

# BrightWork webinars

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## 3 Ways to Align Your Remote Project Team With SharePoint

*presented by*



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# BrightWork

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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, lowercase sans-serif font with a curved orange arrow underneath it pointing from the letter 'a' to the letter 'z'.The Dimensional logo, consisting of a red and white geometric icon of three nested triangles pointing right, followed by the word "Dimensional" in a bold, black, sans-serif font.The Camden National Bank logo, featuring the word "Camden" in a blue, serif font with a blue anchor icon above the letter 'n', and the words "NATIONAL BANK" in a smaller, blue, sans-serif font below it.The Siemens Healthineers logo, with "SIEMENS" in a teal, sans-serif font and "Healthineers" in an orange, sans-serif font, followed by a cluster of orange dots.The AMSURG logo, featuring the word "AMSURG" in a bold, blue, serif font.The Ascend Performance Materials logo, featuring a stylized blue and yellow 'A' icon above the word "ASCEND" in a bold, black, sans-serif font, with "PERFORMANCE MATERIALS" in a smaller, black, sans-serif font below it.The Schneider Electric logo, with "Schneider" in a bold, green, sans-serif font and "Electric" in a smaller, green, sans-serif font below it, accompanied by a green circular icon with a white 'E'.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 underlining "POSTAL SERVICE".

**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.”*

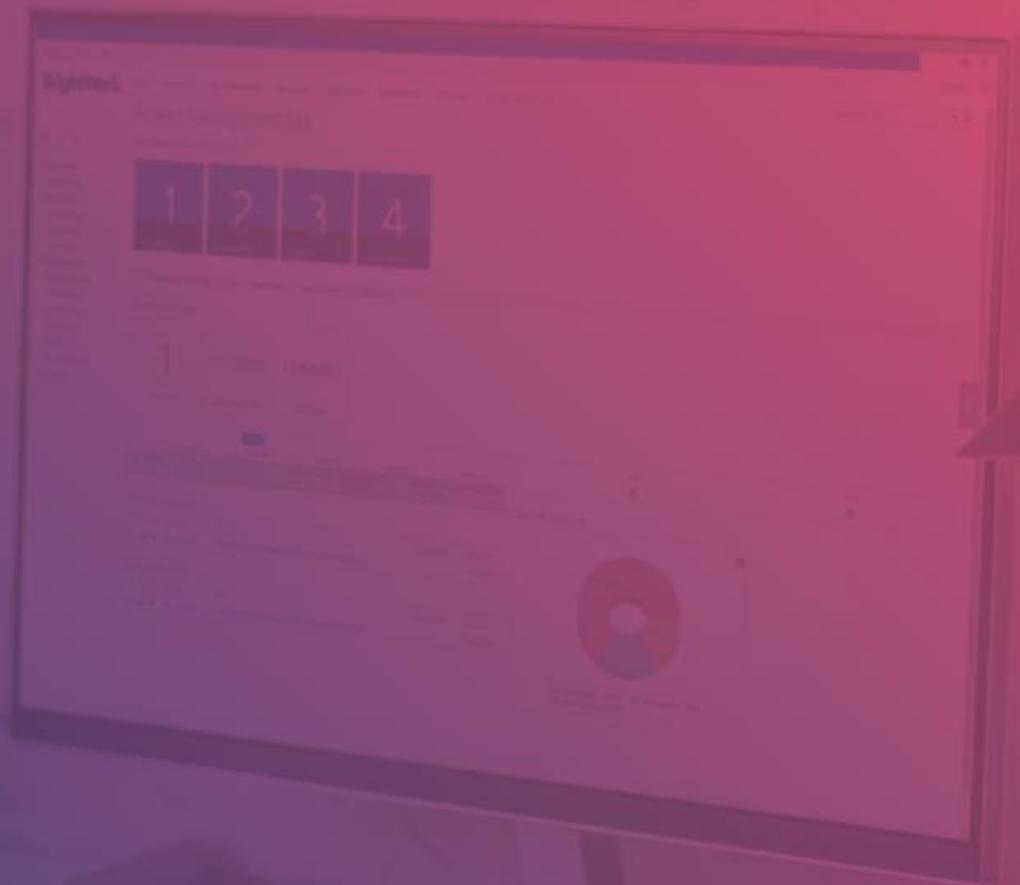
## Tips for Managing a Remote Team

- 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.

