

# BrightWork

LIVE WEBINAR

## Using SharePoint Workflows for Project Team Collaboration



presented by  
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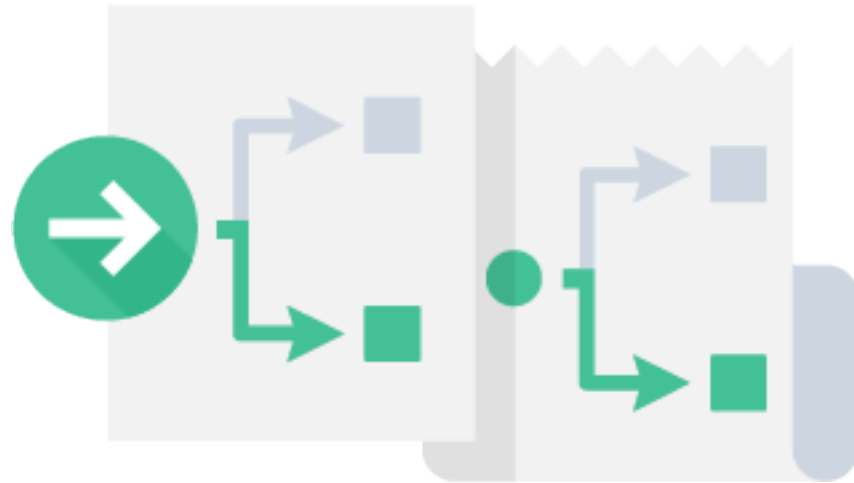
**QUICK POLL!**

**Are you using SharePoint workflows  
for Project Management?**

# AGENDA

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- ✓ Managing Projects with SharePoint
- ✓ Automating Project Process with Sharepoint Workflows
- ✓ Introducing Nintex with BrightWork for workflows and forms
- ✓ Q&A



# 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:

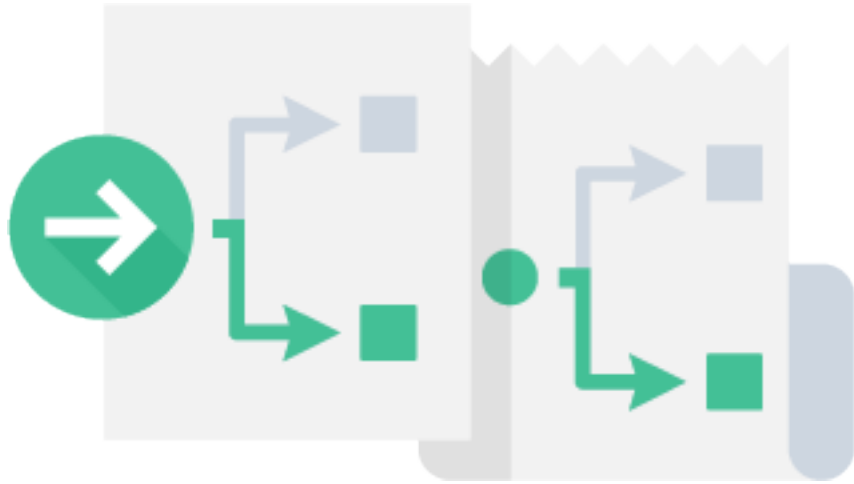
- Navigation Bar:** Includes links for BROWSE, PROJECT, TASKS, and LIST. The main navigation area contains links for Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts.
- Project Office Home:** The main dashboard area for the 'Contoso Marketing (PO)' project. It includes a 'Get started' section with links to 'Projects Tracker' and 'New Project Site'. 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).
- Project Office Summary:** A summary table for the project, showing metrics for Health, Time, Cost, Quality, Issues, and Finish Date. The table is filtered for the period 'Apr. 15-Aug. 11, 2018'.
- Task List:** A list of tasks for the project, including 'Create draft bud...', 'Create draft plan fo...', and 'Create B...'. The tasks are organized by date and status.
- Task Details:** A detailed view of a task, showing its name, description, and a list of sub-tasks. The sub-tasks include 'Hardware Upgrade Global', 'Project-Initiation', 'Identify-suppliers', 'Create-draft-budget-for-upgrade', 'Create-draft-plan-for-upgrade', 'Create-Business-Impact-Plan', 'Make-Proposal-Presentation', 'Project-Planning', and 'Get-Budget-Signoff'.
- Calendar:** A calendar view showing the project schedule, with tasks plotted against dates. The calendar is filtered for the month of August.

