



Enhancing SharePoint Cross-Project Reporting with Power BI Dashboards

presented by



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QUICK POLL

**Are You Using Power BI
for Project Reporting?**



BrightWork

Projects • Portfolios • SharePoint •

Start managing projects with best-practice templates and dashboards.

Evolve project management with one complete SharePoint solution.



BrightWork

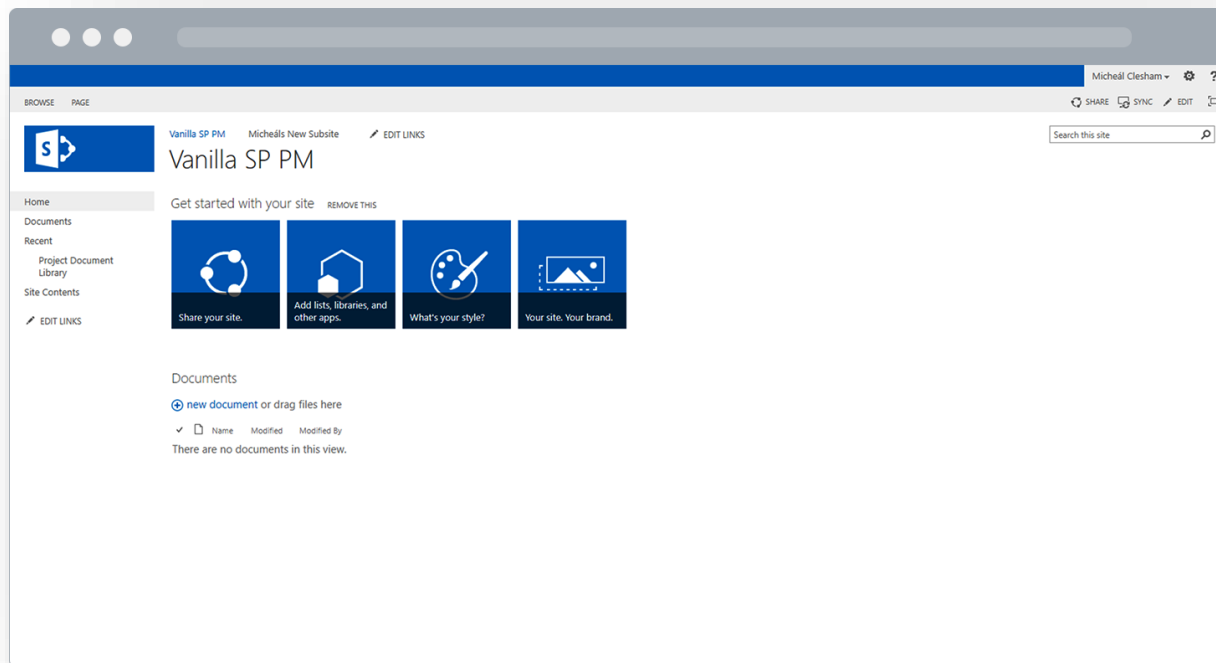
Some of the companies we work with and have provided Project Management Solutions

The Amazon logo, featuring the word "amazon" in a bold, black, sans-serif font with a curved orange arrow underneath it.The Dimensional logo, featuring a red stylized play button icon to the left of the word "Dimensional" in a bold, black, sans-serif font.The Camden National Bank logo, featuring the word "Camden" in a large, blue, serif font with a blue anchor icon above the "n", and the words "NATIONAL BANK" in a smaller, blue, sans-serif font below it.The Siemens Healthineers logo, featuring the word "SIEMENS" in a green, sans-serif font above the word "Healthineers" in an orange, sans-serif font, with a cluster of orange dots to the right.The AMSURG logo, featuring the word "AMSURG" in a large, blue, serif font.The Ascend Performance Materials logo, featuring a stylized blue and yellow "A" icon above the word "ASCEND" in a large, blue, serif font, with the words "PERFORMANCE MATERIALS" in a smaller, blue, sans-serif font below it.The Schneider Electric logo, featuring the word "Schneider" in a large, green, sans-serif font above the word "Electric" in a smaller, green, sans-serif font, with a green circular icon to the left of "Electric".The United States Postal Service logo, featuring a blue eagle head icon above the words "UNITED STATES" and "POSTAL SERVICE" in a blue, sans-serif font, with a red horizontal line between the two lines of text.

Agenda

- **Leveraging SharePoint** lists, libraries, sites and site collections for project management.
- **Creating a Project Office** with BrightWork portfolio templates for high visibility reporting across projects.
- **Enhancing your reports** with visual, interactive dashboards using the BrightWork Power BI Pack.
- **Q&A**