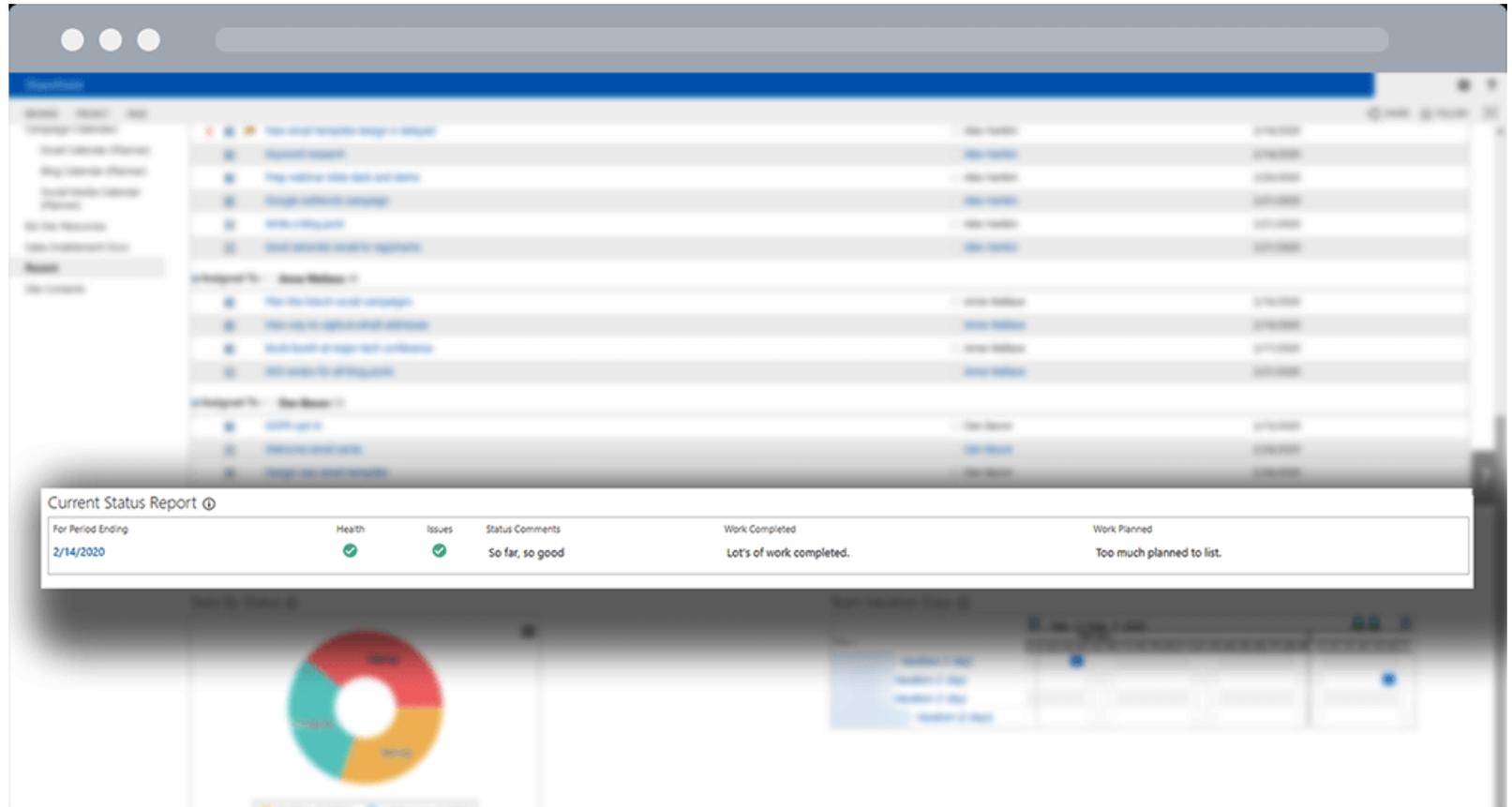
The screenshot displays the BrightWork Project Tasks interface. At the top, there are navigation tabs for 'BROWSE', 'TASKS', and 'LIST'. The main header shows 'BrightWork' and 'Project Tasks' with an 'EDIT LINKS' option. Below the header is a Gantt chart showing a project timeline from March 19 to April 12. The Gantt chart is divided into four main phases: 'Initiate the Project' (3/19 - 3/23), 'Plan and Setup the Project' (3/26 - 3/30), 'Work the Project' (4/2 - 4/6), and 'Track and Re-Plan the Project' (4/9 - 4/13). A 'Today' marker is positioned at the end of the 'Plan and Setup the Project' phase.

Below the Gantt chart, there is a section for 'Project Tasks' with a '+ new task or edit this list' button and tabs for 'All Tasks', 'Active Tasks', and 'Calendar'. The 'All Tasks' tab is selected, showing a list of tasks with columns for 'Task Name', 'Start Date', 'Finish Date', 'Task Status', and 'Assigned To'. The tasks are organized into four main categories: 'Initiate the Project', 'Plan and Setup the Project', 'Work the Project', and 'Track and Re-Plan the Project'. Each category contains several sub-tasks with checkboxes for completion and status indicators.

