

RECORDED DEMO

BrightWork Project and Portfolio Management Software for SharePoint

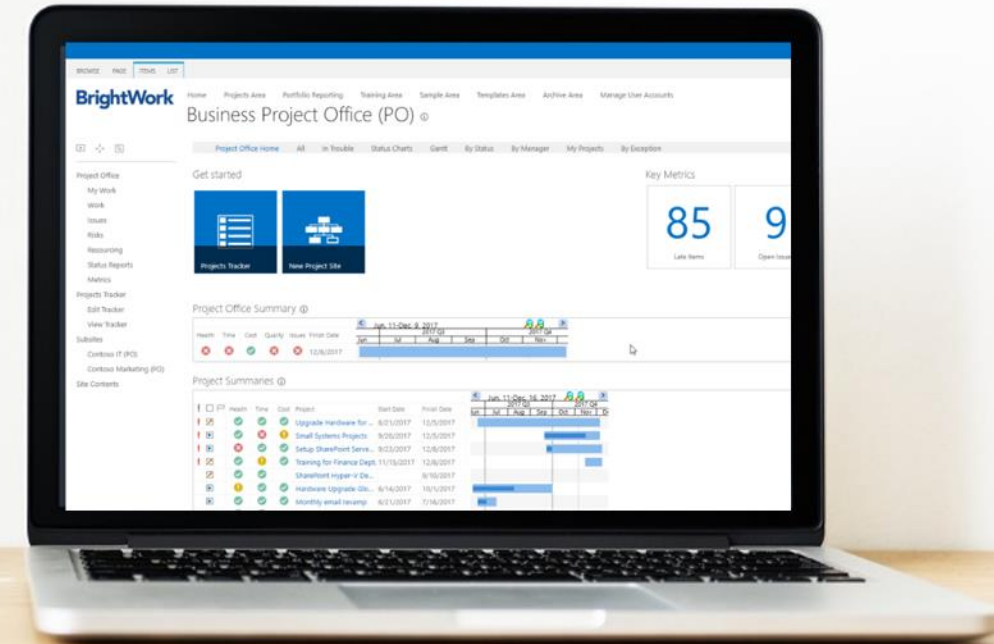
PRESENTED BY:



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AGENDA

- ✓ Executive Summary
- ✓ BrightWork Demo:
 - Manage projects with best-practice templates
 - Track projects and portfolios with reporting dashboards
 - Connect your team through collaborative project sites
- ✓ Q&A

Executive Summary

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 interface for a Business Project Office (PO). The main dashboard includes a navigation menu on the left, a top navigation bar with options like Home, Projects Area, and Portfolio Reporting, and a central content area. Key features visible include:

- Project Office Home:** A navigation bar with options like All, In Trouble, Status Charts, Gantt, By Status, By Manager, My Projects, and By Exception.
- Get started:** Two prominent buttons for "Projects Tracker" and "New Project Site".
- Key Metrics:** Two large boxes showing "85 Late Items" and "9 Open Issues".
- Project Office Summary:** A table with columns for Health, Time, Cost, Quality, Issues, and Finish Date, showing data for 2017 Q3 and Q4.
- Project Summaries:** A detailed table listing projects such as "Upgrade Hardware for...", "Small Systems Projects", "Setup SharePoint Serve...", "Training for Finance Dept.", and "SharePoint Hyper-V De...".
- Project - Status Charts:** A pie chart titled "Status" showing the distribution of project statuses.
- Late Items:** A section at the bottom right showing a bar chart for late items.

Health	Time	Cost	Quality	Issues	Finish Date
✖	✖	✔	✖	✖	12/8/2017

Health	Time	Cost	Project	Start Date	Finish Date
✖	✔	✔	Upgrade Hardware for ...	6/21/2017	12/5/2017
✖	✔	✖	Small Systems Projects	9/20/2017	12/5/2017
✖	✔	✔	Setup SharePoint Serve...	9/23/2017	12/8/2017
✖	✔	✔	Training for Finance Dept.	11/15/2017	12/8/2017
✔	✔	✔	SharePoint Hyper-V De...	9/10/2017	