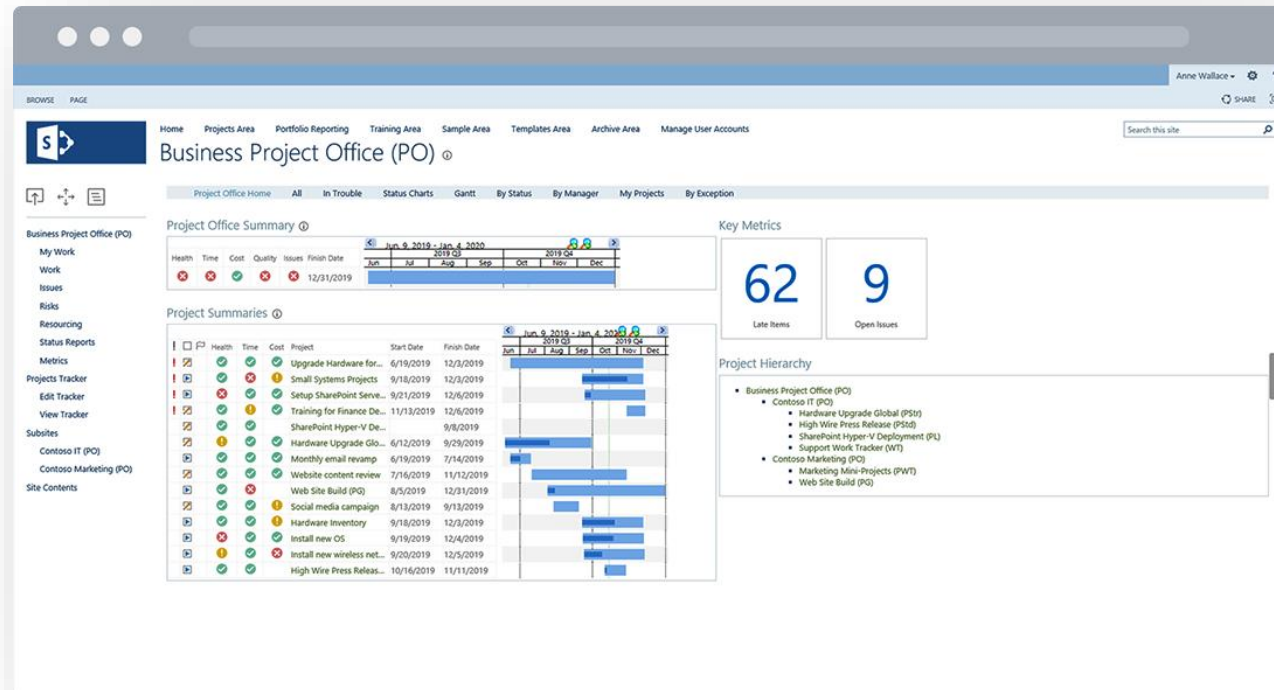
SharePoint Project Management



Highly configurable, SharePoint is ideal for project and portfolio management.

- One central location for project data
- Document management
- Collaborative team sites
- Task lists
- Workflows
- Permissions
- Version control
- Quick Launch

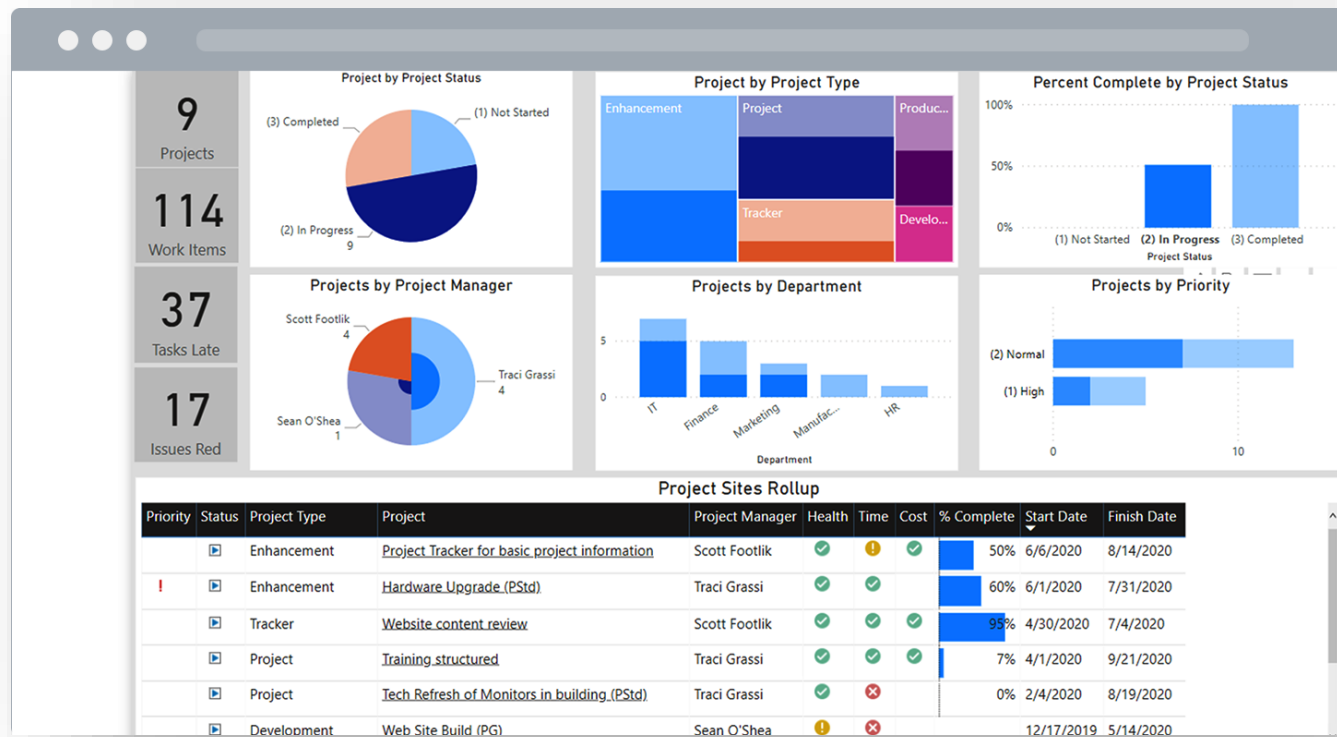
BrightWork Portfolio Templates



Get control over projects and deliver more business value.