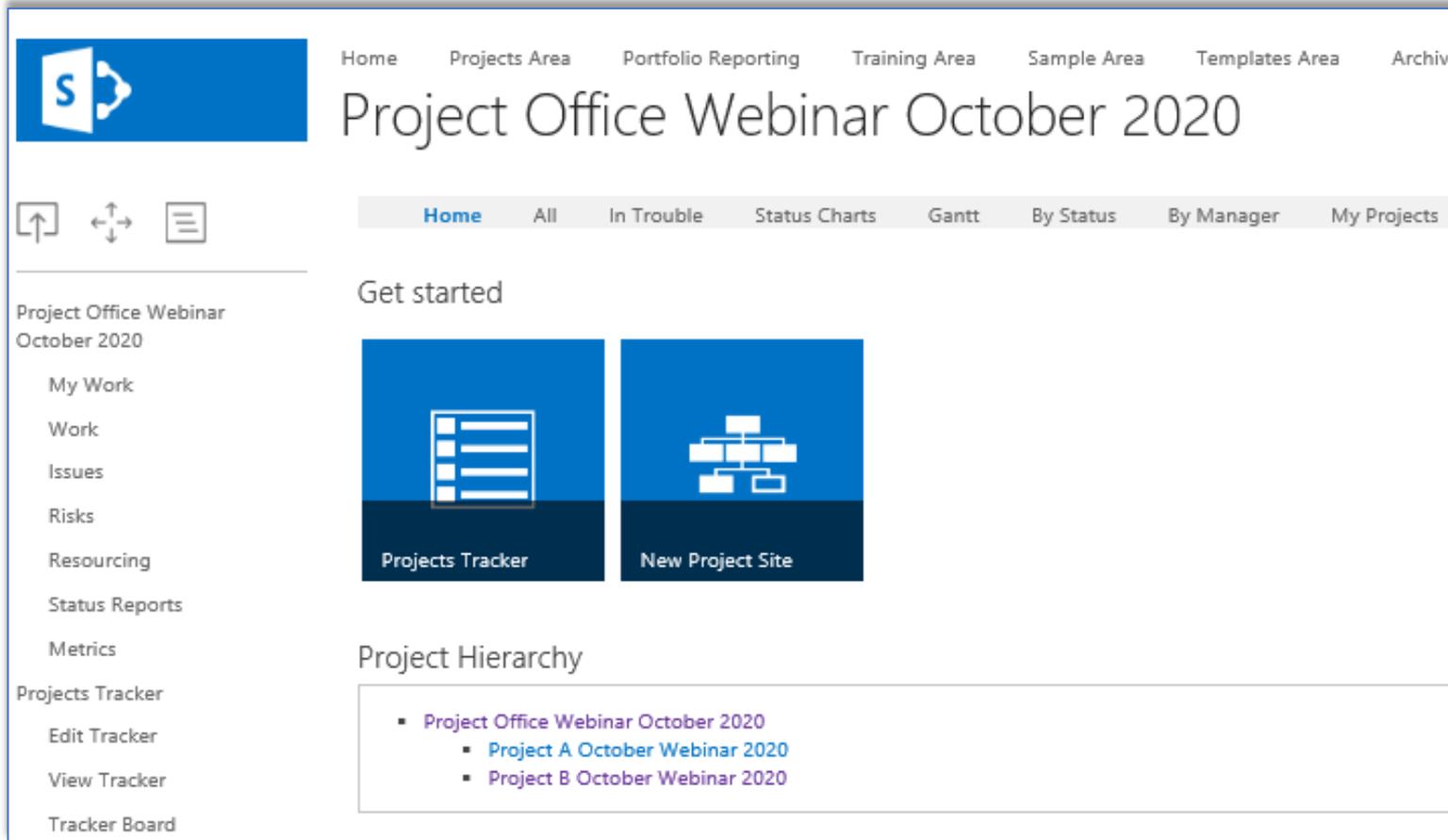
Task Name	Start Date	Finish Date	Task Status	Assigned To
Initiate the Project	March 19	3 days ago	Completed	Billy Guinan
Get the Project Approved, Sponsored, and Resourced	...	3 days ago	Completed	Billy Guinan
Decide a Project Management Process	...	3 days ago	Not Started	Billy Guinan
Create a Collaborative Project Site	...	3 days ago	In Progress	Billy Guinan
Plan and Setup the Project	Today	Friday	In Progress	Billy Guinan
Plan the Project	...	Friday	In Progress	Billy Guinan
Desk Check the Project Plan	...	Friday	In Progress	Billy Guinan
Notify the Team of their Responsibilities	...	Friday	In Progress	Billy Guinan
Work the Project	April 02	April 06	Not Started	Billy Guinan
Find Work	...	April 06	Not Started	Billy Guinan
Do Work	...	April 06	Not Started	Billy Guinan
Update Progress on Work (recording any issues)	...	April 06	Not Started	Billy Guinan
Track and Re-Plan the Project	April 09	April 13	Not Started	Billy Guinan
Check and Understand the Project's Progress	...	April 13	Not Started	Billy Guinan
Find and Manage Exceptions (e.g. issues, risks)	...	April 13	Not Started	Billy Guinan
Re-Plan the Project	...	April 13	Not Started	Billy Guinan
Close the Project	April 16	April 20	Deferred	Billy Guinan
Close Out the Project and the Project site	...	April 20	Deferred	Billy Guinan
Run Project Post-mortem and Track Lessons Learnt	...	April 20	Deferred	Billy Guinan
Capture any Useful Modifications (made to the project site for use on future projects)	...	April 20	Deferred	Billy Guinan

