

BrightWork365

Project and Portfolio Management Templates for Microsoft 365

What's New in BrightWork 365

Presented by



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Today's Topic: Project and Portfolio Templates with Microsoft 365

Project and Portfolio Management on Microsoft 365 – an overview of BrightWork 365

Highlighting Some of the Recent Features:

- Enhanced Status Reporting including KPI tracking.
- New Power BI Reporting for My Work, Portfolio and Projects, and Project Documents.
- Improved Site Map for easy navigation and tracking across projects and programs.

Live Questions & Answers!

Note: The agenda assumes questions throughout.

The background of the slide is a photograph of a group of people in a meeting, overlaid with a semi-transparent purple filter. The people are seated around a table, and some are gesturing while speaking. A laptop is visible on the table in the foreground.

QUICK POLL

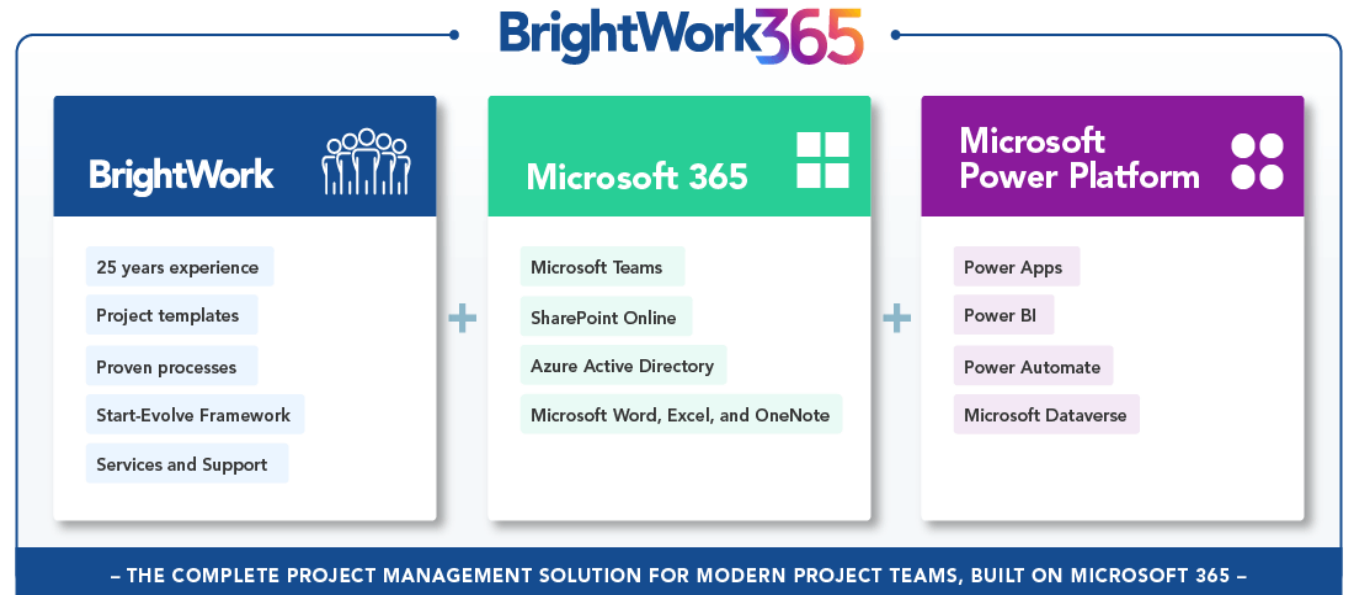
**Why does your team wish to
address Project and
Portfolio Management?**

BrightWork 365 for Microsoft 365

The "What"



The "How"



[BrightWork 365 Product page](#)

[BrightWork 365 Deployment page](#)

More "How"