- Cross project reporting
- Gantt charts, project schedules
- Issues, risks and change requests
- Work Reports and charts
- Resource allocation and reports
- Scheduled emails
- Project Request management

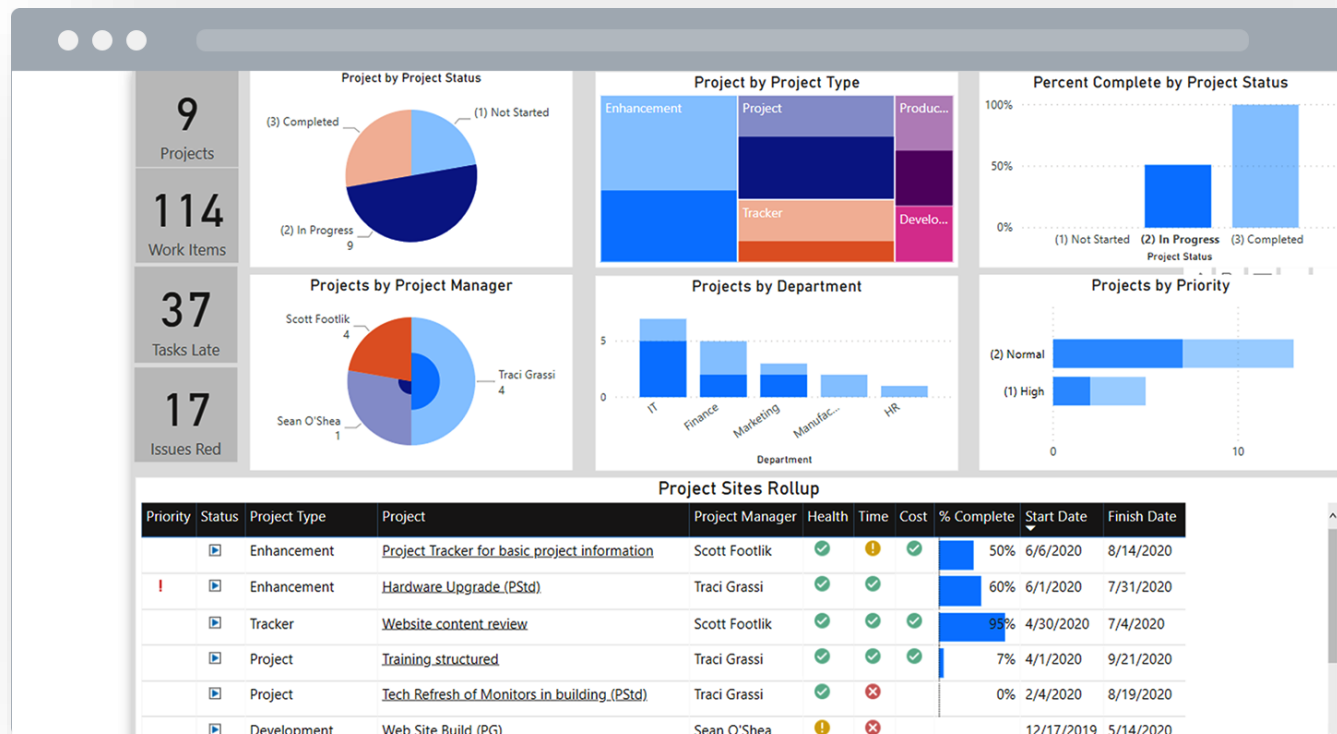
Actionable Insights With Power BI Dashboards



Visual and interactive dashboards that give you:

- Useful, actionable data.
- Business intelligence without coding.
- Statistical analysis without training.
- Visual, shareable data representations

