

BrightWork
webinars

Configuring SharePoint for Agile Project Management

presented by



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QUICK POLL!

**Are You Using SharePoint for Project
Management**

Agenda

- **Agile vs Traditional** Project Management Methodologies
- **Backlog Management** using SharePoint lists
- **Iteration and sprint planning** using BrightWork In-Browser Scheduler
- **Ensuring flow of work** with Swimlanes and Work in Progress Limits in Kanban Boards.

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



amazon



Dimensional



Camden
NATIONAL BANK



SIEMENS
Healthineers



AMSURG



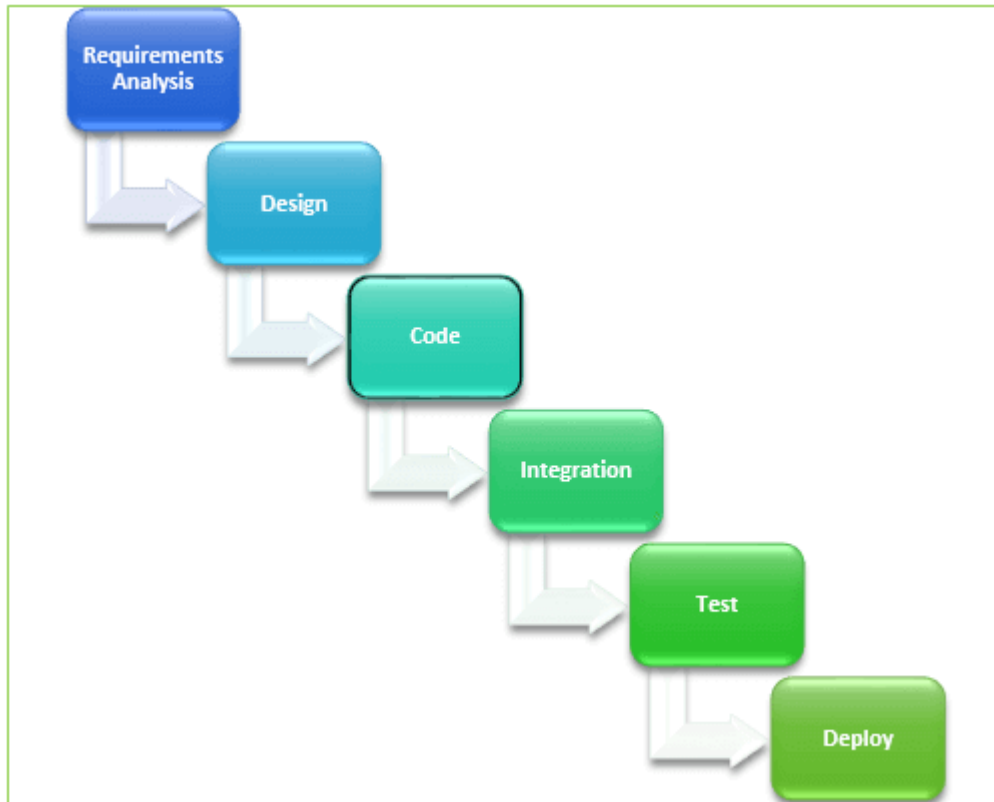
ASCEND
PERFORMANCE MATERIALS



Schneider
Electric



Police
Credit Union
Better Banking



Agile vs Traditional Project Management Methodology

Waterfall framework

Assumes a deliberate progressive set of activities that fall in order. Definitive start and end dates

Agile Project Management

More flexible approach that allows for changing priorities as the project progresses.

Requirements in the form of capabilities are defined and prioritized. A backlog of these items is built and maintained on an ongoing basis.

