



LIVE WEBINAR

3 Ways to Master Project Reporting Using SharePoint

Wednesday | September 19th

4pm BST | 11am EDT | 8am PDT



presented by

Peter Doyle

**BrightWork Project Management
Consultant**



hosted by

Micheál Clesham

Inbound Marketing Executive



QUICK POLL!

Are you looking to extend SharePoint
for Project and Portfolio
Management?

AGENDA

- ✓ About BrightWork
- ✓ Mastering Project Reporting Using SharePoint
 1. Start reporting quickly with configurable, best practice templates.
 2. Create tailored reports for stakeholders, project managers, and team members.
 3. Automate reports to easily keep the team and stakeholders up-to-date with critical information
- ✓ Q&A

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 web application interface, which is a SharePoint-based project management solution. The interface is divided into several sections:

- Navigation Bar:** Includes links for Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts.
- BrightWork Contoso Marketing (PO):** The main header area, featuring a "Project Office Home" button and a "Get started" section with links to "Projects Tracker" and "New Project Site".
- Key Metrics:** Displays two metrics: "10 Late Items" and "2 Open Issues".
- Project Hierarchy:** Shows a tree structure of projects, including "Contoso Marketing (PO)", "Free Template Site", "Marketing Mini-Projects (PWT)", and "Web Site Build (PG)".
- Project Office Summary:** A table summarizing project performance across various metrics.
- Task List:** A section on the left titled "Project Tasks" with a "Stop editing this list" button and a list of tasks.
- Task List Details:** A detailed view of a task list with columns for Task Name, Health, Time, Cost, Quality, Issues, and Finish Date.
- Task List Table:** A table with 7 columns: Task Name, Health, Time, Cost, Quality, Issues, and Finish Date. It lists tasks such as "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".
- Task List Table Data:** The table contains data for each task, including a health status (e.g., "X" for red, "O" for green), a time status (e.g., "X" for red, "O" for green), a cost status (e.g., "X" for red, "O" for green), a quality status (e.g., "X" for red, "O" for green), an issues status (e.g., "X" for red, "O" for green), and a finish date (e.g., "8/10/2018").
- Task List Table Footer:** A footer section with a "completed" status and a "De" button.