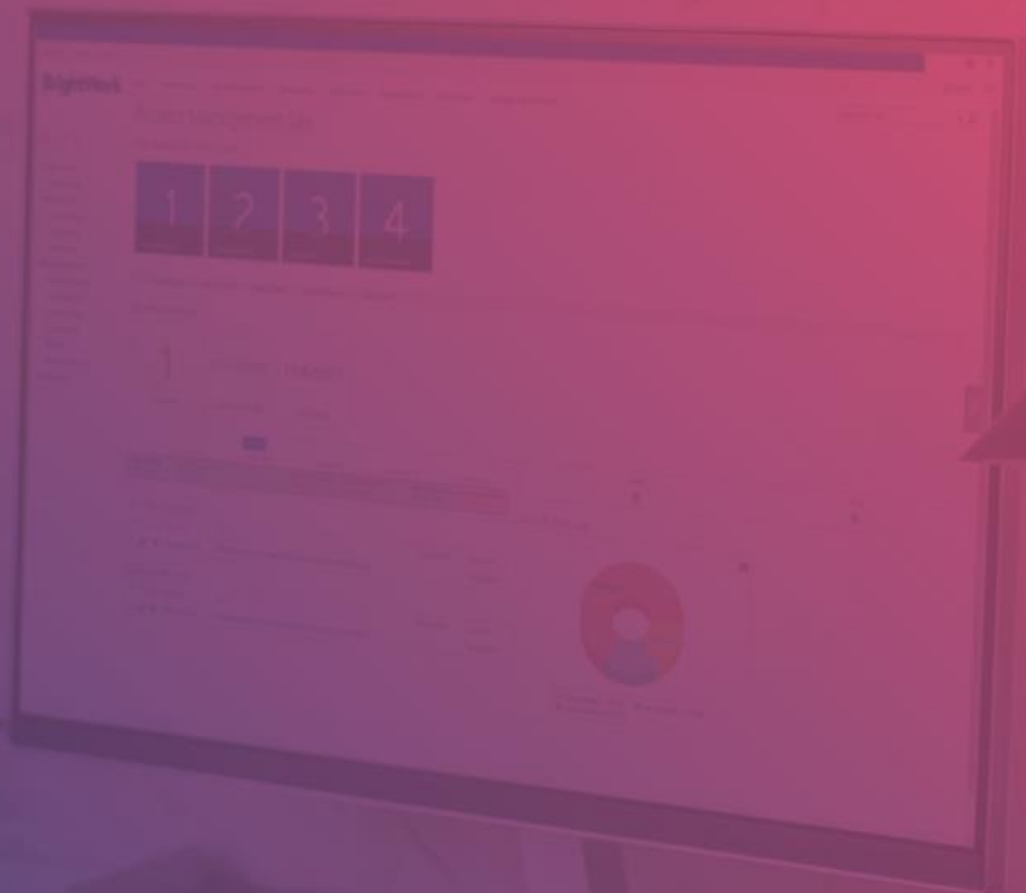
BrightWork Power BI Pack



The BrightWork Power BI Pack comes pre built with six central dashboards.

- Portfolio Dashboard
- Portfolio Timeline
- Project Task Timeline
- Work Reports
- Status Report Dashboard
- Issue Report

DEMO



QUESTIONS?

➤ Use the Question pane in GoToWebinar to ask questions

THANK YOU

➤ Talk to our Solution Specialists about your project management needs



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APPENDIX

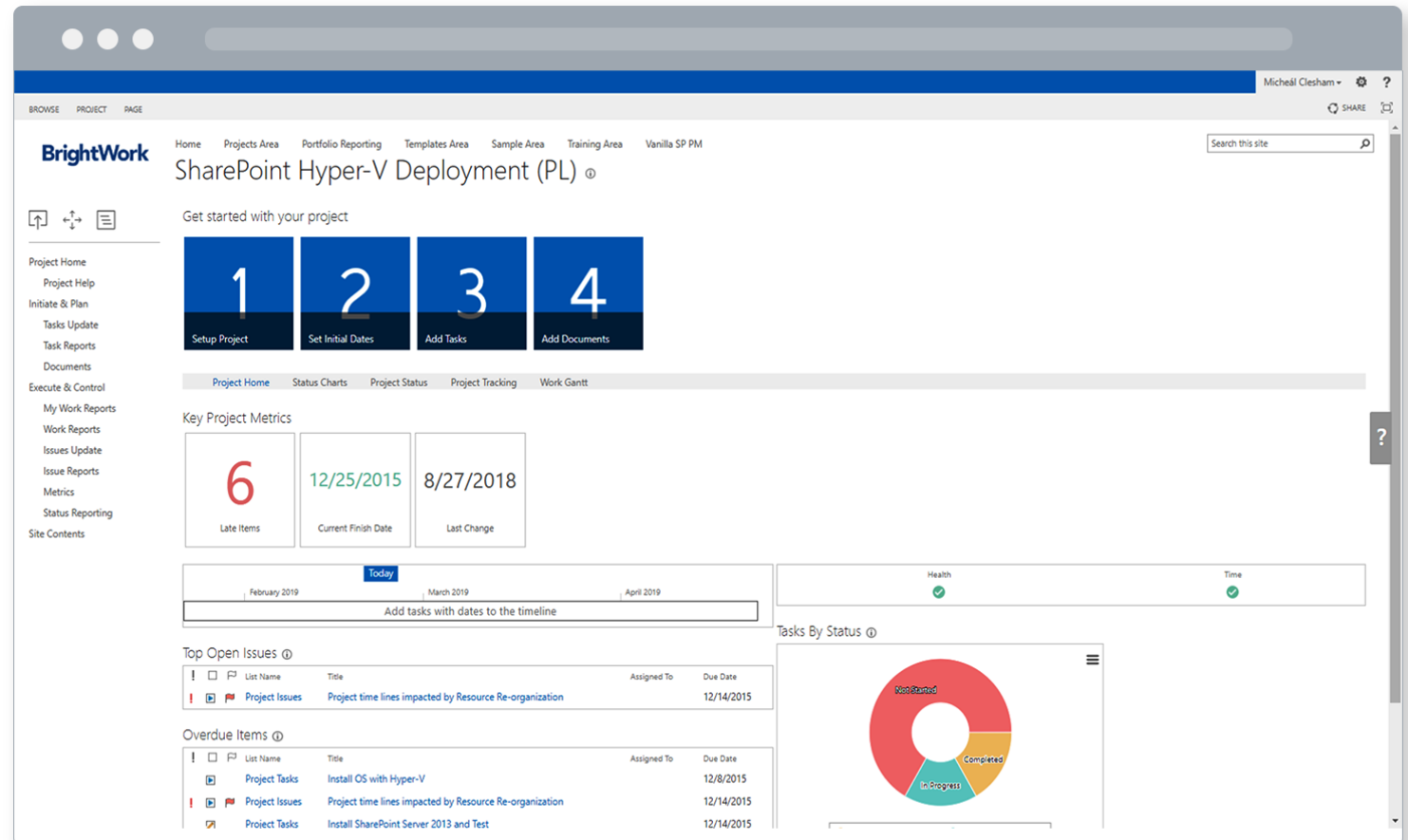
➤ BrightWork model explained

PROJECTS

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.

