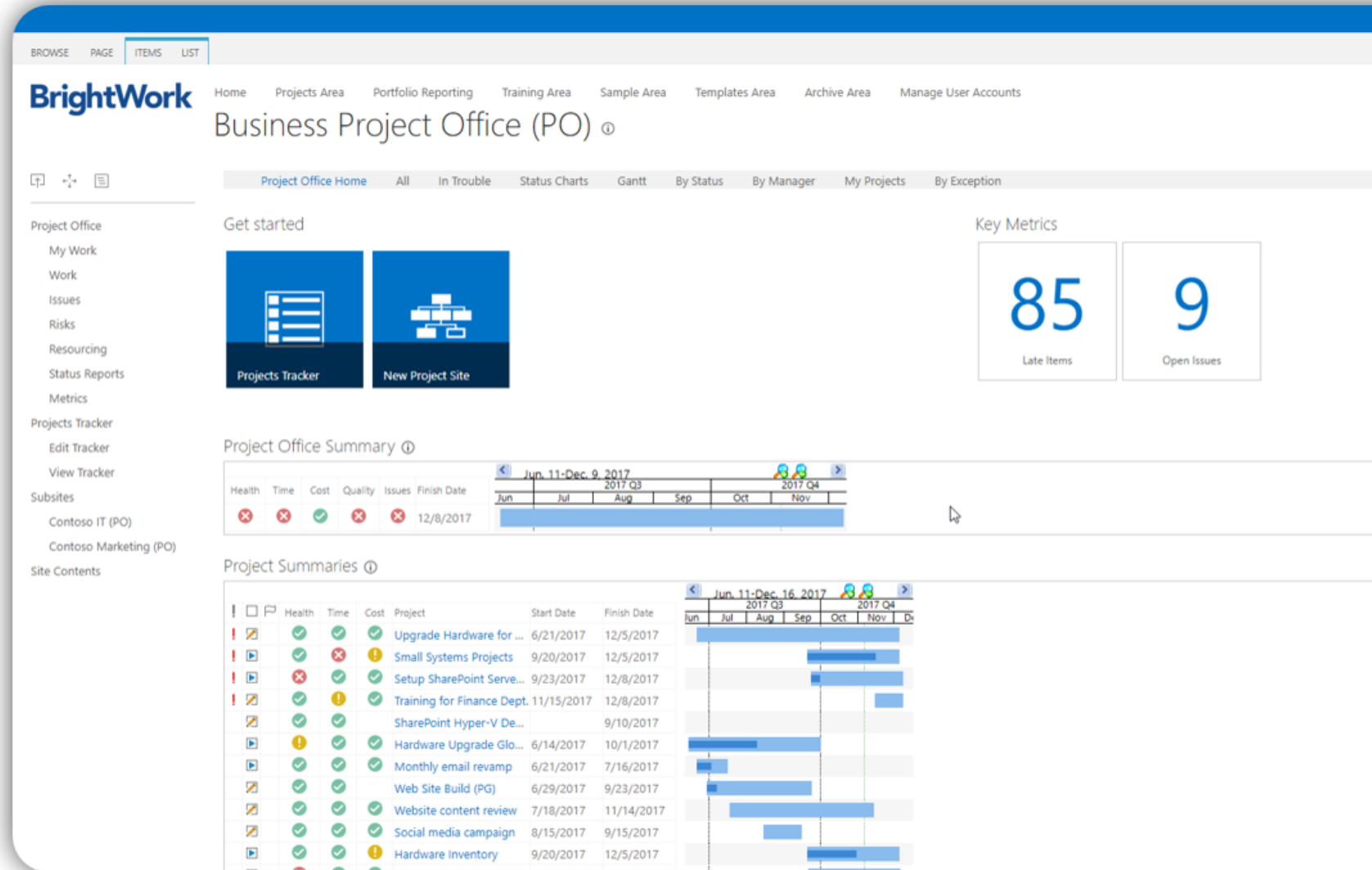
Reference	Title
PR-0004	New Marketing Automation Software
PR-0005	Develop New Employee Onboarding Program
PR-0006	Go Green at the Office Initiative



Track with Real-Time Portfolio Dashboards

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

Get visibility and drill into the detail of specific projects.



[illegible]

BrightWork

Leverage your SharePoint investment

Accelerate user adoption, support project teams, scale performance on your existing infrastructure.



Deploy with a Low IT Burden

As BrightWork is built on the industry SharePoint platform, organizations can leverage existing and investments in infrastructure and training.

