



3 Ways to Align Your Remote Project Team With SharePoint

presented by



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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

The Amazon logo, featuring the word "amazon" in a bold, black, sans-serif font with a curved orange arrow underneath it.The Dimensional logo, featuring a red stylized play button icon to the left of the word "Dimensional" in a bold, black, sans-serif font.The Camden National Bank logo, featuring the word "Camden" in a large, blue, serif font with a blue anchor icon above the "n", and the words "NATIONAL BANK" in a smaller, blue, sans-serif font below it.The Siemens Healthineers logo, featuring the word "SIEMENS" in a green, sans-serif font above the word "Healthineers" in an orange, sans-serif font, with a cluster of orange dots to the right.The AMSURG logo, featuring the word "AMSURG" in a large, blue, serif font.The Ascend Performance Materials logo, featuring a stylized blue and yellow "A" icon above the word "ASCEND" in a large, blue, serif font, with the words "PERFORMANCE MATERIALS" in a smaller, blue, sans-serif font below it.The Schneider Electric logo, featuring the word "Schneider" in a large, green, sans-serif font above the word "Electric" in a smaller, green, sans-serif font, with a green circular icon to the left of "Electric".The United States Postal Service logo, featuring a blue eagle head icon above the words "UNITED STATES" and "POSTAL SERVICE" in a blue, sans-serif font, with a red horizontal line between the two lines of text.

QUICK POLL

**Are You Working On a
Remote Team?**



Challenges of a Remote Team

“To succeed as individuals and as a team, we needed to get comfortable with constant change and add more structure.”

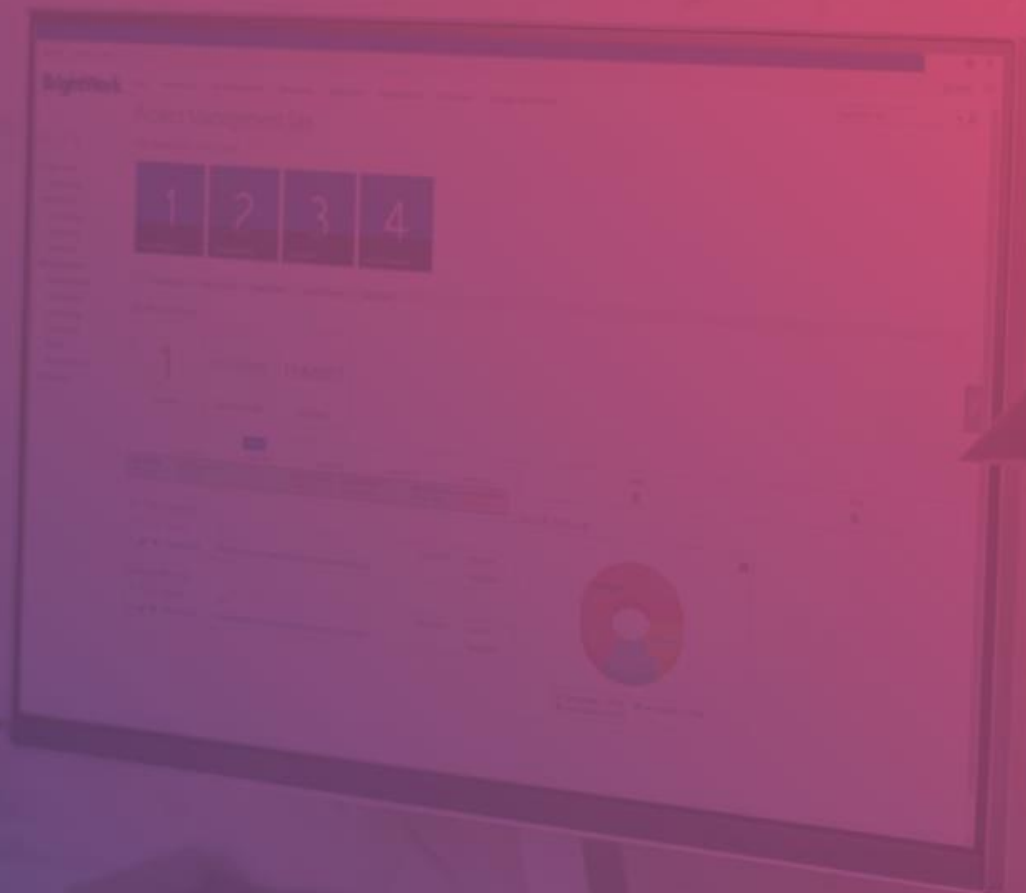
Tips for Managing a Remote Team

- Strong Leadership
- Maintain regular meeting rhythms
- Define roles and responsibilities
- Virtual Water Cooler
- Prioritizing the backlog
- Single Source of truth
- Celebrate Success!

Agenda

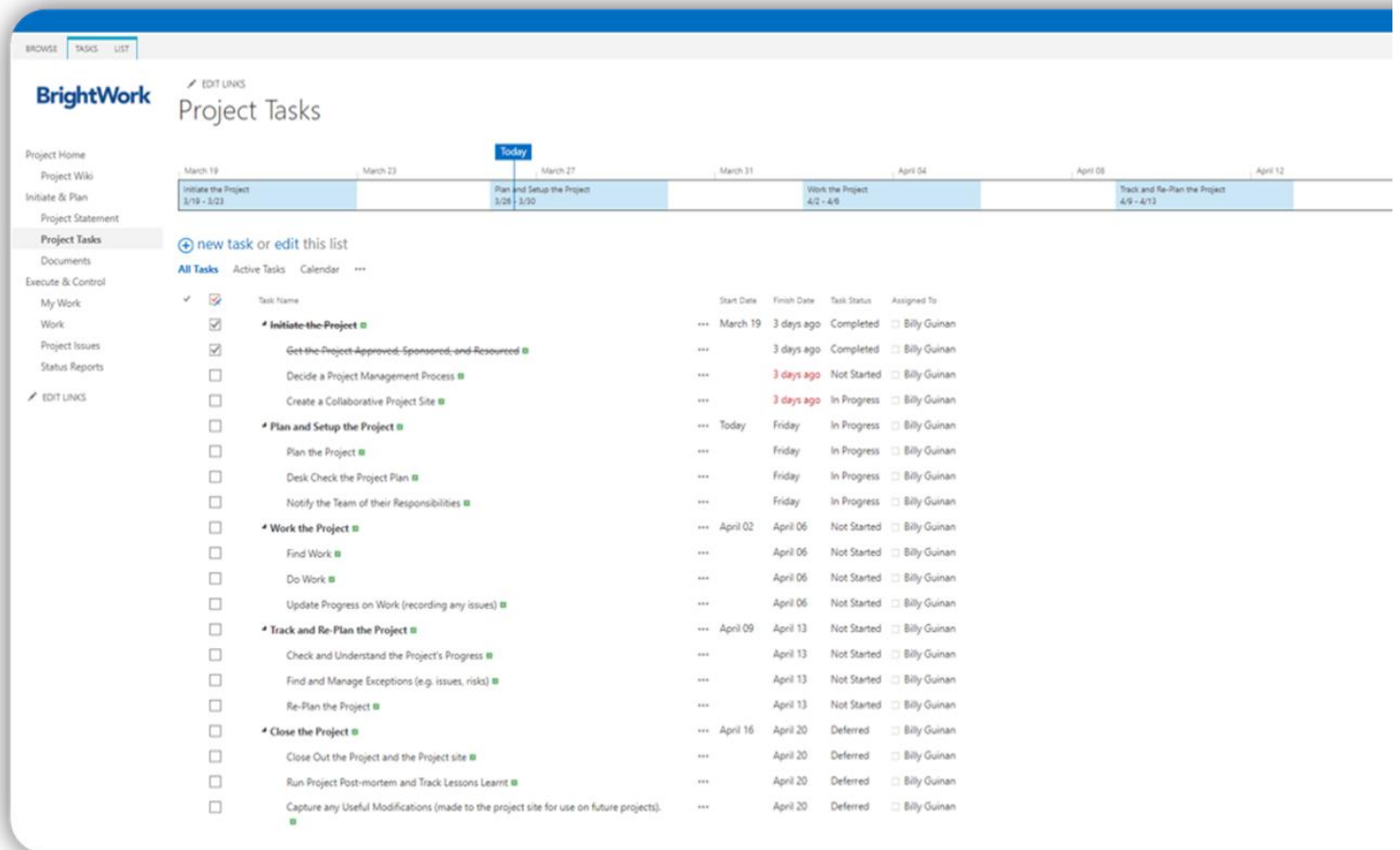
- **Aligning Your Remote Project Team**
 - **Manage Tasks** to ensure visible accountability across your team.
 - **Find your Work** in a centralized tool with Project and Project Office reporting.
 - **Communicate with your Team** using advanced reporting and scheduled emails.
- **Q&A**