Increase productivity by centralizing all project information into a single, cohesive tool.



PROJECTS

Collaborate with a Team-focused 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.

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

The screenshot displays the BrightWork interface for a project site titled "Selected Project Open Work". The user is logged in as Anne Wallace. The dashboard is organized into several sections:

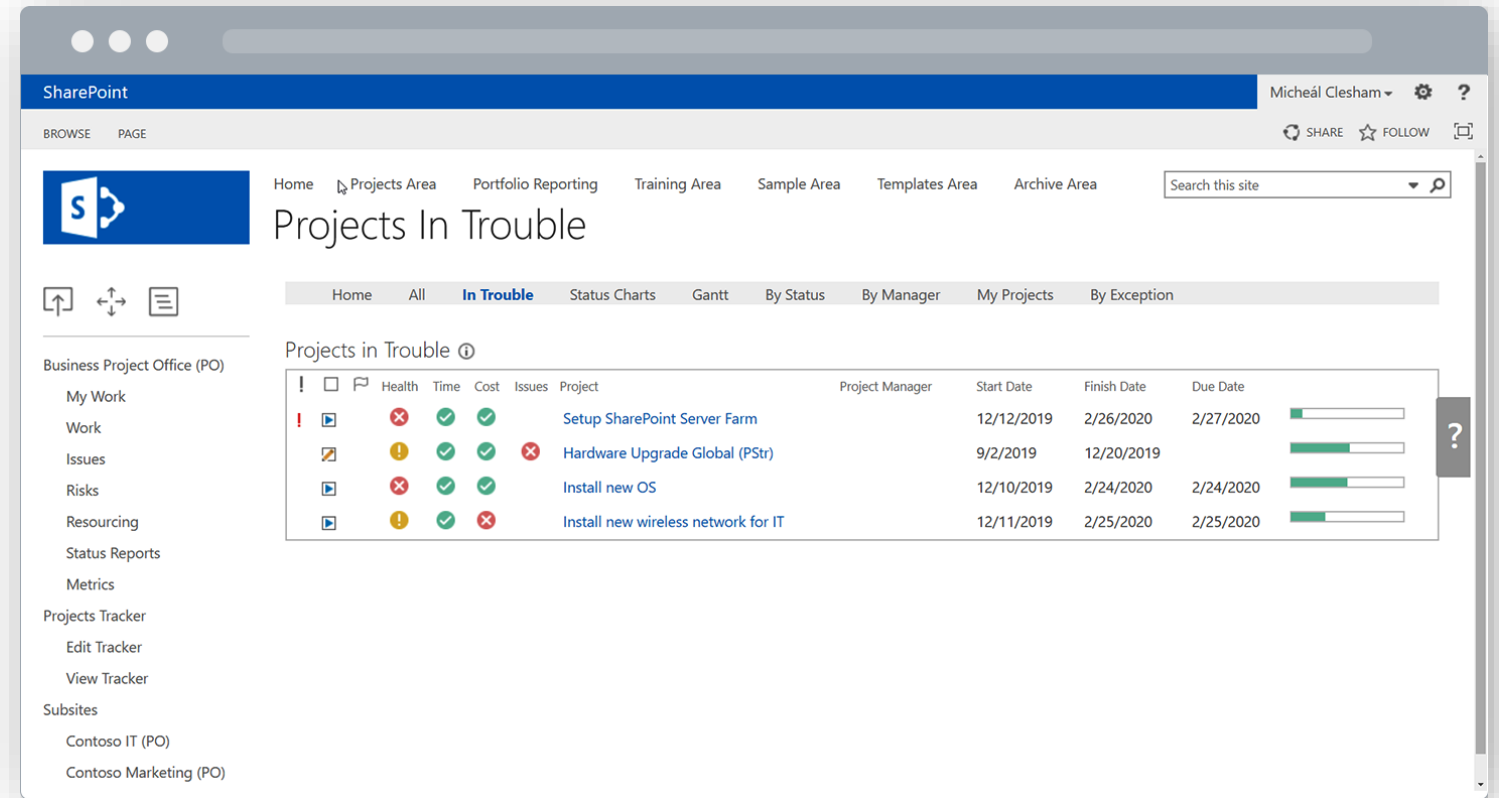
- Navigation:** Includes tabs for BROWSE, PAGE, and BOARD. A top navigation bar lists areas like Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts.
- Left Sidebar:** Contains a "CONTOSO" logo and a navigation menu with options like "Marketing Mini-Projects (PWT)", "Selected Project", "All Projects", "All My Work", "All Tasks", "All Documents", "All Issues", and "Site Contents".
- Main Content Area:**
 - Select your default Project:** A dropdown menu currently shows "Website content review".
 - Projects:** A table listing project items. The first item is "Website content review" with a status of "0 % Complete", assigned to "Anne Wallace", and scheduled for "7/16/2019" to "11/12/2019".
 - Project Documents:** A section for documents related to the project, including "Revised Messaging Framework 2019" and "SEO Keyword Stats", both modified 2 hours ago by Anne Wallace.
 - Project Tasks:** A list of tasks for the project, including "Review first draft design", "Create second design", "Review second design", "Select version and send test", and "Kick-off Project", with their respective due dates and assignees.
 - Tasks Priority:** A visual task board showing tasks categorized by priority: (1) High, (2) Normal, and (3) Low. Tasks include "Create an initial plan", "Create second design", "Review first draft design", "Kick-off Project", "Gather design submissions", and "Select version and send test", each with a progress bar and completion status.

