Demand Management with BrightWork

Training Guide

Contents

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1 Introduction

The industry term for the management of potential, as well as existing projects, is Project Portfolio Management (PPM). In this training guide we will focus on one aspect of PPM: Demand Management.

Demand Management is the process used to determine which of the projects being requested should be initiated.

Many organizations want to introduce processes to help determine which incoming projects get approved and which do not. To do this, organizations need to establish criteria to allow comparisons between requested projects. For example: alignment to business goals; cost/benefit ratios; optimal use of capacity; change management implications; ability to execute; and so on.

This guide will explore some of the Demand Management options available in BrightWork.

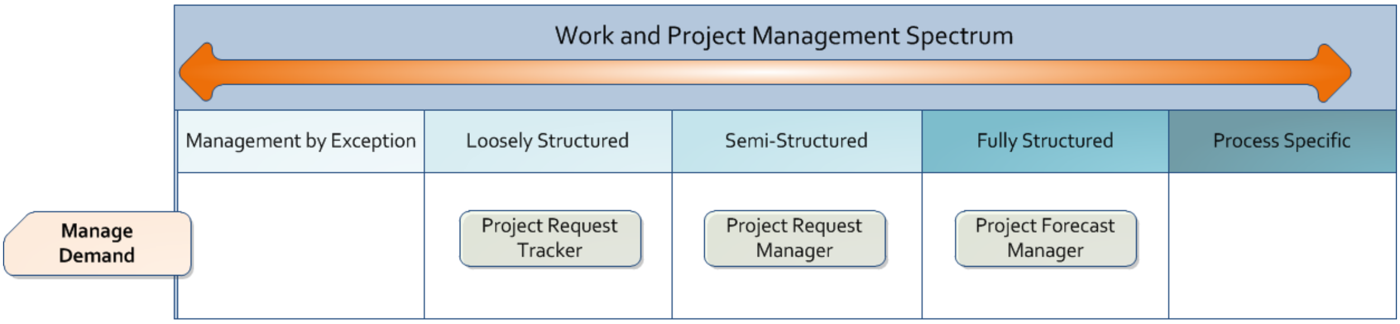
1.1 Demand Management with BrightWork

Organizations need a process that allows requests for new projects be submitted, reviewed and accepted or rejected. BrightWork includes three approaches of varying complexity; these approaches are situated below on the Work and Project Management Spectrum.

Each of the subsequent chapters in this guide is devoted to a specific approach. All approaches can be easily configured to fit local needs and requirements.

The approaches and their associated chapters are:

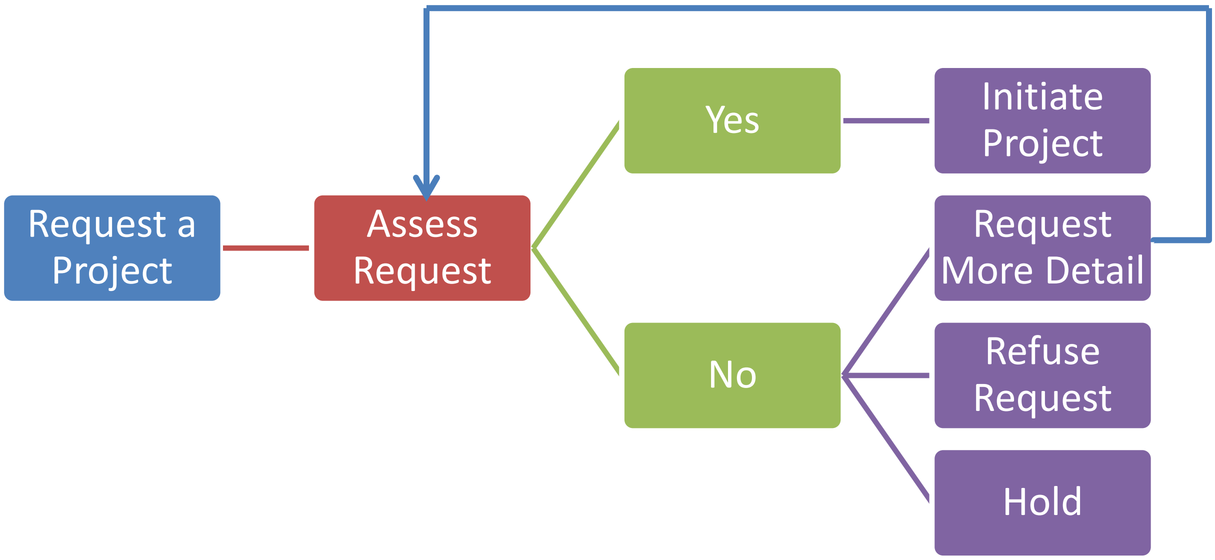
- Chapter 2: Loosely Structured**: Project Request Tracker**
- Chapters 3 and 4: Semi-Structured: **Project Request Manager**
- Chapter 5: Fully Structured: **Project Forecast Manager**



- Chapter 6 describes another approach: **Portfolio Management: What-if Forecasting**

1.2 High-Level Process Overview

Common to all of the process approaches described in this guide is the idea that organizations desire that projects must be evaluated and approved before going ahead.



1.3 Prerequisites

It is assumed that you have already completed at least one of the BrightWork Project Manager training guides available in the TrainingZone and, as a result, that you have a Project Office site created in the BrightWork TrainingZone to do these exercises in.

1.4 Getting In

For this training, you are logging in as Alex Hankin. This fictional person has the same level of access that a site owner would have in a typical BrightWork environment.

We have adapted the standard Project Requests area in TrainingZone for this training. To access this Project Requests area, use the details below:

- **URL**: http://sp2010.brightworkdemo.com/sites/trainingzone/training
- **User Name**: bw\ahankin
- **Password**: BrightWork2011

2 Loosely Structured: Project Request Tracker

This is the simplest approach and involves tracking project requests in a single list. The Project Request Tracker provides a simple and transparent approach to managing project requests. It facilitates the capture of key data about requested projects and allows this information to be sent for review and approval/rejection.

2.1 Scenario

Your organization is getting requests for projects all the time. Some are small, some are large. You need to track these requests in a single place, decide which are important enough to initiate, which should be put on hold for now, and which should be rejected.

The criteria for deciding is relatively straight forward, you check the requests against business goals, get high level estimates of effort and cost (if available) and set indicators for cost/benefit and risks. Then using this information you determine the priority of project requests.

The approach we recommend for such a scenario is the Project Request Tracker.

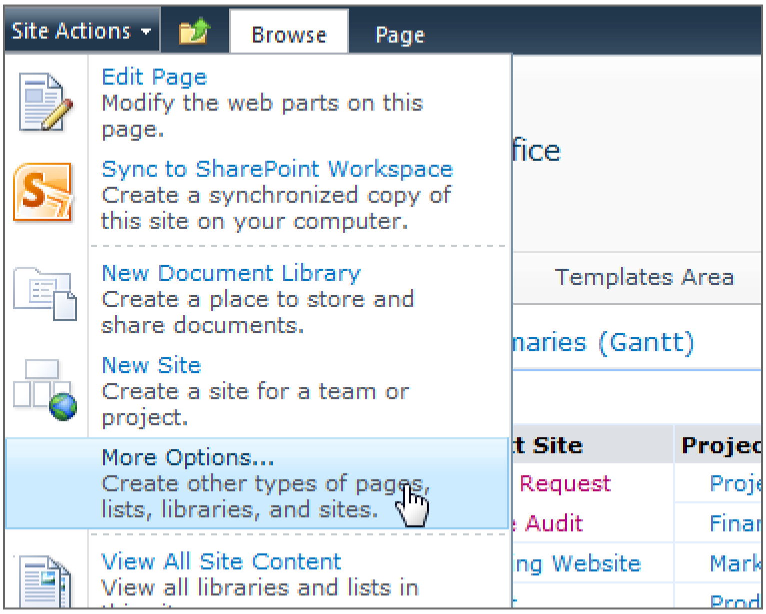
Note: The criteria for project submission and acceptance vary from organization to organization. The project request list should be regarded as a basic starting place for simple demand management that can be tailored to the processes that exist in your organization.