DEMO



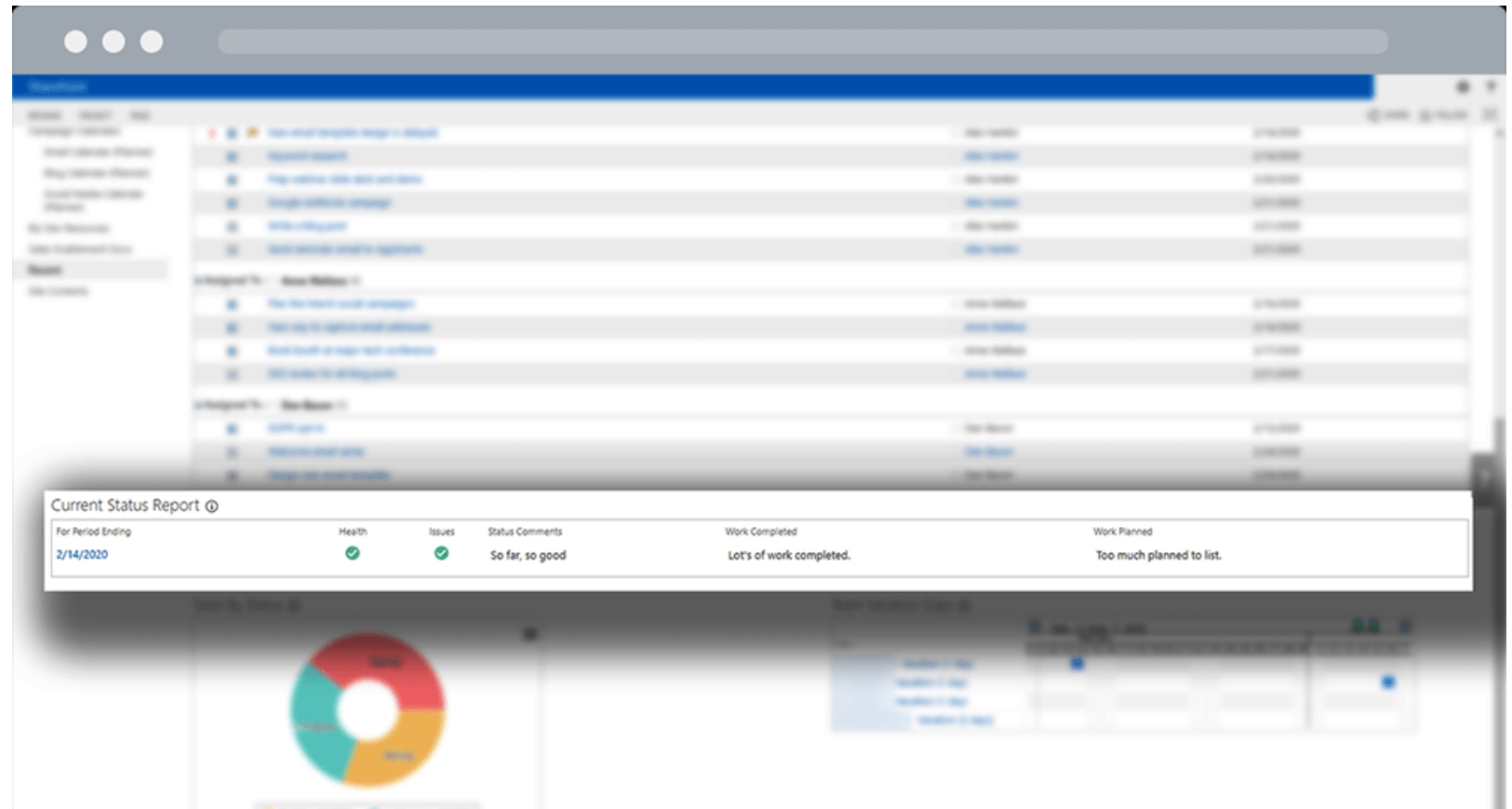
Plan the Project Schedule

Use the **Project Tasks List** to build your project schedule.