START

Deliver Immediate
Visibility & Control



EVOLVE

Grow Organisational
Project Management

The BrightWork Approach

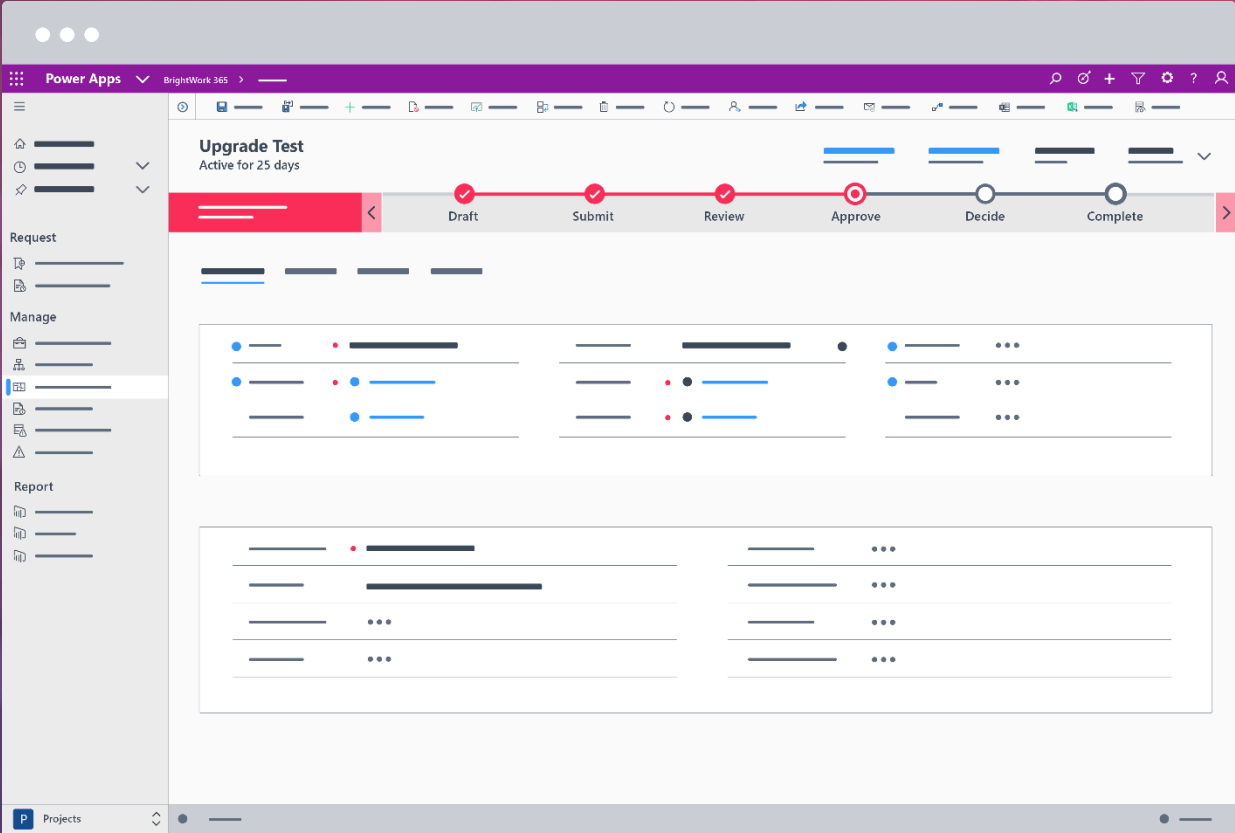