PROJECTS

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.



SharePoint

Micheál Clesham

Home Projects Area Portfolio Reporting Training Area Sample Area Templates Area Archive Area

Search this site

Projects In Trouble

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

Projects in Trouble ⓘ

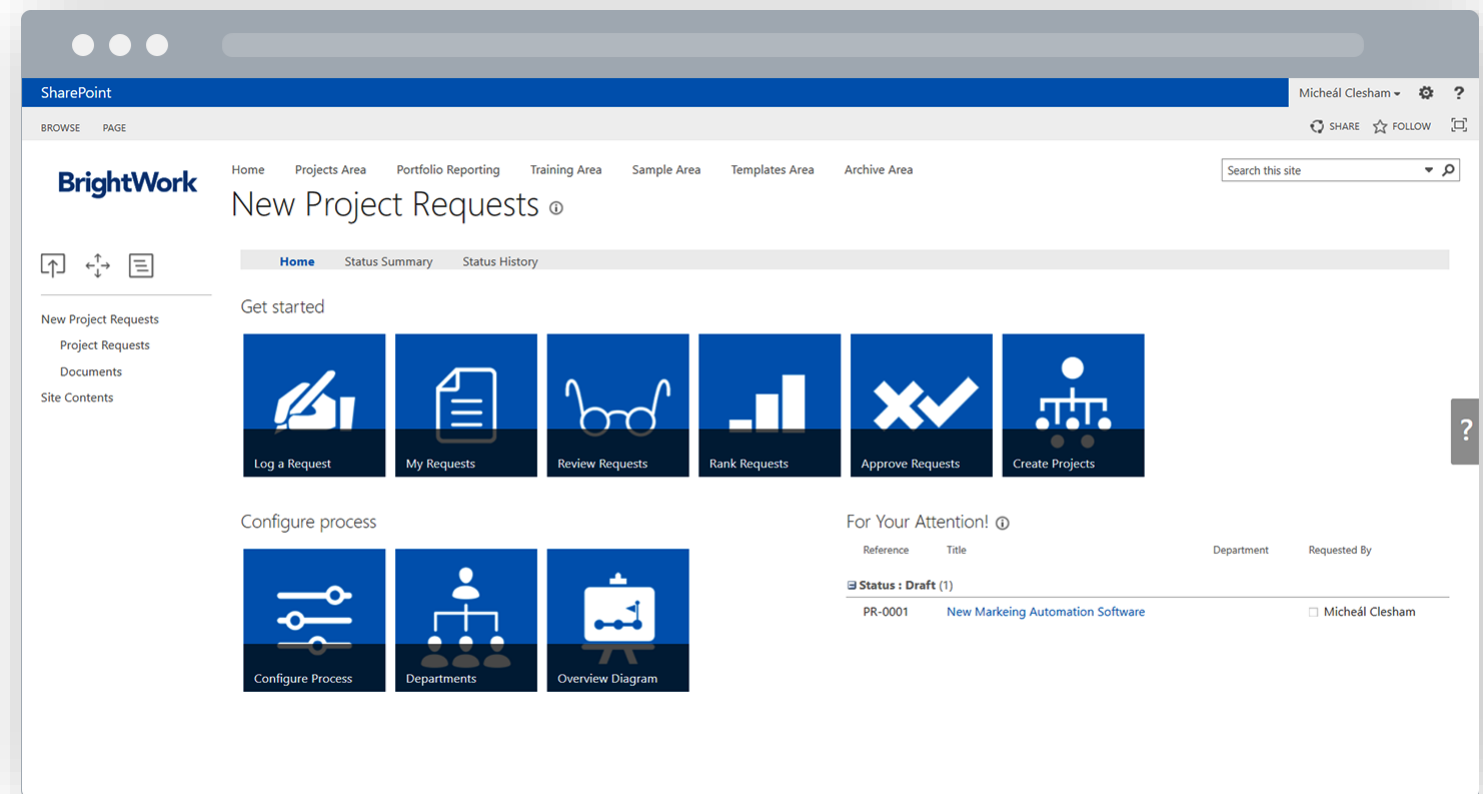
Health	Time	Cost	Issues	Project	Project Manager	Start Date	Finish Date	Due Date
!	✗	✓	✓	Setup SharePoint Server Farm		12/12/2019	2/26/2020	2/27/2020
!	!	✓	✓	Hardware Upgrade Global (PStr)		9/2/2019	12/20/2019	
!	✗	✓	✓	Install new OS		12/10/2019	2/24/2020	2/24/2020
!	!	✓	✗	Install new wireless network for IT		12/11/2019	2/25/2020	2/25/2020