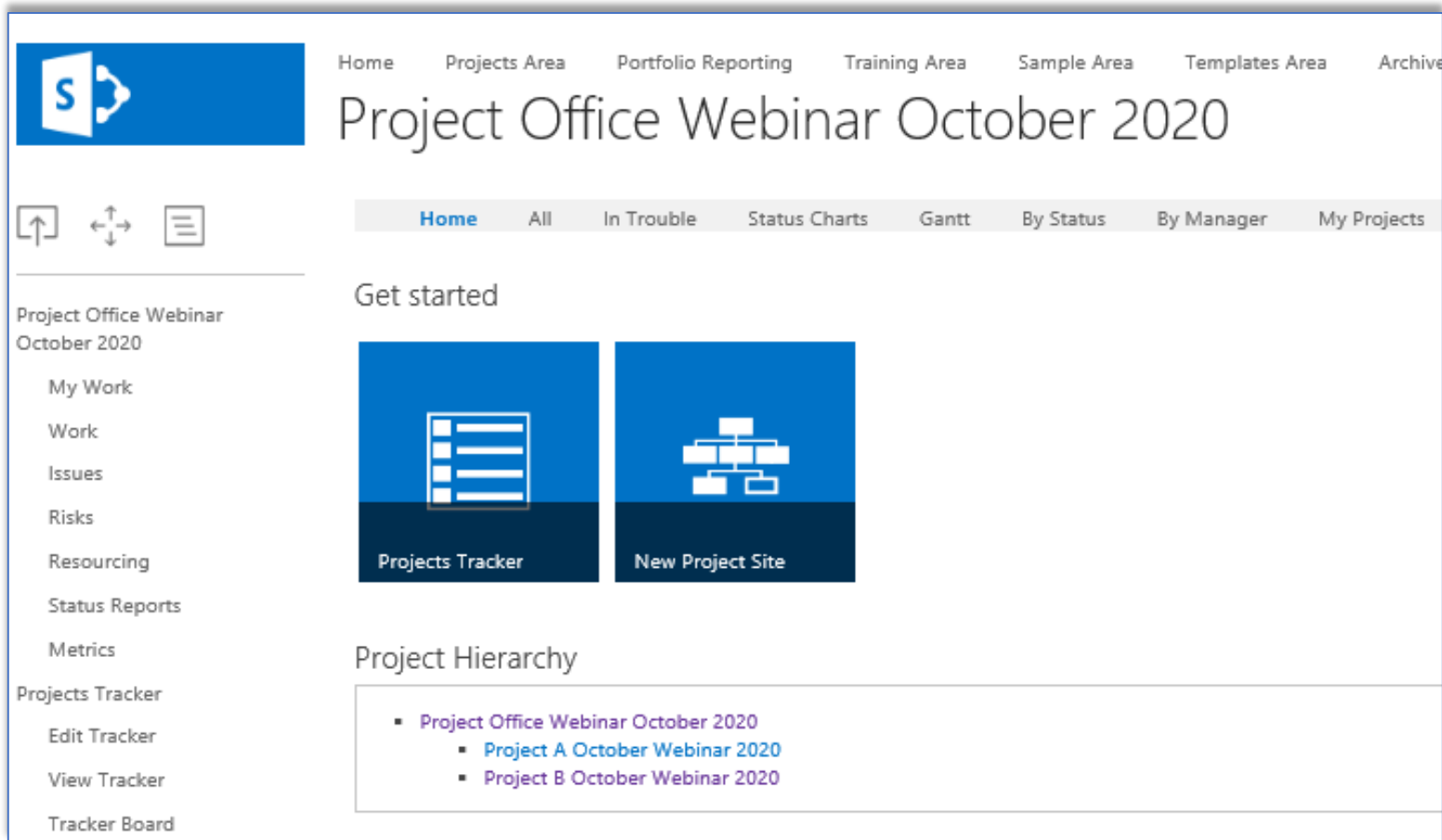


Project Reporting

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



Project Office Work Reporting



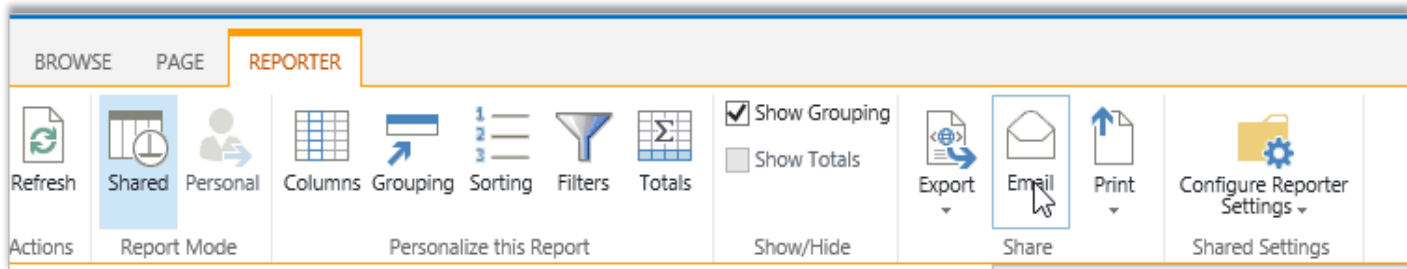
MY WORK

Same reports offered at the Project Site level under 'MY WORK' but for all the Projects within the Project Office.

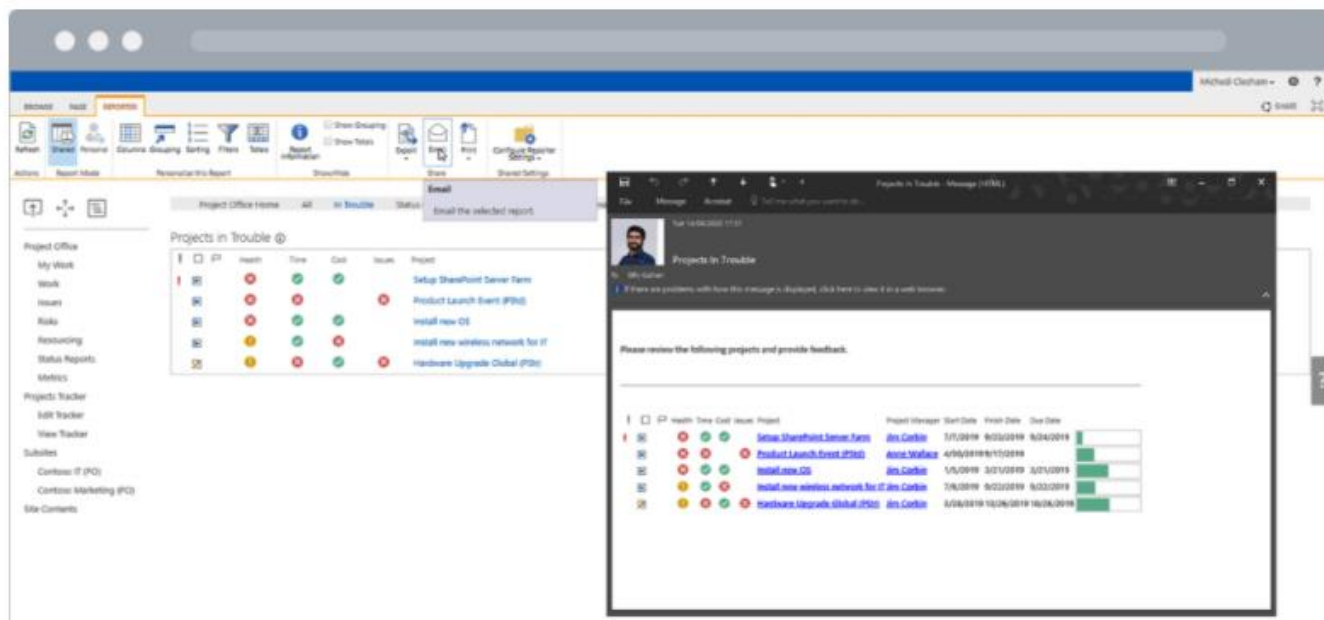
WORK

Same reports offered at the Project Site level under 'WORK' but for all the Projects within the Project Office.

