

BrightWork365

Instant Visibility with Project Management Templates for Microsoft 365

Presented by



Jonathan Weisglass
BrightWork

Instant Visibility with Project Management Templates

AGENDA:

- **Overview of BrightWork 365 for Microsoft 365**
 - **Personal Options, Views & Charts**
 - **Leveraging Business Process Flows & Forms for Project Management**
 - **Giving Your Projects a Head Start With Content Templates**
-

QUICK POLL

A photograph of a group of people sitting around a table in a meeting room. A laptop is open on the table. The image is overlaid with a semi-transparent red filter. The text 'QUICK POLL' is centered in the upper half of the image in a bold, yellow, sans-serif font.

BrightWork 365 for Microsoft 365

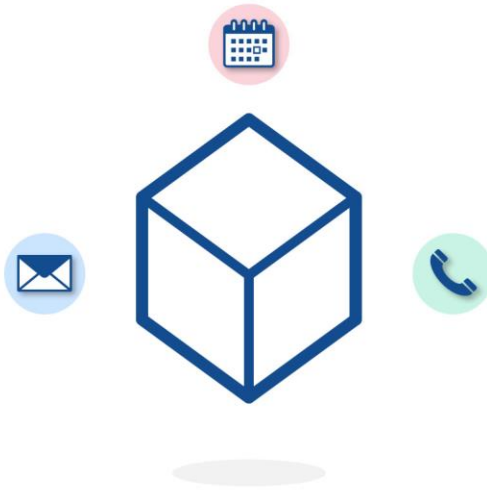
The "What"



The "How"



More "How"