The BrightWork Approach




Start

**Deliver Immediate
Visibility & Control**



Evolve

**Grow Organizational
Project Management**



Manage projects with pre-configured templates

Track the high-level details of many projects

The screenshot displays a project management interface with a blue header and a navigation menu. The main content area is titled 'Selected Project Open Work' and features a dropdown menu for selecting a project, currently set to 'Monthly email revamp'. Below this are three tabs: 'Selected Project Open Work', 'Selected Project My Work', and 'Selected Project All Work'. The 'Projects' section shows a table with one entry: 'Monthly email revamp' with a 50% completion rate and dates from 5/30/2016 to 6/14/2016. The 'Project Tasks' section lists four tasks: 'Review first draft design', 'Create second design', 'Review second design', and 'Select version and send test', all assigned to 'Monthly email revamp'. The 'Project Documents' section shows a document named 'Logo' with a modification time of 'About a minute ago'. The 'Project Issues' section is partially visible at the bottom.

Home Projects Area Portfolio Reporting Templates Area Project Area 2

Selected Project Open Work

Select your default Project

Select a Project: Monthly email revamp

[Selected Project Open Work](#) [Selected Project My Work](#) [Selected Project All Work](#)

Projects

[+ new item or edit this list](#)

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Health	Time	Title	Project Manager	% Complete	Start Date	Finish Date
<input checked="" type="checkbox"/>	<input type="checkbox"/>	✓	✓	Monthly email revamp	...	50 %	5/30/2016	6/14/2016

Project Tasks

[+ new task or edit this list](#)

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Task Name	Finish Date	Assigned To	Project
<input type="checkbox"/>	<input type="checkbox"/>	Review first draft design	... Today		Monthly email revamp
<input type="checkbox"/>	<input type="checkbox"/>	Create second design	... June 07		Monthly email revamp
<input type="checkbox"/>	<input type="checkbox"/>	Review second design	... Friday		Monthly email revamp
<input type="checkbox"/>	<input type="checkbox"/>	Select version and send test	... Today		Monthly email revamp

Project Documents

[+ new document or drag files here](#)

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Name	Modified
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Logo	... About a minute ago

Project Issues

[+ new item or edit this list](#)

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Graphic Designer unavailable to

Manage projects in the small

The screenshot displays the BrightWork project management interface for a project titled "SharePoint Hyper-V Deployment (PL)". The interface includes a navigation menu on the left, a top navigation bar with various project areas, and a main content area with several key metrics and charts.

Key Project Metrics:

- Late Items: 0
- Current Finish Date: 9/28/2017
- Last Change: 9/5/2017

Task Gantt Chart:

The Gantt chart shows tasks from September 4 to September 12. Key tasks include:

- Get Hardware (9/3)
- Install OS with Hyper-V (9/7)
- Install SharePoint Server 2013 and Test (9/7 - 9/14)
- Test overall environment (9/11 - 9/14)
- Write up recommendations (9/11 - 9/14)

Tasks By Status:

A donut chart shows the distribution of tasks by status:

- Not Started: 5 (50%)
- In Progress: 3 (30%)
- Completed: 2 (20%)

Top Open Issues:

List Name	Title	Assigned To	Due Date
Project Issues	Project time lines impacted by Resource Re-organization	Alan Morgan	9/7/2017
Project Tasks	Reschedule install	Alan Morgan	9/28/2017

Overdue Items:

There were no items found.

Manage more complex projects

The screenshot shows the BrightWork project management interface for a project named "Project Structured". The interface includes a navigation menu on the left, a main content area with a "Get started with your project" section, a "Metric Display" section, a Gantt chart, a "Top Open Issues" table, and a "Tasks By Status" donut chart.

Get started with your project

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

Metric Display (BrightWork)

5 Late Items	6/29/2016 Current Finish Date	5/26/2016 Last Change	7 % % Complete	28 Duration (days)	3.25 Duration Variance	392 Work
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Top Open Issues

List Name	Title	Assigned To	Due Date
Project Issues	Initial Cost Estimate does not include developer tools		12/13/2015
Project Issues	Staff Leave		
Project Issues	Time could be delayed with install of new dev tools		12/13/2015

Tasks By Status

Not Started

Get instant visibility with reporting dashboards

Overview of all projects in a Project Office

BrightWork Home Templates Area Training Area Sample Area Projects Area Portfolio Reporting Manage User Accounts Search this site