2.2 Add Request List to Project Office

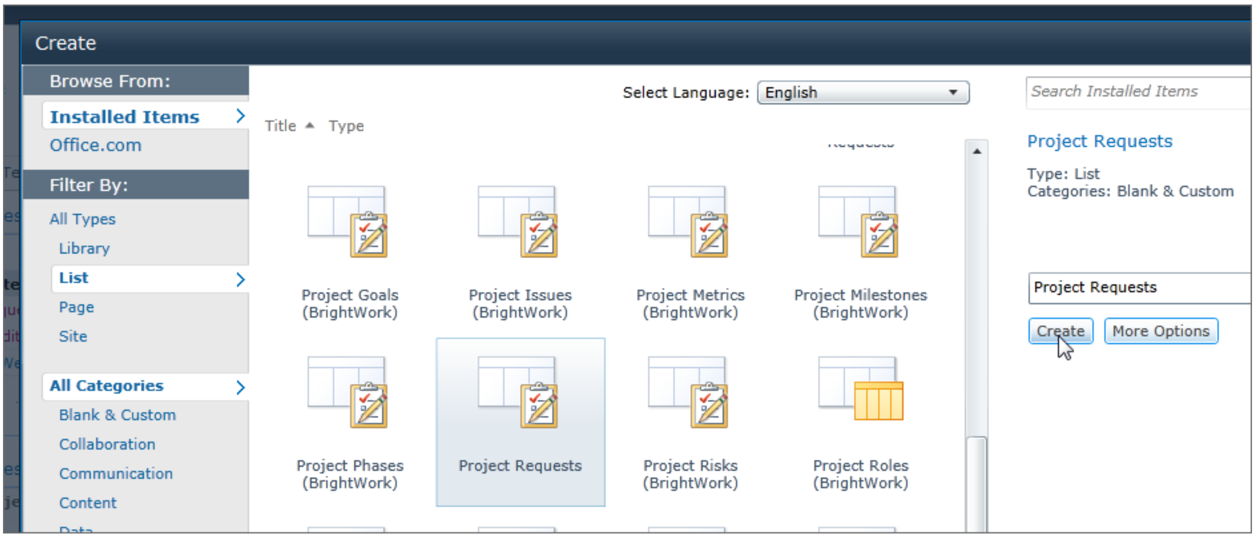
The Project Request list you will be adding here includes some sample data. This is included to help add some clarity to your training!

To add the list to your project office:

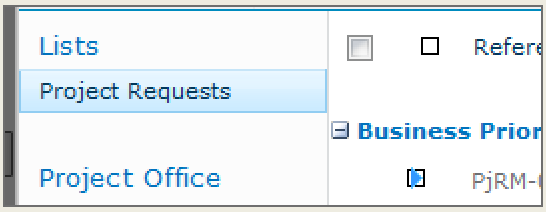
1. Navigate to your Project Office and click **Site Actions | More Options**.



2. Click **List** and select the **Project Requests** list.
3. Give the list a title (e.g. Project Requests) and click **Create**.

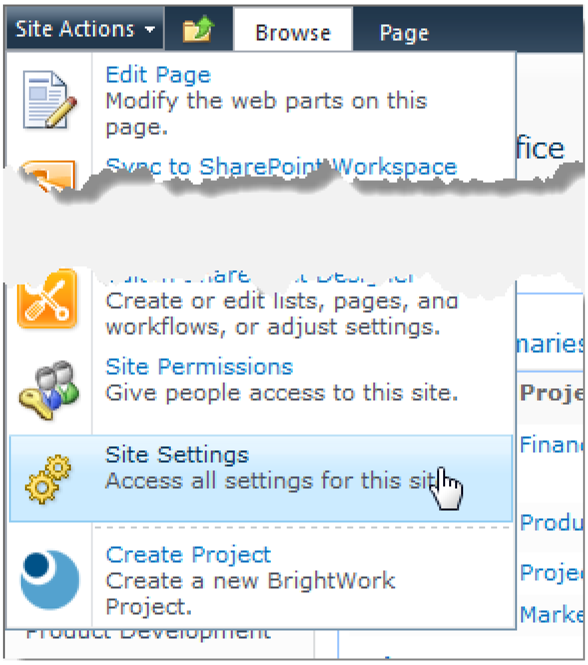


Note: The list will be added at the top of the Quick Launch.

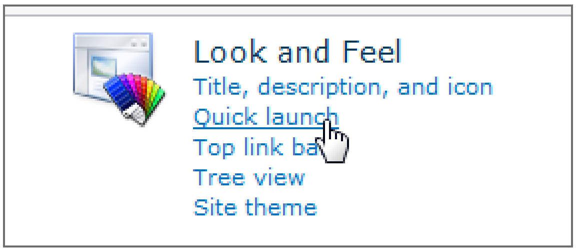


The best place for it is probably under the Metrics list and you will remedy this next.

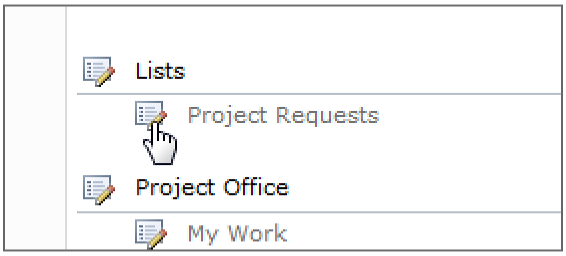
4. Click **Site Actions | Site Settings**.



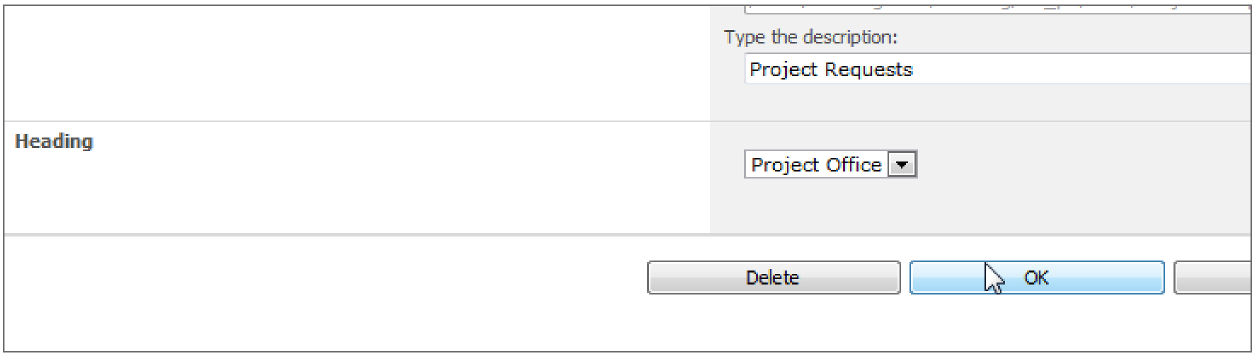
5. Click **Quick Launch**.