START

Deliver Immediate
Visibility & Control




EVOLVE

Grow Organisational
Project Management

The BrightWork Approach

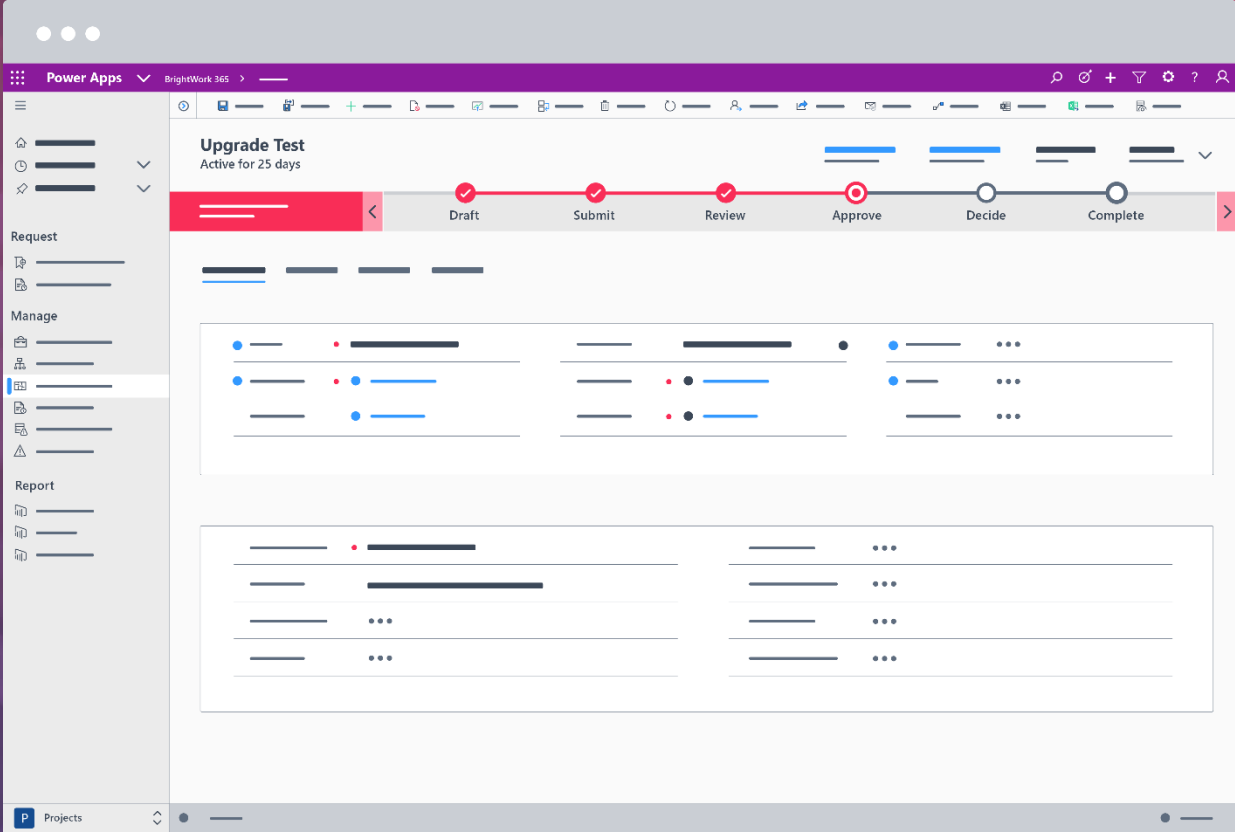
Built into our Product with Templates

and

Designed into our Deployment Approach with Services

DEMO

Project and Portfolio Management



Personal Options

Set Personal Options

Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities Formats Email Templates Email Signatures Email Privacy Languages

Select your home page and settings for Get Started panes

Default Pane <Default based on user role> Default Tab <Default based on user role>

Set the number of records shown per page in any list of records

Records Per Page 50

Select the default mode in Advanced Find

Advanced Find Mode Simple Detailed

Set the time zone you are in

Time Zone (GMT) Coordinated Universal Time

Select a default currency

Currency

Support high contrast settings

Select this option if you are using the High Contrast settings in your browser or operating system.

Enable high contrast

Personal Views & Charts

Edit columns: Projects

+ Add columns ↶ Reset to default

- Name
- Project Reference
- Project Status
- Stage
- Priority
- Project Type
- Health Icon
- Project Manager
- Program
- Portfolio
- Template
- Created On
- Modified On

Add columns

Project Related

Search All

- (Deprecated) Stage Id
- (Deprecated) Traversed Path
- % Complete
- % Complete Comment
- Account
- Active Stage
- Actual to Date
- Actual to Date (Base)
- Approval Date
- Approval Requirements
- Approved Budget
- Approved Budget (Base)
- BPF
- Budget Assigned
- Budget Assigned (Base)

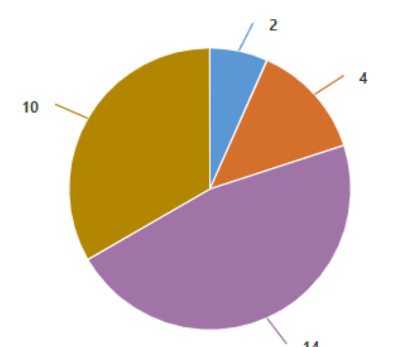
JW All Projects Edit columns

Name	Project R...	Project St...	Stage	Priority	Project Ty...	Health Icon	Pro
Frozen Desserts for South...	Proj-0012...	In Prog...	Develop...	2. High	Strategic	●	EM
Powdered Cream Cheese ...	Proj-0010...	In Prog...	Scale-Up	2. High	Strategic	●	FM
Frozen Desserts for Argen...	Proj-0010...	In Prog...	Develop...	2. High	Strategic	●	JW
Powdered Cream Cheese ...	Proj-0010...	In Prog...	Scale-Up	2. High	Strategic	●	AH

All Projects

JW Projects by Priority

● (blank) ● 1. Very High ● 2. High ● 3. Medium



Name	Project
Frozen Desserts for South...	Proj-00
Powdered Cream Cheese ...	Proj-00
Frozen Desserts for Argen...	Proj-00
Powdered Cream Cheese ...	Proj-00
Powdered Cream Cheese ...	Proj-00
Frozen Desserts for Chile	Proj-00
Move all Internal Servers t...	Proj-00
Refresh Remote Desktops	Proj-00
Fabrikam Deployment	


Leveraging Business Process Flows & Forms


Project Standard - Saved
Template · Template ▾


Details Projects Content Templates


Name * Project Standard

Description This template is for requesting and managing projects that have a reasonably mature amount of project management process applied.