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





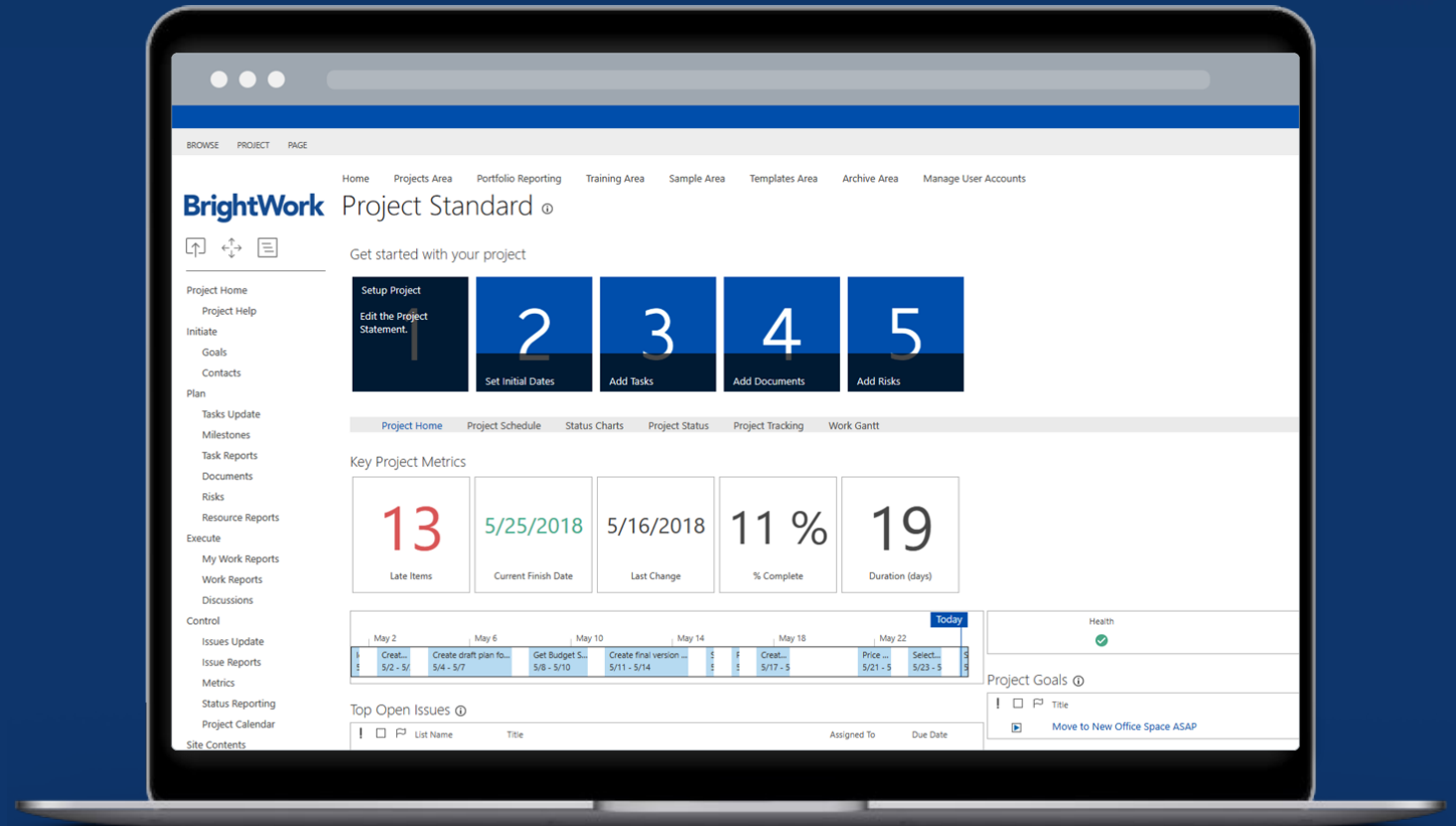
## SharePoint Workflows

The automated movement of documents or items through a sequence of actions or tasks that are related to a business process.

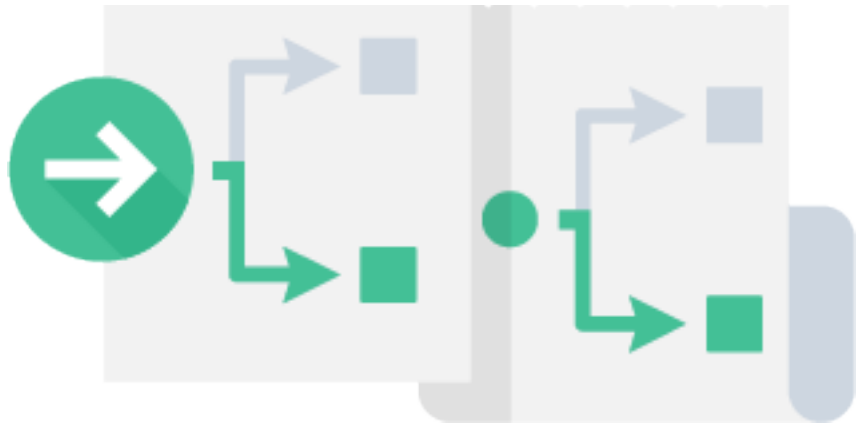
Workflows can be used to consistently manage common business processes within an organization by enabling the organization to attach business logic to documents or items in a SharePoint list or library.

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# DEMO



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## Nintex Workflows

Nintex is easy, point-and-click workflow automation software to tackle everything from basic business functions to company-wide processes with a few clicks – not code – helping you improve how you work.

By combining Nintex Workflows and forms into BrightWork project management templates you can ensure that they are automatically deployed when you start new projects.



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## 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.

The image displays three overlapping screenshots of the BrightWork project management interface, which is a SharePoint-based solution.

**Central Screenshot: Business Project Office (PO)**

- Navigation:** BROWSE, PAGE, ITEMS, LIST. Top menu: Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, Manage User Accounts.
- Section: Get started**
  - Buttons: Projects Tracker, New Project Site
- Section: Key Metrics**
  - 85 Late Items
  - 9 Open Issues
- Section: Project Office Summary**
  - Health: Time, Cost, Quality, Issues, Finish Date
  - Table: Jun, Jul, Aug, Sep, Oct, Nov
- Section: Project Summaries**
  - Table with columns: Health, Time, Cost, Project, Start Date, Finish Date
  - Projects listed: Upgrade Hardware for..., Small Systems Projects, Setup SharePoint Serve..., Training for Finance Dept., SharePoint Hyper-V De...

**Left Screenshot: Hardware Upgrade**

- Section: Get started with your project**
  - Buttons: Setup Project, Set Initial Data
- Section: Key Project Metrics**
  - 5 Late Items
  - 12/13/2017 Current Finish

**Right Screenshot: Project - Status Charts**

- Section: Status**
  - Pie chart showing project status distribution
- Section: Late Items**
  - 0.00