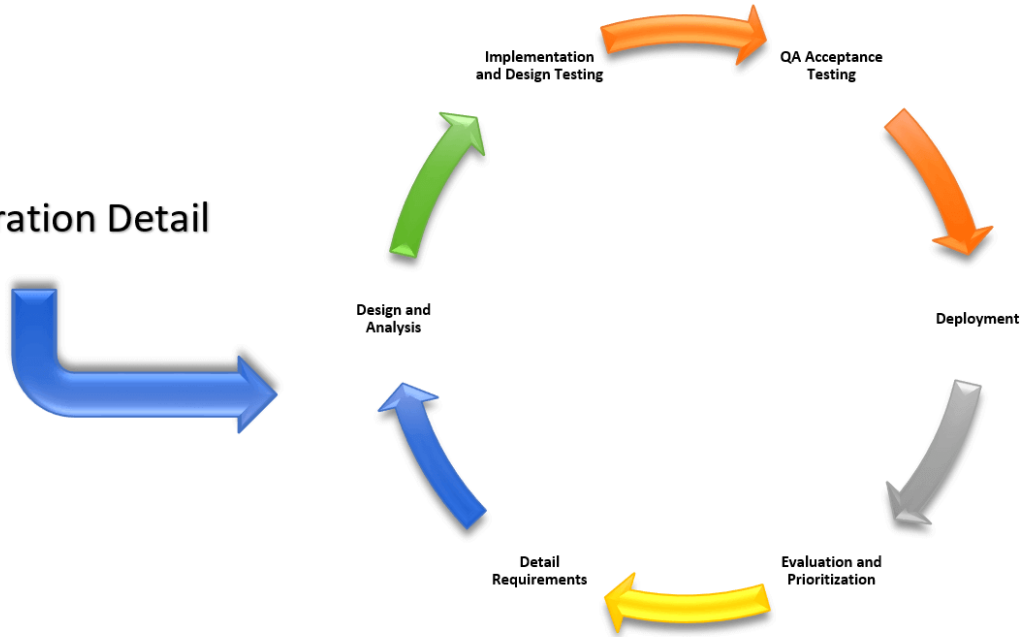
Agile Iterations

New capabilities are planned in a series of Iterations or Sprints which are short in duration.

Each iteration goes through a cycle to deliver the target capabilities.

The combination of Iterations rapidly delivers more and more capability in the product or software over time.

Iteration Detail



Backlog Management

Backlog ⓘ

+ new task or edit this list

All Tasks Active Sprint Backlog ...

✓	<input checked="" type="checkbox"/>	Sprint Number	Task Name	Task Status	Sprint Status	Start Date	Finish Date	Assigned To	% Complete	Est. Work At Completion	Planned Work	Task Type
	<input type="checkbox"/>		Project Summary	...	Not Started	Active	October 15, 2016	October 31, 2016		0 %	0	0
	<input type="checkbox"/>		Agile Project	...	Not Started	Active	October 15, 2016	October 31, 2016		0 %	0	0
	<input type="checkbox"/>	1	Sprint 1	...	Not Started	Active	October 15, 2016	October 31, 2016		0 %	0	0
	<input type="checkbox"/>	1	item 1	...	In Progress	Active	October 15, 2016	October 31, 2016	Scott Footlik	50 %	50	50
	<input type="checkbox"/>	1	item 2	...	Not Started	Active	October 15, 2016	October 31, 2016	Scott Footlik	0 %	50	50
	<input type="checkbox"/>	1	item 3	...	Not Started	Active	October 15, 2016	October 31, 2016	Scott Footlik	0 %	50	50
	<input type="checkbox"/>	1	item 4	...	Not Started	Active	October 15, 2016	October 31, 2016	Scott Footlik	0 %	50	50
	<input type="checkbox"/>	2	Sprint 2	...	Not Started	Not Active	January 1	January 15		0 %	0	0
	<input type="checkbox"/>	2	item 5	...	Not Started	Not Active	January 1	January 15		0 %	0	0
	<input type="checkbox"/>	2	item 6	...	Not Started	Not Active	January 1	January 15		0 %	0	0
	<input type="checkbox"/>	2	item 7	...	Not Started	Not Active	January 1	January 15		0 %	0	0
	<input type="checkbox"/>	Backlog	item 8	...	Not Started	Not Active				0 %	0	0
	<input type="checkbox"/>	Backlog	item 9	...	Not Started	Not Active				0 %	0	0
	<input type="checkbox"/>	Backlog	Item 10	...	Not Started	Not Active				0 %	0	0

The **product backlog** is the requirements for a product, expressed as a prioritized list of product backlog Items.