Request Business Process Flow *  Project Request 1 Stage

Request Form *  Project Request 1 Stage

Project Business Process Flow *  BrightWork Project

Project Form *  Project Standard

Request Reference Type Automated

Available in Requests Yes

Content Templates

Content Templates ▾	
<input type="radio"/> Name ▾	Template ▾
Content Template from Acme Solution Deployment 2:16 PM	Contoso Project Structured
Content Template from Website Redesign 2:16 PM	Contoso Project Standard
Content Template from Employee Onboarding 2:15 PM	Contoso Project Lite
Content Template from Widget Blue Product 2:15 PM	Contoso New Product Idea
Content Template from Widget Green Product Update 2:13 PM	Contoso Product Update

QUESTIONS?

➤ Use the Question panel to ask questions

THANK YOU



For sales info contact:

Adam Sheehan

Tel: +1 617 631 9825

+353 91 412741

Email: asheehan@brightwork.com

Our mission is to:

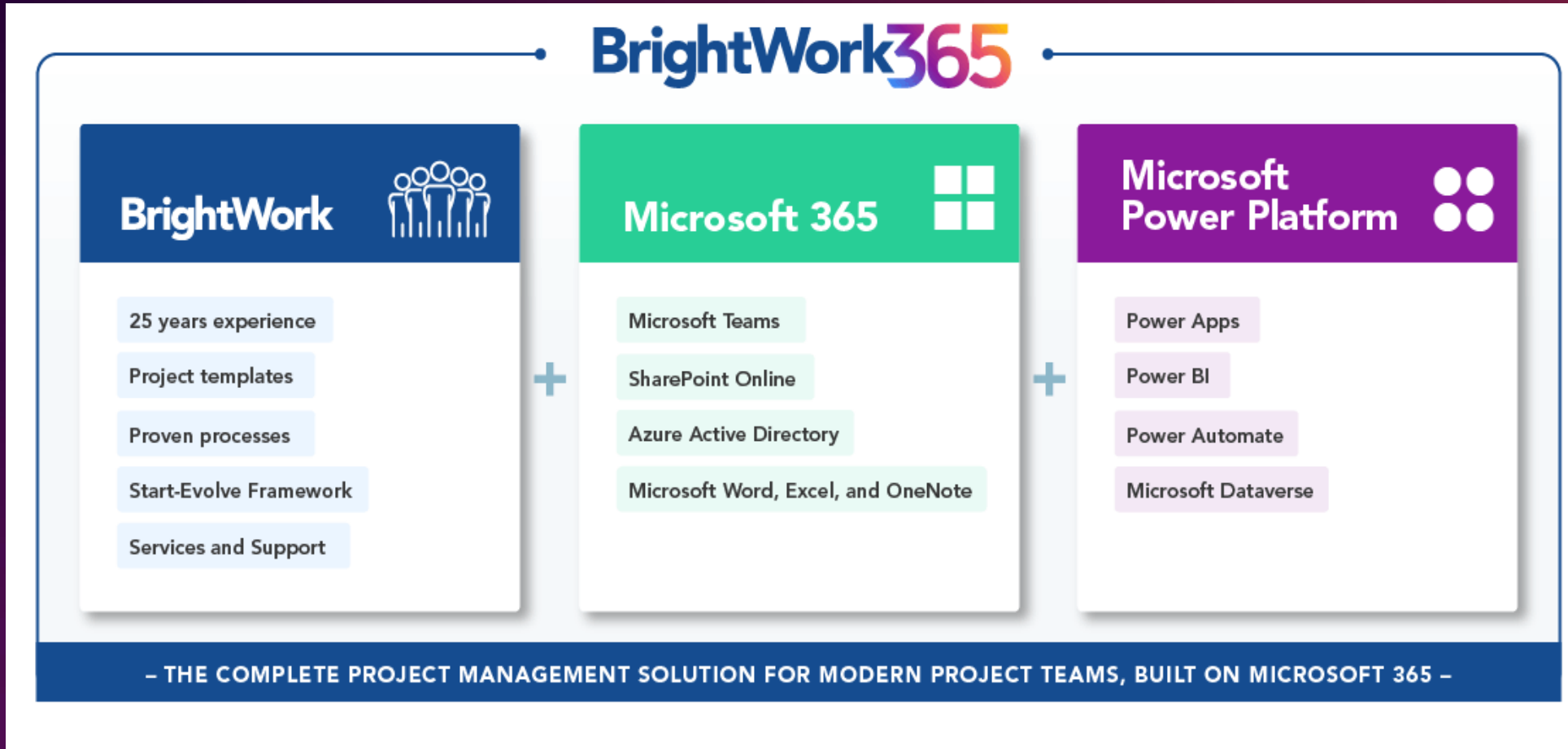
Make Project and Portfolio
Management with Microsoft
SharePoint and Microsoft 365
easier for our customers.