Business Project Office (PO) ⓘ

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

- 70 Late Items
- 10 Open Issues

Project Office Summary ⓘ

Health	Time	Cost	Quality	Issues	Finish Date	2016 Q2				2016 Q3					
						May	Jun	Jul	Aug	Sep	Oct				
!	✓	✓	✗	✗	10/21/2016	[Gantt Chart]									

Project Summaries ⓘ

Health	Time	Cost	Project Link	Start Date	Finish Date	2016 Q2				2016 Q3					
						May	Jun	Jul	Aug	Sep	Oct				
!	✓	✓	Upgrade Hardware for	5/4/2016	10/18/2016	[Gantt Chart]									
!	✓	✗	Small Systems Projects	8/3/2016	10/18/2016	[Gantt Chart]									
!	✗	✓	Setup SharePoint Server	8/6/2016	10/21/2016	[Gantt Chart]									
!	✓	!	Training for Finance	9/28/2016	10/21/2016	[Gantt Chart]									
!	!	✗	Hardware Upgrade	4/27/2016	8/14/2016	[Gantt Chart]									
!	✓	✓	Monthly email revamp	5/4/2016	5/29/2016	[Gantt Chart]									
!	✓	✓	Website content review	5/31/2016	9/27/2016	[Gantt Chart]									

Get immediate
visibility and
control

BROWSE PAGE

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

All Projects ⓘ

Health	Time	Cost	Quality	Priority	Status	Status Indicator	Project Link	Project Manager	Start Date	Finish Date
				(1) High	(4) Deferred	(2) In Danger	Hardware Upgrade Global (PStr)			
✓	✗	!	✓	(1) High	(2) In Progress	(1) On Schedule	Small Systems Projects		1/4/2016	3/20/2016
✓	✓	✓	✓	(1) High	(1) Not Started	(1) On Schedule	Upgrade Hardware for Finance Dept.		10/5/2015	3/20/2016
✓	!	✓	✗	(1) High	(1) Not Started	(1) On Schedule	Training for Finance Dept.		2/29/2016	3/23/2016
✗	✓	✓	✓	(1) High	(2) In Progress	(1) On Schedule	Setup SharePoint Server Farm		1/7/2016	3/23/2016
✓	✓			(2) Normal	(1) Not Started	(1) On Schedule	Hardware Upgrade (PStd)			12/28/2015
✓	✓			(2) Normal	(2) In Progress	(1) On Schedule	SharePoint Hyper-V Deployment (PL)		11/30/2015	12/28/2015
✓	✓	✓	✓	(2) Normal	(2) In Progress	(1) On Schedule	Monthly email revamp		5/30/2016	6/14/2016
✓	✓	✓	✓	(2) Normal	(1) Not Started	(1) On Schedule	Website content review		11/1/2015	2/28/2016
✓	✓	✓	✓	(2) Normal	(1) Not Started	(1) On Schedule	Social media campaign		11/29/2015	12/30/2015
✗	✓	✓	✗	(2) Normal	(1) Not Started	(1) On Schedule	Customer Services (PMO)		8/3/2015	4/18/2016

Project Status Reports

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

Project Status Reports - Current

Current Status Reports Status Reports Between Dates

Current Project Status Reports ⓘ

Project Site	Title	For Period Ending	Health	Time	Issues	Risk	Current Fini
For Period Ending : 8/12/2016 (4)							
Hardware Upgrade (PStd)	Project Status	8/12/2016	✓	✓	✓		
Hardware Upgrade Global (PStr)	Project Status	8/12/2016	✓	✓	✓	✓	
SharePoint Hyper-V Deployment (PL)	Project Status	8/12/2016	✓	✓			
Web Site Build (PG)		8/12/2016	✓	✓	✓		

Emailed Reports

File Message Tell me what you want to do...