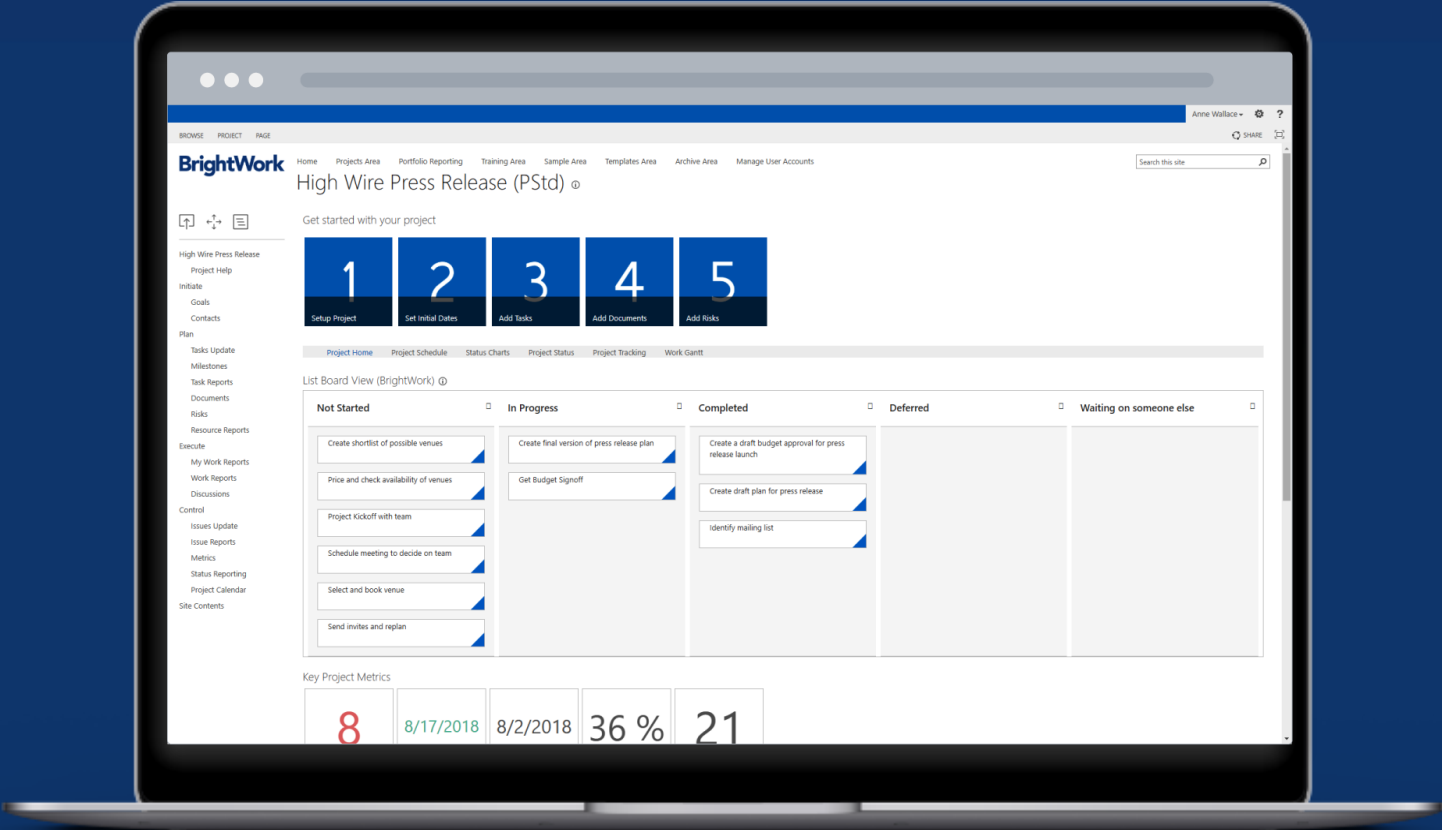
BrightWork

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



BrightWork

DEMO



A person is sitting at a desk, writing on a notepad with a