

# BrightWork365

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## Costs and Budgets With Microsoft 365

Presented by



**Julie Batista**  
BrightWork

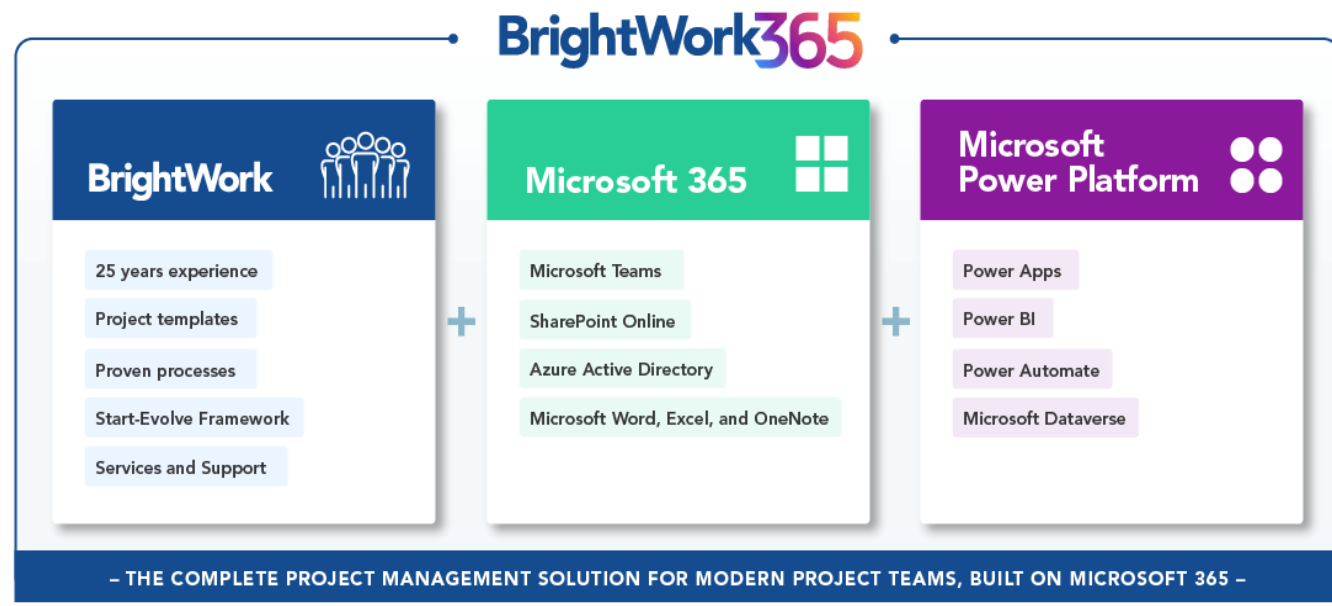
# QUICK POLL

# BrightWork 365 for Microsoft 365

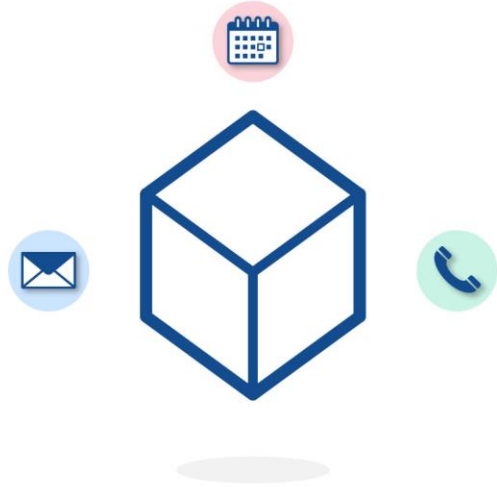
## The "What"



## The "How"

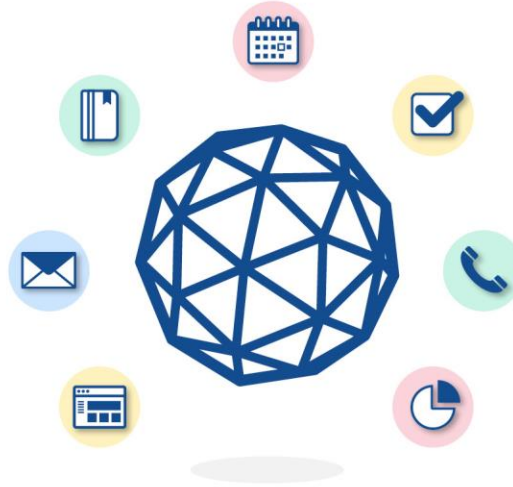


More "How"