6. Click the **Edit** button beside Project Requests.

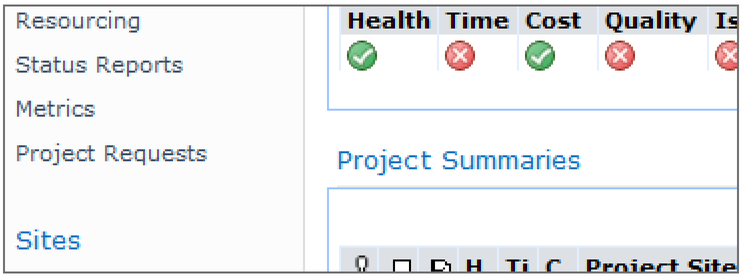


7. Select **Project Office** from the heading menu and click **OK**.



8. Click the Edit button beside Lists
9. Click **Delete** and click **OK** to confirm the deletion.

   The Project Requests list will now be in a more suitable location on the Quick Launch.



2.3 Review Existing Requests

As mentioned above, for the purposes of this training exercise, this Project Request list has some sample data in it. This is to illustrate how a number of proposed projects can be seen side by side and evaluated.

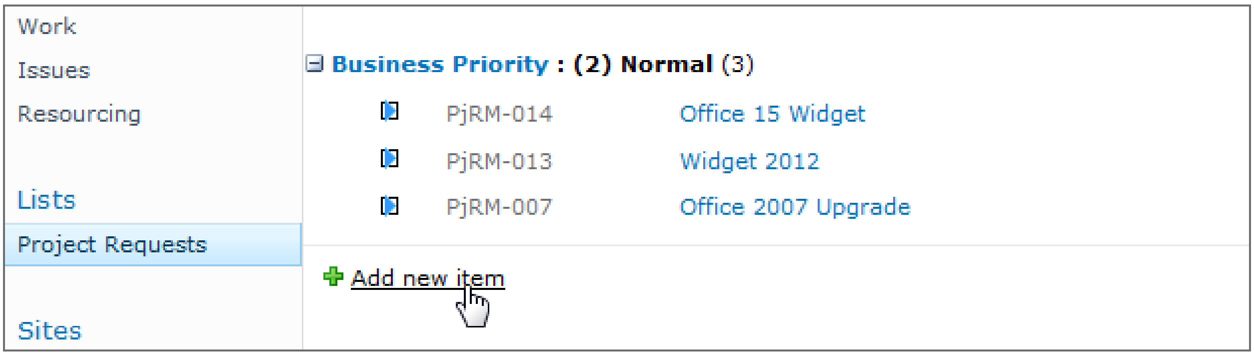
To get an understanding of the type of information captured in a Project Request, you should open a few of the Requests already in the list. Notice also that the Project Requests can be seen in various ways and can be grouped by criteria like Priority. Also note that criteria like Goal Alignment can be represented in view using icons to help facilitate comparison between Project Requests.

2.4 Create a Request

With the Project Request list, the user creates a simple list item and assigns the item to the person who is responsible for making such decisions. Remember, you are asking for approval for a project here, so supply as much information as possible.

To create a request:

1. Click **Project Requests** on the Quick Launch.
2. Click **Add new item**.



3. Fill out the form as far down as the Estimated Cost column, supplying as much detail as possible.

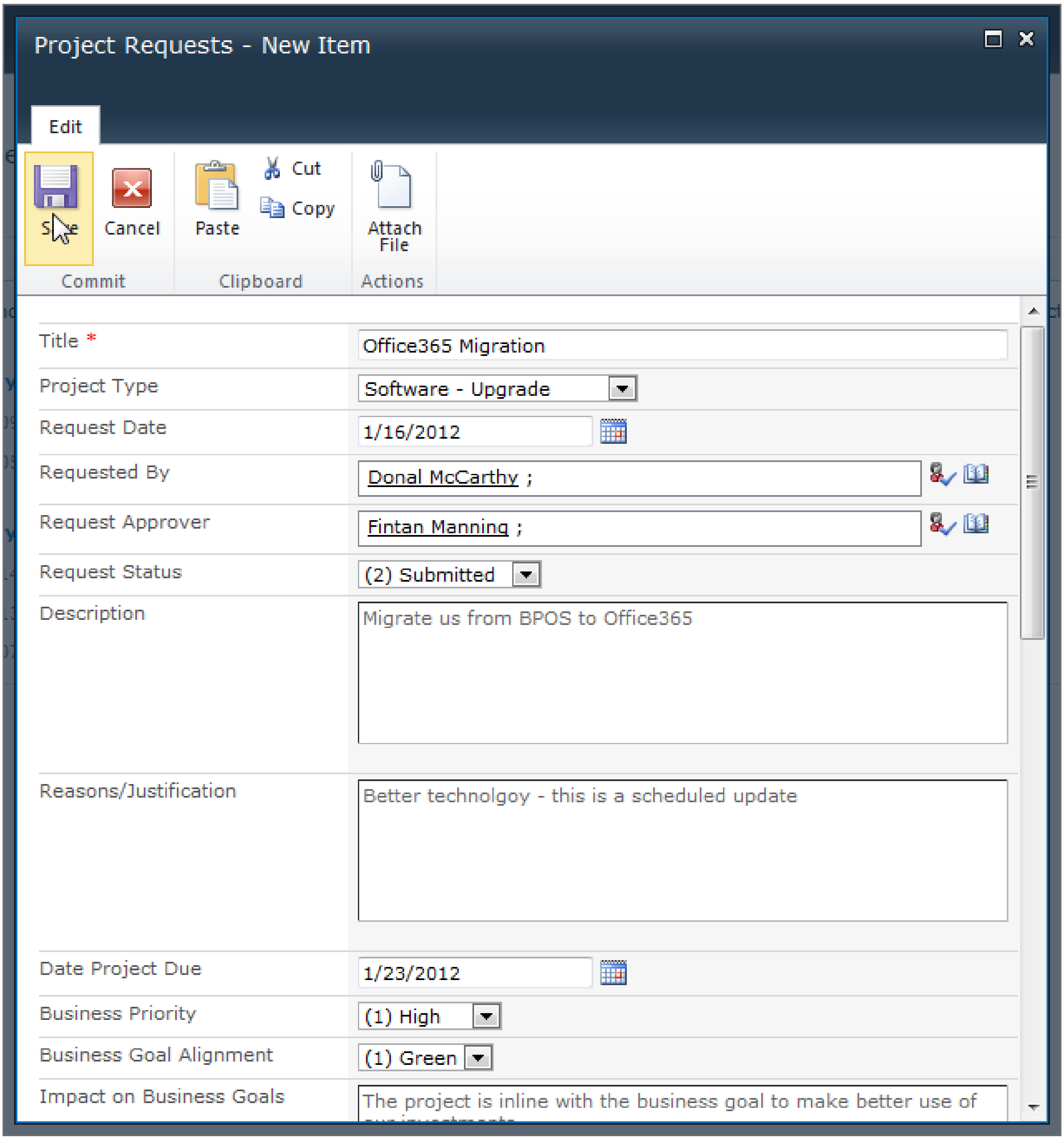
Note: The person making the request should supply as much detail as possible.