yellow marker. A laptop is visible in the background. The image is overlaid with a semi-transparent dark grey layer containing text.

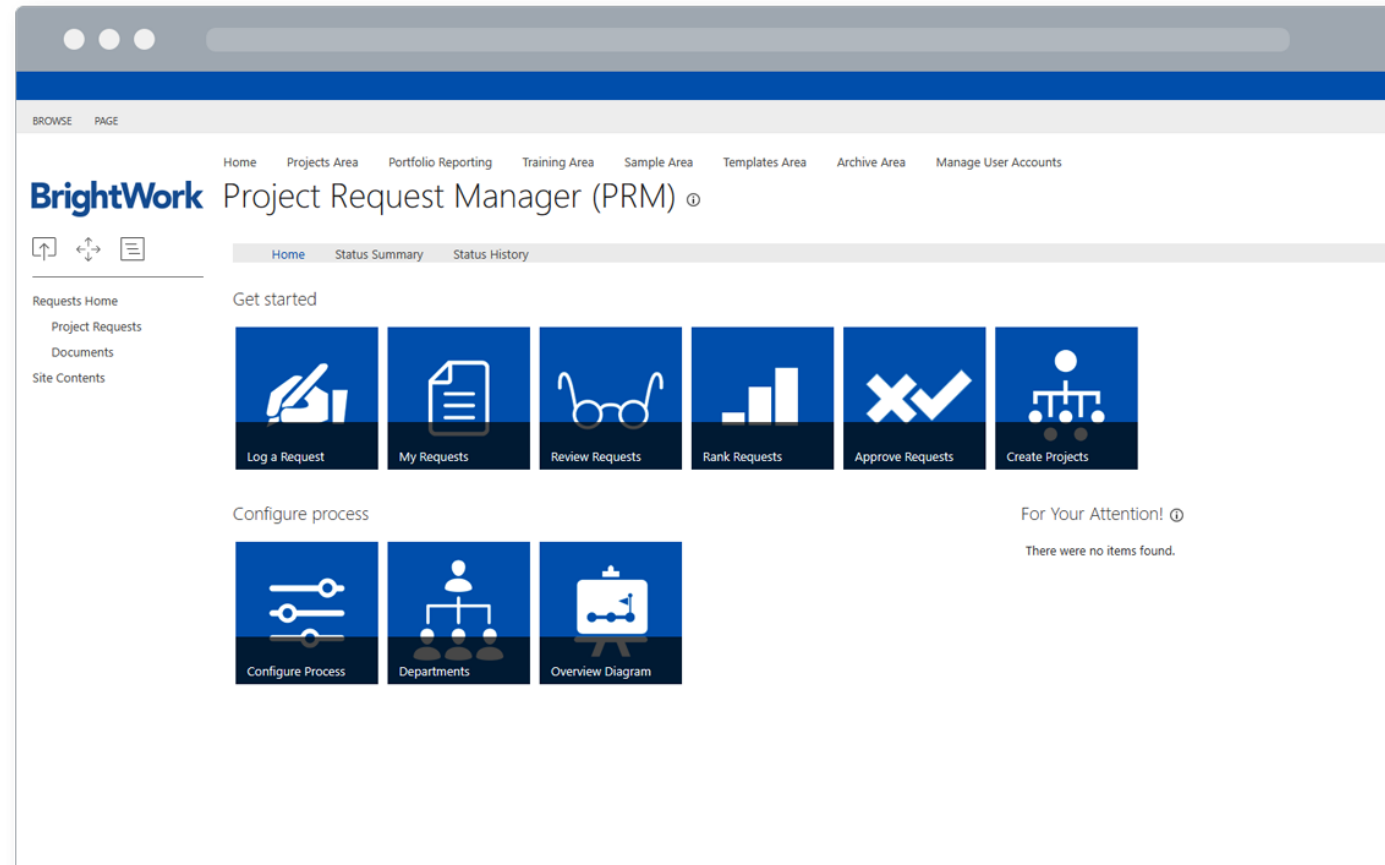
QUICK POLL!