Email A Report



All emailed reports have hyperlinks for the recipient to drill down into each project to get more insight.



Schedule An Email Report

The screenshot displays the BrightWork Reporter interface. At the top, a ribbon labeled 'REPORTER' contains various icons for report management. The 'Advanced Share' icon is highlighted, and its dropdown menu is open, showing two options: 'Create Scheduled Email' and 'View Scheduled Emails'. Below the ribbon, there are tabs for 'My Work', 'My Gantt', 'My Work Due Soon', and 'My Overdue Work'. The 'My Open Work' section is active, showing a filter for 'User: Peter Doyle' and an 'Apply Filter' button. Below this, a table header is visible with columns: Title, Owner, Assigned To, Start Date, Finish Date, and Date Due. The table content shows a project site 'Erickson Living Training (2)' and a list name 'Project Issues (2)'. A 'Show Description' link is also present.

REPORTER

Personalize this Report

Show/Hide

Share

Create Scheduled Email
Click to create a scheduled email for this report.

View Scheduled Emails
Click to view scheduled emails for this report.

My Open Work

User: Peter Doyle

Apply Filter

Title	Owner	Assigned To	Start Date	Finish Date	Date Due
Project Site : Erickson Living Training (2)					
List Name : Project Issues (2)					

Show Description

Schedule An Email Report contd.

The screenshot shows a web application interface for configuring a scheduled email report. The interface is divided into several sections:

- Navigation Menu (Left):** Includes links for Hardware Upgrade (PSId), Project Help, Initiate, Goals, Contacts, Plan, Tasks Update, Task Reports, Documents, Risks, Resource Reports, Execute, My Work Reports, Work Reports, Discussions, Control, Issues Update, Issue Reports, Metrics, Status Reporting, and Site Contents.
- Item Settings:** A section for specifying the report item title and whether it will be processed by the timer job. It includes a link to "Learn more about Scheduled Report Emails."
- Schedule Frequency:** A section for specifying the frequency of the email. It includes radio buttons for Daily, Weekly, and Monthly, and a "On:" section with checkboxes for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat).
- Email From:** A section for specifying the email address or the user that the email should come from. It includes a "From *" label and two options: "Specify a User" (selected) and "Specify an Address". The "Specify a User" option has a text input field containing "Grace Windsor x".
- Email To:** A section for specifying who will be the recipients of the scheduled report. It includes a "To *" label and two options: "All Relevant Users" (selected) and "Specify User(s)". The "Specify User(s)" option has a text input field containing "<Specify the user(s) to email >".

The interface also includes a "BROWSE" button, an "EDIT" button, and a "Commit" button at the top.

QUESTIONS?

➤ Use the Question pane in GoToWebinar to ask questions

THANK YOU

➤ Talk to our Team about your project management needs



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APPENDIX

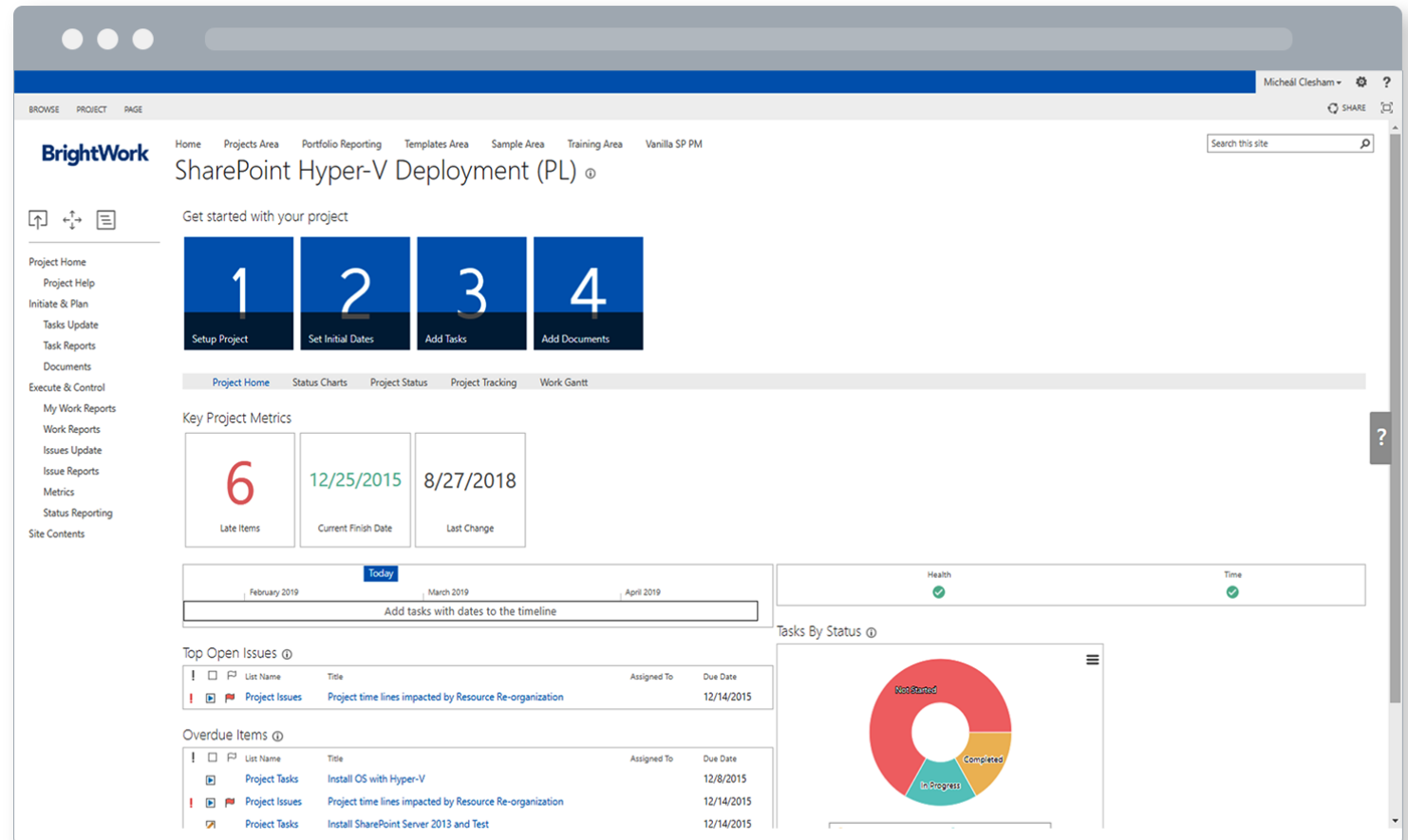
➤ BrightWork model explained

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.