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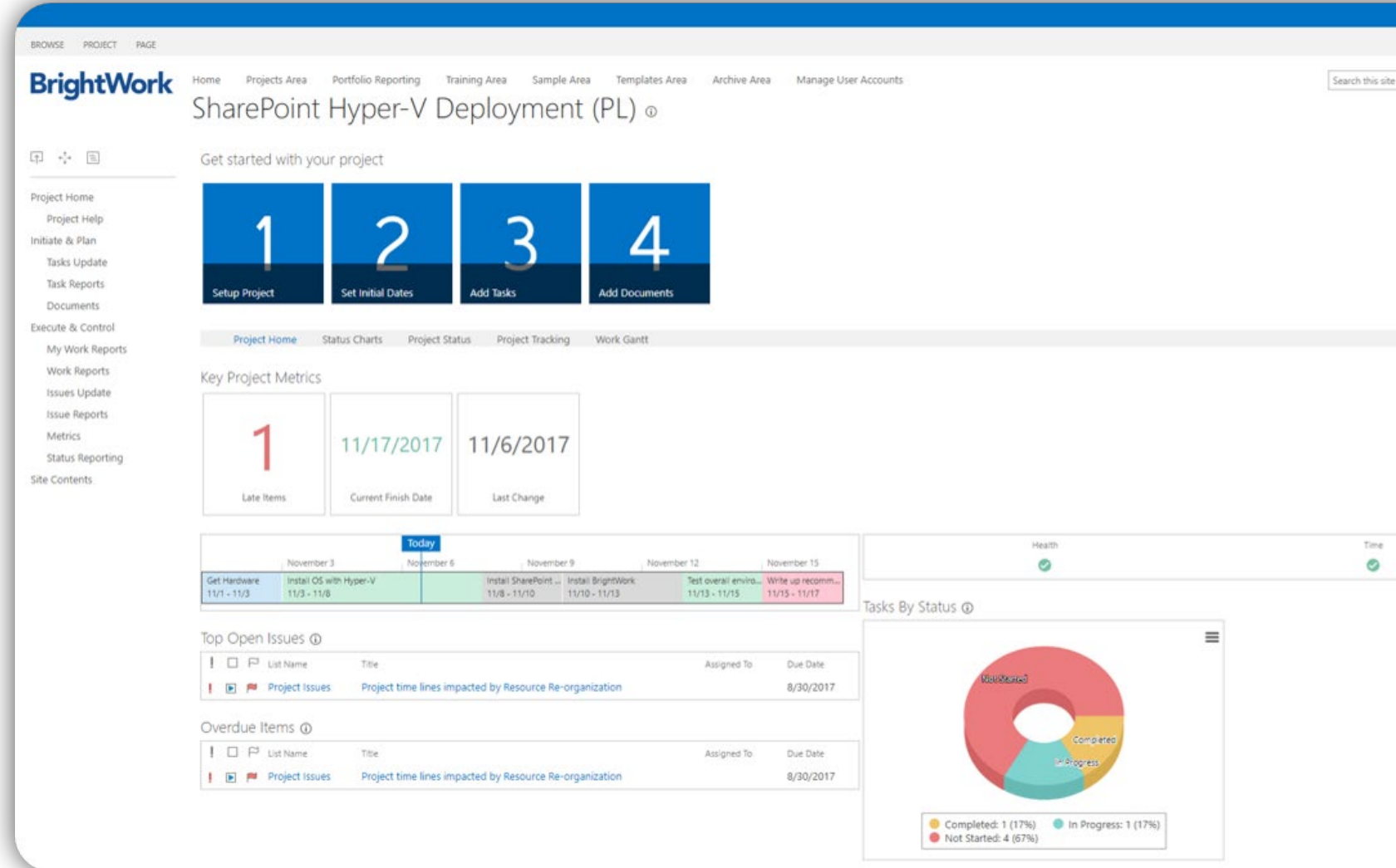
## Manage Projects Successfully

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 ... 8/23', 'Create ... 8/29 - 8/3', 'Get Budget Signoff 9/1 - 9/5', 'Create final ... 9/6 - 9/9', 'Sc... 9/12', 'Create report outlinin... 9/14 - 9/19', 'Cre... 9/20', and 'Upgrade hardware in s... 9/22 - 9/27'.