# Project Reporting

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



# Project Office Work Reporting



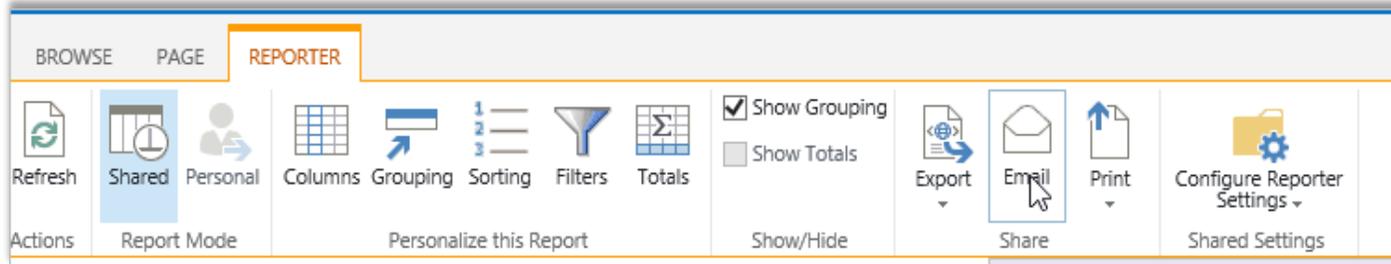
## MY WORK

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

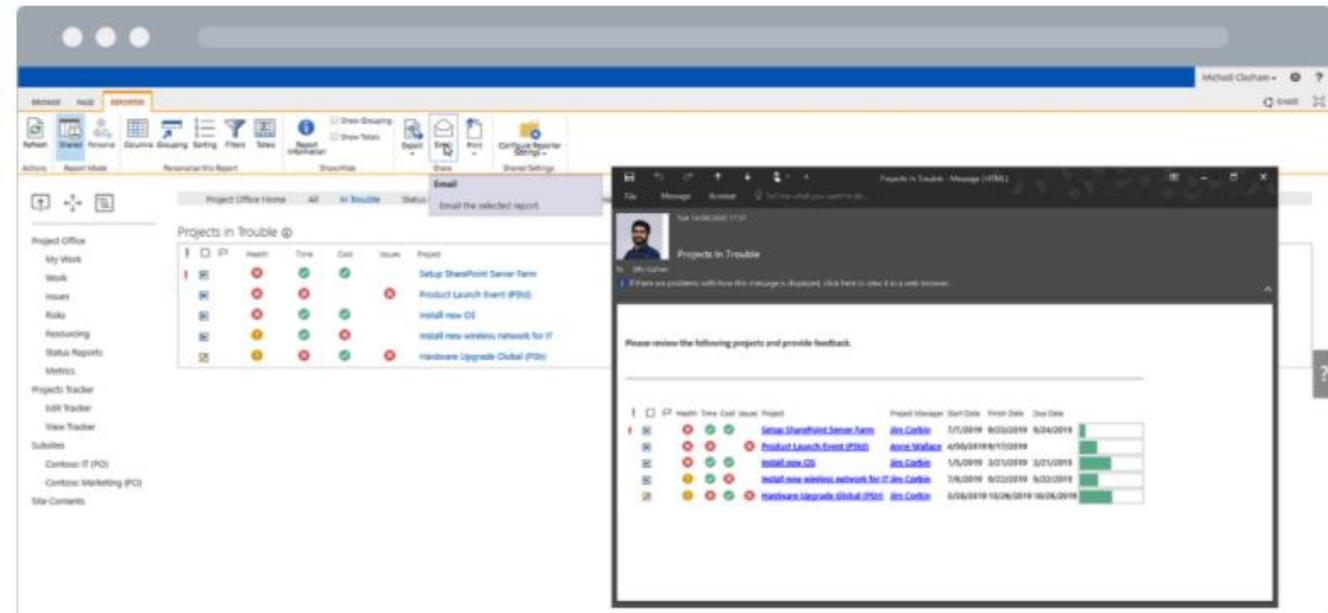
## WORK

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 'REPORTER' interface in BrightWork. The top navigation bar includes options for 'Columns', 'Grouping', 'Sorting', 'Filters', 'Totals', 'Report Information', 'Export', 'Email', and 'Print'. A 'Personalize this Report' section contains 'Show Grouping' (checked) and 'Show Totals' (unchecked). A 'Share' section includes 'Advanced Share' and 'Configure Reporter Settings'. A dropdown menu is open under 'Advanced Share', showing two options: 'Create Scheduled Email' (with a clock icon) and 'View Scheduled Emails' (with a magnifying glass icon). Below the navigation bar, there are tabs for 'My Work', 'My Gantt', 'My Work Due Soon', and 'My Overdue Work'. The main content area is titled 'My Open Work' and features a 'User:' dropdown menu set to 'Peter Doyle' with an 'Apply Filter' button. Below this is a table header with columns: Title, Owner, Assigned To, Start Date, Finish Date, and Date Due. The table content shows a filter for 'Project Site : Erickson Living Training (2)' and a sub-filter for 'List Name : Project Issues (2)'. A 'Show Description' link is visible at the bottom.

# Schedule An Email Report contd.

The screenshot shows the 'Schedule An Email Report' configuration page in SharePoint. The page is divided into several sections:

- Item Settings:** Includes a text box for 'Specify the Scheduled Report Item Title and whether this report will be processed by the timer job.' and a checkbox for 'Activate Scheduled Email to include this item in the Scheduled Report Email Timer Job.' with a link to 'Learn more about Scheduled Report Emails.'
- Schedule Frequency:** Includes a text box for 'Specify the frequency of the email.' and radio buttons for 'Daily', 'Weekly', and 'Monthly'. The 'Weekly' option is selected, and the days of the week are listed with checkboxes: Sun, Mon, Tue, Wed, Thu, Fri, Sat. The 'Mon', 'Tue', 'Wed', and 'Thu' checkboxes are checked.
- Email From:** Includes a text box for 'Specify the email address or the user that the email should come from.' and radio buttons for 'Specify a User' and 'Specify an Address'. The 'Specify a User' option is selected, and the text 'Grace Windsor x' is entered in the adjacent text box.
- Email To:** Includes a text box for 'Specify who will be the recipients of the scheduled report.' and radio buttons for 'All Relevant Users' and 'Specify User(s)'. The 'All Relevant Users' option is selected. Below the text box, it says 'This Report contains a User Filter.' and 'Select 'All Relevant Users' to email all users with Report Data returned by the Report Filter.'
- Web Part Page:** Shows 'BrightWork Pages/My Work.aspx'.
- Web Part Title:** Shows 'My Open Work'.
- Item Title \*:** Shows 'My Open Work' in a text box.

The left sidebar contains a navigation menu with categories: 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.

# 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.

The screenshot displays the BrightWork project management interface for a project titled "SharePoint Hyper-V Deployment (PL)". The interface is organized into several key sections:

- Navigation:** A top navigation bar includes "Home", "Projects Area", "Portfolio Reporting", "Templates Area", "Sample Area", "Training Area", and "Vanilla SP PM". A search bar is located in the top right corner.
- Project Home:** A sidebar on the left lists various project management tasks such as "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".
- Get started with your project:** A central section with four numbered steps: 1. Setup Project, 2. Set Initial Dates, 3. Add Tasks, and 4. Add Documents.
- Key Project Metrics:** A section showing three metrics: "Late Items" (6), "Current Finish Date" (12/25/2015), and "Last Change" (8/27/2018).
- Timeline:** A horizontal timeline view for the year 2019, with a "Today" marker and a prompt to "Add tasks with dates to the timeline".
- Top Open Issues:** A table listing issues, including "Project Issues" with the title "Project time lines impacted by Resource Re-organization" and a due date of 12/14/2015.
- Overdue Items:** A table listing overdue tasks, including "Project Tasks" for "Install OS with Hyper-V" (due 12/8/2015), "Project Issues" for "Project time lines impacted by Resource Re-organization" (due 12/14/2015), and "Project Tasks" for "Install SharePoint Server 2013 and Test" (due 12/14/2015).
- Tasks By Status:** A donut chart showing the distribution of tasks by status: "Not Started" (red), "Completed" (yellow), and "In Progress" (green).