These included both functional and non-functional customer requirements.

You can then prioritize each item for inclusion in the appropriate Sprint plan.

Agile Boards

Modern, Visual Task Management

Use boards to drag and drop items between stages.

Swimlanes

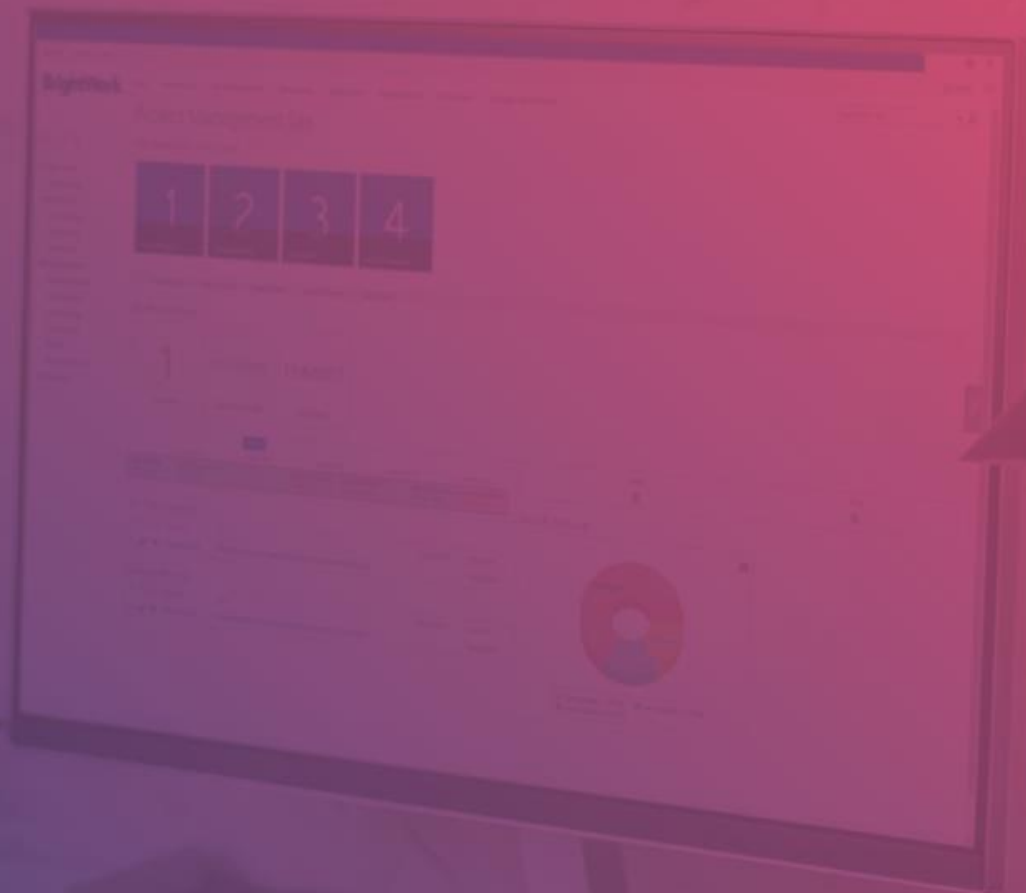
Use horizontal swimlanes for team members, departments or areas of expertise.

