

# BrightWork

LIVE WEBINAR

## 4 Steps for Managing New Project Requests With SharePoint



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 interface for a project office named 'Contoso Marketing (PO)'. The interface is divided into several sections:

- Navigation:** A top navigation bar includes 'Home', 'Projects Area', 'Portfolio Reporting', 'Training Area', 'Sample Area', 'Templates Area', 'Archive Area', and 'Manage User Accounts'. Below this, a secondary navigation bar offers options like 'Project Office Home', 'All', 'In Trouble', 'Status Charts', 'Gantt', 'By Status', 'By Manager', 'My Projects', and 'By Exception'.
- Project Office Overview:** A 'Get started' section features two main cards: 'Projects Tracker' and 'New Project Site'. A 'Project Hierarchy' section shows a tree structure: 'Contoso Marketing (PO)' containing 'Free Template Site', 'Marketing Mini-Projects (PWT)', and 'Web Site Build (PG)'. A 'Project Office Summary' table provides a snapshot of project health and metrics.
- Key Metrics:** Two large boxes display '10 Late Items' and '2 Open Issues'.
- Task Management:** A 'Project Tasks' section on the left shows a list of tasks with checkboxes and dates. A 'Task Name' filter is active, showing tasks like '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'.
- Gantt Chart:** A Gantt chart on the right shows a project schedule for August, with tasks assigned to 'Anne Wallace' and 'Ann'.

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

# BrightWork

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## 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

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



# AGENDA

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- ✓ Manage Projects Requests with SharePoint
  1. **Rank, Manage and Report** on new requests
  2. **Manage new requests** from Draft to Approval
  3. **Use the 'Resource Allocation'** list to assign resources
  4. **Create a project site** based on approved requests.
- ✓ Q&A

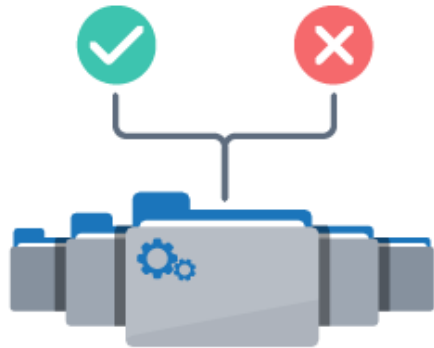
# Project Request Management

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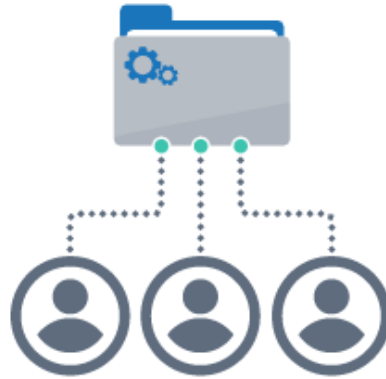
# Resource Allocation