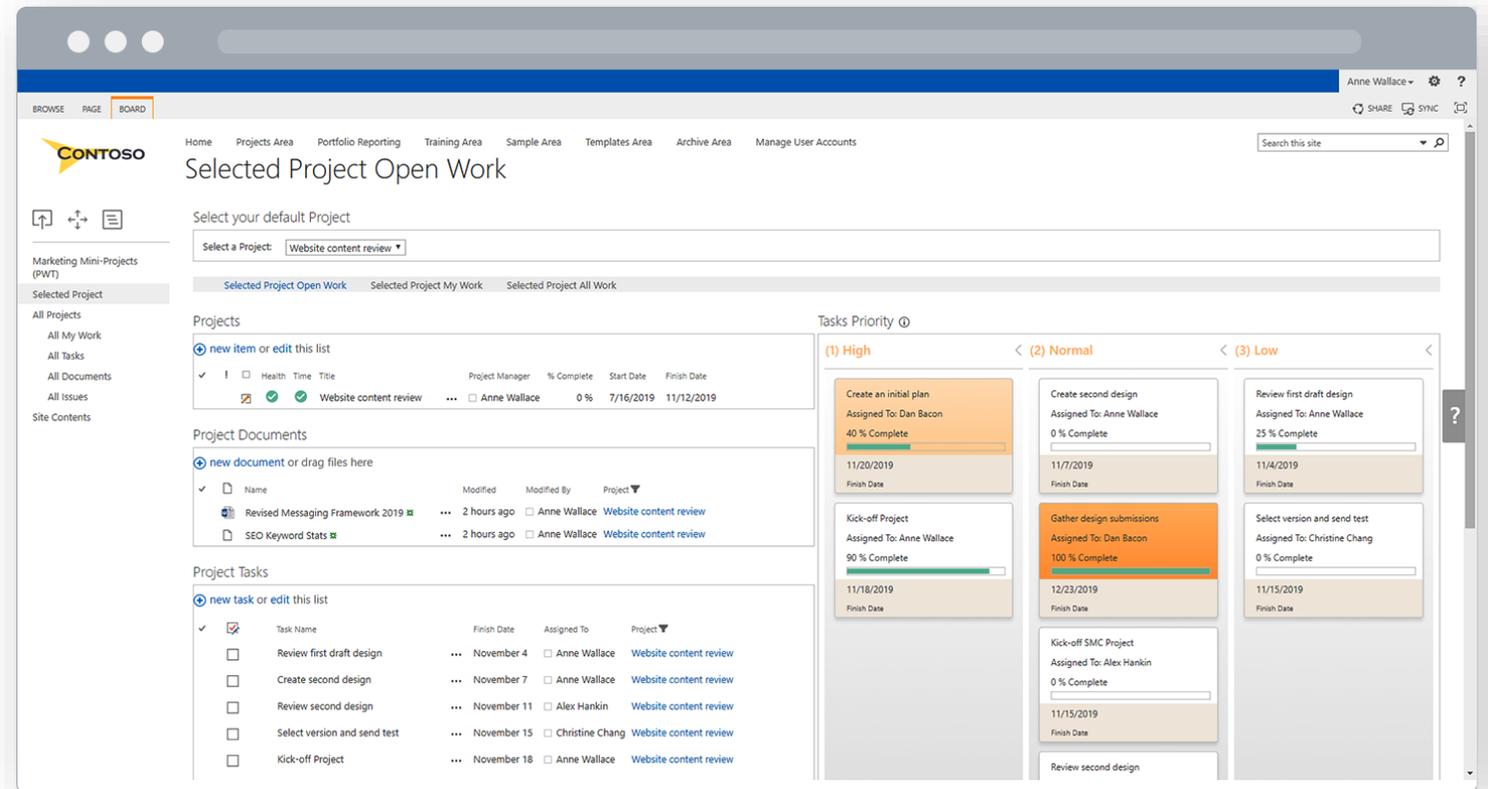
# PROJECTS

## 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.

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

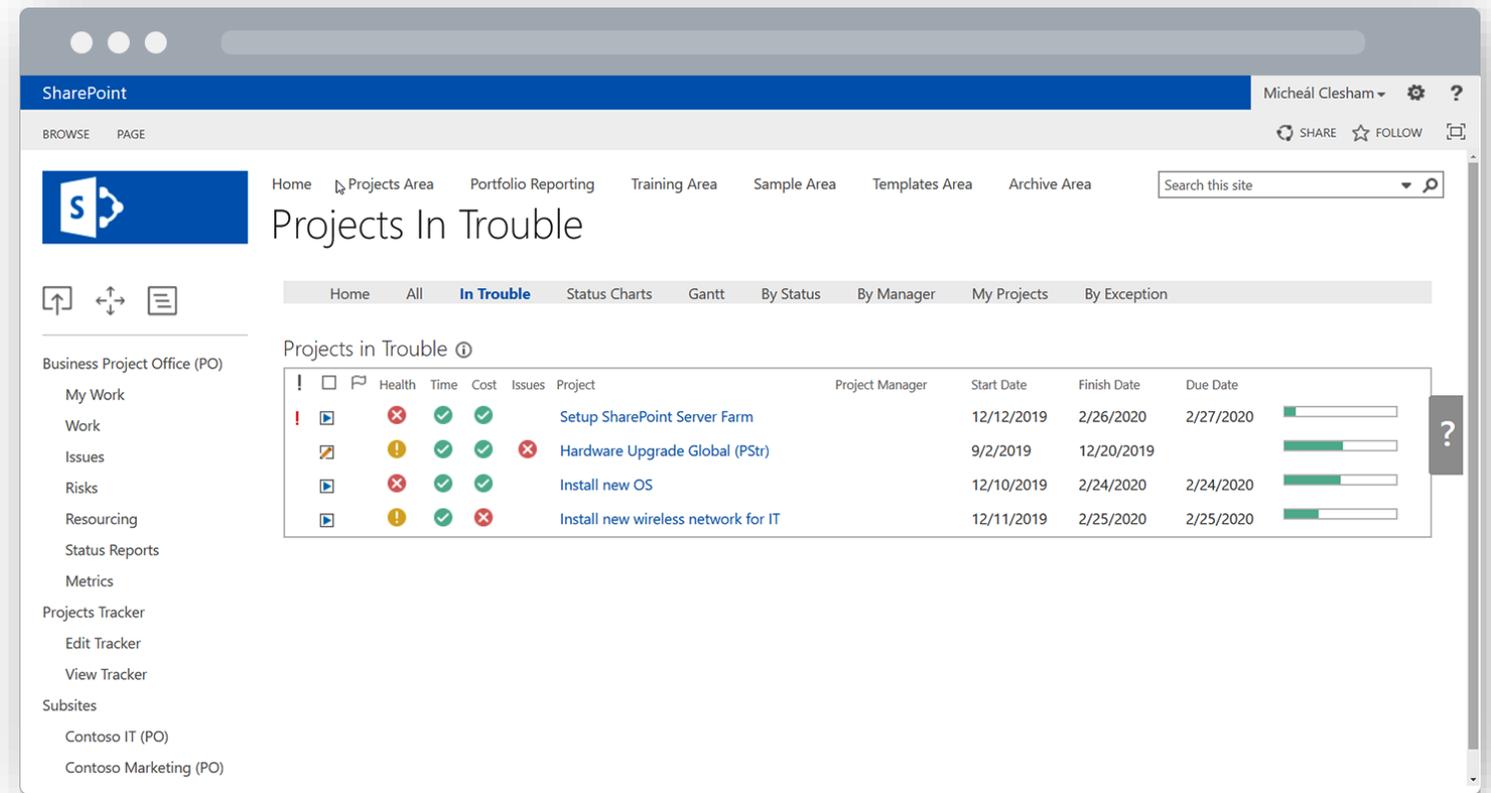