Work in Progress Limits

Utilize Kanban methodology by limiting how many items are allowed into each column thus ensuring no bottlenecks appear in production

The screenshot displays a SharePoint Agile Board titled "Project Tasks - Board". The interface is organized into horizontal swimlanes for team members: Alex Hankin (3 cards), Anne Wallace (5 cards), and Dan Bacon (1 card). Each swimlane contains task cards with progress bars, completion percentages, and details like finish dates, priorities, and IDs. The board is divided into columns representing task stages: Backlog (2 cards), Selected (1 card), In Progress (4 cards, with a limit of 3), Completed (2 cards), and Finished (2 cards). A search bar is visible at the top right of the board area.

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.

The screenshot shows the BrightWork project management interface for a project titled "SharePoint Hyper-V Deployment (PL)". The interface includes a navigation menu on the left, a main content area with a "Get started with your project" section, and several data visualization components.

Get started with your project:

- 1 Setup Project
- 2 Set Initial Dates
- 3 Add Tasks
- 4 Add Documents

Key Project Metrics:

- Late Items: 6
- Current Finish Date: 12/25/2015
- Last Change: 8/27/2018

Tasks By Status:

A donut chart showing the distribution of tasks by status: Not Started (red), In Progress (green), and Completed (yellow).

Top Open Issues:

List Name	Title	Assigned To	Due Date
Project Issues	Project time lines impacted by Resource Re-organization		12/14/2015

Overdue Items:

List Name	Title	Assigned To	Due Date
Project Tasks	Install OS with Hyper-V		12/8/2015
Project Issues	Project time lines impacted by Resource Re-organization		12/14/2015
Project Tasks	Install SharePoint Server 2013 and Test		12/14/2015