PROJECTS

Collaborate with a Team-focused 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.

Manage your schedule with instant visibility into project and non-project task

The screenshot displays the BrightWork interface for a project site titled "Selected Project Open Work". The user is logged in as Anne Wallace. The dashboard is organized into several sections:

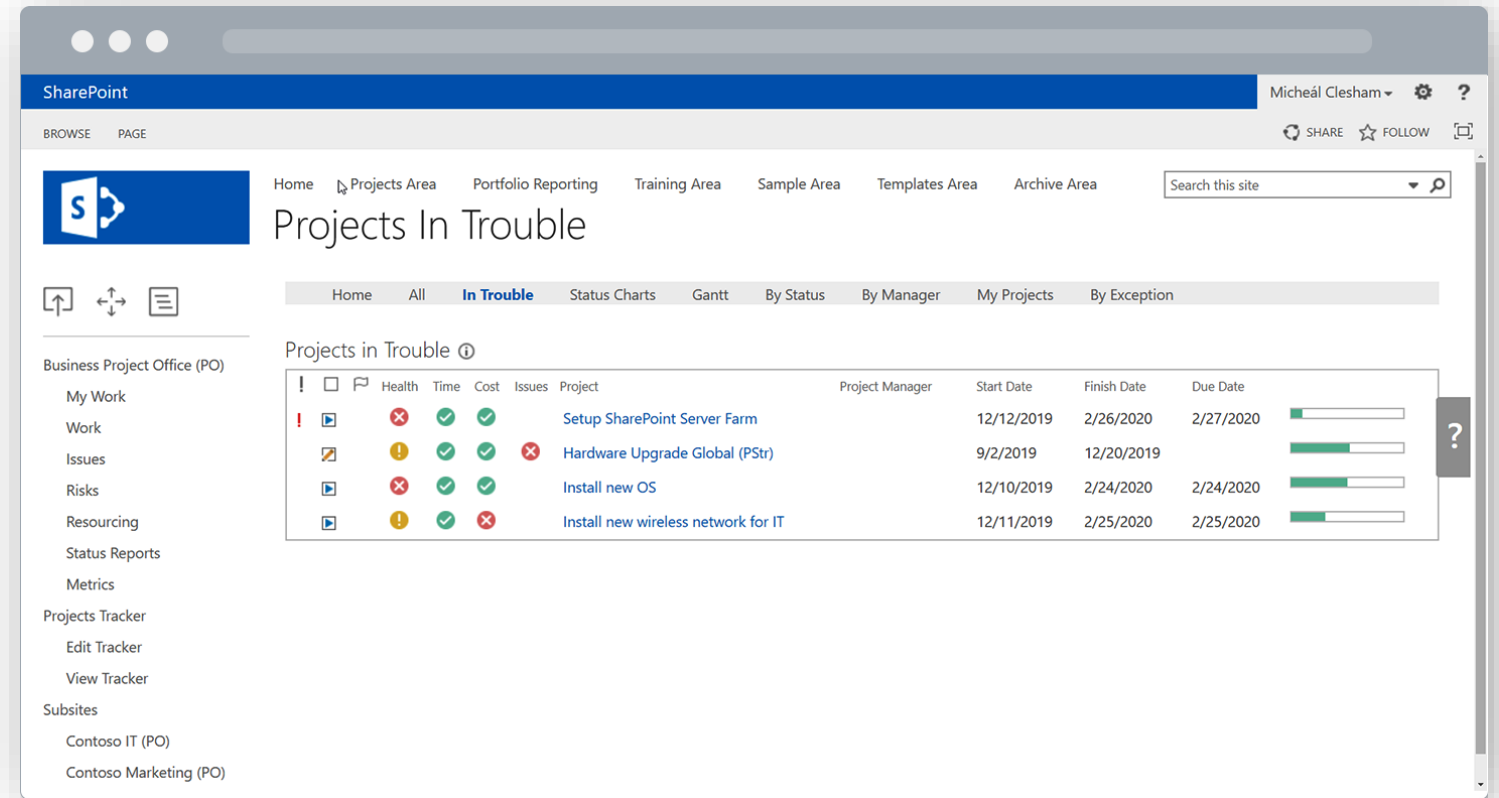
- Navigation:** Includes tabs for BROWSE, PAGE, and BOARD. A top navigation bar lists areas like Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts.
- Left Sidebar:** Contains navigation links for Marketing Mini-Projects (PWT), Selected Project, All Projects, All My Work, All Tasks, All Documents, All Issues, and Site Contents.
- Project Selection:** A dropdown menu allows selecting a project, currently set to "Website content review". Below it, tabs show "Selected Project Open Work", "Selected Project My Work", and "Selected Project All Work".
- Projects Section:** A table lists project items with columns for Health, Time, Title, Project Manager, % Complete, Start Date, and Finish Date. One item, "Website content review", is listed with a 0% completion rate.
- Project Documents Section:** A table lists documents with columns for Name, Modified, Modified By, and Project. Documents include "Revised Messaging Framework 2019" and "SEO Keyword Stats".
- Project Tasks Section:** A table lists tasks with columns for Task Name, Finish Date, Assigned To, and Project. Tasks include "Review first draft design", "Create second design", "Review second design", "Select version and send test", and "Kick-off Project".
- Tasks Priority Section:** A visual task board categorized by priority: (1) High, (2) Normal, and (3) Low. Each task card shows the task name, assignee, completion percentage, and finish date.

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.



SharePoint

Micheál Clesham

Home Projects Area Portfolio Reporting Training Area Sample Area Templates Area Archive Area