What is the most important project management problem you have?

BrightWork

Some common Project and Portfolio Management problems that BrightWork can solve

- Creating a Project Office
- Task Scheduling
- Reporting
- Configuring templates
- Project Request Management
- Template design sync



QUESTIONS?

Use the questions pane in GoToWebinar to ask questions

Thank you!

Talk to our Experts about your SharePoint needs



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BrightWork

APPENDIX

Bright work 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 software interface, showcasing its project management capabilities.

Central Screenshot: Business Project Office (PO)

- Navigation:** BROWSE, PAGE, ITEMS, LIST. 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:** Health, Time, Cost, Quality, Issues, Finish Date. Jun 11-Dec 9, 2017.
- Project Summaries:** Health, Time, Cost, Project, Start Date, Finish Date. Jun 11-Dec 16, 2017.

Left Screenshot: Hardware Upgrade

- Navigation:** BROWSE, PROJECT, PAGE. Home, Projects Area, Portfolio Reporting.
- Get started with your project:** Setup Project, Set Initial Data.
- Key Project Metrics:** 5 Late Items, 12/13/2017 Current Finish.

Right Screenshot: Project - Status Charts

- Navigation:** Home, Projects Area, Portfolio Reporting, Templates Area, Project Status.
- Status Charts:** Project Home, Project Schedule, Status Charts, Project Status.
- Status:** Pie chart showing project status distribution.
- Late Items:** 0.00.

BrightWork

Control Portfolios of Projects

Successful portfolio management starts by having visibility into project statuses, resource allocation and new project requests



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.

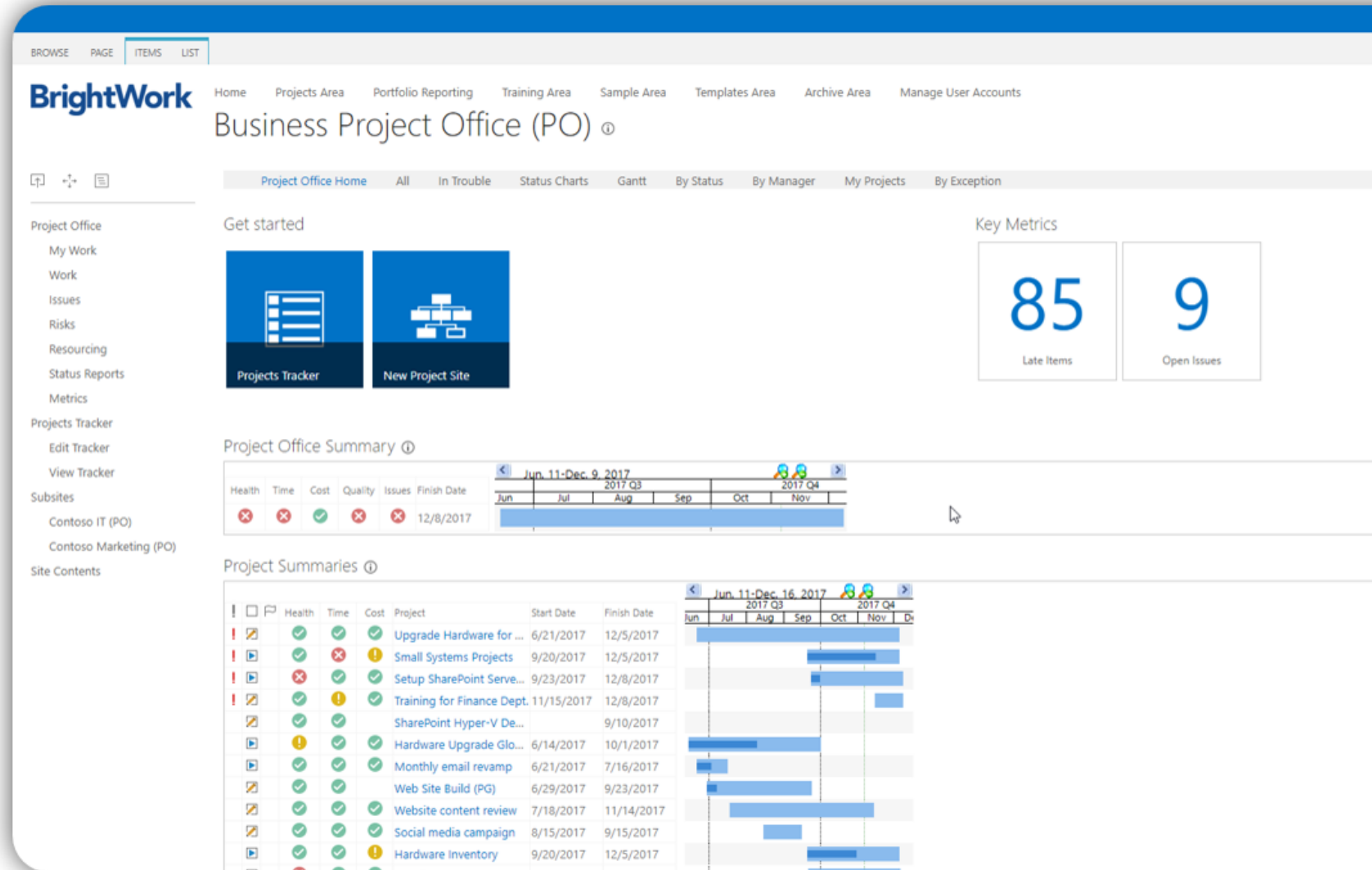
The screenshot shows the BrightWork interface for 'New Project Requests'. The top navigation bar includes links for Home, Templates Area, Training Area, Sample Area, Projects Area, Portfolio Reporting, and Manage User Accounts. The left sidebar contains 'Requests Home', 'Project Requests', 'Documents', and 'Site Contents'. The main content area is titled 'New Project Requests' and includes a sub-navigation bar with 'Home', 'Status Summary', and 'Status History'. Below this, there are two sections: 'Get started' and 'Configure process'. The 'Get started' section contains six 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). The 'Configure process' section contains 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.