Built into our Product
with Templates

and

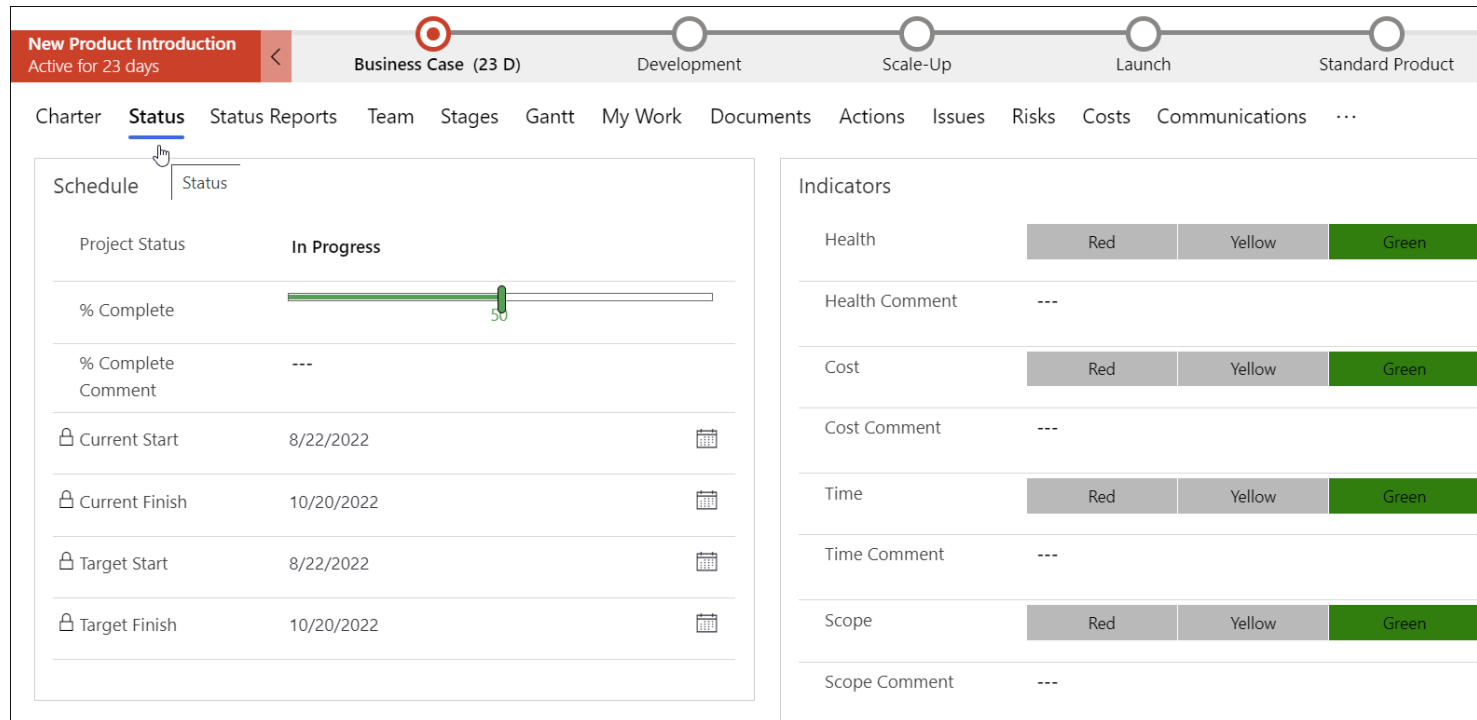
Designed into our
Deployment Approach with
Services