Enter your name in the Requested By column and the name of the person who should approve the request in the Request Approver column.

If you have any supporting documents, attach them to the list item.

Generally, the detail under the Estimated Cost column is intended for the Project Request approver.

4. Select **Submitted** from the Request Status column and click **Save.**

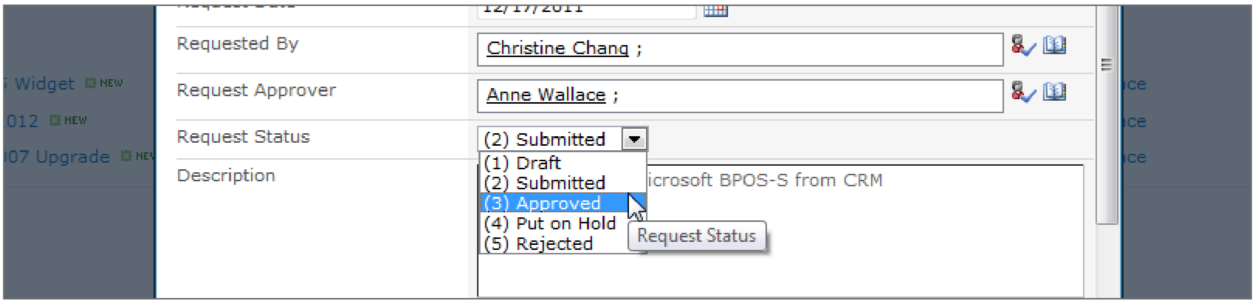


2.5 Assess a Request

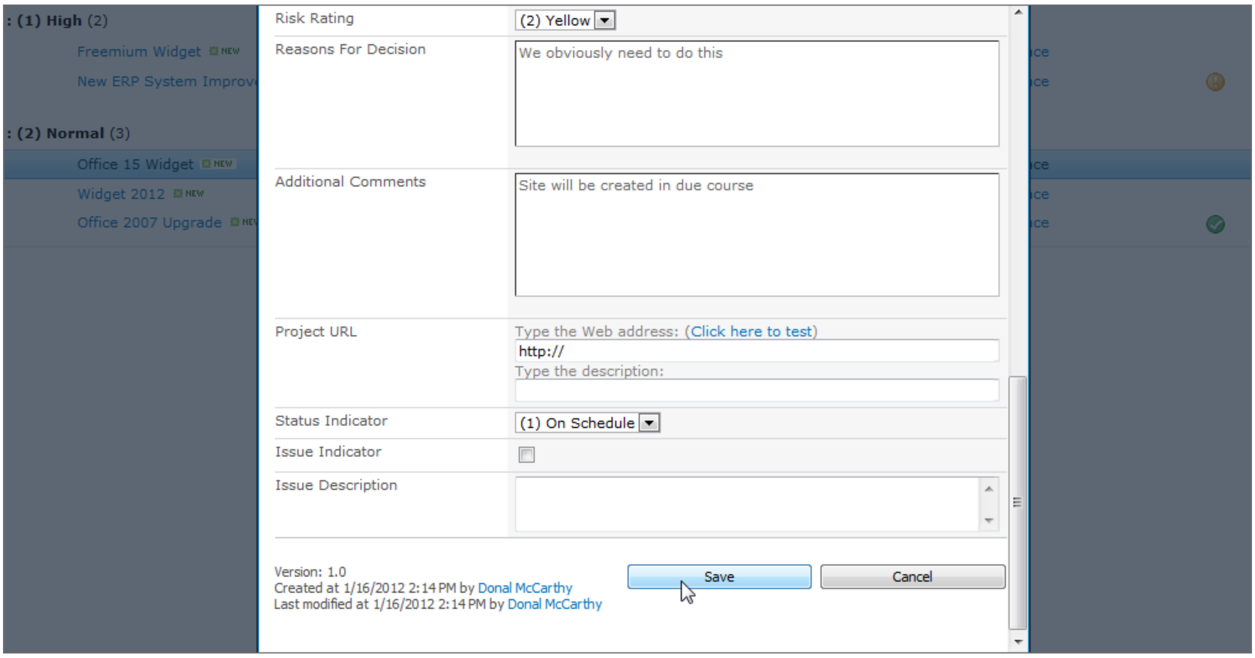
You should review requests and assess them against the criteria your organization has decided upon. Each organization will likely have its own criteria for deciding how to select the most appropriate projects. The Project Request list allows you to indicate the suitability of the request under a number of criteria, including:

- Goal: provides a relative measure of the projects alignment to the business goals, e.g. Green if the project aligns with all the business goals.
- Cost/Benefit: the return on investment for the proposed project, e.g. Yellow if it is not as high as would be typically expected, but is close and within a threshold.
- Risk: the degree of risk involved in this project, e.g. if the proposed project involves a lot of new technology, and/or new people, it might be categorized as Red.
- Overall: Based on the goal alignment, cost/benefit analysis and degree of risk, how does this project compare relatively to others in an overall sense, e.g. if the project has two or more yellow flags, or one red flag, then the overall criteria for this proposed project might be flagged as Yellow, so would not be a project that clearly should be done (Green) though equally is not a project that clearly should not be done (Red).

When you have made your decision, click **Edit Item** and select your decision from the Request Status column. For the purposes of this exercise, we suggest selecting **(3) Approved**.



You can add the reasons for your decision to the area of the form under the Estimated Cost column. Click **Save** once you are done.



You will notice that the Project Request you just approved disappears from the default Active Items view. You will find the item in another view in the next section.

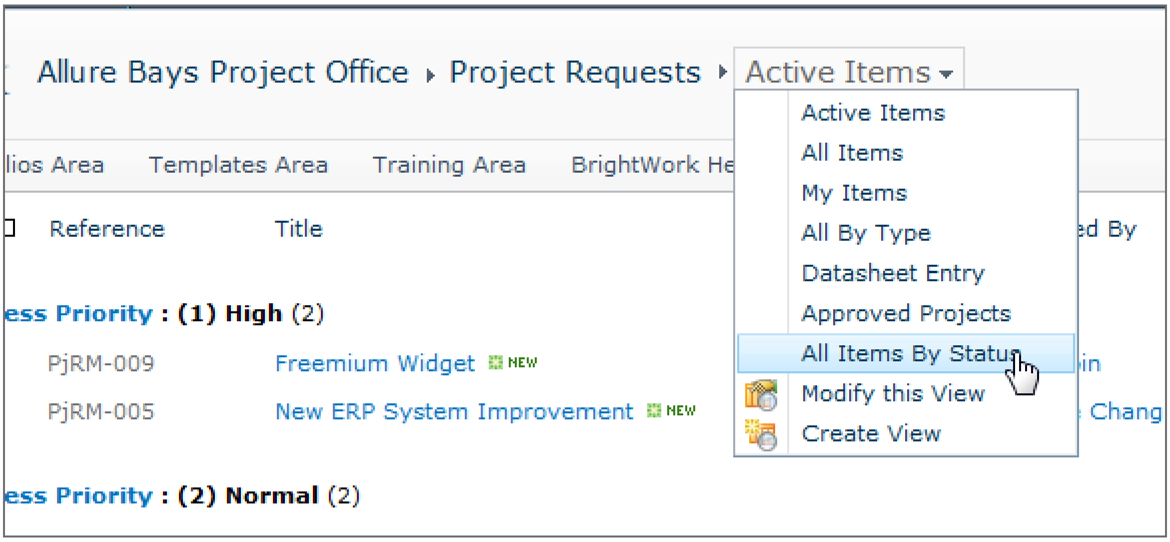
> ***Project Management Note***
>
> While the Project Request Tracker is quite a basic form of Demand Management, it can also be used as a starting place to help get a more defined and measurable process in place. With experience, criteria can be added, and relative weights applied to them, so that the project approval process can become more scientific.
>
> For example, it would be normal to require a Business Case (or Project Brief) as the minimum criteria when requesting a project; however, creating these documents can require time and a certain amount of expertise. Therefore, it might be useful to have a step where a Request Tracker could be used to pre-vet projects before the creation of a Business Case.