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1

Project  
Requests



2

Resource  
Allocations



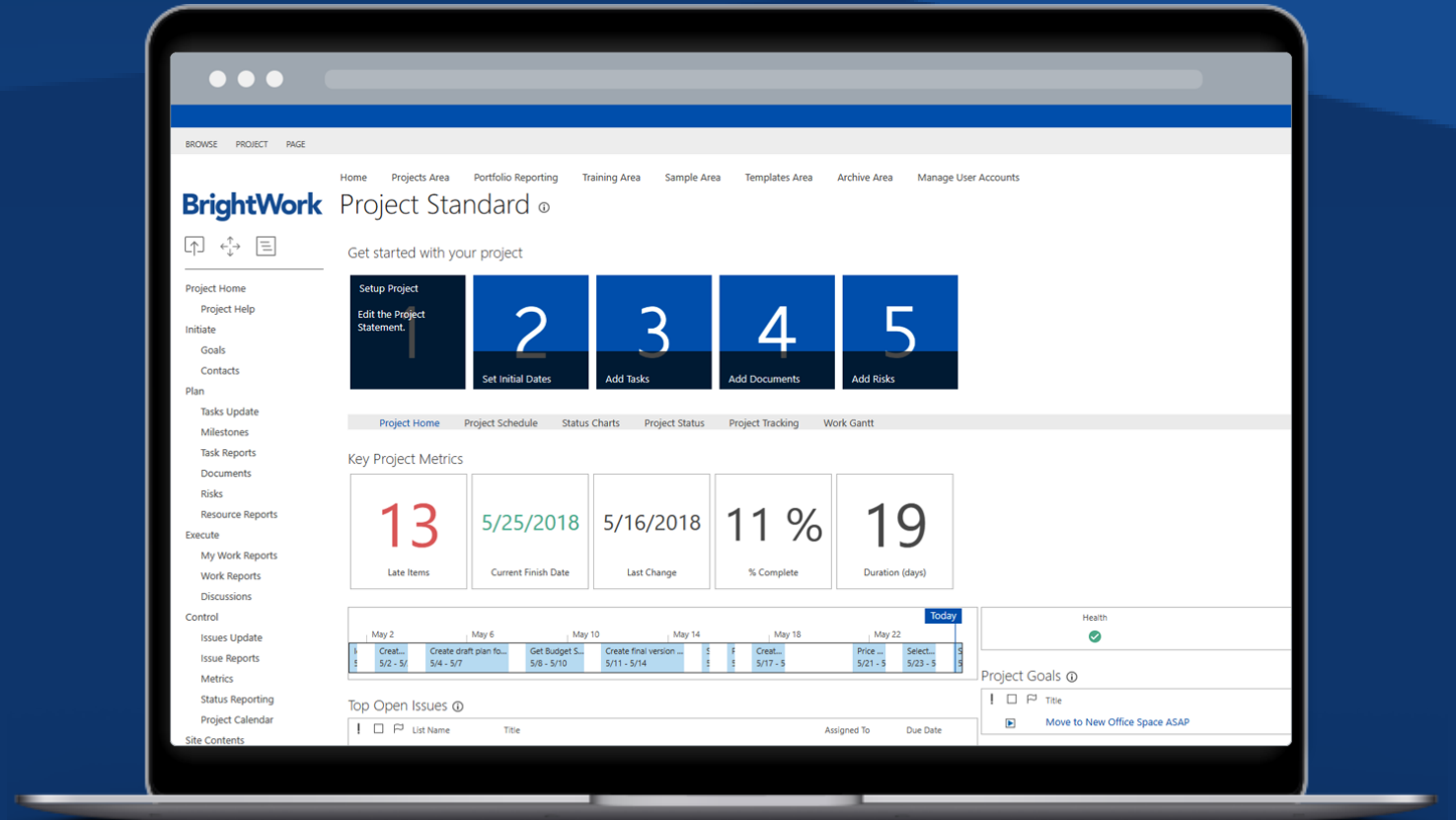
3

Resource  
Reporting



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# DEMO



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## QUESTIONS?

Use the questions pane in GoToWebinar to ask questions

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## Thank you!

### Talk to our Solution Specialists about your project management needs



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**BrightWork**

**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 screenshot displays the BrightWork interface for a 'Business Project Office (PO)'. The main dashboard includes:

- Navigation:** Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, Manage User Accounts.
- 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:** A table showing project health, time, cost, quality, issues, and finish dates across quarters (2017 Q3 and 2017 Q4).
- Project Summaries:** A table listing projects with their health, time, cost, start/finish dates, and Gantt charts.
- Project - Status Charts:** A pie chart showing the status distribution of projects.
- Late Items:** A section for tracking late items.