DEMO

Project and Portfolio Management



Enhanced Status Reporting



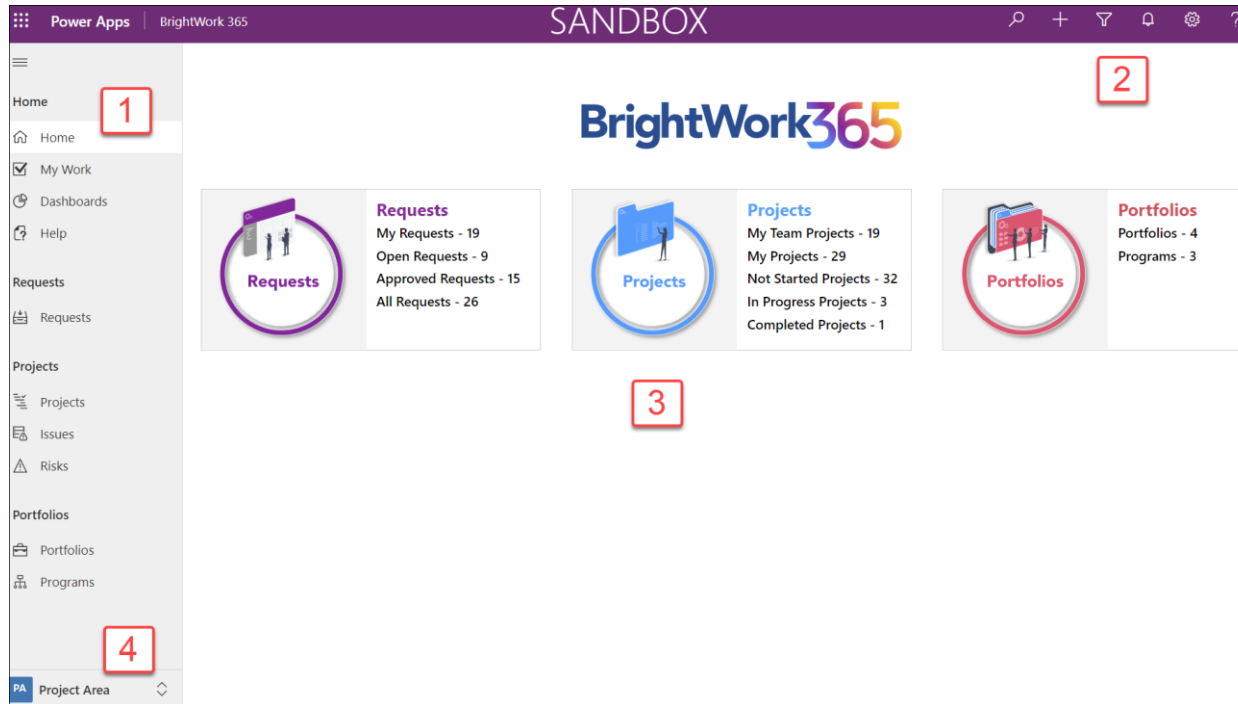
- You can now choose to have the app set the Health KPI (Green, Yellow, Red) automatically, or set it manually as before.
- Status Reports now have their own tab with relevant data exposed in a table view.
- Saved and emailed status reports now use HTML output instead of MS Word; the status data is saved in your Microsoft 365 Dataverse.
- Quick Create has been replaced with the full form experience.
- Improved historical reporting.

Power BI Enhancements



- Reports are now divided into three pages for quicker refresh: My Work, Portfolio and Projects, and Project Documents.
- Power BI reports have been moved to the Dashboards section of the site map.
- Power BI login no longer required.
- Direct links to work items have been added to Work and My Work reports.
- A Costs and Budgets reporting tab has been added.
- Reporting now includes Project Type and Project Priority charts.
- Added the ability to easily open the reports in Power BI.

Improved Site Map



- A separate Requests section has been added to the Site Map.

- Projects has been renamed to Project Area.

- Admin has been renamed to Admin Area.

- The My Work report has been moved to the top of the site map.

A background image showing a group of people in a meeting, overlaid with a semi-transparent purple filter. The text is centered over this image.

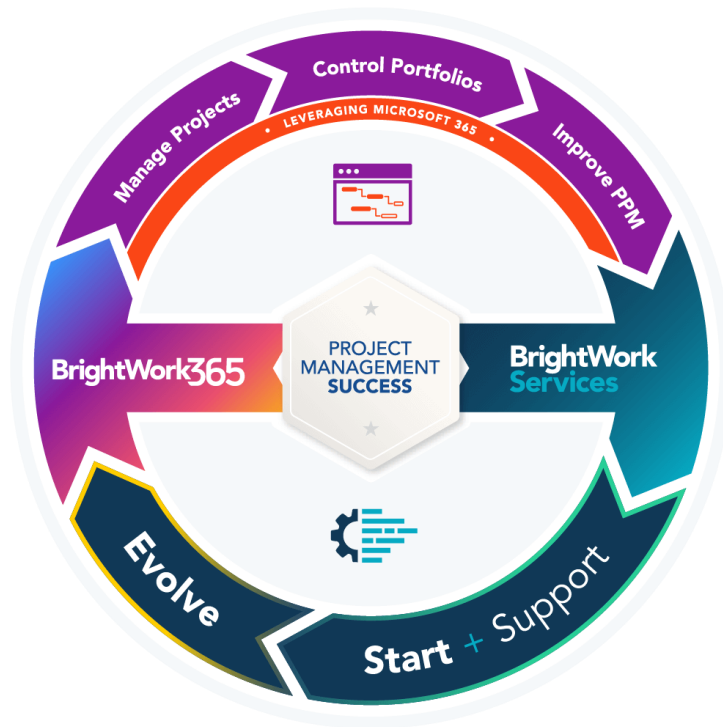
QUICK POLL

**Does it look like BrightWork
365 might answer your Why?**

QUESTIONS?