Ignore Delete Reply Reply All Forward Meeting IM More Message CRM Fields Archive Team Email Reply & Delete To Manager Done Create New Rules OneNote Actions Move

Tue 2/21/2017 16:38

Alan Morgan
All Project Summary Report

To: Billy Guinan

LinkedIn

Hi All, see attached the latest All Project summary report, Regards Alan

Health	Time	Cost	Quality	Priority	Status	Status Indicator	Project Link	Project Manager	Start Date	Finish Date
!	!	✓	✓	(1) High	(2) In Progress	(1) On Schedule	Setup SharePoint Server Farm	Alan Morgan	8/6/2016	11/11/2016
✗	✓	!	✓	(1) High	(2) In Progress	(1) On Schedule	Small Systems Projects	Alan Morgan	8/3/2016	11/24/2016
✓	!	✓	✗	(1) High	(1) Not Started	(1) On Schedule	Training for Finance Dept.	Alan Morgan	11/10/2016	11/14/2016
✓	!	✗	!	(1) High	(2) In Progress	(1) On Schedule	Upgrade Hardware for Finance Dept.	Alan Morgan	10/18/2016	11/25/2016
!	✓			(2) Normal	(2) In Progress	(1) On Schedule	Hardware Upgrade (PStd)		1/25/2017	7/26/2017
✓	✓			(2) Normal	(2) In Progress	(1) On Schedule	SharePoint Hyper-V Deployment (PL)		6/29/2016	7/24/2016
✓	✓	✓	✓	(2) Normal	(2) In Progress	(1) On Schedule	Monthly email revamp		5/4/2016	5/29/2016



Enable team collaboration with project sites in SharePoint

Understand what's happening on the project

The screenshot shows a project management dashboard for a project named "Project Structured". The dashboard includes a navigation menu, a "Get started with your project" section with five numbered steps, a "Metric Display (BrightWork)" section with seven key metrics, and a "Project Scorecard" table.

Project Scorecard

Title	May/2016	Trend
Health	✓	☹
Time	✓	☹
Cost	✓	☹
Quality	✓	☹
Late Issues	✓	☹
Risk	✓	☹

Metric Display (BrightWork)

5	6/29/2016	5/26/2016	7 %	28	3.25	392
Late Items	Current Finish Date	Last Change	% Complete	Duration (days)	Duration Variance	Work

Manage work and update progress

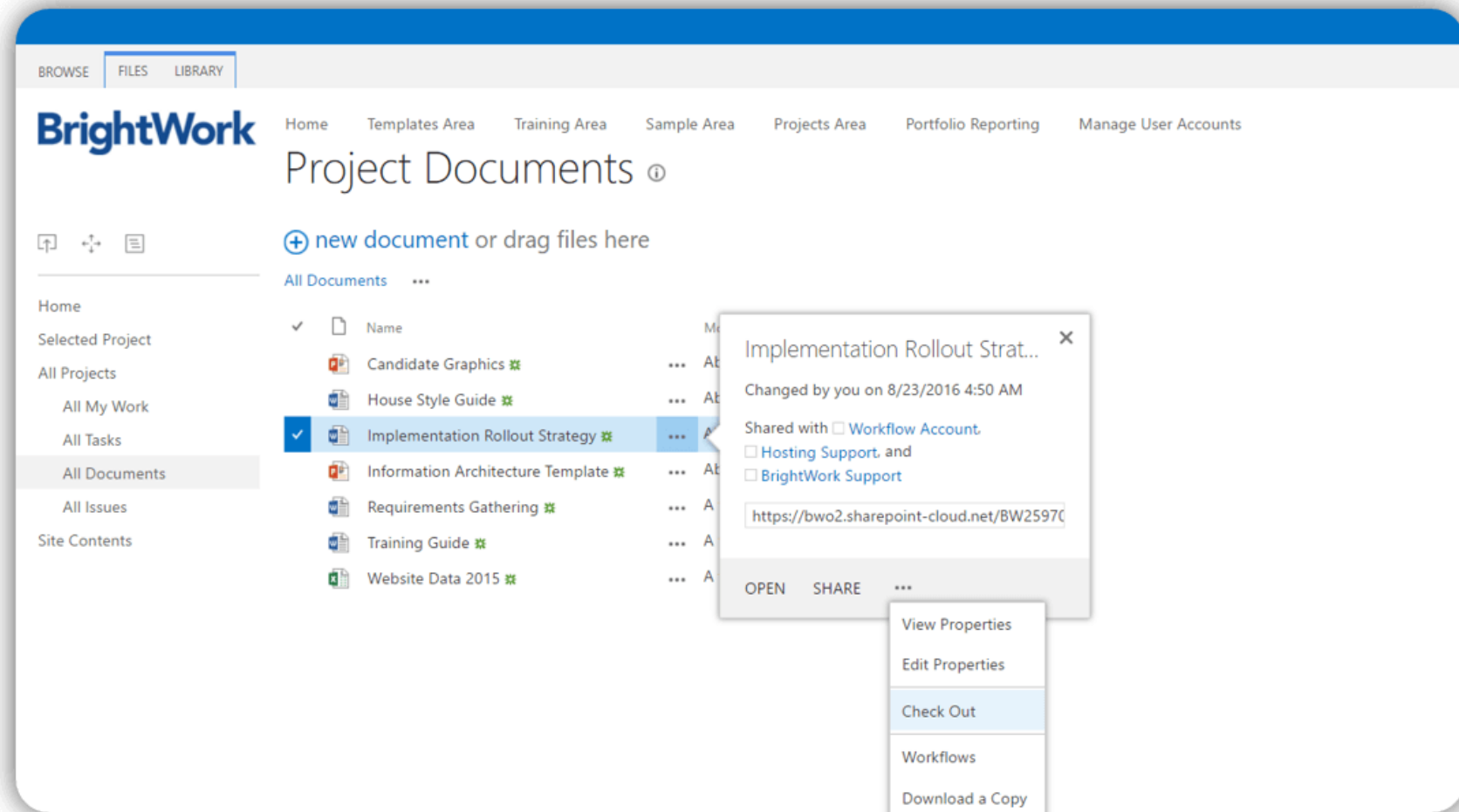
My Work My Work Due Soon My Overdue Work My Gantt My Change History