Health	Time	Cost	Quality	Issues	Finish Date	2017 Q3	2017 Q4				
						Jun	Jul	Aug	Sep	Oct	Nov
✗	✗	✓	✗	✗	12/8/2017						

Health	Time	Cost	Project	Start Date	Finish Date	2017 Q3	2017 Q4					
						Jun	Jul	Aug	Sep	Oct	Nov	Dec
!	✓	✓	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							

# BrightWork

## 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.

The screenshot displays the BrightWork project management interface for a project titled "SharePoint Hyper-V Deployment (PL)". The interface includes a navigation menu on the left with options like "Project Home", "Project Help", "Initiate & Plan", "Tasks Update", "Task Reports", "Documents", "Execute & Control", "My Work Reports", "Work Reports", "Issues Update", "Issue Reports", "Metrics", "Status Reporting", and "Site Contents". The main content area features a "Get started with your project" section with four numbered steps: 1. Setup Project, 2. Set Initial Dates, 3. Add Tasks, and 4. Add Documents. Below this is a "Key Project Metrics" section with three cards: "Late Items" (1), "Current Finish Date" (11/17/2017), and "Last Change" (11/6/2017). A Gantt chart shows task progress from November 3 to November 15, with tasks like "Get Hardware", "Install OS with Hyper-V", "Install SharePoint", "Install BrightWork", "Test overall enviro.", and "Write up recomm.". The "Top Open Issues" and "Overdue Items" sections both list a single issue: "Project time lines impacted by Resource Re-organization" with a due date of 8/30/2017. A "Tasks By Status" donut chart shows the following distribution: Not Started: 4 (67%), Completed: 1 (17%), and In Progress: 1 (17%).



# 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 software interface. At the top, there are navigation tabs: BROWSE, PROJECT, TASKS, and LIST. Below these are various toolbars with icons for actions like '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'.

The main content area shows a Gantt chart view of tasks. The tasks are represented as bars on a timeline from August 28 to September 27. The tasks include: 'Cre... 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 outlin... 9/14 - 9/19', 'Cre... 9/20', and 'Upgrade hardware in s... 9/22 - 9/27'.

Below the Gantt chart, there is a section titled 'Stop editing this list' with options for 'All Tasks', 'All Tasks and Columns', and 'Calendar'. A table view is also visible, showing a list of tasks with columns for 'Task Name', 'Duration', 'Start Date', 'Finish Date', and 'Predecessors'. The 'Start Date' and 'Finish Date' columns are highlighted, and a calendar pop-up is shown for the 'Start Date' column, displaying the dates for August 2017. The current date is Tuesday, August 23, 2017.

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





# 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.

!	☐	🚩	Health	Time	Cost	Issues	Project Link	Start Date	Finish Date	Due Date	Progress
!	☐	🚩	✖	✔	✔		<a href="#">Setup SharePoint Server Farm</a>	8/6/2017	10/21/2017	10/22/2017	<div style="width: 100%;"></div>
	☐	🚩	⚠	✖	✔	✖	<a href="#">Hardware Upgrade Global (PStr)</a>	4/27/2017	8/12/2017	8/14/2017	<div style="width: 100%;"></div>
	☐	🚩	✖	✔	✔		<a href="#">Install new OS</a>	8/4/2017	10/19/2017	10/19/2017	<div style="width: 100%;"></div>
	☐	🚩	⚠	✔	✖		<a href="#">Install new wireless network for IT</a>	8/5/2017	10/20/2017	10/20/2017	<div style="width: 100%;"></div>

**BrightWork**

# **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

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

## New Project Requests

Home Status Summary Status History

### Get started

- Log a Request: Log a new project request.
- My Requests
- Review Requests
- Rank Requests
- Approve Requests
- Create Projects

### Configure process

- Configure Process
- Departments
- Overview Diagram

### For Your Attention! (3)

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.