➤ Use the Question panel to ask questions

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.

THANK YOU



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Our mission is to

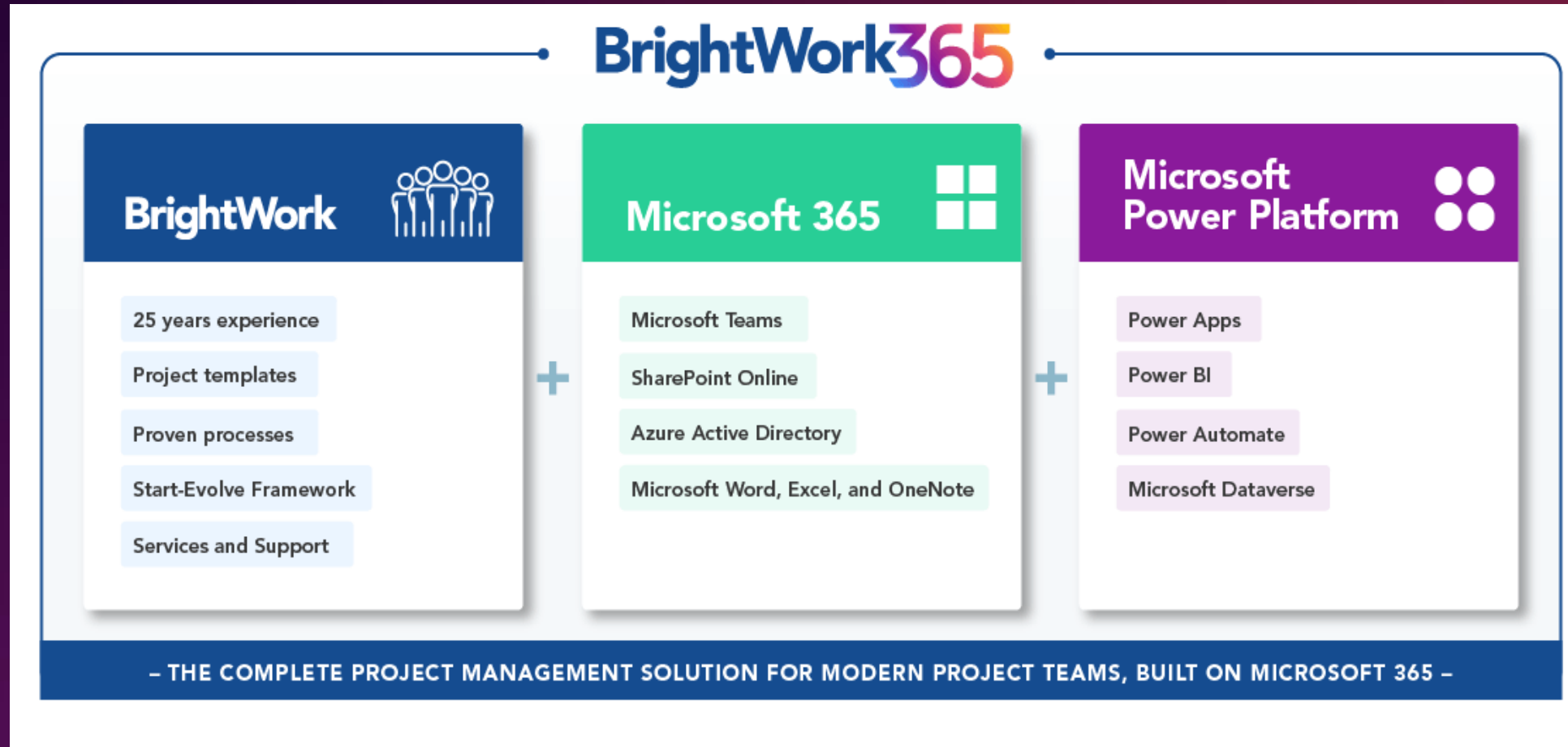
Make Project and Portfolio
Management with Microsoft
SharePoint and Microsoft 365
easier for our customers.