The main content area is titled 'Stop editing this list' and includes tabs for 'All Tasks', 'All Tasks and Columns', and 'Calendar'. The 'All Tasks' tab is selected, displaying a table of tasks with columns for Task Name, Duration, Start Date, Finish Date, Predecessors, and % Complete.

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	

A calendar popup is visible, showing the month of August 2017. The date August 23 is highlighted, and the text 'Today is Tuesday, August 23, 2017' is displayed at the bottom of the calendar.



# 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.

The screenshot displays the BrightWork Reporter interface. At the top, there's a blue header bar with the user name 'Anne V'. Below it, a navigation bar includes 'VIEW', 'PAGE', and 'REPORTER'. The 'REPORTER' tab is active, showing a ribbon with options like 'Shared', 'Personal', 'Columns', 'Grouping', 'Sorting', 'Filters', 'Totals', 'Report Information', 'Show Grouping', 'Show Totals', 'Export', 'Email', 'Print', and 'Configure Reporter Settings'. Below the ribbon, there's a section for 'Project Office Home' with tabs for 'All', 'In Trouble', 'Status Charts', 'Gantt', 'By Status', 'By Manager', and 'My Projects'. The 'In Trouble' tab is selected, showing a list of 'Projects in Trouble' with columns for Health, Time, Cost, Issues, Project Link, Start Date, Finish Date, and Due Date. The list contains four projects, each with a progress bar on the right.

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
!	✗	✓	✗	Hardware Upgrade Global (PStr)	4/27/2017	8/12/2017	8/14/2017
✗	✓	✓		Install new OS	8/4/2017	10/19/2017	10/19/2017
!	✓	✗		Install new wireless network for IT	8/5/2017	10/20/2017	10/20/2017



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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 actionable 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 side, there is a 'For Your Attention!' section with a table of pending requests.