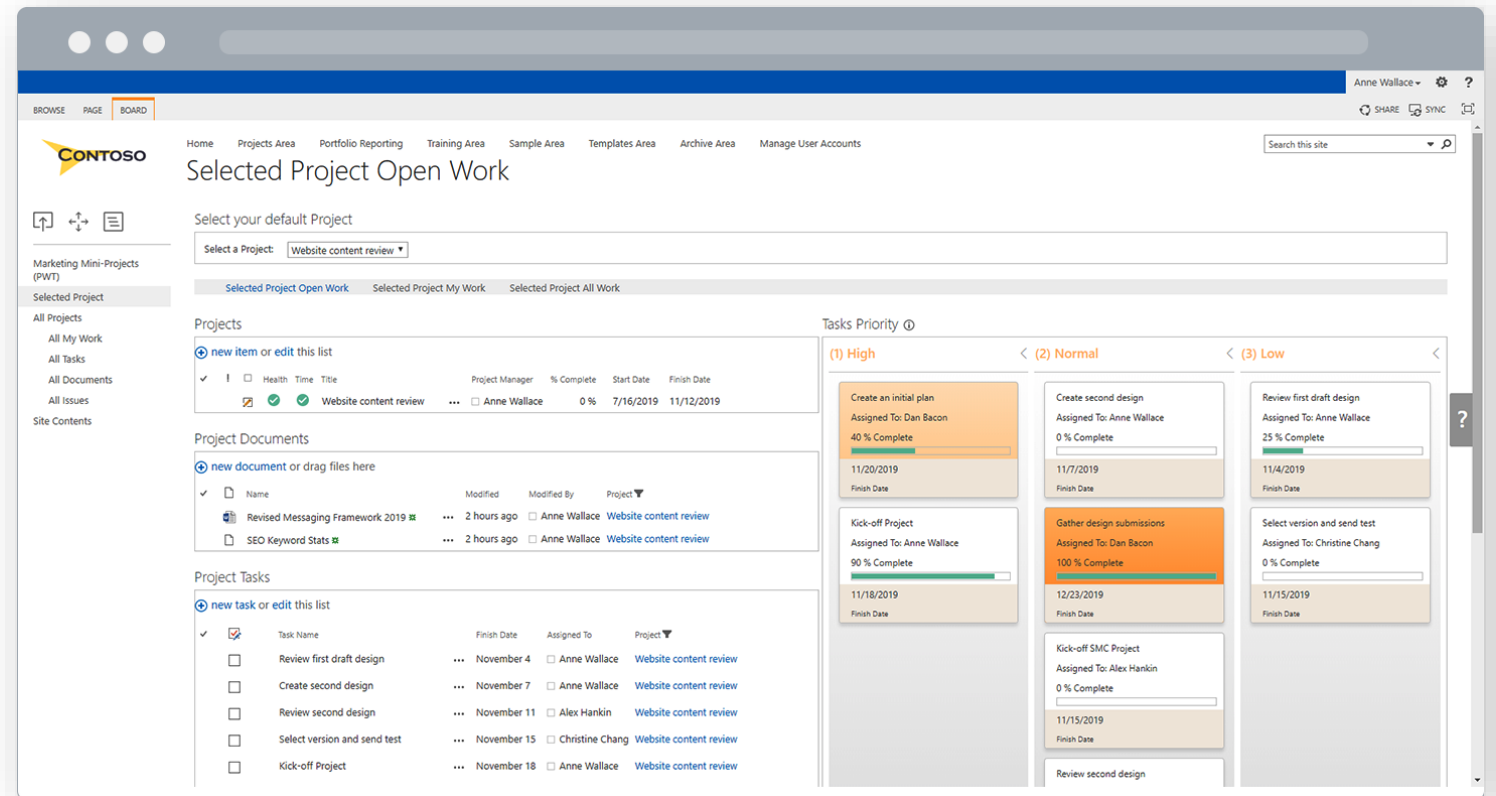
PROJECTS

Collaborate with a Team-focused Project Site

Team members can find, do and report on their work in a team-focused project site with BrightWork.

Manage your schedule with instant visibility into project and non-project tasks.