Search this site

Projects In Trouble

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

Projects in Trouble ⓘ

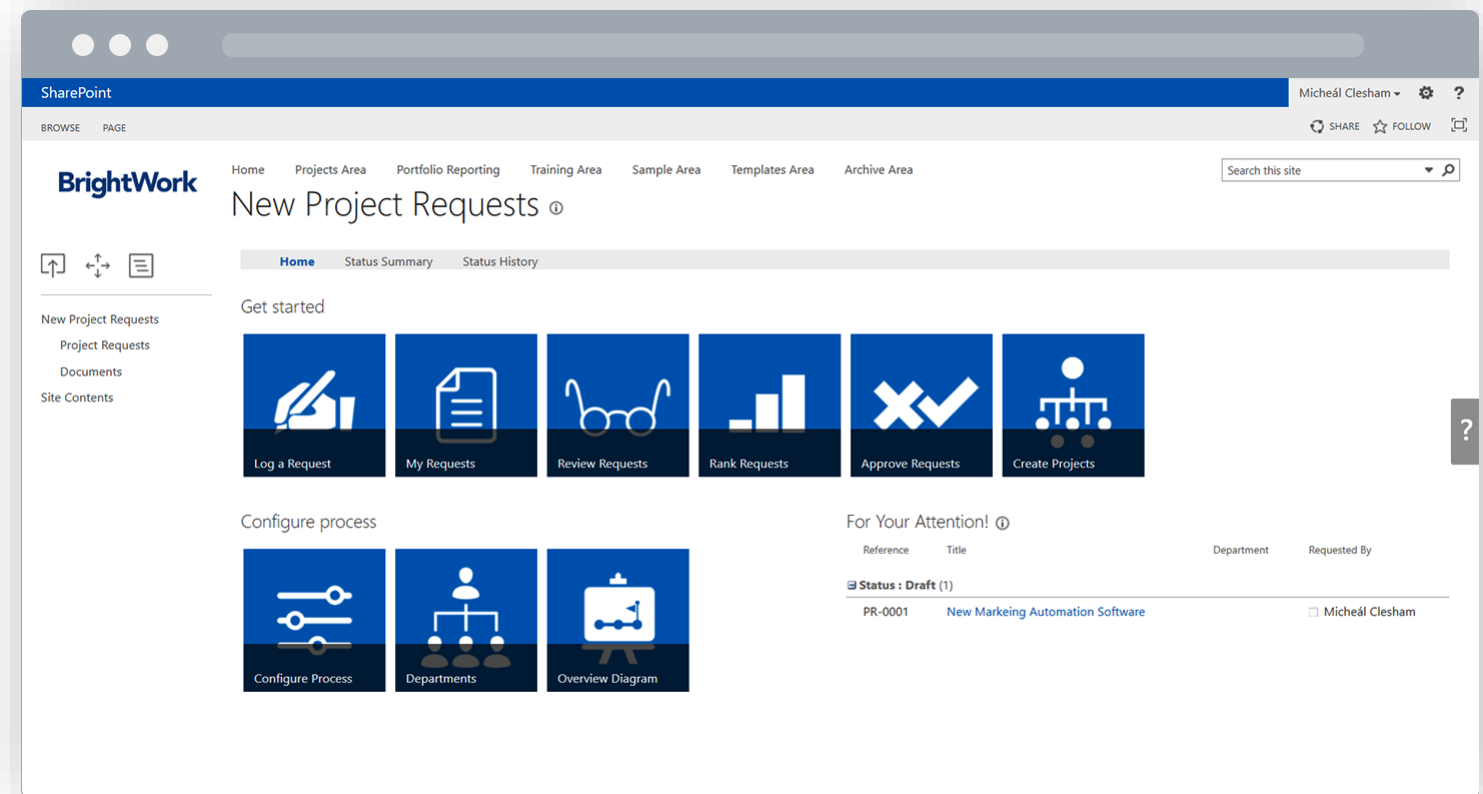
	Health	Time	Cost	Issues	Project	Project Manager	Start Date	Finish Date	Due Date	
! [Project Icon]	✗	✓	✓		Setup SharePoint Server Farm		12/12/2019	2/26/2020	2/27/2020	<div></div>
[Project Icon]	!	✓	✓	✗	Hardware Upgrade Global (PStr)		9/2/2019	12/20/2019		<div></div>
[Project Icon]	✗	✓	✓		Install new OS		12/10/2019	2/24/2020	2/24/2020	<div></div>
[Project Icon]	!	✓	✗		Install new wireless network for IT		12/11/2019	2/25/2020	2/25/2020	<div></div>