# PROJECTS

## 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.

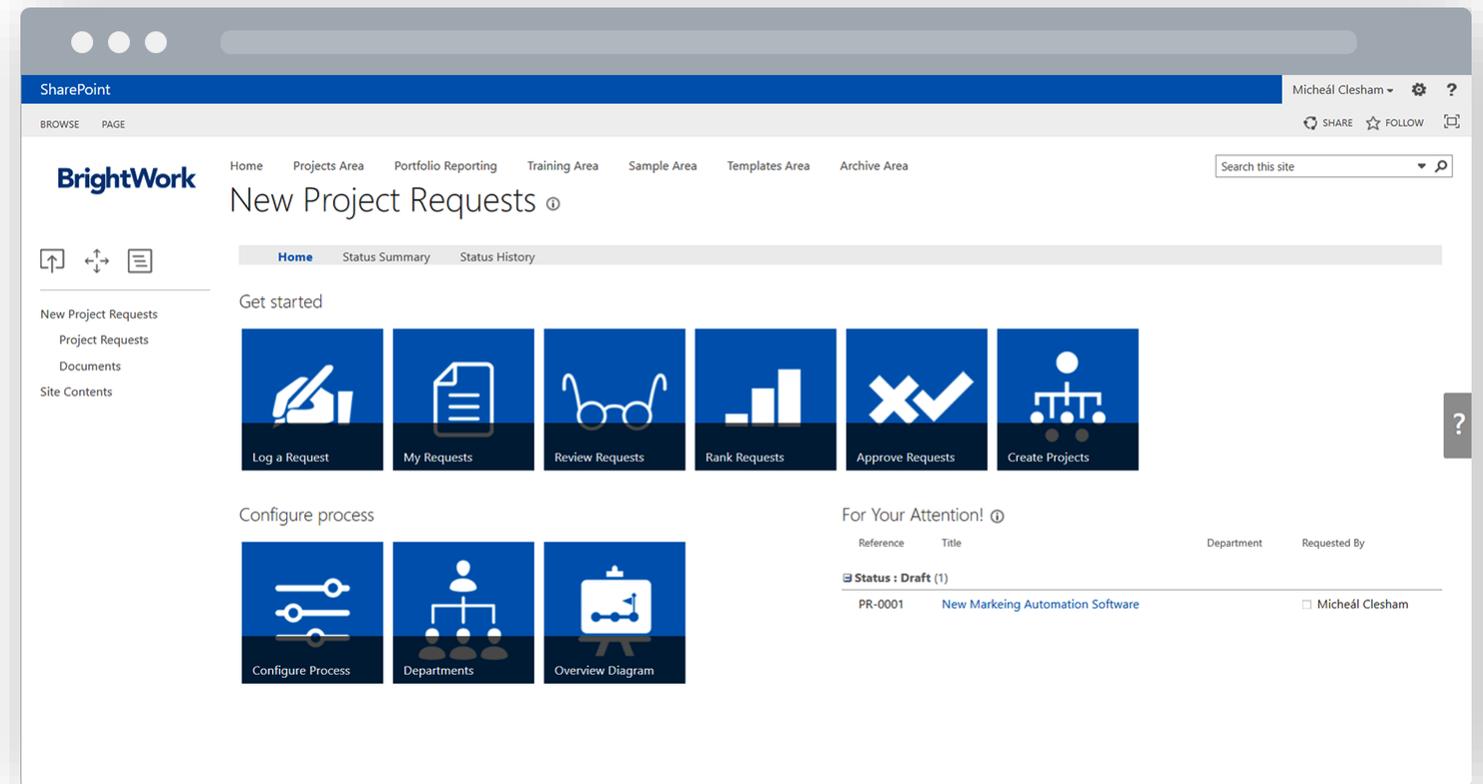


# PORTFOLIOS

## 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

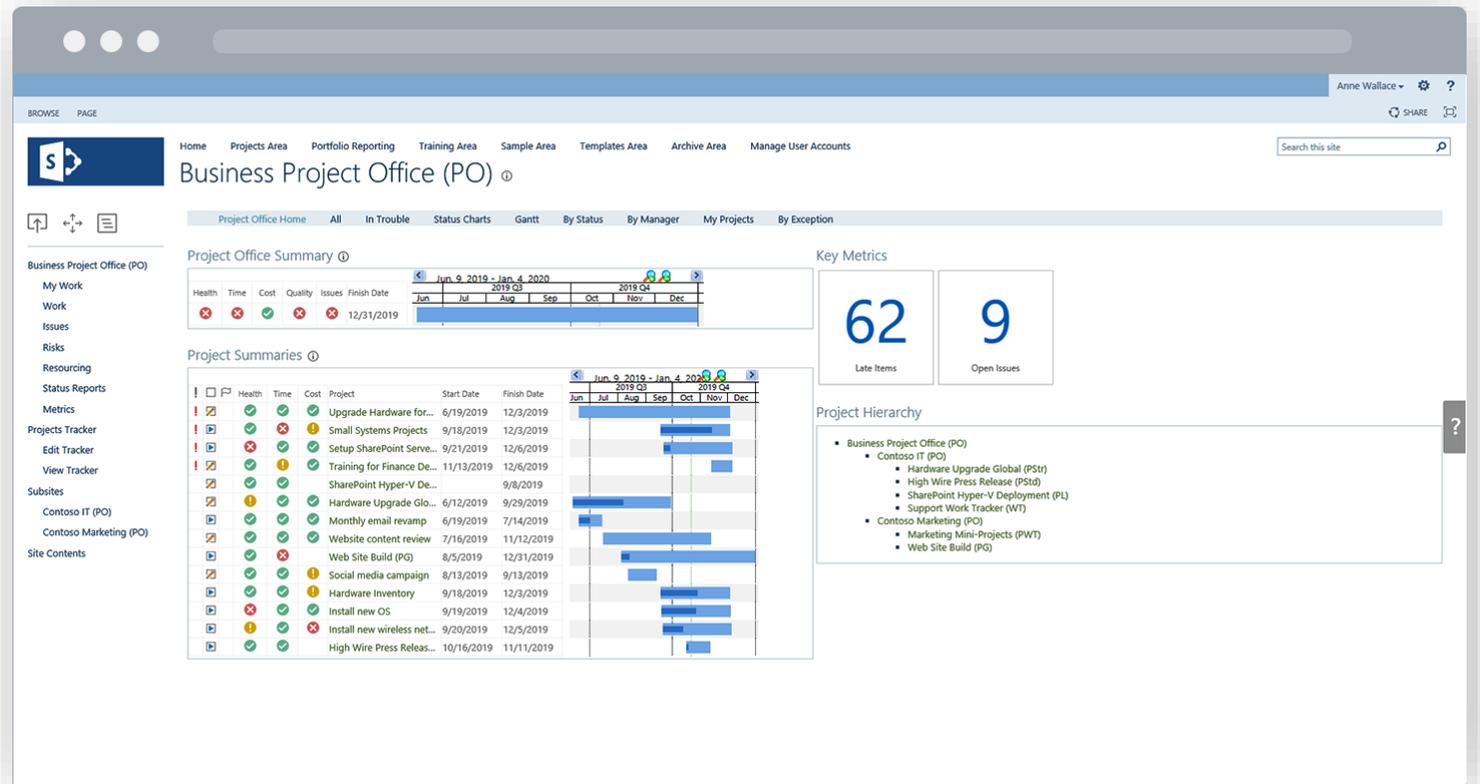