The screenshot displays the BrightWork Business Project Office (PO) dashboard. The interface includes a navigation menu on the left with options like 'Project Office', 'My Work', 'Work', 'Issues', 'Risks', 'Resourcing', 'Status Reports', 'Metrics', 'Projects Tracker', 'Edit Tracker', 'View Tracker', 'Subsites', 'Contoso IT (PO)', 'Contoso Marketing (PO)', and 'Site Contents'. The main content area is titled 'Business Project Office (PO)' and features a 'Project Office Home' section with tabs for 'All', 'In Trouble', 'Status Charts', 'Gantt', 'By Status', 'By Manager', 'My Projects', and 'By Exception'. Below this, there are two tiles: 'Projects Tracker' and 'New Project Site'. To the right, 'Key Metrics' are displayed: 85 Late Items and 9 Open Issues. The 'Project Office Summary' section shows a table with columns for Health, Time, Cost, Quality, Issues, and Finish Date, with a date range of Jun 11-Dec 9, 2017. The 'Project Summaries' section shows a table with columns for Health, Time, Cost, Project, Start Date, and Finish Date, with a date range of Jun 11-Dec 16, 2017. The table lists various projects such as 'Upgrade Hardware for ...', 'Small Systems Projects', 'Setup SharePoint Serve...', 'Training for Finance Dept.', 'SharePoint Hyper-V De...', 'Hardware Upgrade Glo...', 'Monthly email revamp', 'Web Site Build (PG)', 'Website content review', 'Social media campaign', and 'Hardware Inventory', each with a corresponding Gantt chart.

Health	Time	Cost	Quality	Issues	Finish Date
✖	✖	✔	✖	✖	12/8/2017

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
✔	✔	✔	Hardware Upgrade Glo...	6/14/2017	10/1/2017
✔	✔	✔	Monthly email revamp	6/21/2017	7/16/2017
✔	✔	✔	Web Site Build (PG)	6/29/2017	9/23/2017
✔	✔	✔	Website content review	7/18/2017	11/14/2017
✔	✔	✔	Social media campaign	8/15/2017	9/15/2017
✔	✔	✔	Hardware Inventory	9/20/2017	12/5/2017



# 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 'REPORTER' tab in a software interface. The top navigation bar includes 'BROWSE', 'PAGE', and 'REPORTER'. Below this is a ribbon with various toolbars: 'Actions' (Refresh, Shared, Personal), 'Report Mode' (Columns, Grouping, Sorting, Filters, Totals), 'Personalize this Report' (Report Information, Show Grouping, Show Totals), 'Share' (Export, Email, Print), and 'Configure Reporter Settings'. The main content area shows a list of 'Open Issues' under the 'Project Office' navigation pane. The list includes items like 'Should we wait until more employees are on holidays' and 'Team Training not up to'. A 'Configure Reporter Settings' dropdown menu is open on the right, showing options for Columns, Grouping, Sorting, Filters, and Totals.

Open Issues	Red & Yellow Issues	Overdue Issues	My Issues
Open Issues ⓘ			
! □ 🚩 Title Owner Assigned To			
📁 Project : <b>Hardware Upgrade (PStd)</b> (3)			
📁 List Name : Project Issues (3)			
🚩 🚩	Should we wait until more employees are on holidays	□ Anne Wallace	<div style="width: 100%; height: 10px; background-color: red;"></div>
🚩 🚩	Team Training not up to	□ Anne Wallace □ Anne Wallace	<div style="width: 100%; height: 10px; background-color: blue;"></div> 8/23/2017 8/26/2017 8/29/2017



# 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**

create and configure your t





# 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 interface for 'New Project Requests'. At the top, there is a navigation bar with the 'BrightWork' logo and links to Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts. Below the navigation bar, the page title 'New Project Requests' is shown with an information icon. A secondary navigation bar includes 'Home', 'Status Summary', and 'Status History'. The main content area is divided into two sections: 'Get started' and 'Configure process'. The 'Get started' section contains six blue tiles with white icons and labels: 'Log a Request' (hand writing), 'My Requests' (document), 'Review Requests' (glasses), 'Rank Requests' (bar chart), 'Approve Requests' (checkmark and X), and 'Create Projects' (organizational chart). The 'Configure process' section contains three blue tiles: 'Configure Process' (gear and key), 'Departments' (organizational chart), and 'Overview Diagram' (presentation board). On the right side of the dashboard, there is a 'For Your Attention' section with a 'Reference' link, a 'Status : Draft' indicator, and two request IDs: 'PR-0001' and 'PR-0002'. On the left side, there is a sidebar with 'Requests Home' and sub-links for 'Project Requests', 'Documents', and 'Site Contents'.