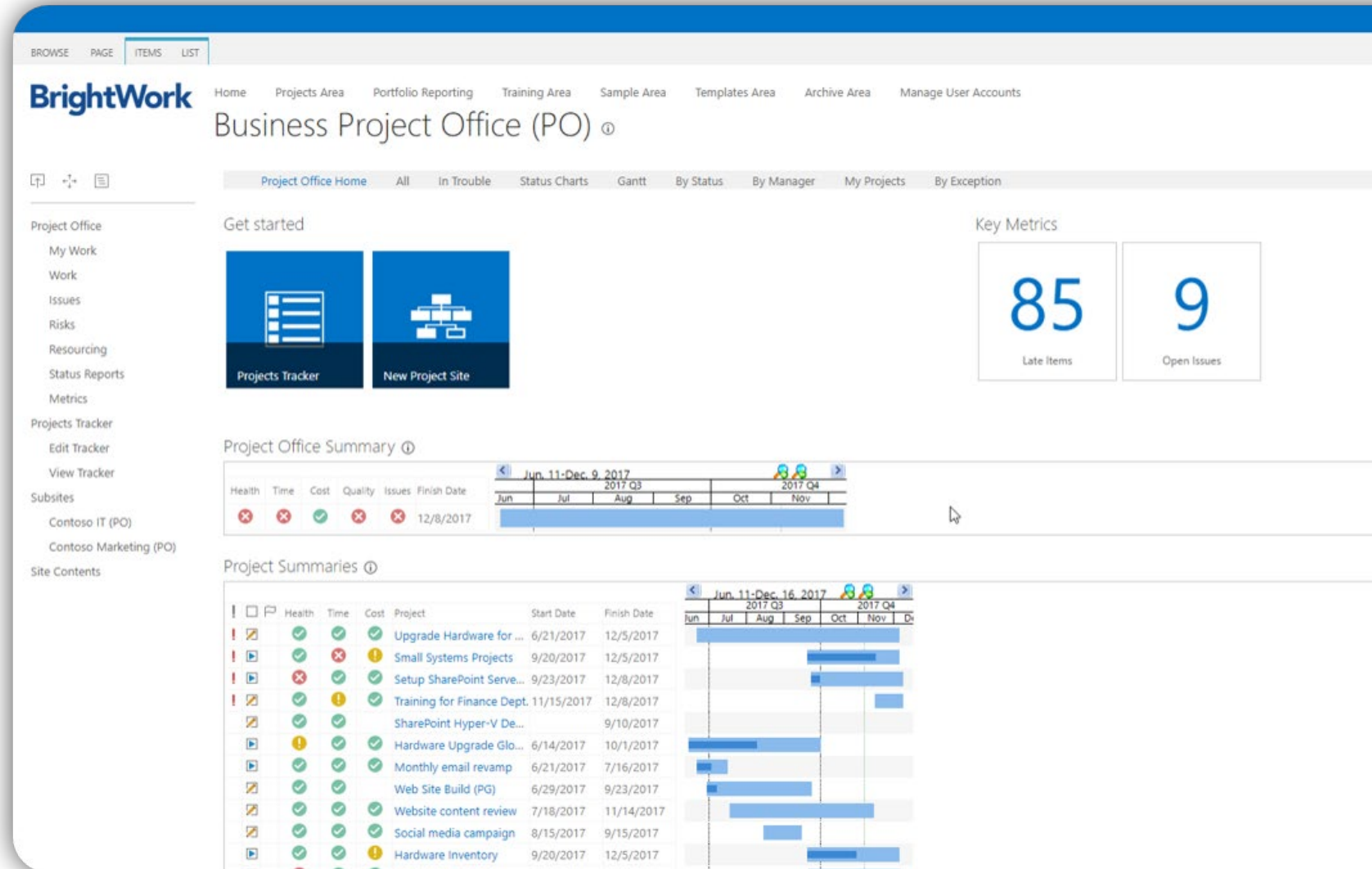
Reference	Title
PR-0004	New Marketing Automation Software
PR-0005	Develop New Employee Onboarding Program
PR-0006	Go Green at the Office Initiative



# Track with Real-Time Portfolio Dashboards

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

Get visibility and drill into the detail of specific projects.





BROWSE	PROJECT	PAGE
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Assigned To	My Work	Due Soon	Work Completed	Unassigned	Export All
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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		
<input checked="" type="checkbox"/> Assigned To : <input type="checkbox"/> Alex Hankin (7)					100.00		
<input checked="" type="checkbox"/> List Name : Project Risks (4)							
<input checked="" type="checkbox"/> List Name : Project Tasks (3)					100.00		
<input checked="" type="checkbox"/> Assigned To : <input type="checkbox"/> Anne Wallace (13)	46.67	13.33	24.00	8.00			
<input checked="" type="checkbox"/> Assigned To : <input type="checkbox"/> Christine Chang (3)							
<input checked="" type="checkbox"/> Assigned To : <input type="checkbox"/> Dan Bacon (1)							

# 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, which is built on the SharePoint platform. The interface includes a top navigation bar with tabs for BROWSE, PAGE, and REPORTER. Below this is a ribbon with various icons for actions like 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' with a sub-header 'Project : Hardware Upgrade (PStd) (3)'. The report lists issues with 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 includes a left sidebar with navigation links for Project Office, My Work, Work, Issues, Risks, Resourcing, Status Reports, Metrics, Projects Tracker, Edit Tracker, and View Tracker. A right sidebar shows the 'Configure Reporter Settings' panel with 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.