The screenshot displays the BrightWork Reporter interface. The top navigation bar includes 'BROWSE', 'PAGE', and 'REPORTER'. The 'REPORTER' tab is active, showing a toolbar with icons for Refresh, Shared, Personal, Columns, Grouping, Sorting, Filters, Totals, Report Information, Show Grouping, Show Totals, Export, Email, and Print. Below the toolbar, the 'Open Issues' report is displayed. The report shows a list of issues for the project 'Hardware Upgrade (PStd)'. The list includes columns for Title, Owner, and Assigned To. The first issue is 'Should we wait until more employees are on holidays' assigned to Anne Wallace. The second issue is 'Team Training not up to' assigned to Anne Wallace. The interface also shows a sidebar with navigation links like Project Office, My Work, Work, Issues, Risks, Resourcing, Status Reports, Metrics, Projects Tracker, Edit Tracker, and View Tracker. A 'Configure Reporter Settings' dropdown menu is open on the right, showing options for Columns, Grouping, Sorting, Filters, and Totals.

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



Start with local, best-practice templates and BrightWork Assistance.

Taking a template based approach to projects makes it easy to improve project standards.

Reduce resistance to change with training resources for new project managers and team members.

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](#)

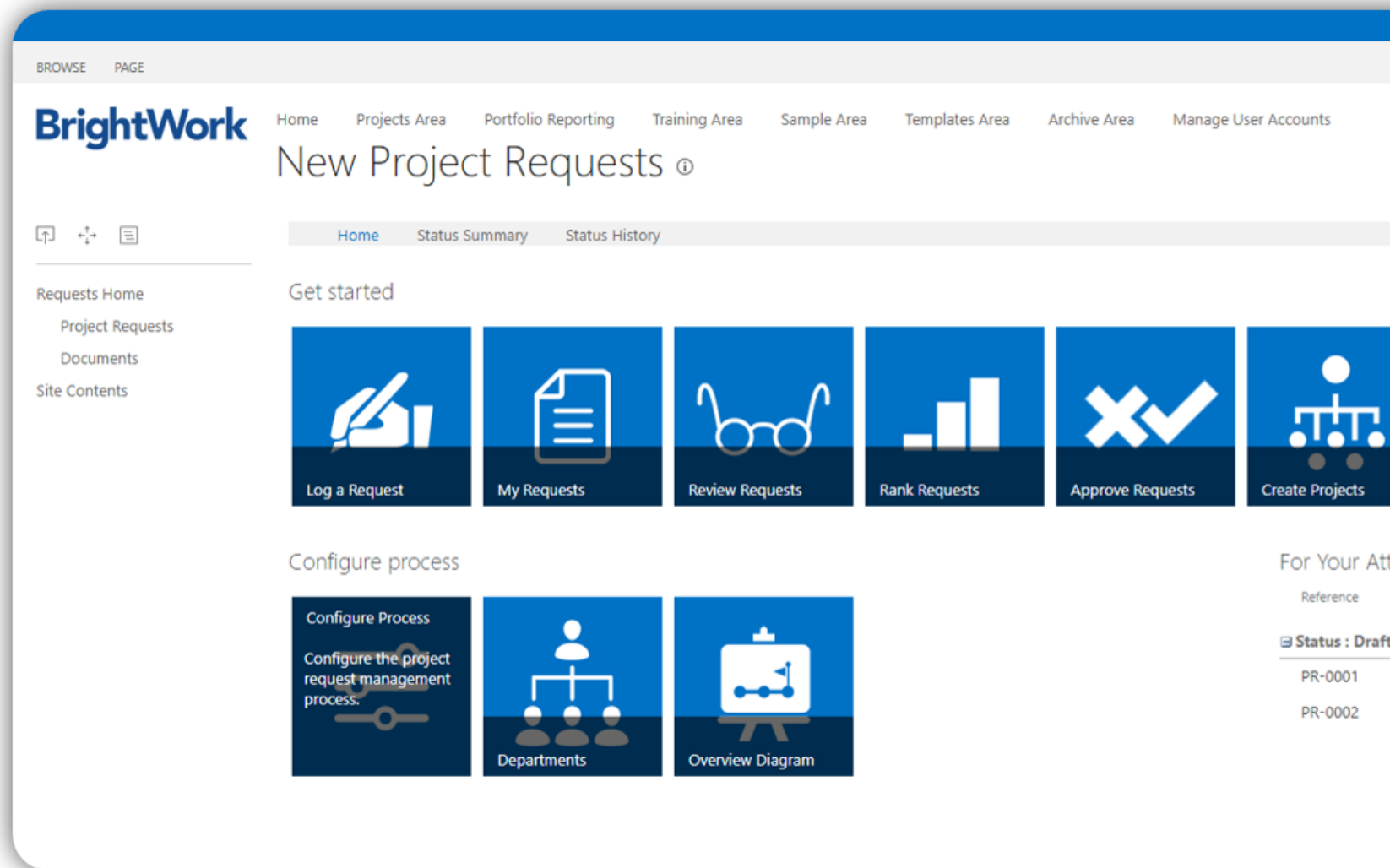
New Template Site
Create a new Template site.