## 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

# Costs and Budgets With Microsoft 365

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## AGENDA:

- **Get an Overview of BrightWork 365 for Project and Portfolio Management**
  - **Learn Project Cost Management Fundamentals**
  - **Creating and Updating Individual Cost Items**
  - **Get Visibility of Costs and Budgets across Multiple Projects in one place**
-

# DEMO

➤ Project and Portfolio Management

Power Apps

BrightWork 365

Search

+ 🔔 ⚙️ ? JB

Home

Home

My Work

Dashboards

Help

Requests

Requests

Projects

Projects

Issues

Risks

Portfolios

Portfolios

Programs

← ↶ Save Save & Close + New Deactivate Delete Refresh Check Access Process Assign Flow Word Templates Run Report Share

JTB Project A - Saved

Project - Project Structured (Demo)

Julie Batista Project Manager JTB Program Health 9/16/2022 Current Finish

BrightWork Project

Active for less than one m...

Initiate (< 1 Min)

Plan

Execute

Close Out

Charter

Status

Status Reports

Team

Stages

Gantt

My Work

Documents

Actions

Issues

Risks

Costs

Communications

Project Settings

Related

Name	JTB Project A	Portfolio	JTB Portfolio	Created On	1/10/2023	2:12 PM
Project Reference	Proj-001475	Program	JTB Program	Source Request	---	
Project Manager	Julie Batista			Teams Channel	---	
Project Sponsor	Julie Batista					

Project Type	---	Objectives	---
Description	---	Overall Project Risk	---
Priority	---	Economic Impact	---
Exit Criteria	---	Out of Scope	---
Approval Requirements	---		



# Learn Project Cost Management Fundamentals

[illegible]

# Creating and Updating Individual Cost Items

**New Cost**

Not StartedCost StatusJTB Project AProjectJTB ProgramProgramJTB PortfolioPortfolio

CostDocuments

Name

\*

---

Cost Type

Internal

Cost Category

---

Vendor

---

Assigned To

---

Forecast Spend Date

---

Related Task

---

Cost Numbers

Cost Status

Not Started

Current Forecast

---

Actual to Date

---

Cost to Complete

---

Date Spend Complete

---

Budget Assigned

---

Budget Assigned Remaining

---

Budget Variance

---

Timeline

Almost there

Select Save to see your timeline.

**Construction Materials - Saved**

In ProgressCost StatusJTB Project AProjectJTB ProgramProgramJTB PortfolioPortfolio

CostDocumentsRelated

Name

\*

Construction Materials

Cost Type

Opex

Cost Category

Other

Vendor

---

Assigned To

---

Forecast Spend Date

---

Related Task

---

Cost Numbers

Cost Status

In Progress

Current Forecast

€20,000.00

Actual to Date

€10,000.00

Cost to Complete

€10,000.00

= Current Forecast – Actual to Date

Date Spend Complete

---

Budget Assigned

€25,000.00

Budget Assigned Remaining

€15,000.00

= Budget Assigned – Actual to Date

Budget Variance

€5,000.00

= Budget Assigned – Current Forecast

Timeline

Get started

Capture and manage all records in your timeline.



# Get Visibility of Costs and Budgets across Multiple Projects in one place

JTB Program - Saved  
Program

JTB Program  
Name

Julie Batista  
Program Manager

Julie Batista  
Program Sponsor

Health

▼

StatementStatusStatus ReportsDocumentsActionsIssuesRisksCostsCommunicationsProgram SettingsRelated ▼

Program Budgets

Approved Budget	€1,000,000.00
Budget Assigned	€25,000.00
Last updated: 12/29/2022 9:00 AM	
Budget Remaining	€990,000.00 = Approved Budget – Actual to Date
Budget Variance	€980,000.00 = Approved Budget – Current Forecast

Program Costs

Current Forecast	€20,000.00
Last updated: 12/29/2022 9:00 AM	
Actual to Date	€10,000.00
Last updated: 12/29/2022 9:00 AM	
Cost to Complete	€10,000.00
Last updated: 12/29/2022 9:00 AM	

# QUESTIONS?

➤ Use the Question panel to ask questions

# THANK YOU



**For sales info contact:**

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+353 91 412741

**Email:** [asheehan@brightwork.com](mailto:asheehan@brightwork.com)

Our mission is to:

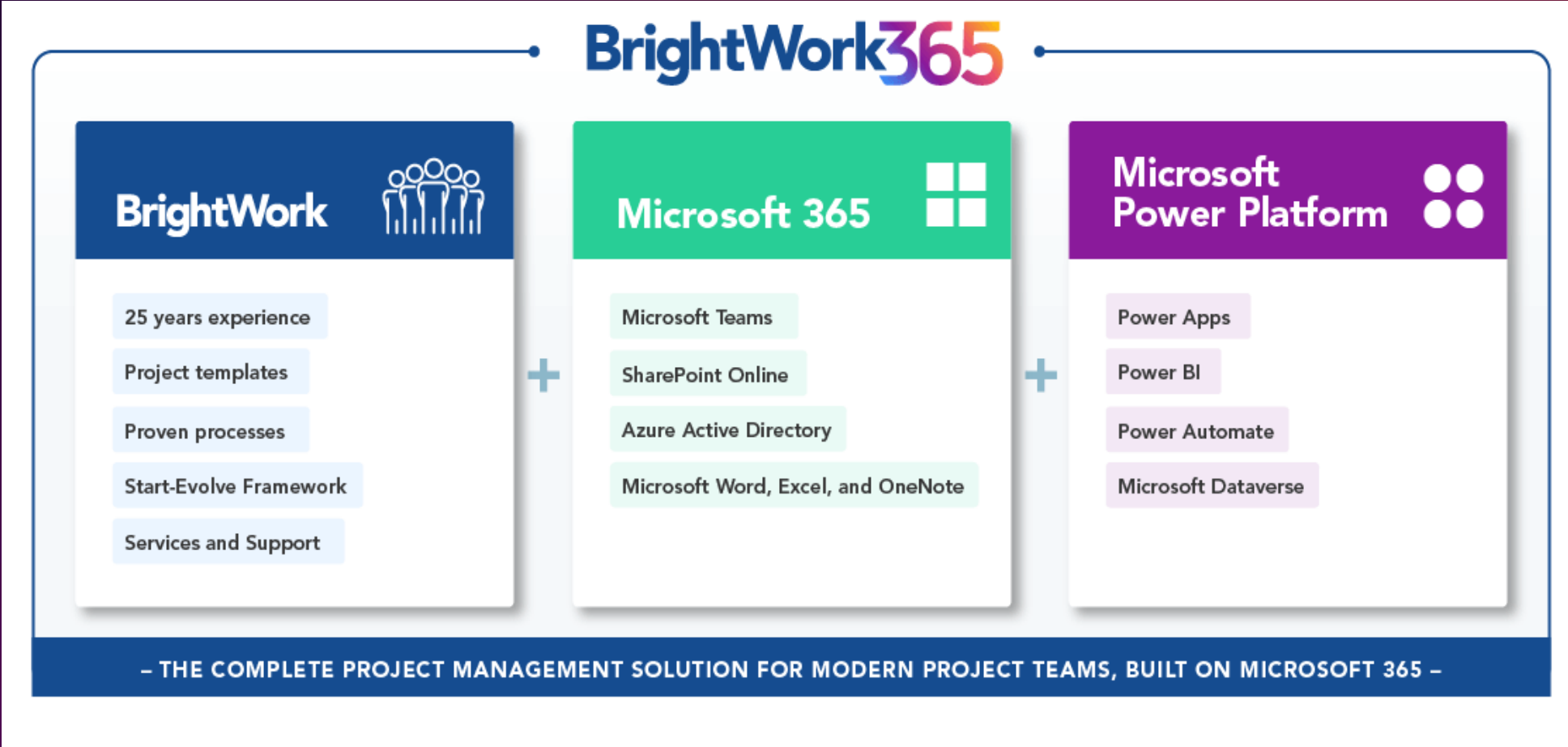
Make Project and Portfolio  
Management with Microsoft  
SharePoint and Microsoft 365  
easier for our customers.