# PORTFOLIOS

## 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

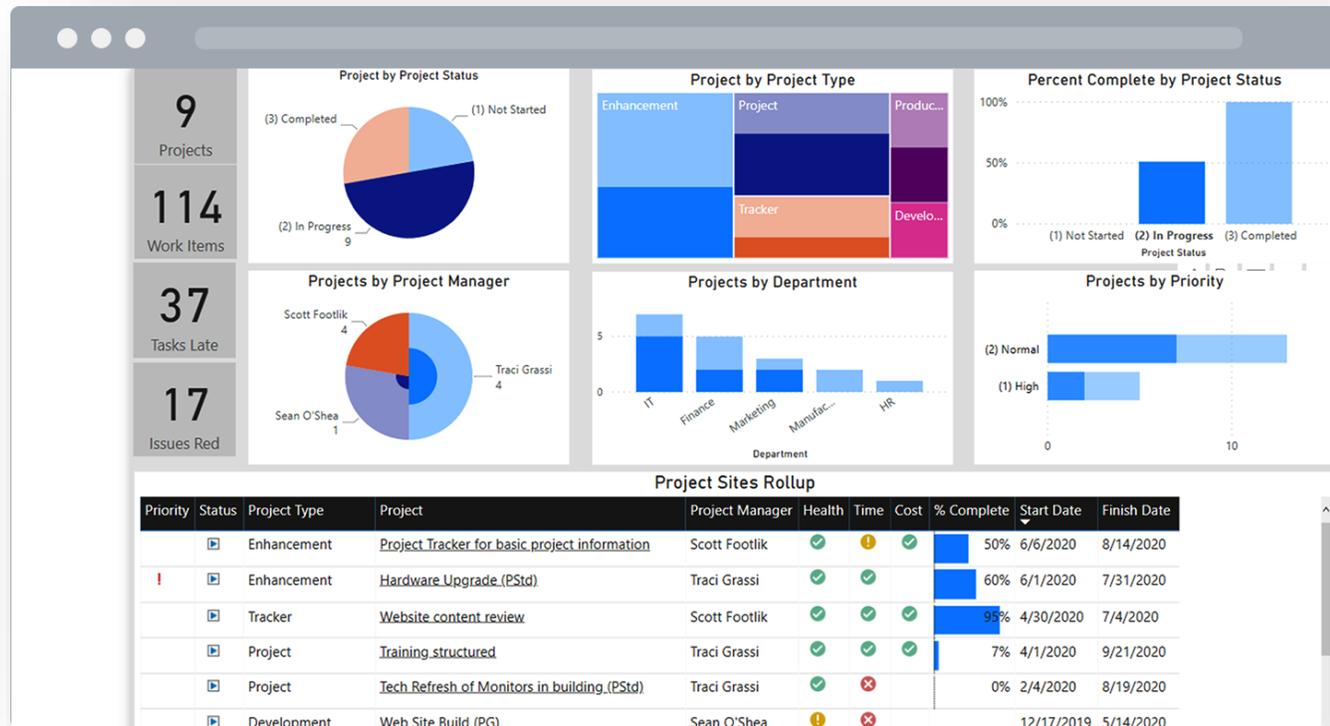
Simple resource reports help you track and forecast resource allocation to make sure you have optimal resource utilization across projects.