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

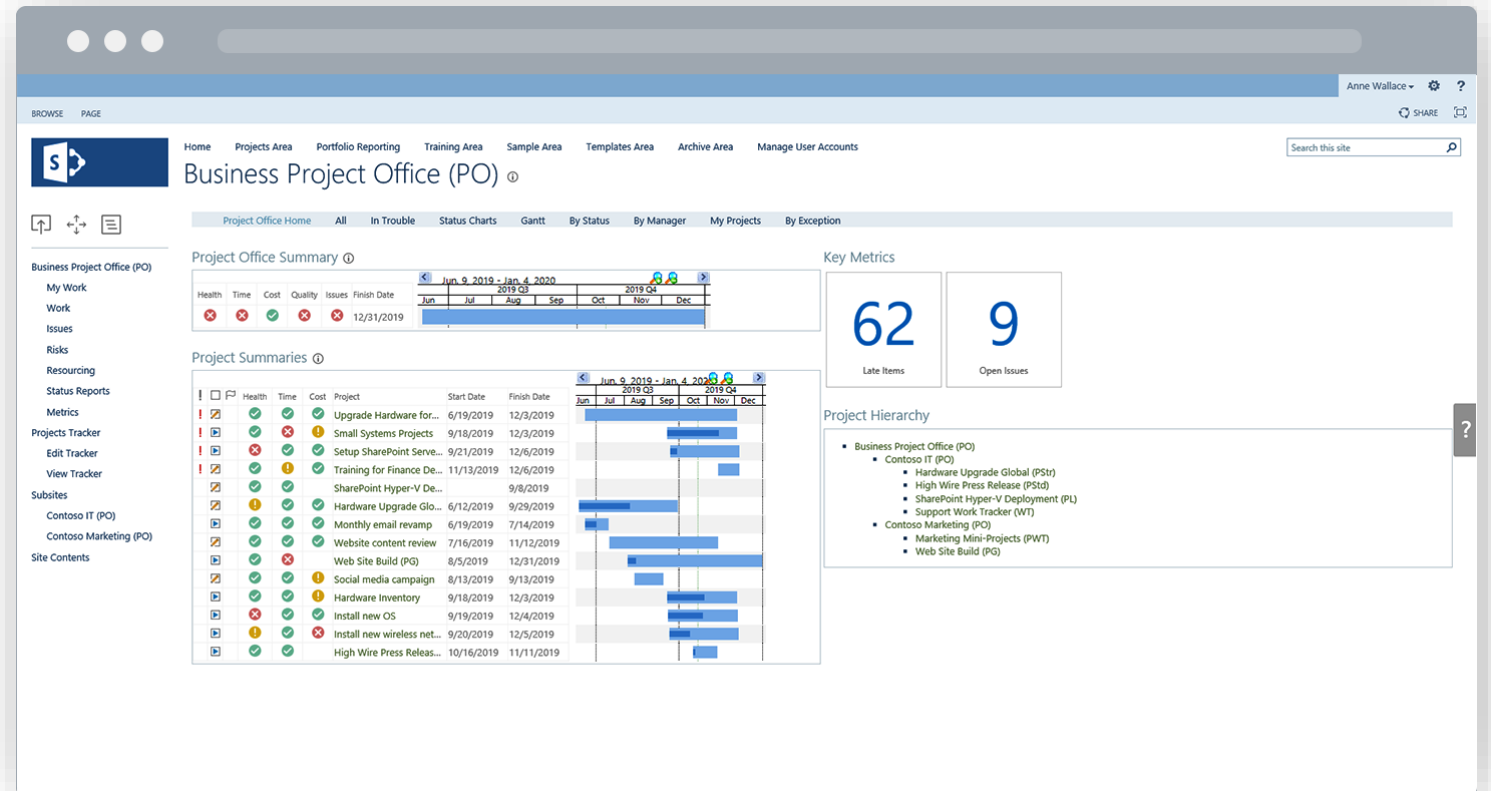


PORTFOLIOS

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

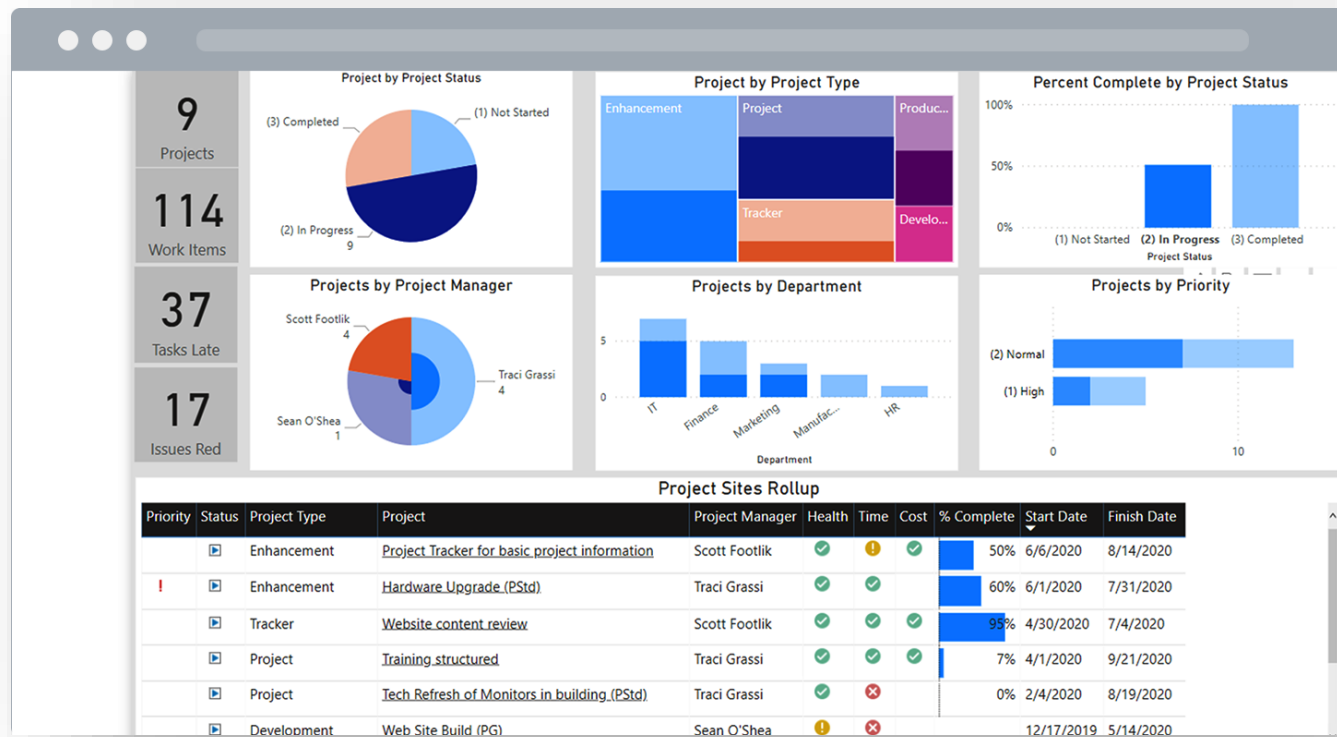
Simple resource reports help you track and forecast resource allocation to make sure you have optimal resource utilization across projects.

Prevent burnout and boost team morale with more transparency around workloads and commitments.

The screenshot displays the BrightWork Resource Management interface. The top navigation bar includes links for Home, Projects Area, Portfolio Reporting, Templates Area, Sample Area, Training Area, and Vanilla SP PM. The left sidebar shows a menu with Requests Home, Project Requests, Documents, Resource Management (highlighted), Resource Allocation, and Site Contents. The main content area is titled 'Resource Management' and features two icons: 'Resource Allocation' and 'Overview Diagram'. Below these icons 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
Assigned To : Anne Wallace (1)					80.00	184.00	176.00	168.00	40.00
Assigned To : Christine Chang (1)					40.00	92.00	88.00	84.00	20.00
Assigned To : Jim Corbin (1)					80.00	184.00	176.00	120.00	

BrightWork Power BI Pack



The BrightWork Power BI Pack is a pre-report built with six central dashboards.

- Portfolio Dashboard
- Portfolio Timeline
- Project Task Timeline
- Work Reports
- Status Report Dashboard
- Issue Report

SHAREPOINT

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.

Reduce the learning curve and accelerate user adoption with a familiar environment.

The screenshot displays the BrightWork application interface within a web browser. The top navigation bar includes the BrightWork logo and a user profile for Micheál Clesham. The main content area is titled 'Resource Management' and features a sidebar with navigation options: Requests Home, Project Requests, Documents, Resource Management, Resource Allocation, and Site Contents. The main content area includes a 'Resource Allocation' icon, an 'Overview Diagram' icon, and a 'Resource Report' table. The table displays resource allocation data for Q2, Q3, and Q4 2019, categorized by assigned personnel: Anne Wallace, Christine Chang, and Jim Corbin.