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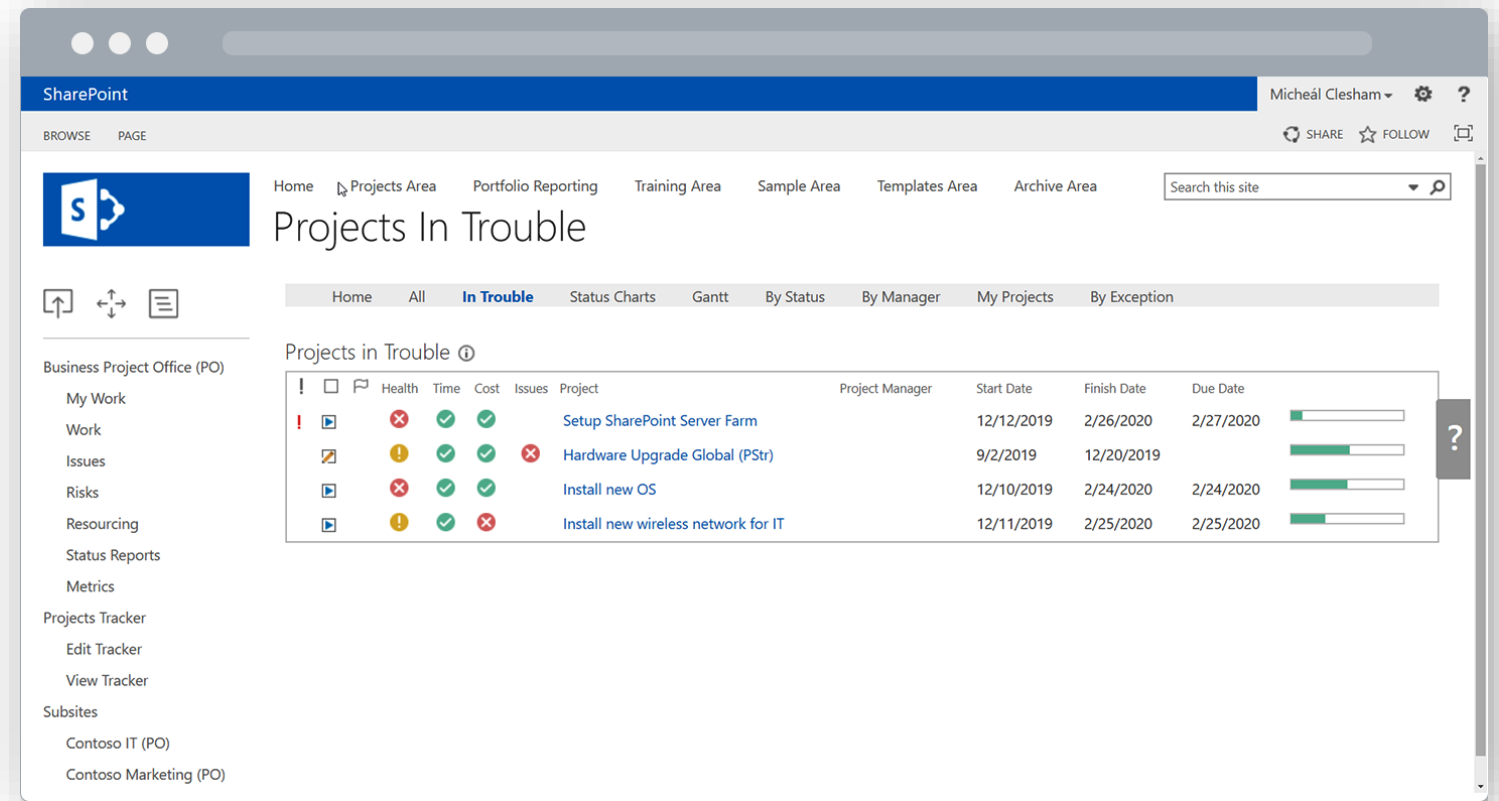


PROJECTS

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.