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 type="checkbox"/> Assigned To : <input type="checkbox"/> Alex Hankin (7)					100.00		
<input type="checkbox"/> List Name : Project Risks (4)							
<input type="checkbox"/> List Name : Project Tasks (3)					100.00		
<input type="checkbox"/> Assigned To : <input type="checkbox"/> Anne Wallace (13)	46.67	13.33	24.00	8.00			
<input type="checkbox"/> Assigned To : <input type="checkbox"/> Christine Chang (3)							
<input type="checkbox"/> Assigned To : <input type="checkbox"/> Dan Bacon (1)							

<input type="checkbox"/>	Title	Start Date	Finish Date	Work	Feb / 2017						
					1/31/2017	2/7/2017	2/14/2017	2/21/2017	2/28/2017	3/6/2017	3/13/2017
Assigned To : <input type="checkbox"/> Alex Hankin (7)									100.00		
List Name : Project Risks (4)											
List Name : Project Tasks (3)									100.00		
Assigned To : <input type="checkbox"/> Anne Wallace (13)					46.67	13.33	24.00	8.00			
Assigned To : <input type="checkbox"/> Christine Chang (3)											
Assigned To : <input type="checkbox"/> Dan Bacon (1)											



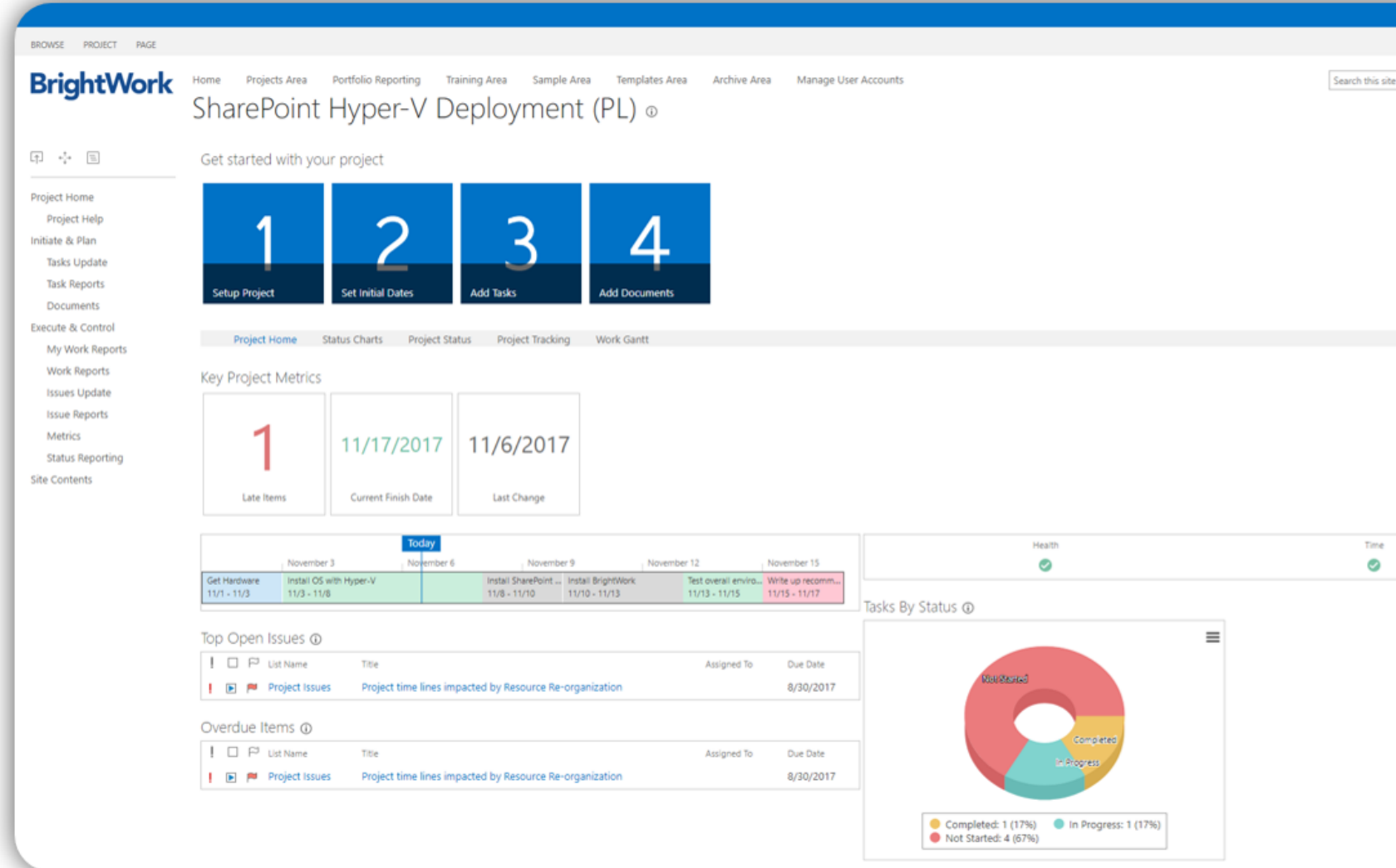
Manage Projects Successfully

Increase project success and deliver on expectations with collaborative project management templates and automated reporting.



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.





Manage with a Collaborative Toolset

The collaborative project management features in BrightWork make it as easy as possible to see what is going on in the project and keep stakeholders informed.

The screenshot displays the BrightWork project management 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...', 'Get Budget Signoff', 'Create final...', 'Sc...', 'Create report outlin...', 'Cre...', and 'Upgrade hardware in s...'. A task titled 'Stop editing this list' is highlighted.

The main view shows a table of tasks with columns for Task Name, Duration, Start Date, Finish Date, Predecessors, and % Complete. The 'Start Date' column is highlighted, and a calendar dropdown is open, showing the date 'Yesterday' (August 22, 2017) selected. The calendar also shows the current date, 'Today is Tuesday, August 23, 2017'.

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	



Inform with Automated Reporting

BrightWork templates come with automated reporting and dashboards to provide project visibility to the people who need it.

Anne V

VIEW PAGE **REPORTER**

Report Mode: Shared Personal Columns Grouping Sorting Filters Totals Report Information Show Grouping Show Totals Export Email Print Configure Reporter Settings Shared Settings

Personalize this Report Show/Hide Share

Project Office Home All **In Trouble** Status Charts Gantt By Status By Manager My Projects

By Exception

Projects in Trouble ⓘ

!	☐	🚩	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	<div></div>
	▶		⚠	✖	✔	✖	Hardware Upgrade Global (PStr)	4/27/2017	8/12/2017	8/14/2017	<div></div>
	▶		✖	✔	✔		Install new OS	8/4/2017	10/19/2017	10/19/2017	<div></div>
	▶		⚠	✔	✖		Install new wireless network for IT	8/5/2017	10/20/2017	10/20/2017	<div></div>