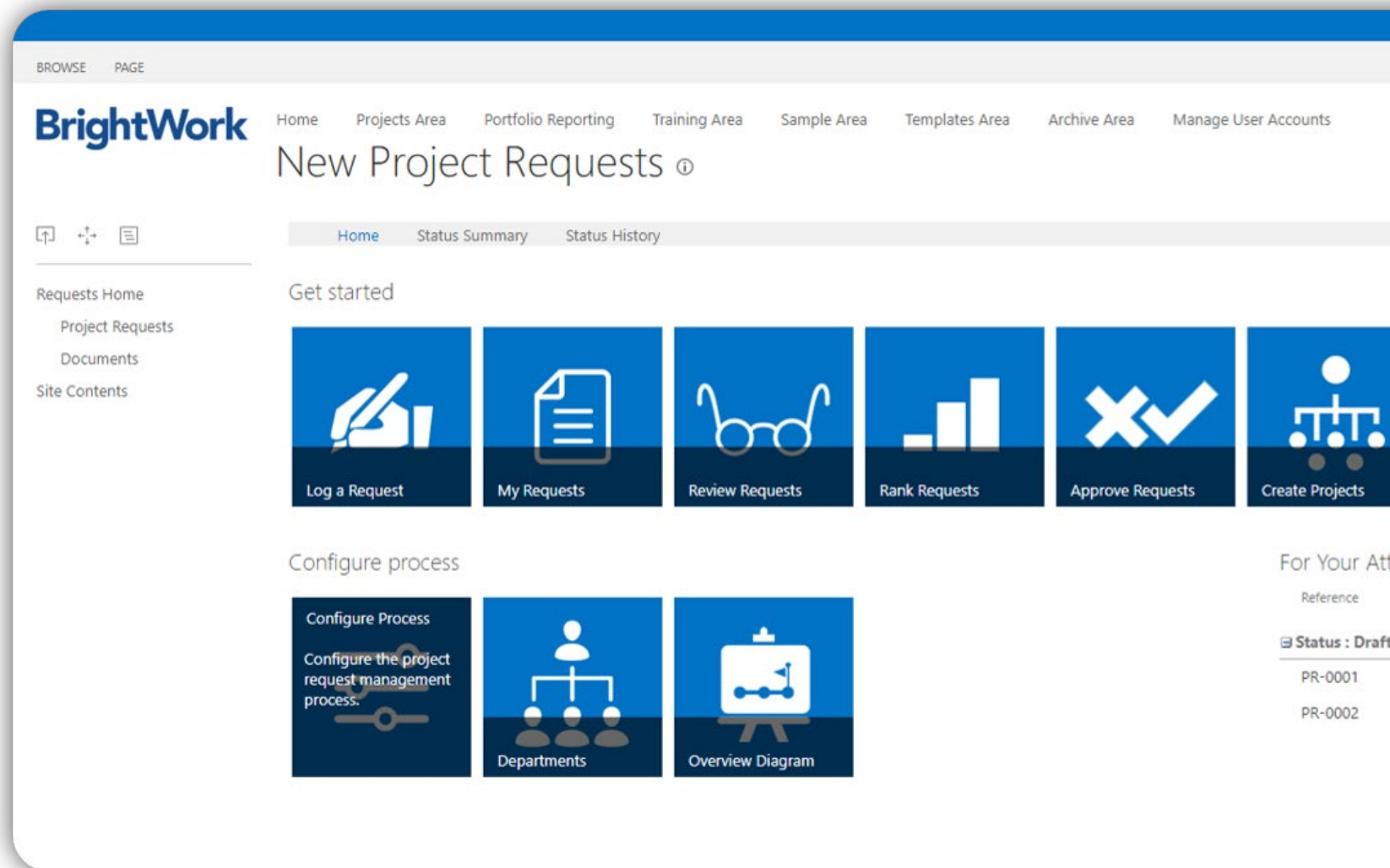
**Template Usage**





# 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**

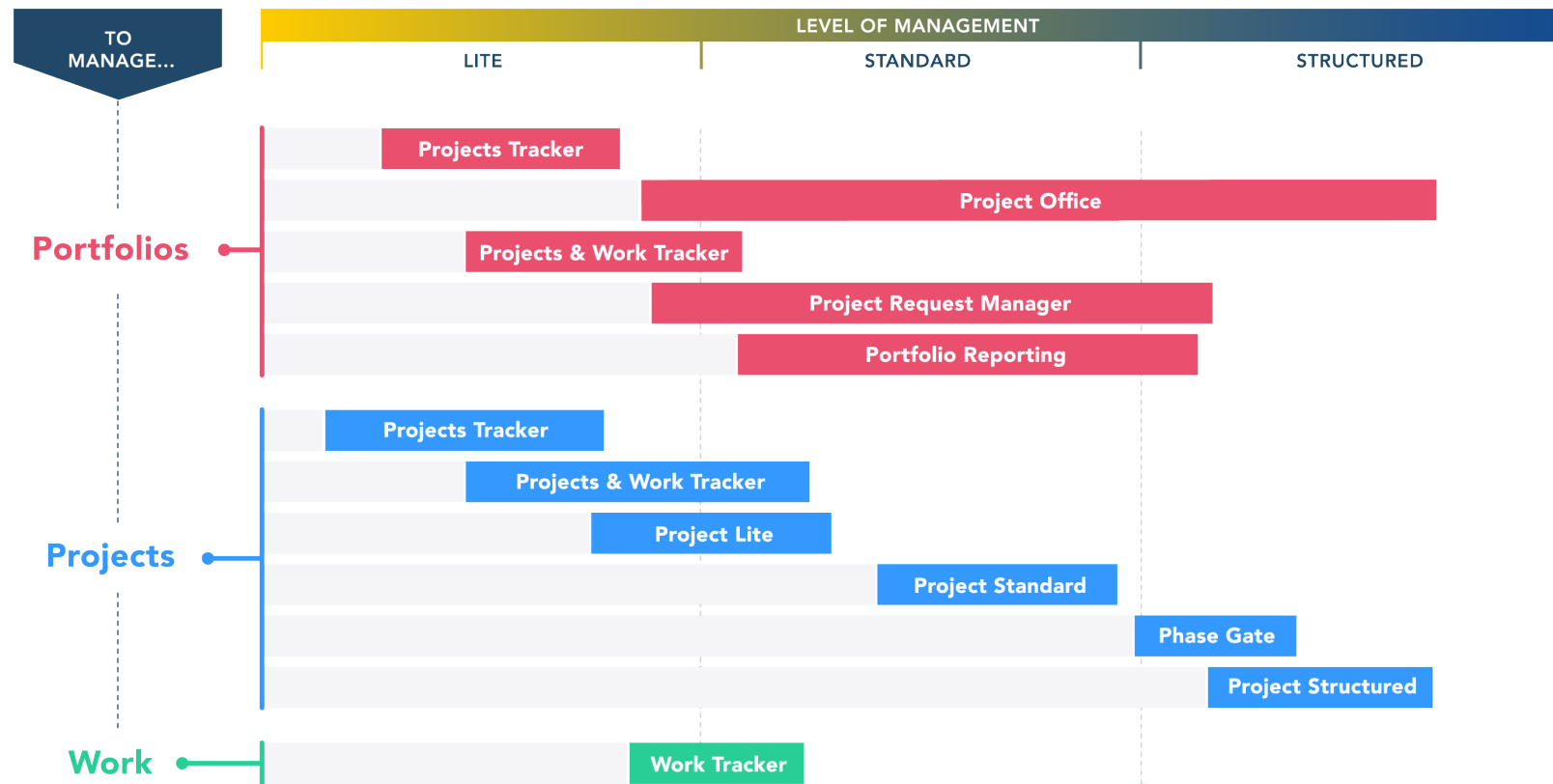


## Evolve

**Grow Organizational  
Project Management**

# BrightWork Templates Spectrum

## TEMPLATE SPECTRUM BrightWork



# BrightWork

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