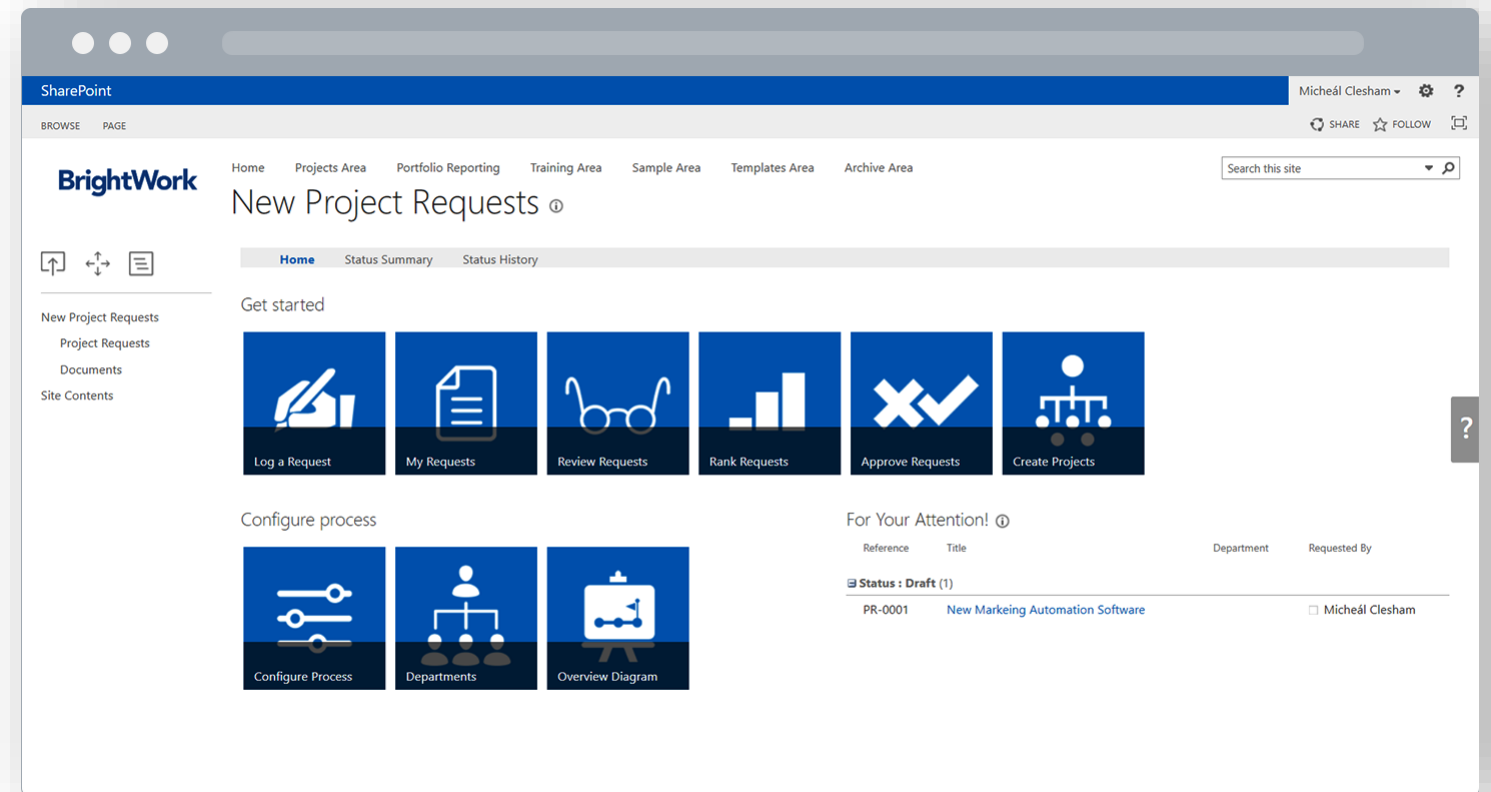


PORTFOLIOS

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

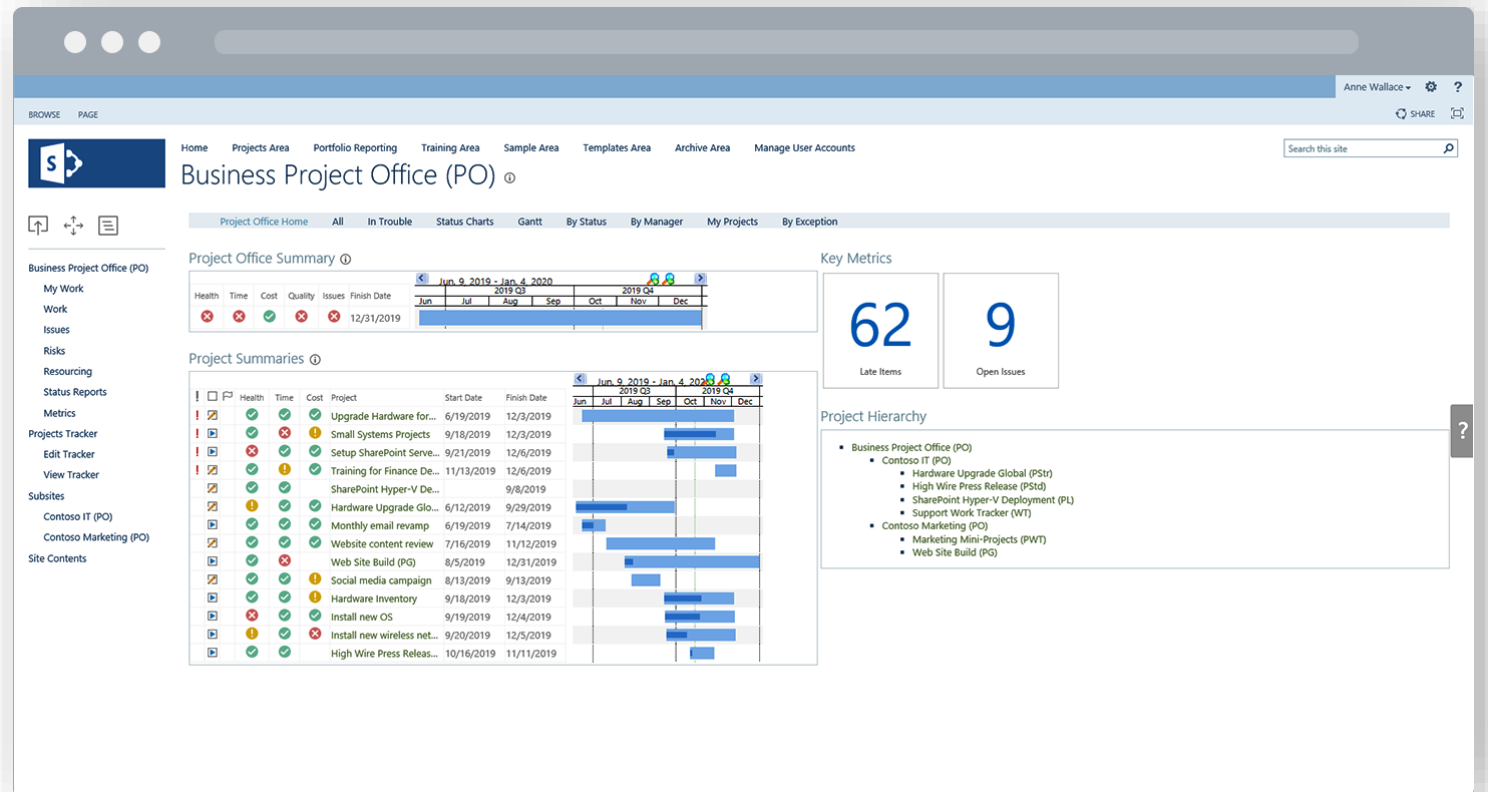


PORTFOLIOS

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. At the top, there's a navigation bar with 'Home', 'Projects Area', 'Portfolio Reporting', 'Templates Area', 'Sample Area', 'Training Area', and 'Vanilla SP PM'. Below this is a search bar and a 'SHARE' button. The main content area is titled 'Resource Management' and includes sub-navigators for 'Home', 'Status Summary', 'Status History', and 'Resource Management'. Two main tiles are visible: 'Resource Allocation' and 'Overview Diagram'. Below these is a 'Resource Report' table.

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

SHAREPOINT

Deploy with 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 Resource Management interface. The top navigation bar includes 'Home', 'Projects Area', 'Portfolio Reporting', 'Templates Area', 'Sample Area', 'Training Area', and 'Vanilla SP PM'. The main content area features two tiles: 'Resource Allocation' and 'Overview Diagram'. Below these is a 'Resource Report' table.

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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.

The screenshot shows a SharePoint project dashboard for 'High-Wire Press Release'. The interface includes a navigation menu on the left with categories like 'Initiate', 'Plan', 'Execute', and 'Control'. The main content area features a Gantt chart at the top showing task timelines from October 20 to November 9. Below the Gantt chart are several key metrics: 6 Late Items, Current Finish Date 11/11/2019, Last Change 10/18/2019, 5% Complete, and 19 Duration (days). There are also sections for 'Top Open Issues' and 'Overdue Items', both listing project issues with titles like 'Team Training not up to date' and 'Office costs are falling, should we wait longer?'. A 'Tasks By Status' donut chart shows 1 task in progress (9%) and 10 tasks not started (91%).

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.