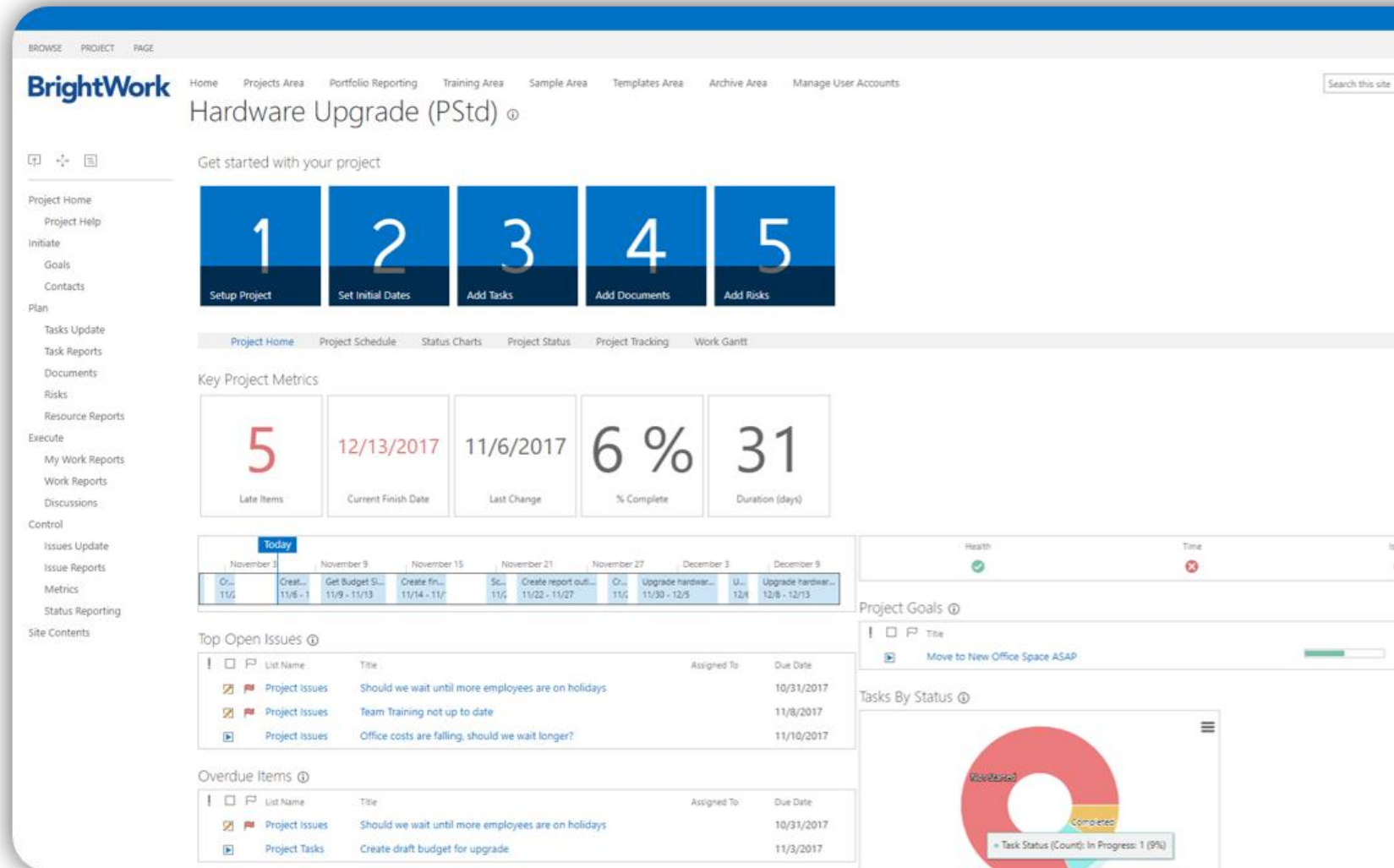
Contribute to Project Success

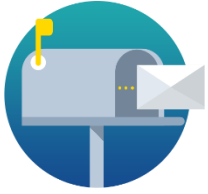
Quickly and easily contribute to project success with the simple work management system and collaborative project site.



Understand with a Team-Focused Project Site

BrightWork project sites bring all project information together in one place, so you always know what's happening on the project and never lose sight of the big picture.





Deliver with a Work Management System

BrightWork gives you a simple work management system to manage tasks and track your progress, including work that occurs outside of projects.

The screenshot displays the 'My Open Work' interface in BrightWork. At the top, there are navigation tabs: 'My Work' (selected), 'My Work Due Soon', 'My Overdue Work', 'My Gantt', and 'My Change History'. Below the tabs, the section is titled 'My Open Work' with an information icon. A dropdown menu shows the user 'Anne Wallace' with a downward arrow, and an 'Apply Filter' button is below it. The main content area is a table with columns for 'Title', 'Owner', and 'Assigned To'. The table is divided into sections for different projects:

- Project : Hardware Upgrade (PStd) (4)**
 - List Name : Project Goals (1)**
 - Task: Move to New Office Space ASAP. Owner: Anne Wallace. Progress bar is green.
 - List Name : Project Issues (3)**
 - Task: Should we wait until more employees are on holidays. Owner: Anne Wallace. Progress bar is red.
 - Task: Team Training not up to date. Owner: Anne Wallace. Progress bar is red.
 - Task: Office costs are falling, should we wait longer?. Owner: Anne Wallace. Progress bar is green.
- Project : Marketing Mini-Projects (PWT) (9)**
 - List Name : Project Issues (1)**
 - Task: Reviewer is not available until later in the month so need a new reviewer. Owner: Anne Wallace. Progress bar is red.



Collaborate with the Microsoft SharePoint Platform

Since BrightWork is built on SharePoint, your team can leverage the powerful collaboration and document management features in SharePoint to move work forward.

The screenshot displays the BrightWork application interface, which is built on the Microsoft SharePoint platform. The top navigation bar includes tabs for BROWSE, FILES, and LIBRARY. The main header area shows the BrightWork logo and navigation links: Home, Templates Area, Training Area, Sample Area, Projects Area, Portfolio Reporting, and Manage User Accounts. The page title is "Project Documents". Below the title, there is a prompt to "new document or drag files here" and a link to "All Documents". A list of documents is displayed, including "Candidate Graphics", "House Style Guide", "Implementation Rollout Strategy" (which is selected), "Information Architecture Template", "Requirements Gathering", "Training Guide", and "Website Data". A context menu is open for the selected document, showing options: "Implementation Rollout Strat...", "Changed by you on 8/23/2017", "Shared with Workflow Account, Hosting Support, and BrightWork Support", a URL "https://bwo2.sharepoint-cloud.net/BW2597C", and buttons for "OPEN", "SHARE", and a three-dot menu. The three-dot menu is expanded, showing options: "View Properties", "Edit Properties", "Check Out", "Workflows", and "Download a Copy".



Flexible Project Management

Support the successful adoption and continuous improvement of project management in your organization.



Deploy with a Low IT Burden

The familiar SharePoint interface and easy deployment options help ensure successful user and organizational adoption.