PORTFOLIOS

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

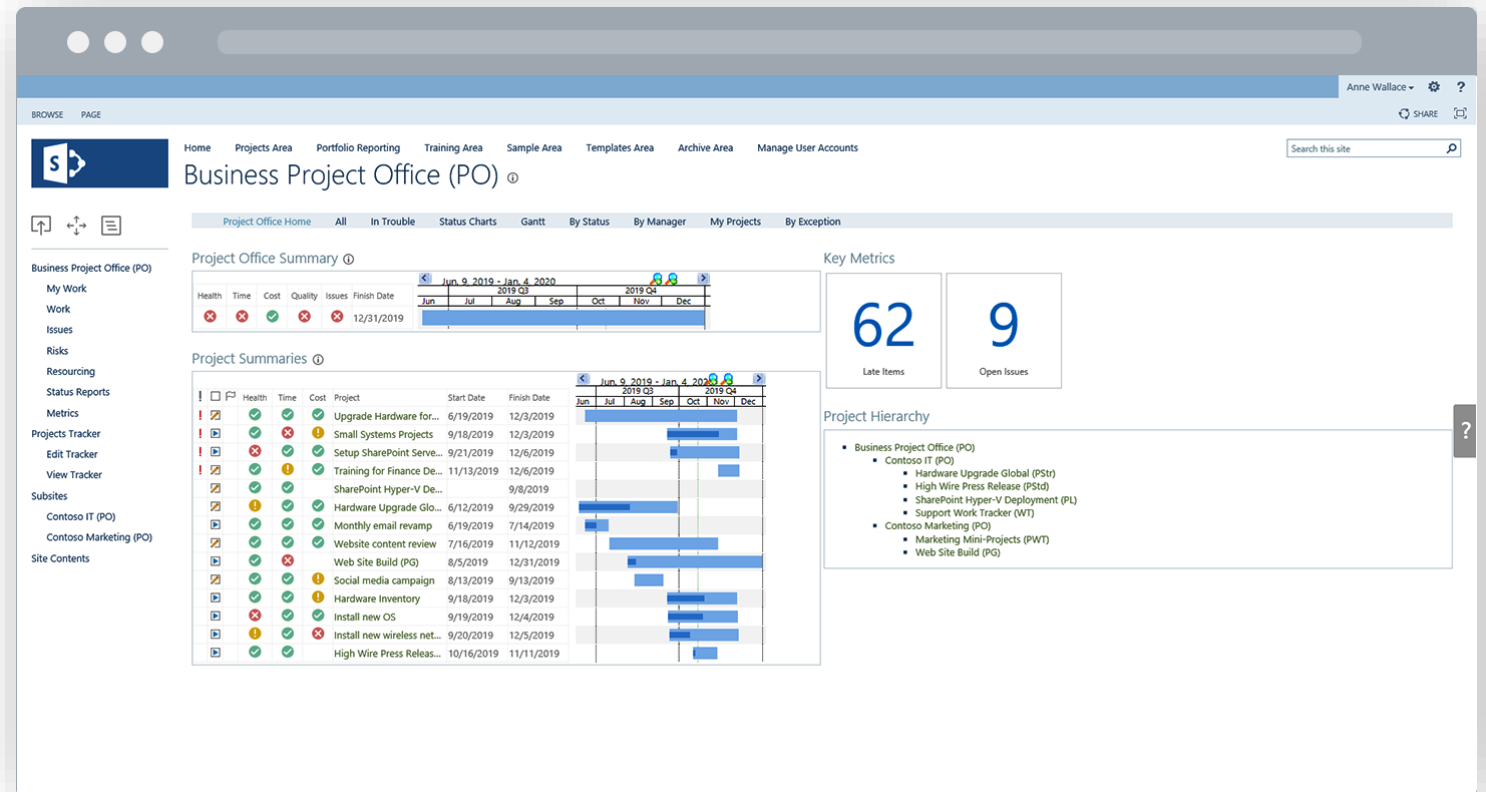


PORTFOLIOS

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.



PORTFOLIOS

Allocate with High-Visibility Resource Management

Simple resource reports help you track and forecast resource allocation to make sure you have optimal resource utilization across projects.

Prevent burnout and boost team morale with more transparency around workloads and commitments.

The screenshot displays the BrightWork Resource Management interface. The top navigation bar includes links for Home, Projects Area, Portfolio Reporting, Templates Area, Sample Area, Training Area, and Vanilla SP PM. The left sidebar lists navigation options: Requests Home, Project Requests, Documents, Resource Management (highlighted), Resource Allocation, and Site Contents. The main content area shows the 'Resource Management' page with tabs for Home, Status Summary, Status History, and Resource Management. Below the tabs are two icons: 'Resource Allocation' and 'Overview Diagram'. A 'Resource Report' table is displayed, showing resource allocation data for Q2, 2019, Q3, 2019, and Q4, 2019.

	Title	Start Date	Finish Date	Work	Q2, 2019	Q3, 2019			Q4, 2019
					Jun/2019	Jul/2019	Aug/2019	Sep/2019	Oct/2019
Assigned To : Anne Wallace (1)					80.00	184.00	176.00	168.00	40.00
Assigned To : Christine Chang (1)					40.00	92.00	88.00	84.00	20.00
Assigned To : Jim Corbin (1)					80.00	184.00	176.00	120.00	

SHAREPOINT

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.