Project Management Success, Made Easy

BrightWork 365 allows organizations to leverage the best of the Microsoft 365 ecosystem for project work and collaboration whilst maintaining a unified view of all projects.

As BrightWork 365 is configurable, organizations can add their processes and ways of working to the Microsoft 365 apps commonly used by their teams.





Introducing BrightWork 365 for Microsoft 365

- A Project Management Solution built for Microsoft 365.
 - Process Requests for new Projects
 - Manage Projects
 - Control Portfolios and Programs
- Uses the best of Microsoft 365 in a fully configurable solution.
 - Integrates with the Power Platform (Power Apps, Power Automate & Power BI), Microsoft Teams, Azure Active Directory, Word, Excel, OneNote etc. and SharePoint Online
 - [BrightWork 365 Product page](#)
- We are happy to assist with your deployment as needed.
 - [BrightWork 365 Deployment page](#)



Upgrading to BrightWork 365



Contact Customer Success

Our approach to upgrading your BrightWork 365 solution includes:

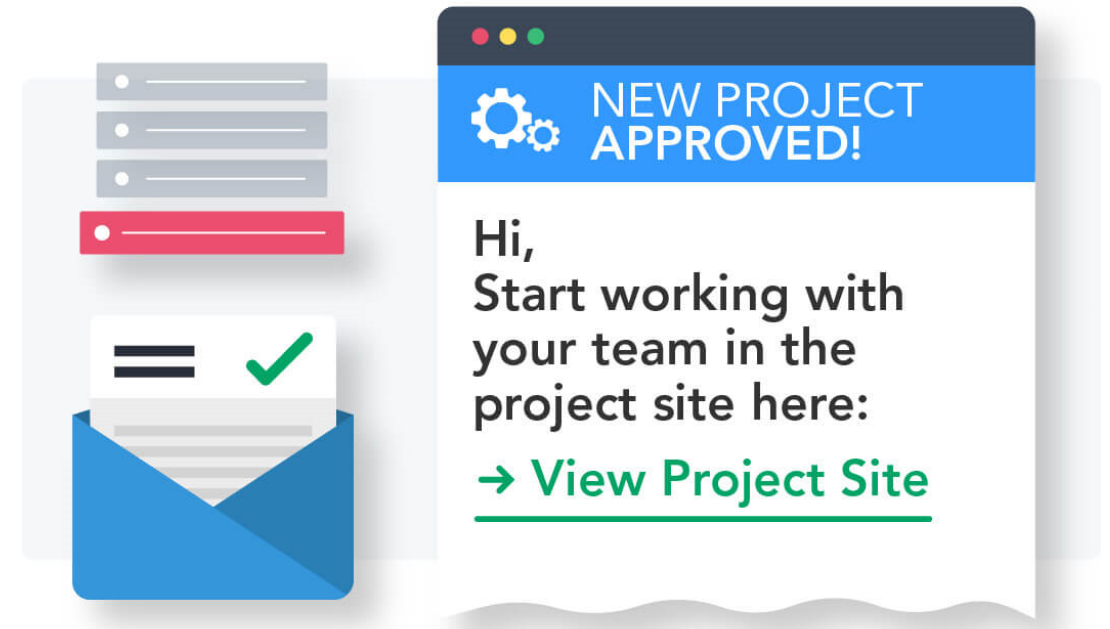
- A pre-evaluation of your Microsoft 365 solution to facilitate a smooth upgrade process.
- Providing on-hand technical assistance during the upgrade process.
- Updating any processes to leverage and new features of the latest release.