The screenshot displays the SharePoint Reporter interface. The top navigation bar includes 'BROWSE', 'PAGE', and 'REPORTER'. The 'REPORTER' tab is active, showing a ribbon with various options: 'Refresh', 'Shared' (selected), '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' for the 'Project : Hardware Upgrade (PStd)'. The report includes a table with columns for 'Title', 'Owner', and 'Assigned To'. The table lists two items: 'Should we wait until more employees are on holidays' and 'Team Training not up to'. The interface also features a left sidebar with navigation links like 'Project Office', 'My Work', 'Work', 'Issues', 'Risks', 'Resourcing', 'Status Reports', 'Metrics', 'Projects Tracker', 'Edit Tracker', and 'View Tracker'. A right sidebar shows 'Configure Reporter Settings' options for 'Columns', 'Grouping', 'Sorting', 'Filters', and 'Totals'.

!	□	🚩	Title	Owner	Assigned To
Project : Hardware Upgrade (PStd) (3)					
List Name : Project Issues (3)					
✎	🚩		Should we wait until more employees are on holidays	□ Anne Wallace	<div><div></div></div>
✎	🚩		Team Training not up to	□ Anne Wallace □ Anne Wallace	<div><div></div></div> 8/23/2017 8/26/2017 8/29/2017



Coordinate with Best-Practice Project Management Templates

With the BrightWork templates, processes do not have to be reinvented for every project. They are embedded right into the template out-of-the-box and can be adjusted as needed.

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](#)

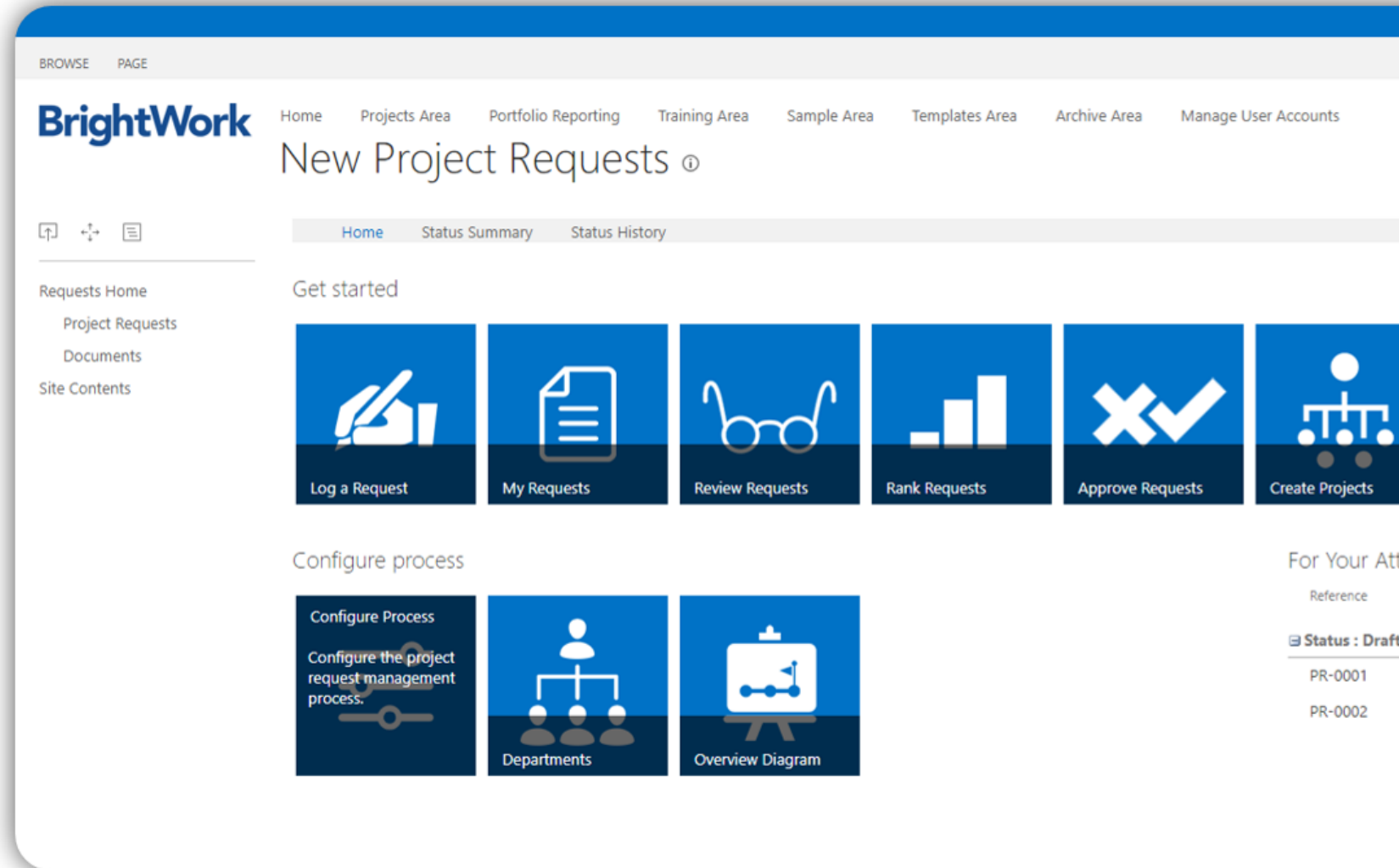
New Template Site
Create a new Template site.