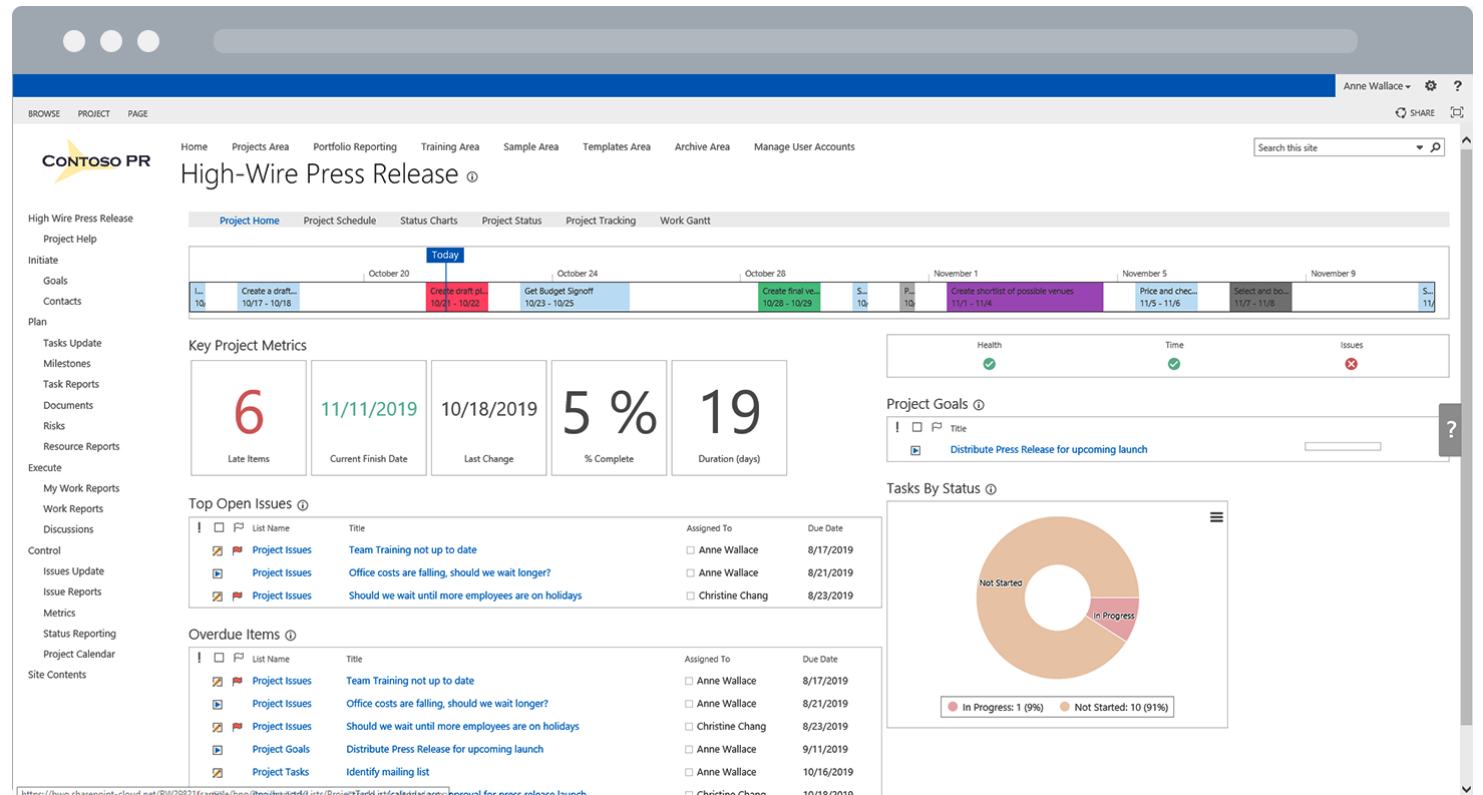
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Assigned To : Jim Corbin (1)					80.00	184.00	176.00	120.00	

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.



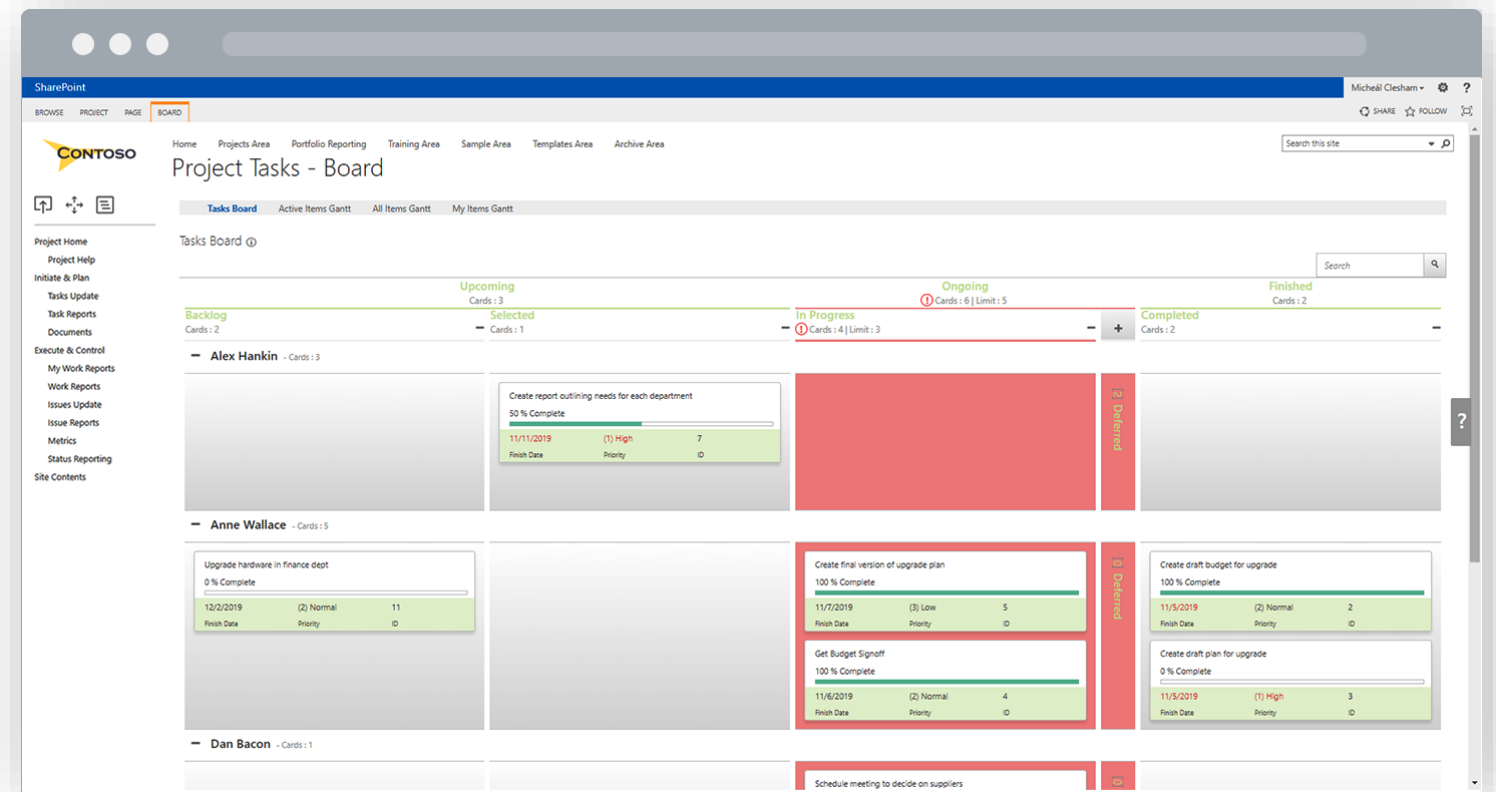
SHAREPOINT

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.



BrightWork Services

Do more with tailored Training and Support

SOLUTION SERVICES

- Deployment JumpStart
- Training & Certification
- BrightWork Support

PROJECT MANAGEMENT SERVICES

- Health Check
- Coaching
- Leadership Training

PLATFORM SERVICES

- BrightWork Upgrade
- Microsoft Power BI Pack
- SharePoint Upgrade