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.





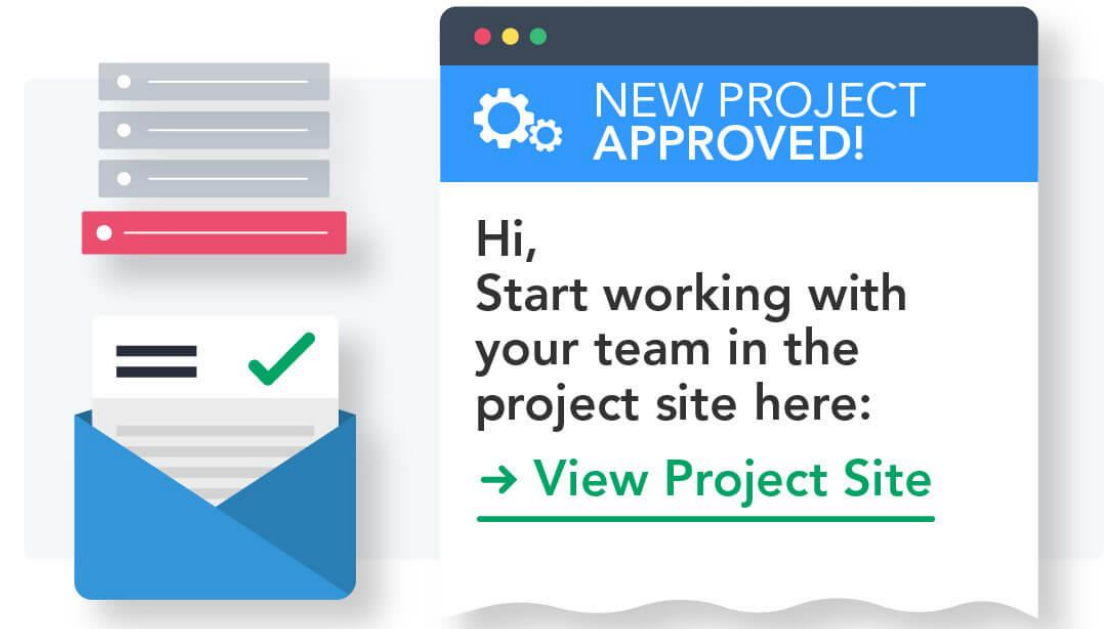
Introducing BrightWork 365 for Microsoft 365

- 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](#)