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

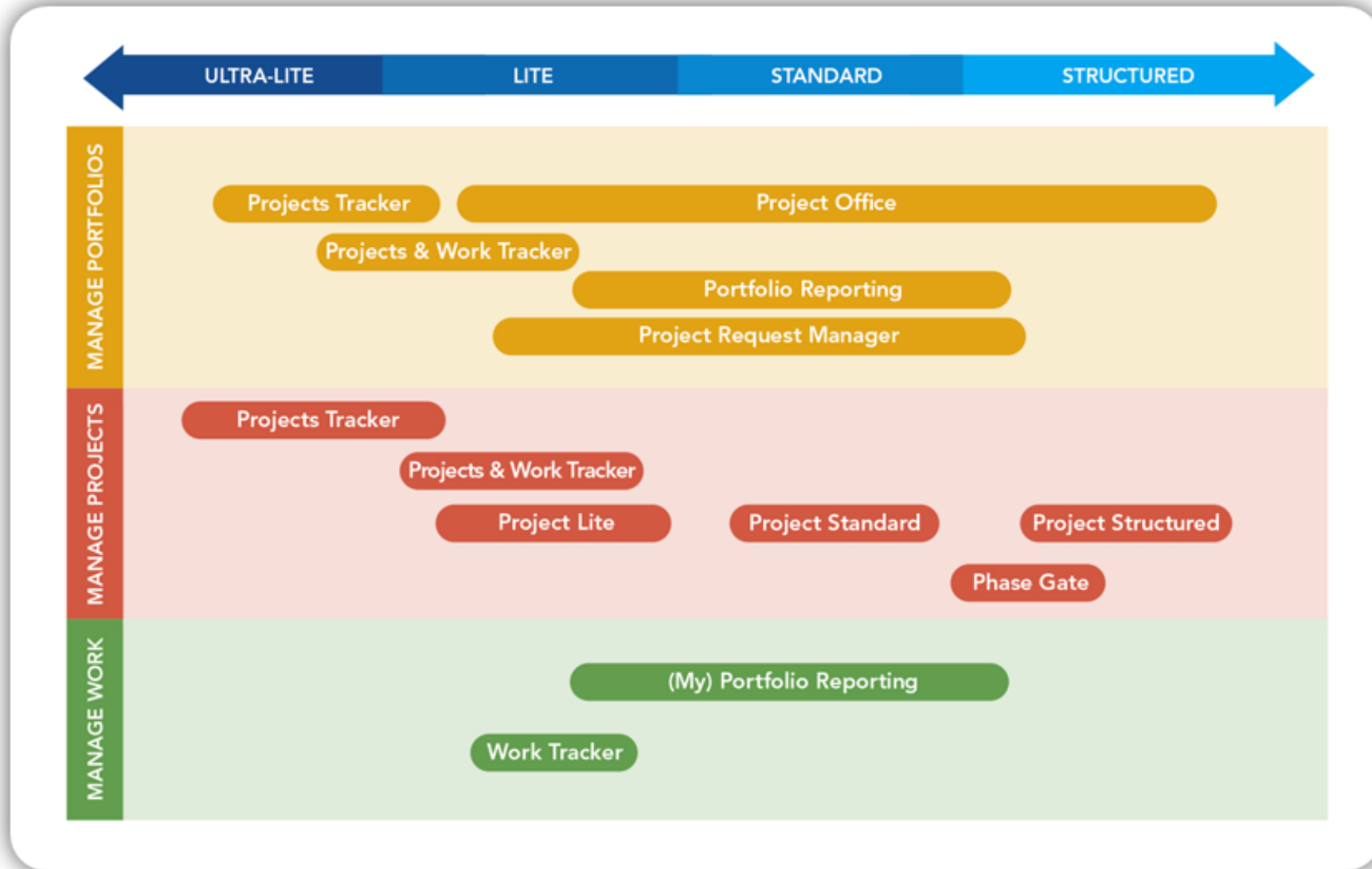
**Deliver Immediate
Visibility & Control**



Evolve

**Grow Organizational
Project Management**

BrightWork Templates Spectrum

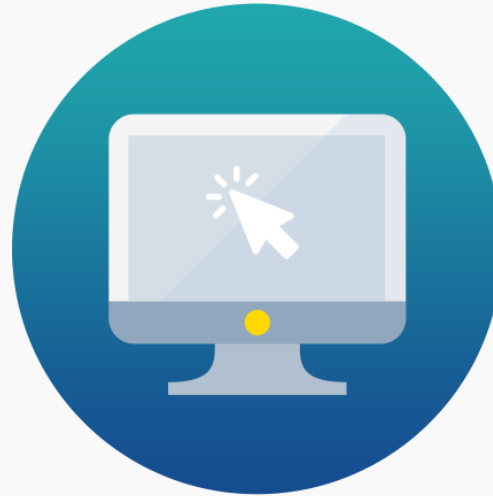


Learn More About BrightWork



Start Free Trial

Test-drive the full BrightWork solution with our free 30-day trial.



Schedule a Demo

Talk to a BrightWork Solution Specialist about your specific needs.



Learn

Read about the BrightWork framework for collaborative project management.

BrightWork

www.brightwork.com