A member of our technical team will work with your Microsoft 365 administration team to upgrade your tenant to the latest version of BrightWork 365.

They will confirm the solution upgrade and answer any post-upgrade questions you may have.

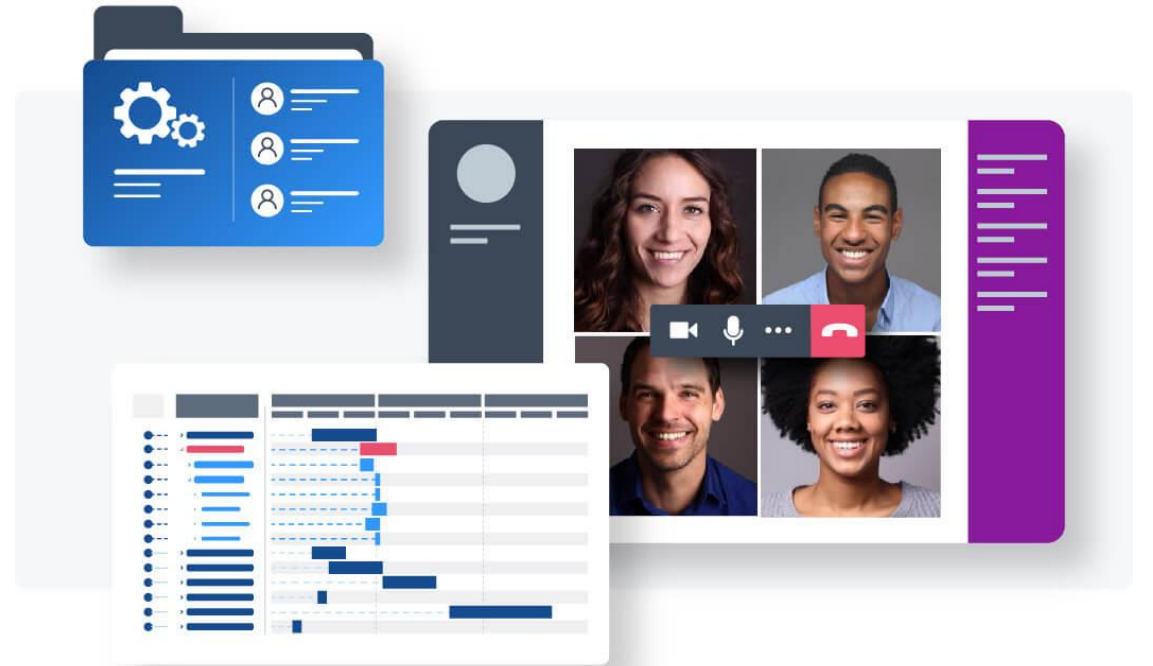
Project Requests

- Capture and manage new ideas from anyone in your organization in one solution.
- Improve project governance by approving and resourcing the right projects to support strategic goals.
- Get visibility into the project pipeline to inform business planning.
- Provide clarity about the objectives of the project to help project teams reach their goals.
- Streamline the decision process to get a fast start on key projects.