## *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.





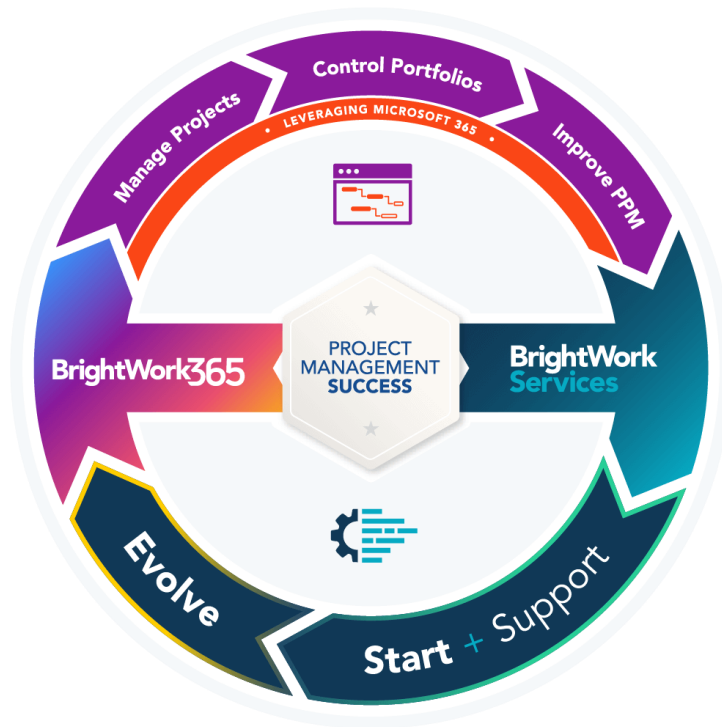


# Introducing BrightWork 365 for Microsoft 365

- 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:

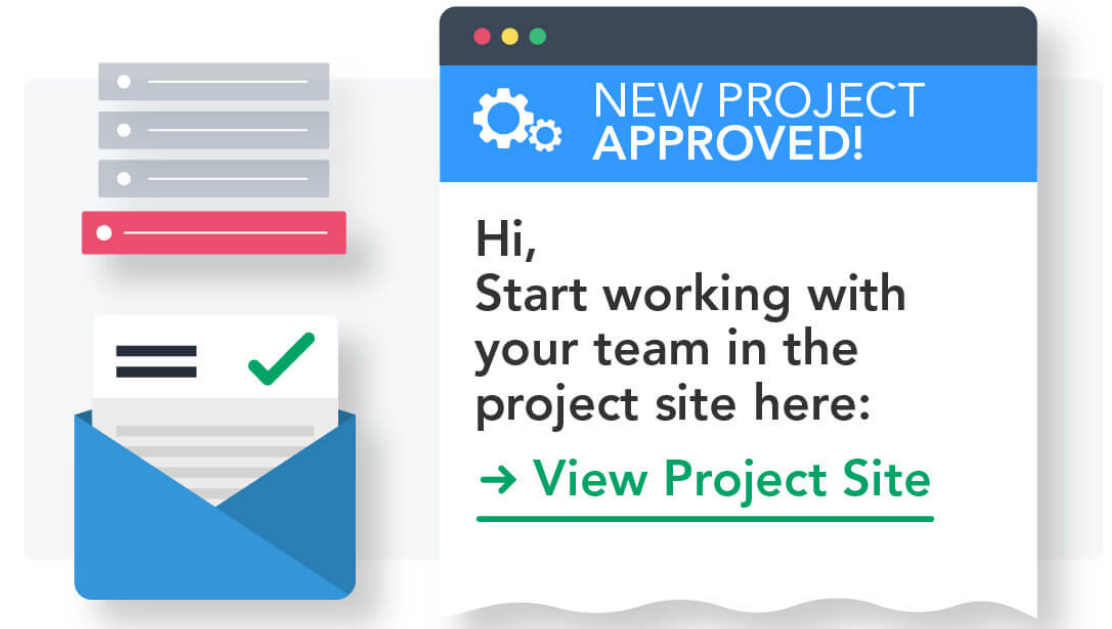
- A pre-evaluation of your Microsoft 365 solution to facilitate a smooth upgrade process.
- Providing on-hand technical assistance during the upgrade process.
- Updating any processes to leverage and new features of the latest release.

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.