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**

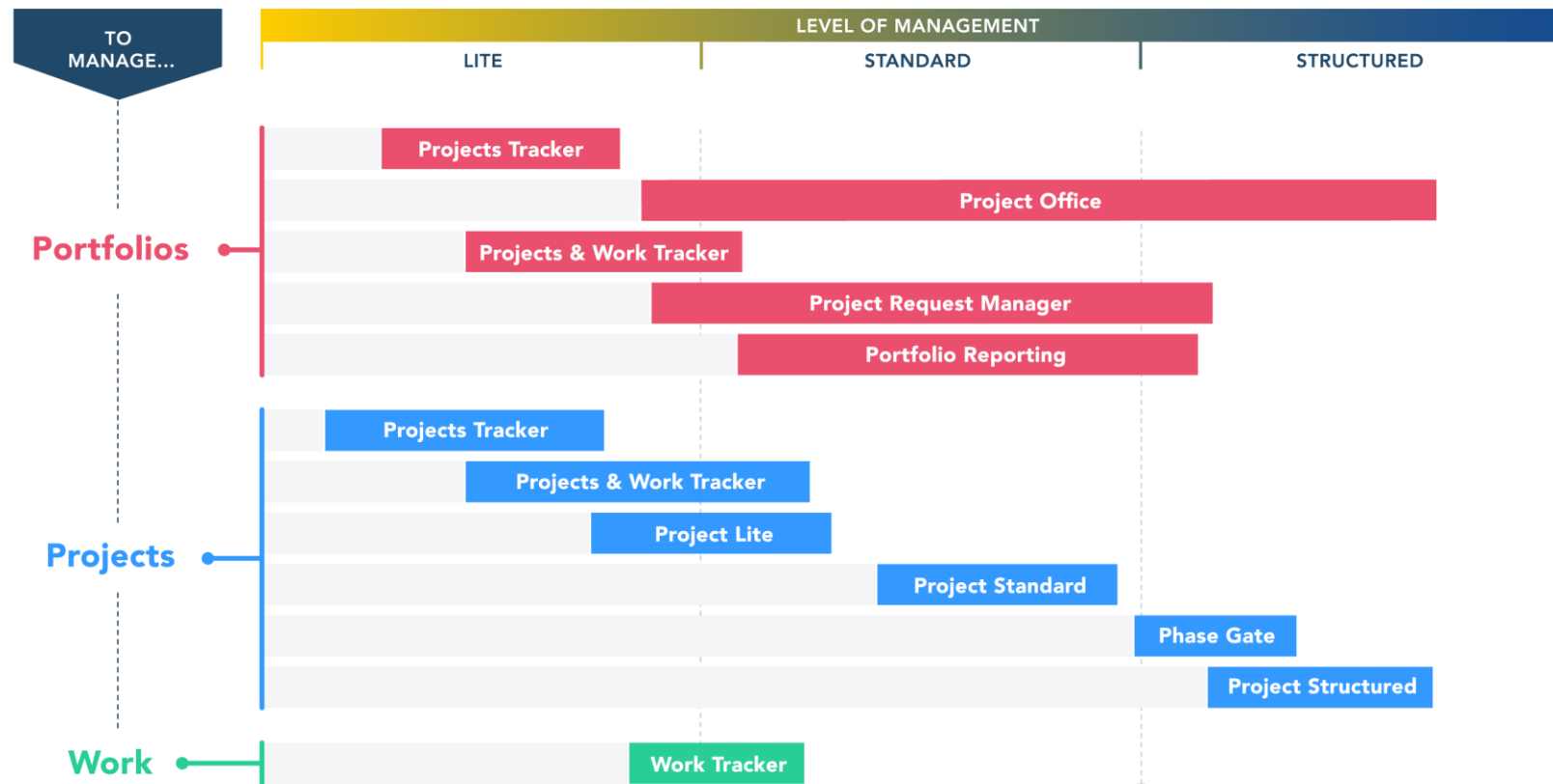


Evolve

**Grow Organizational
Project Management**

BrightWork Templates Spectrum

TEMPLATE SPECTRUM BrightWork



BrightWork

www.brightwork.com