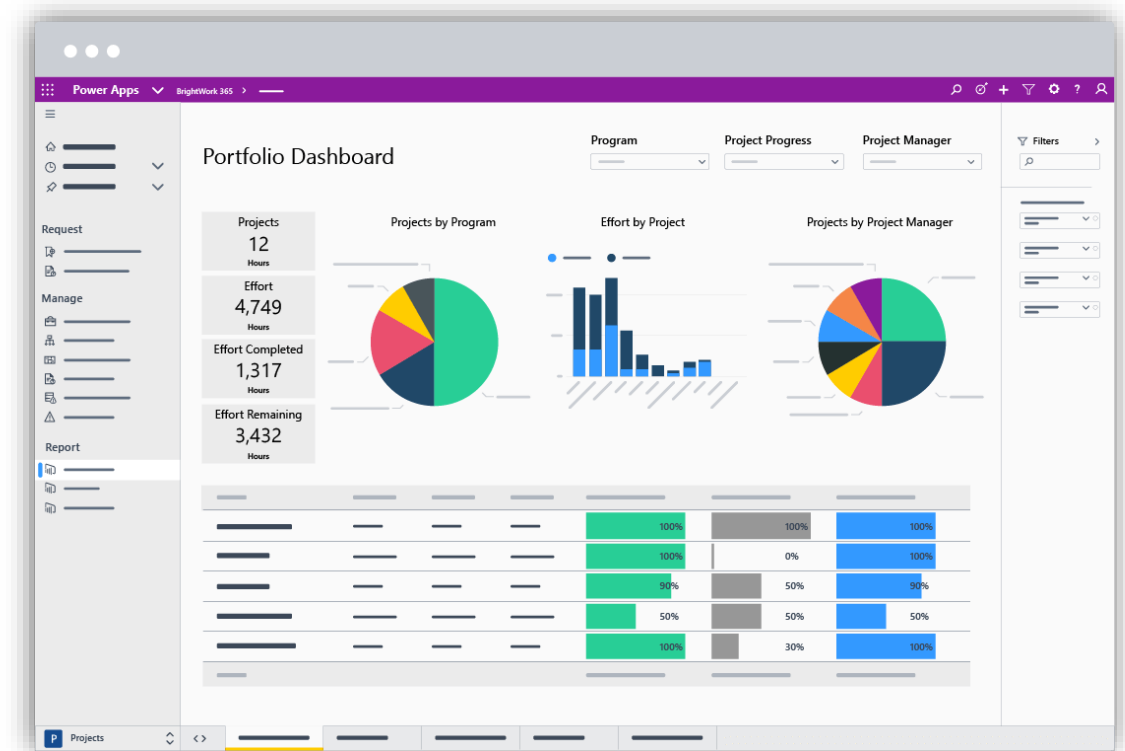
Manage Projects

- Save time during project setup with templates and stages.
- Streamline project set up by using the Microsoft 365 apps you are familiar with in one app.
- Improve project quality with stage gates, providing in-built checks at every project phase.
- Save time and reduce errors with automation.
- Ensure stakeholder satisfaction with a clear project charter, including acceptance criteria for deliverables.



Manage Portfolios

- See how portfolios are performing with at-a-glance, real-time reports.
- Take action quickly to address issues and keep projects on track.
- Visualize project data with interactive reports to understand complex information quickly.
- Reclaim lost time with fewer meetings and lengthy email chains.



DEPLOYMENT SERVICES

- Your dedicated Customer Success Partner is with you at every step.
- The BrightWork 365 Start Service is based on our 3D Deployment (Design, Deliver, Deploy) approach.



BrightWork Customer Success stories