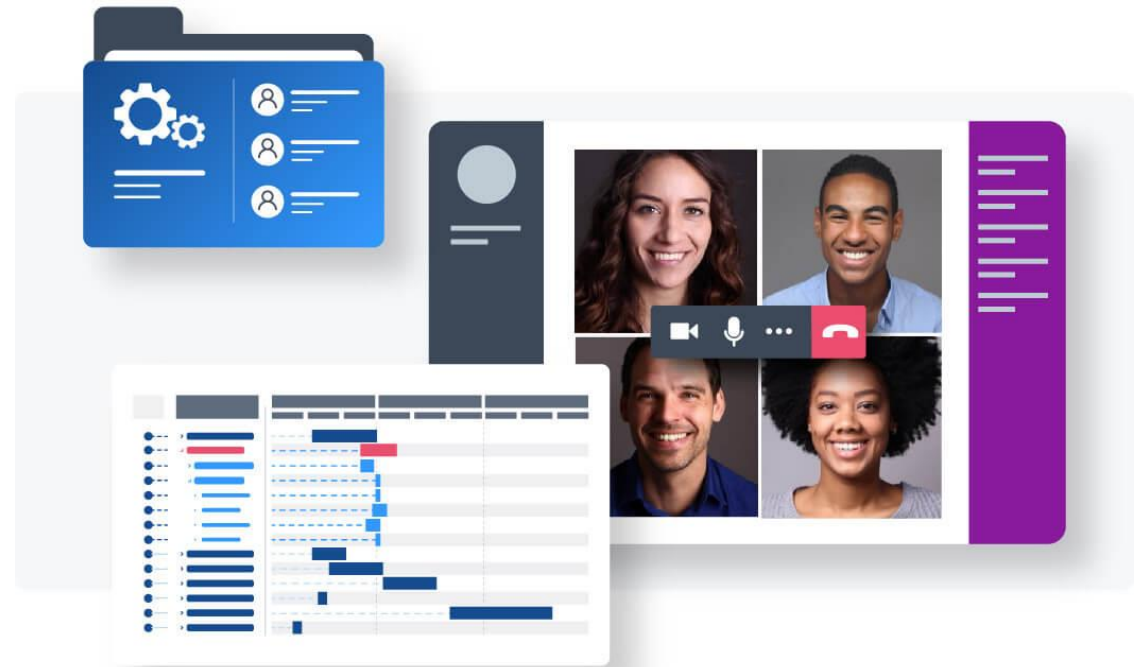
Project Requests

- 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.



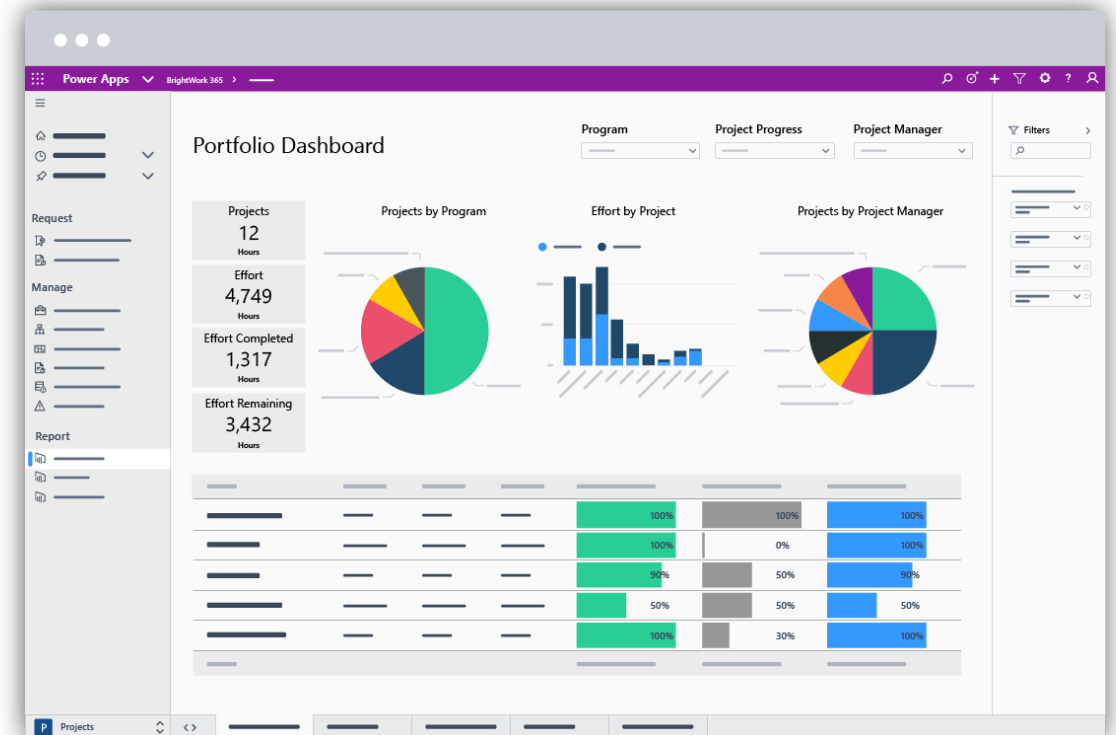
Manage Projects

- 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