# The BrightWork Approach



## Start

**Deliver Immediate  
Visibility & Control**

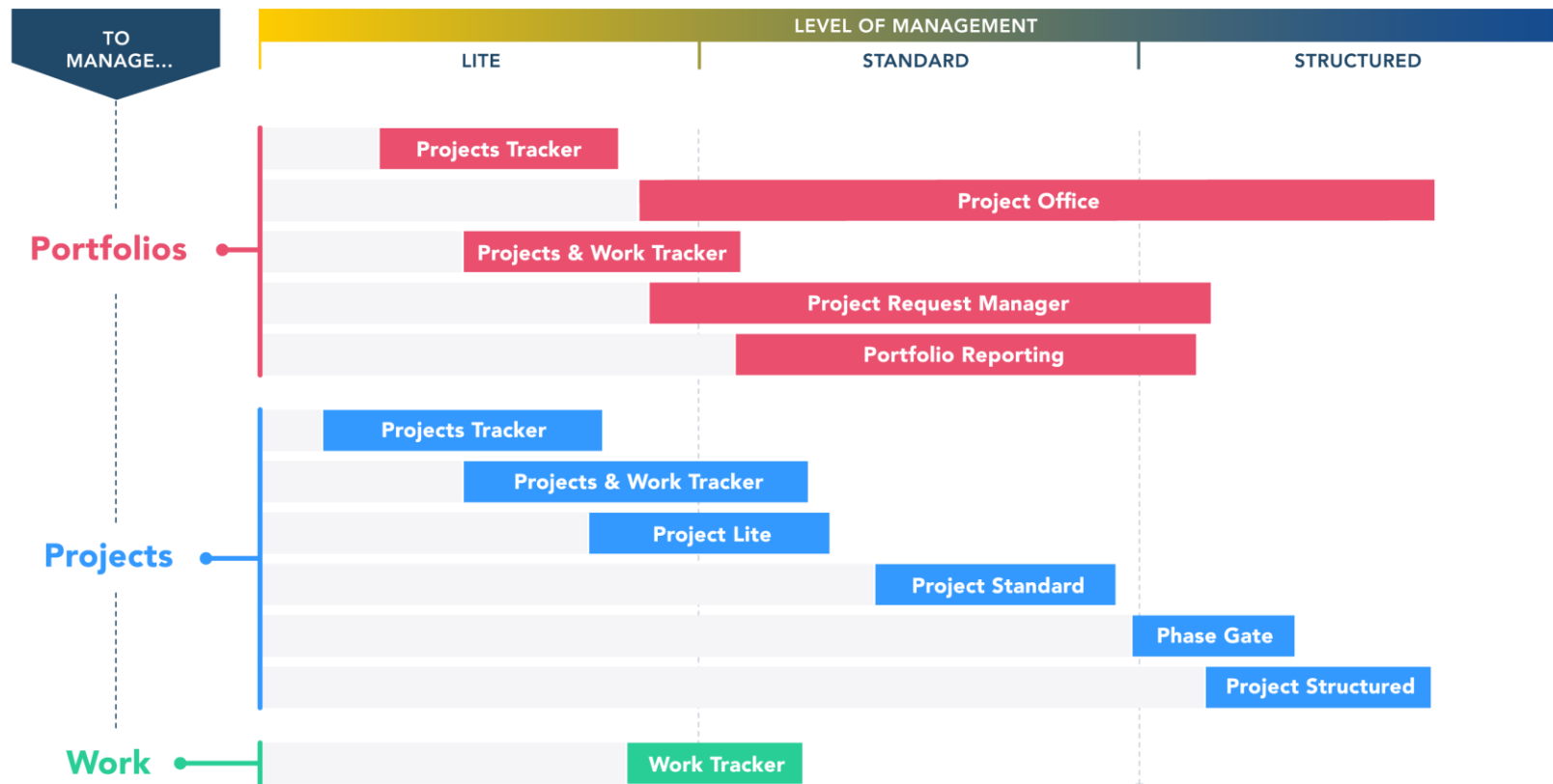


## Evolve

**Grow Organizational  
Project Management**

# BrightWork Templates Spectrum

## TEMPLATE SPECTRUM BrightWork



**BrightWork**

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