Reduce the learning curve and accelerate user adoption with a familiar environment.

The screenshot displays the BrightWork application interface within a SharePoint web browser. The top navigation bar includes the BrightWork logo and a list of menu items: Home, Projects Area, Portfolio Reporting, Templates Area, Sample Area, Training Area, and Vanilla SP PM. A search bar is located on the right. The left sidebar shows a tree view with 'Requests Home' expanded, containing 'Project Requests', 'Documents', 'Resource Management' (selected), 'Resource Allocation', and 'Site Contents'. The main content area is titled 'Resource Management' and features two tiles: 'Resource Allocation' and 'Overview Diagram'. Below these tiles is a 'Resource Report' table. The table has columns for Title, Start Date, Finish Date, Work, and a breakdown of hours by quarter (Q2, 2019; Q3, 2019; Q4, 2019). The data shows three resources: Anne Wallace, Christine Chang, and Jim Corbin, with their respective hour allocations across the quarters.

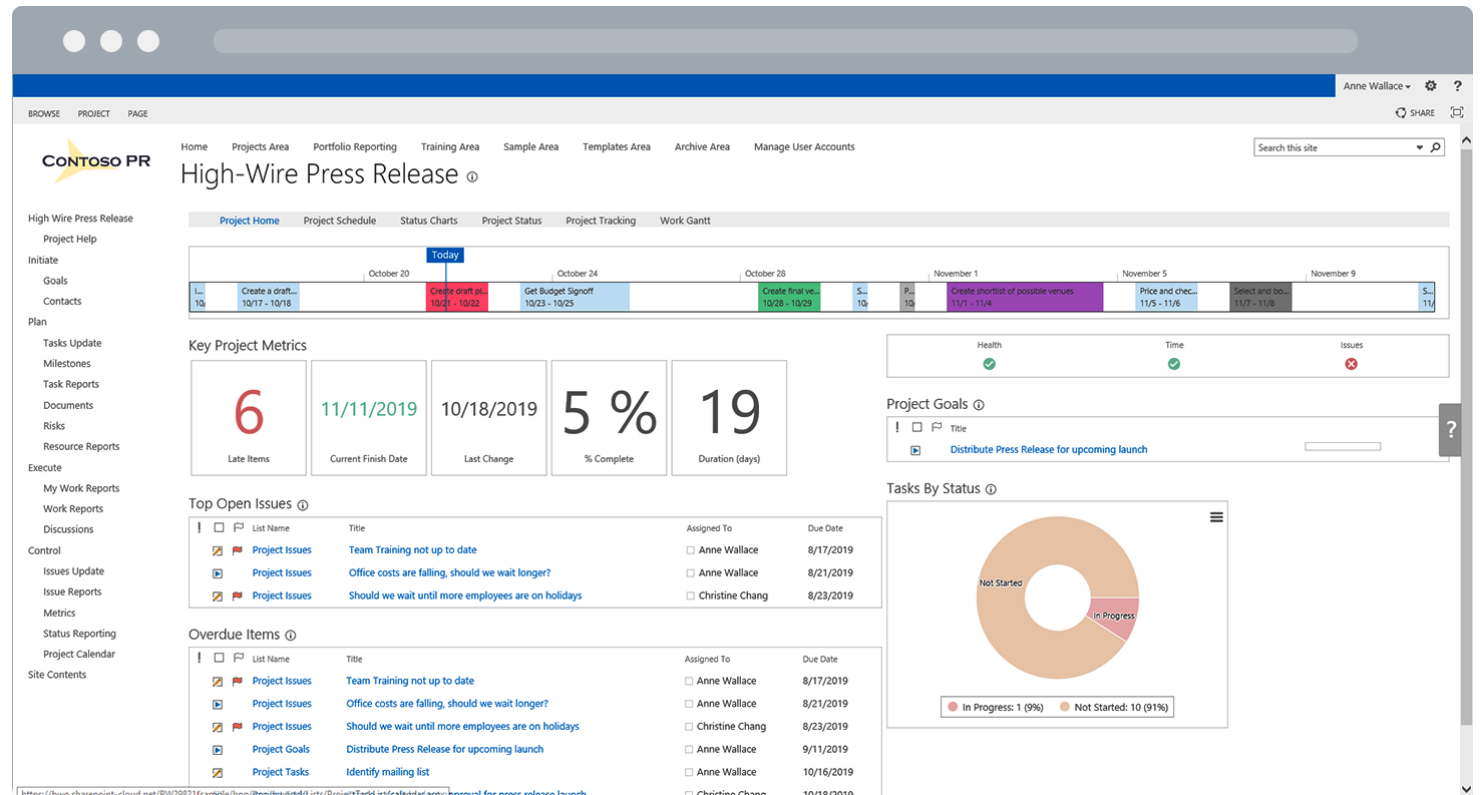
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SHAREPOINT

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.



SHAREPOINT

Evolve with Easy-To-Configure Templates

Easily create, use, reuse, and update your project management best-practices on an organizational scale.

Expand BrightWork into new teams and departments without any impact on performance or reporting.

Evolve to the desired level of organizational project management quickly and easily.