2.6 View Version History

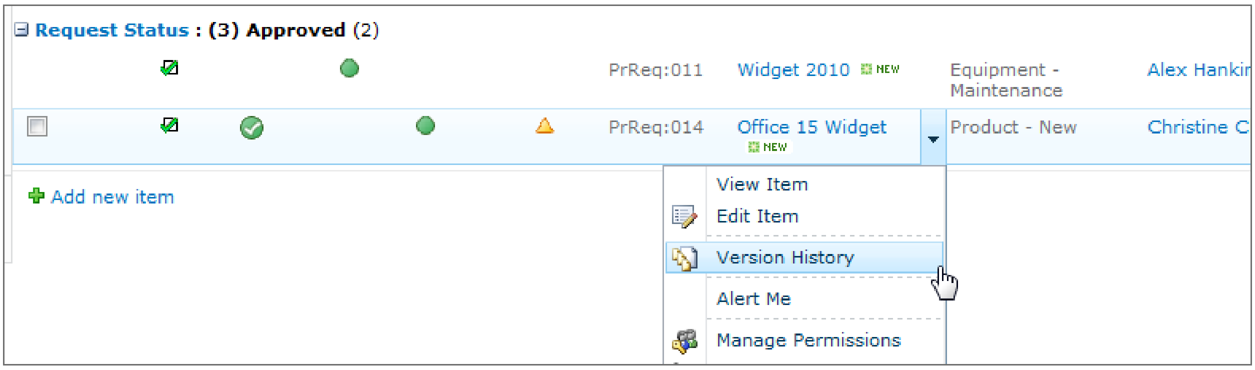
Understanding the evolution of a Project Request can be quite useful from an overall process point of view. A SharePoint feature called Version History that does exactly this is enabled by default in the Project Request list.

To view Version History:

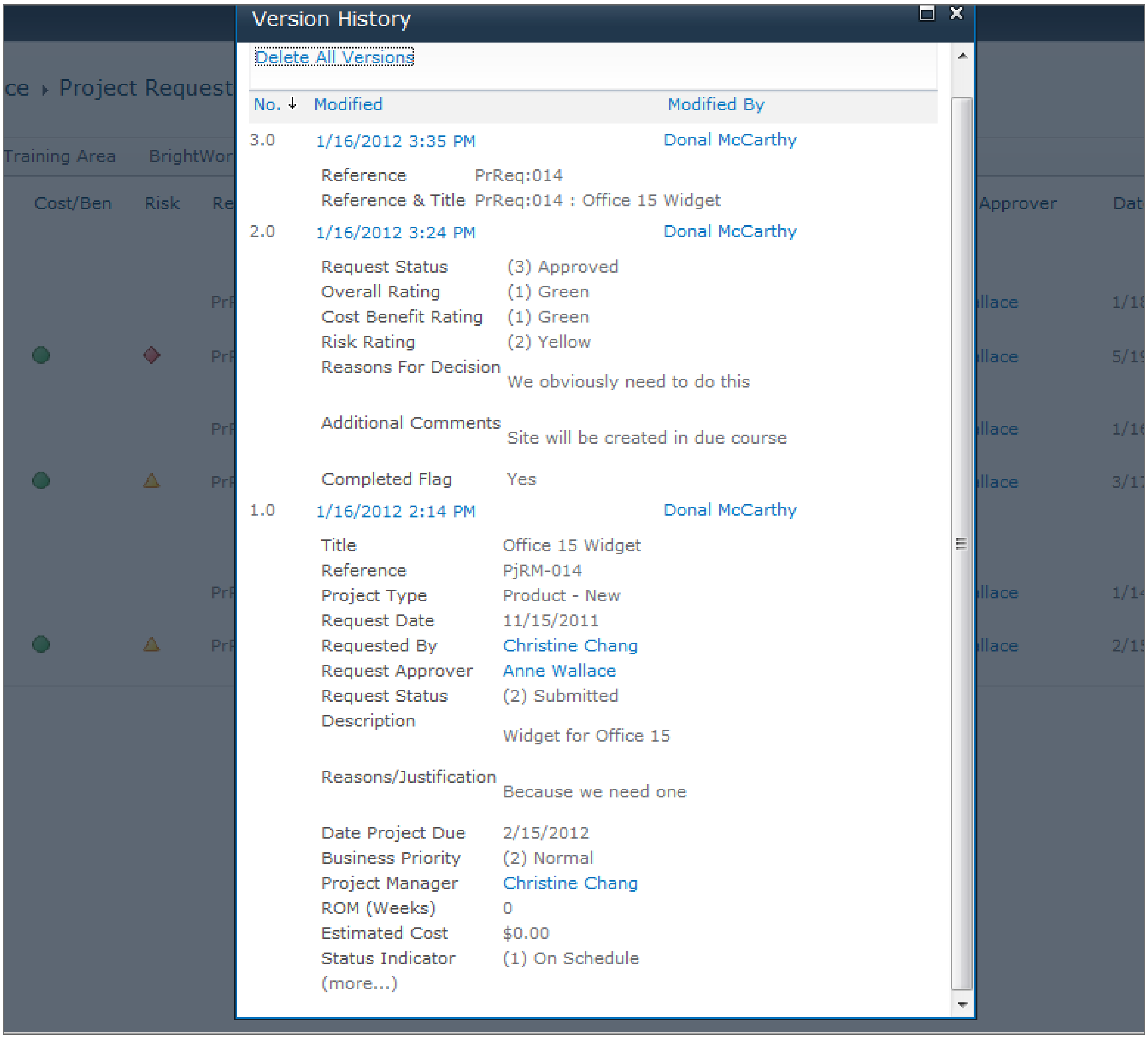
1. Click **All Items By Status** on the Project Requests list view menu.



2. Select **Version History** from the list item menu of the item that you just approved.



The Version History will be displayed.



3 Semi-Structured Approach: Project Request Manager

The Project Request Manager site template offers a more comprehensive process than the Project Request list. It provides a process to create requests, supply supporting documents and track organizational goals.

The Project Request Manager also includes an email workflow that notifies the nominated Request Approver when a new Project Request has been submitted and also copies the project requestor of any decision regarding the Project Request.