My Open Work ⓘ

User:

!	☐	🚩	Title	Owner	Assigned To	Sta
Project : Hardware Upgrade (PStd) (4)						
List Name : Project Goals (1)						
▶			Move to New Office Space ASAP		<input type="checkbox"/> Anne Wallace	<div style="width: 50%;"><div style="width: 50%;"></div></div>
List Name : Project Issues (3)						
🗑	🚩		Should we wait until more employees are on holidays	<input type="checkbox"/> Anne Wallace	<input type="checkbox"/> Anne Wallace	<div style="width: 75%;"><div style="width: 75%;"></div></div> 7/2
🗑	🚩		Team Training not up to date	<input type="checkbox"/> Anne Wallace	<input type="checkbox"/> Anne Wallace	<div style="width: 80%;"><div style="width: 80%;"></div></div> 8/2
▶			Office costs are falling, should we wait longer?		<input type="checkbox"/> Anne Wallace	<div style="width: 60%;"><div style="width: 60%;"></div></div> 6/3
Project : Marketing Mini-Projects (PWT) (9)						
List Name : Project Issues (1)						
▶	🚩		Reviewer is not available until later in the month so need a new reviewer	<input type="checkbox"/> Anne Wallace		<div style="width: 10%;"><div style="width: 10%;"></div></div> 5/

Track and manage project documents and deliverables



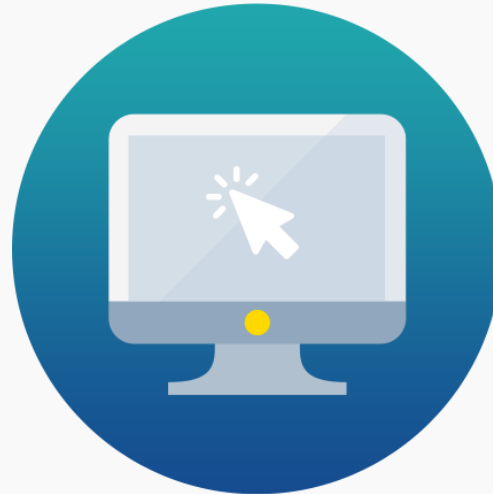
Demo Time!

More About BrightWork



Get Free Template

Free Project Management Template for SharePoint 2016, 2013 and 2010



Schedule a Demo

Talk to a BrightWork Solution Specialist about your specific needs.



Learn

Read about the BrightWork framework for collaborative project management.

Get In Touch!

Set up a call to meet **1-on-1** with a BrightWork representative to discuss your requirements.

If you would like to set up this call, please leave a comment now (noting any specific needs or challenges) and we will follow up with you shortly!



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THANK YOU FOR ATTENDING.

It's time for Q&A!

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