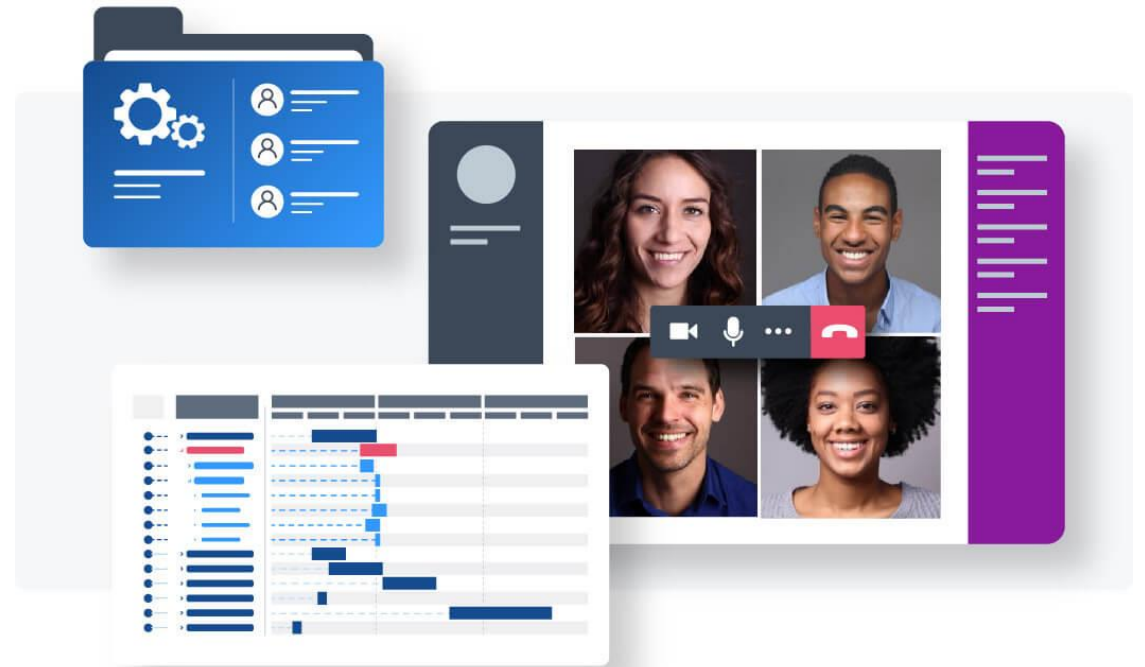
## Project Requests

- 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.



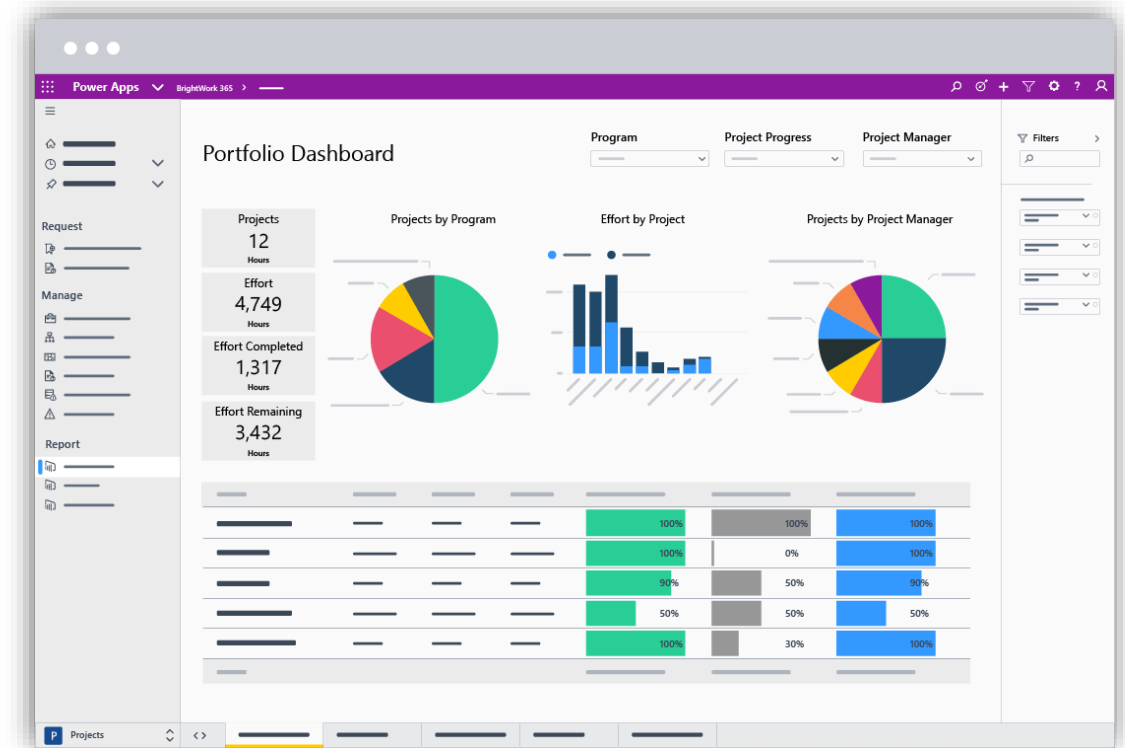
## Manage Projects

- 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