3.1 Scenario

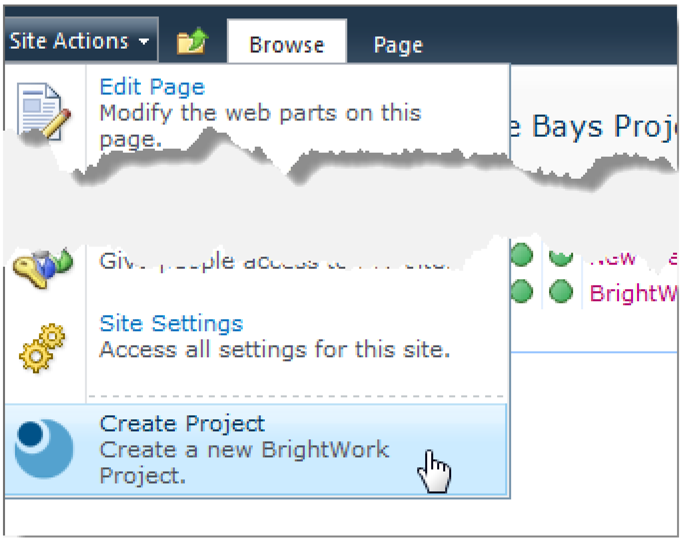
As with the Loosely Structured approach, you have lots of requests for projects. In analyzing the requests, you need to maintain a list of business goals and also track the documents (e.g. Project Brief or a Business Case) that are required when managing project requests.

For this scenario you need more than a single Project Requests list and the Project Request Manger should fit the bill.

3.2 Create Request Manager Site

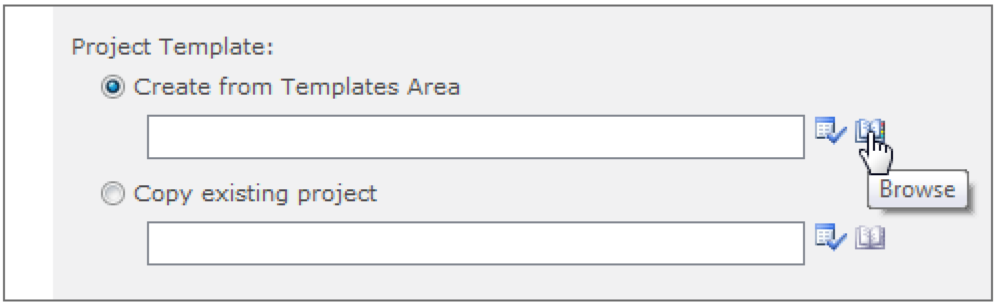
To create the Request Manager site:

1. Navigate to your Project Office and click **Site Actions | Create Project**.

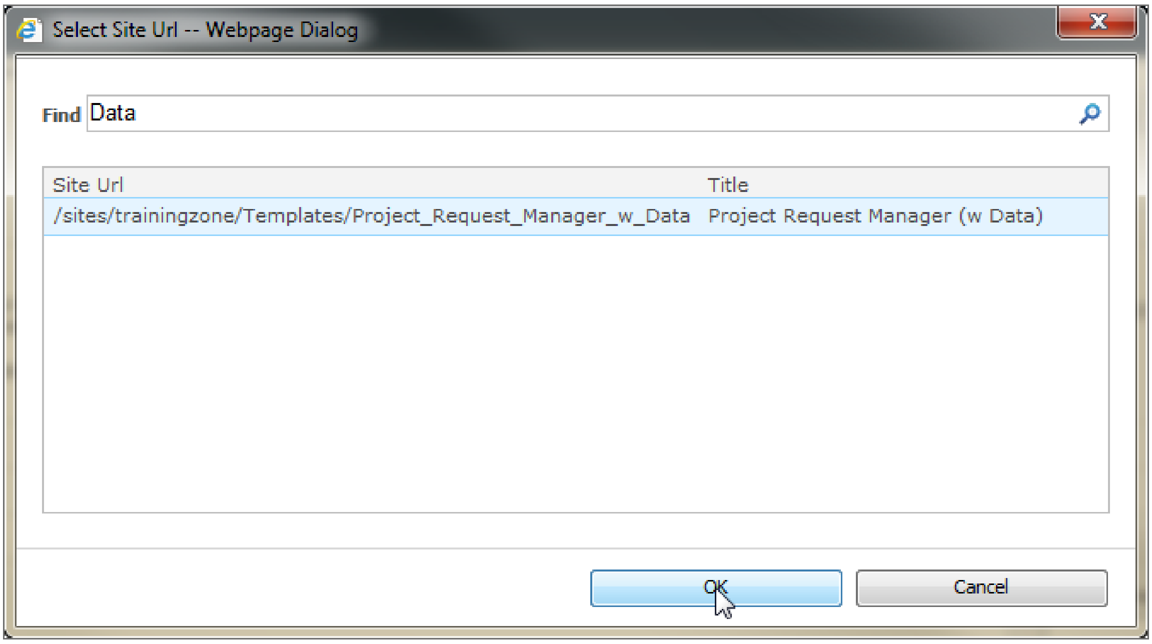


2. Give the site a Title and a URL name.

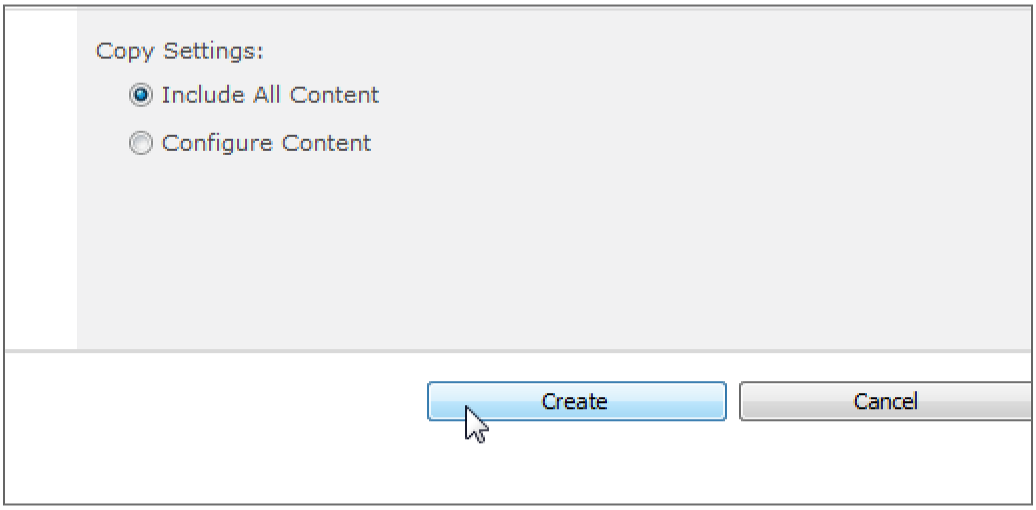
3. Click **Browse** to open the Template Picker.



4. Enter Data into the Find field and click the search icon to filter the available templates.
5. Select **Project Request Manager (w Data)** and click **OK**.