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 user profile for 'Micheál Clesham'. The main content area is titled 'Resource Management' and includes sub-navigation 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	

# 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 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 is titled 'Resource Management' and features a sub-menu with 'Home', 'Status Summary', 'Status History', and 'Resource Management'. Below this are two tiles: 'Resource Allocation' and 'Overview Diagram'. A 'Resource Report' table is displayed at the bottom, showing work assignments for three users across five months from June 2019 to October 2019.

	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 : Anne Wallace (1)				80.00	184.00	176.00	168.00	40.00
<input type="checkbox"/>	Assigned To : Christine Chang (1)				40.00	92.00	88.00	84.00	20.00
<input type="checkbox"/>	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.

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 of 11/11/2019, Last Change on 10/18/2019, 5% Complete, and a Duration of 19 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%).

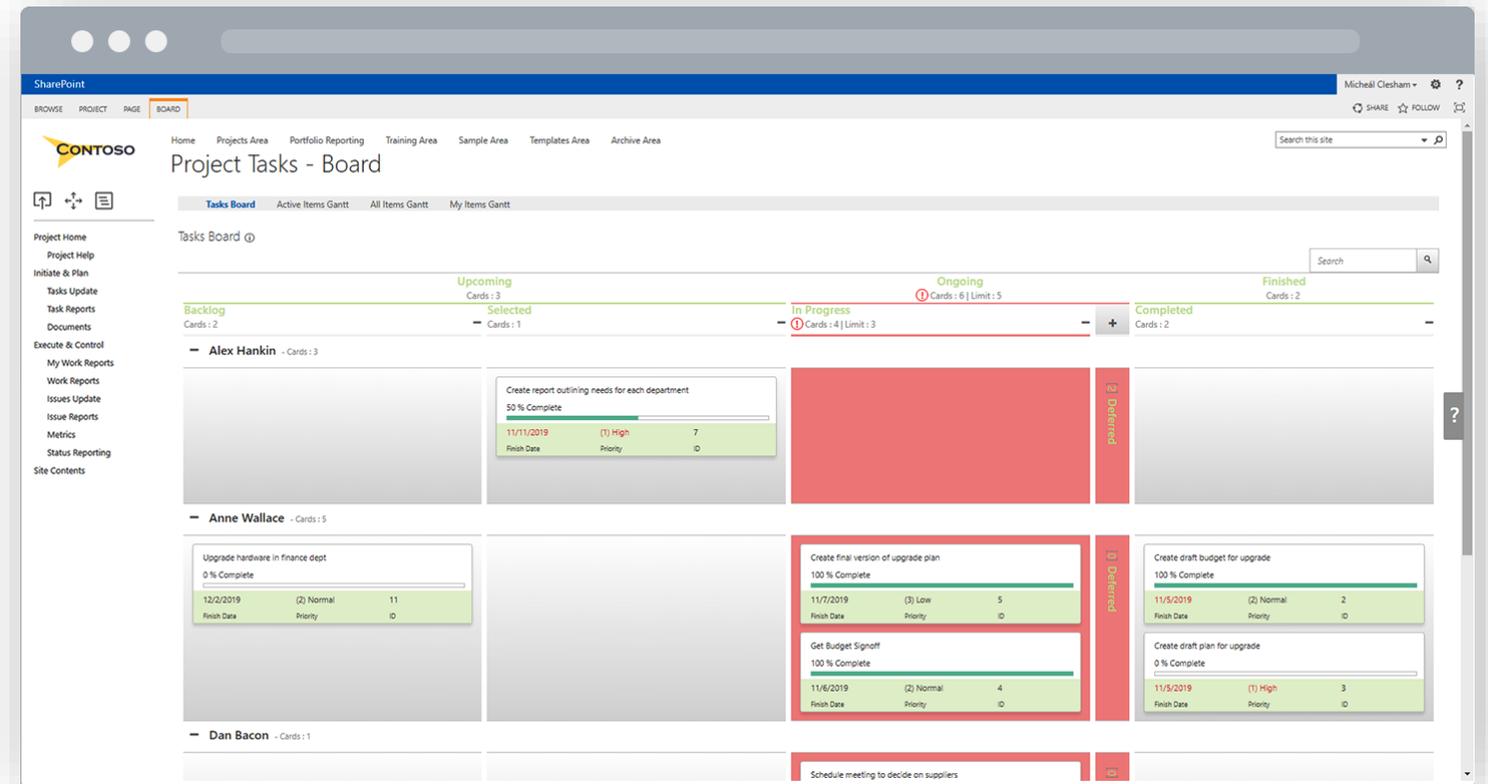
# SHAREPOINT

## 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.



# 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