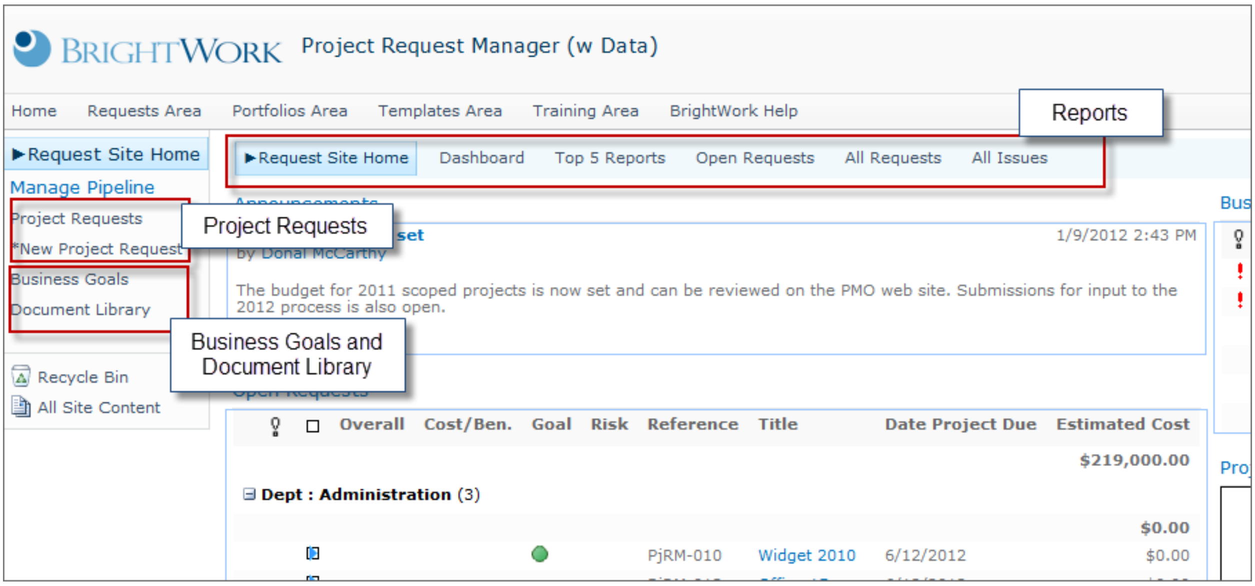
6. Click **Create**.



3.3 Understand Project Request Manager Elements

Take a brief moment to review and understand the various elements in the Project Request Manager site.

- **Reports** – these reports show you various cuts of the information in the site.
- **Project Requests** – this is where Project Requests are created, assessed and accepted or rejected.
- **Business Goals** and **Document Library** – these two elements are explained in greater detail in the subsequent sections but their main functions is to support the Project Request process.



3.4 Review and Create Goals

The Project Request Manager assumes that the demand management process used to determine which projects go ahead, and which do not, includes justification of the project on the basis of its alignment with organizational goals. Obviously, for this process to function correctly, an organization will have to create these goals. For the purposes of this exercise the Goals list in the Project Request Manager template includes some generic goals.

At the very least, you (and anyone else creating a Request) should click **Business Goals** on the Quick Launch and review the goals.

The SharePoint steps to add an item to the Goals list are much the same as with any other list.

1. Click the **Business Goals** link on the Quick Launch
2. Click **Add new item**.
3. Fill out the form and click **Save**.

3.5 Request a New Project

The Project Request Manager takes the Business Goal alignment concept used in the Project Request list a stage further in that it requires you so select the specific goals the requested project is aligned to and any necessary supporting documents.

The Project Request Manager template assumes that individuals making project requests will have an understanding of the business goals of the organization and be able to relate these to project requests.

Note: The Project Requests list also includes a workflow that will email notifications to the appropriate individuals depending on the status of the project request. This will be discussed in a later section.

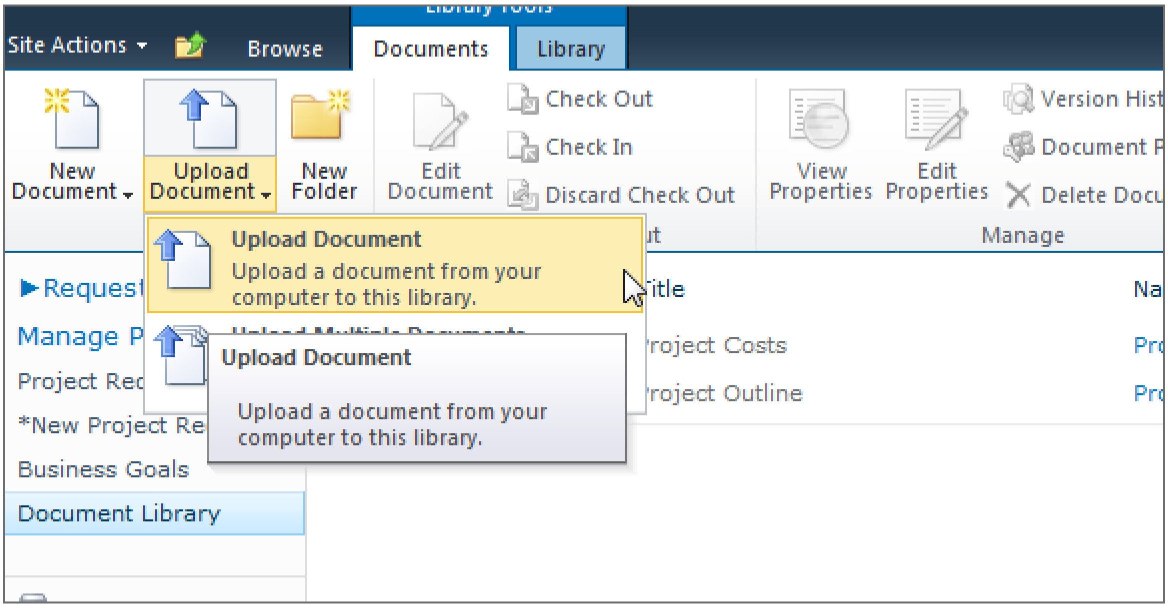
3.5.1 Upload Project Documents

If you have supporting documents for the project request, such as a budget spreadsheet or a Project Brief, upload them to the Document Library as you will be able to link to them from the request.

Note: The Project Request Manager template you are using already includes some sample documents, so if you are familiar with uploading documents in SharePoint, you can skip this section.

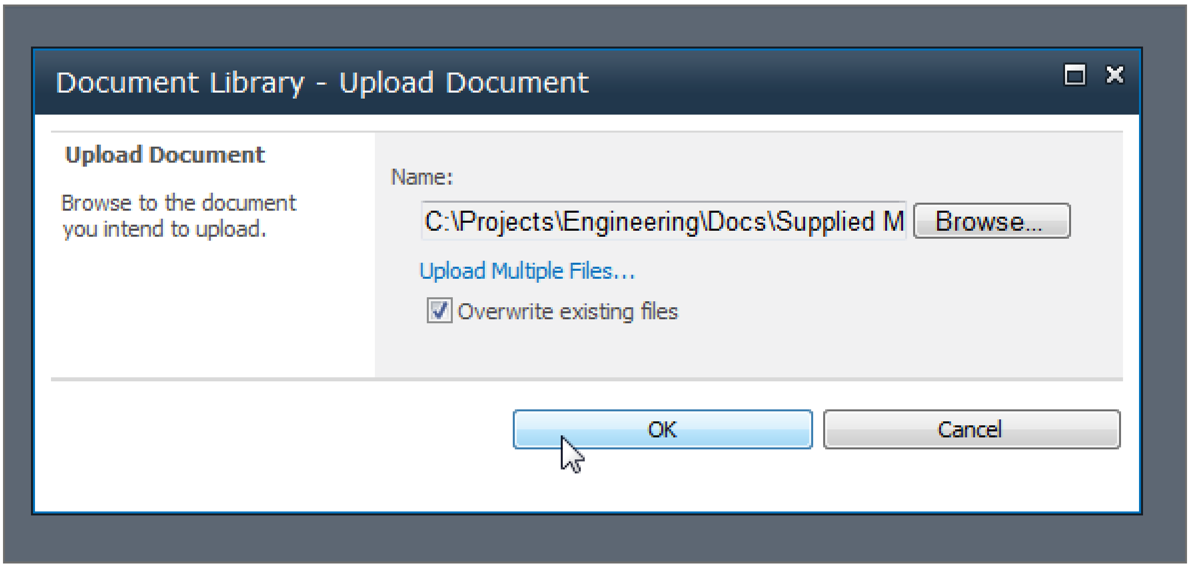
To upload a document:

1. Click **Document Library** on the Quick Launch.
2. Click **Documents | Upload Documents**.

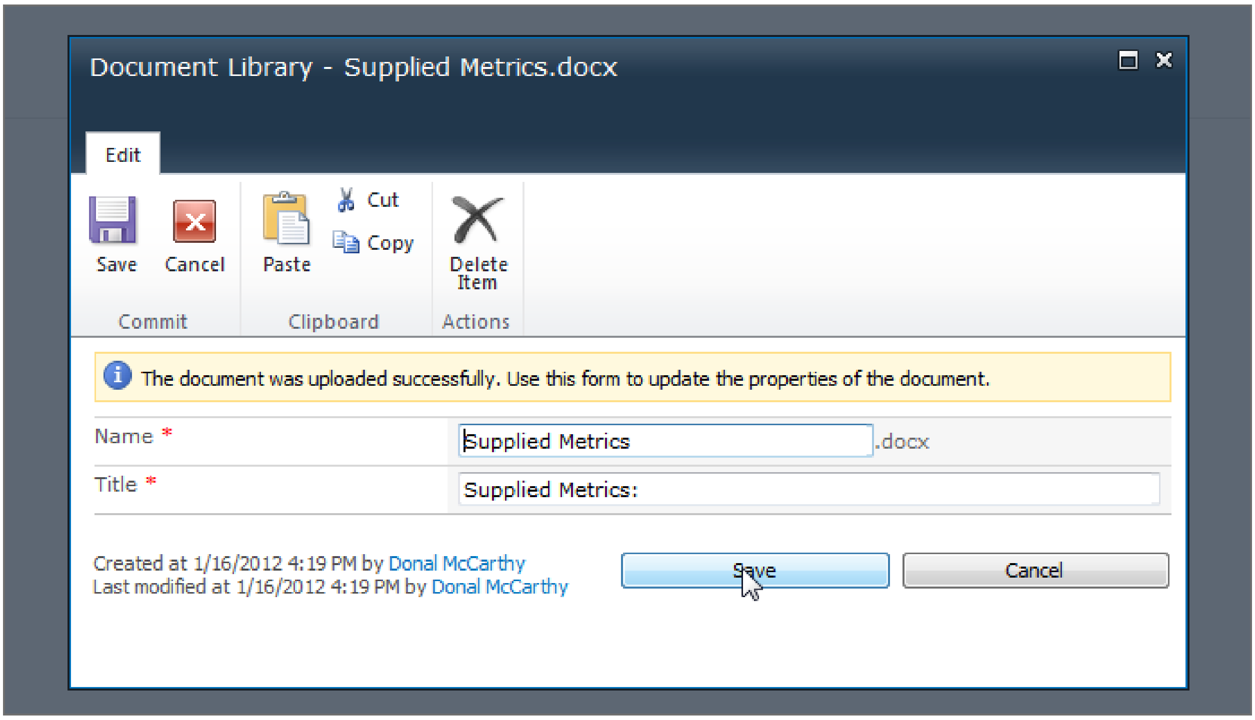


3. Click Browse, navigate to the location where the document is stored and double-click on the document.

4. Click **OK**.



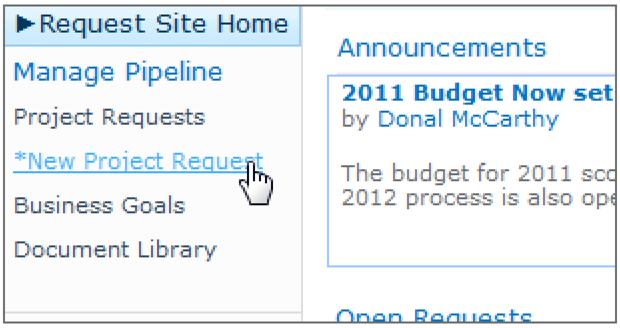
5. Ensure the Document has a Name and a Title and click **Save**.



3.5.2 Create and Submit Request

To create a request:

1. Click ***New Project Request** on the Quick Launch.



2. Enter a Title for the project, select an Organization.
3. Specify a Requested By and a Request Approver.

Note: In a real world environment, you would probably enter your name in the Requested By column and another named person in the Request Approver column.

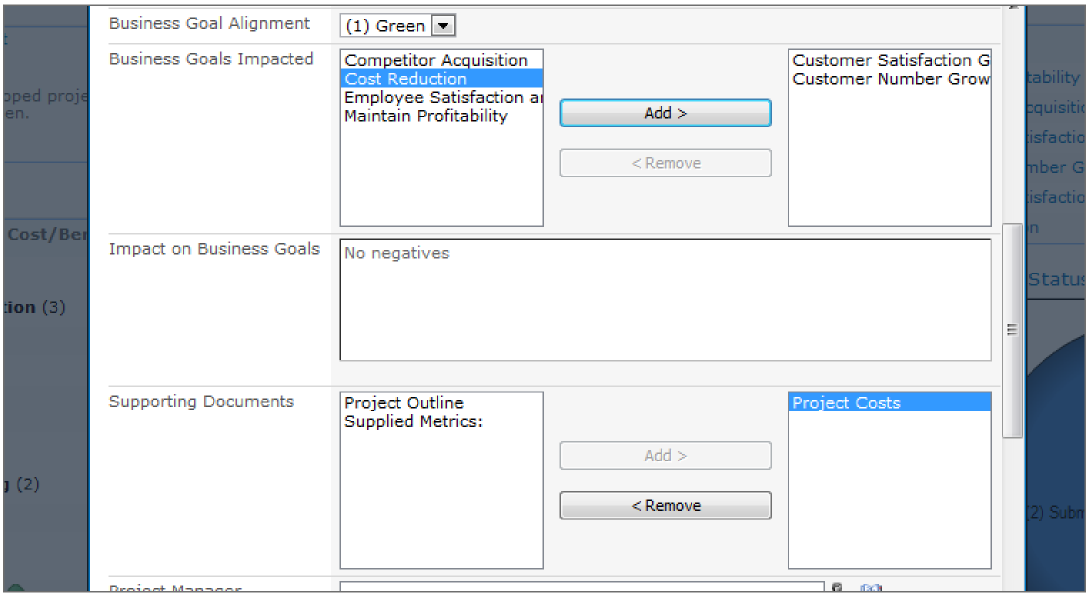
If you are taking this training using your own login, enter your name in both columns, as this will enable you to receive the emails generated by the workflow.

If you are taking this training using a generic login, enter that name in both columns – we will show you screenshots of the emails generated by the workflow later in this guide.

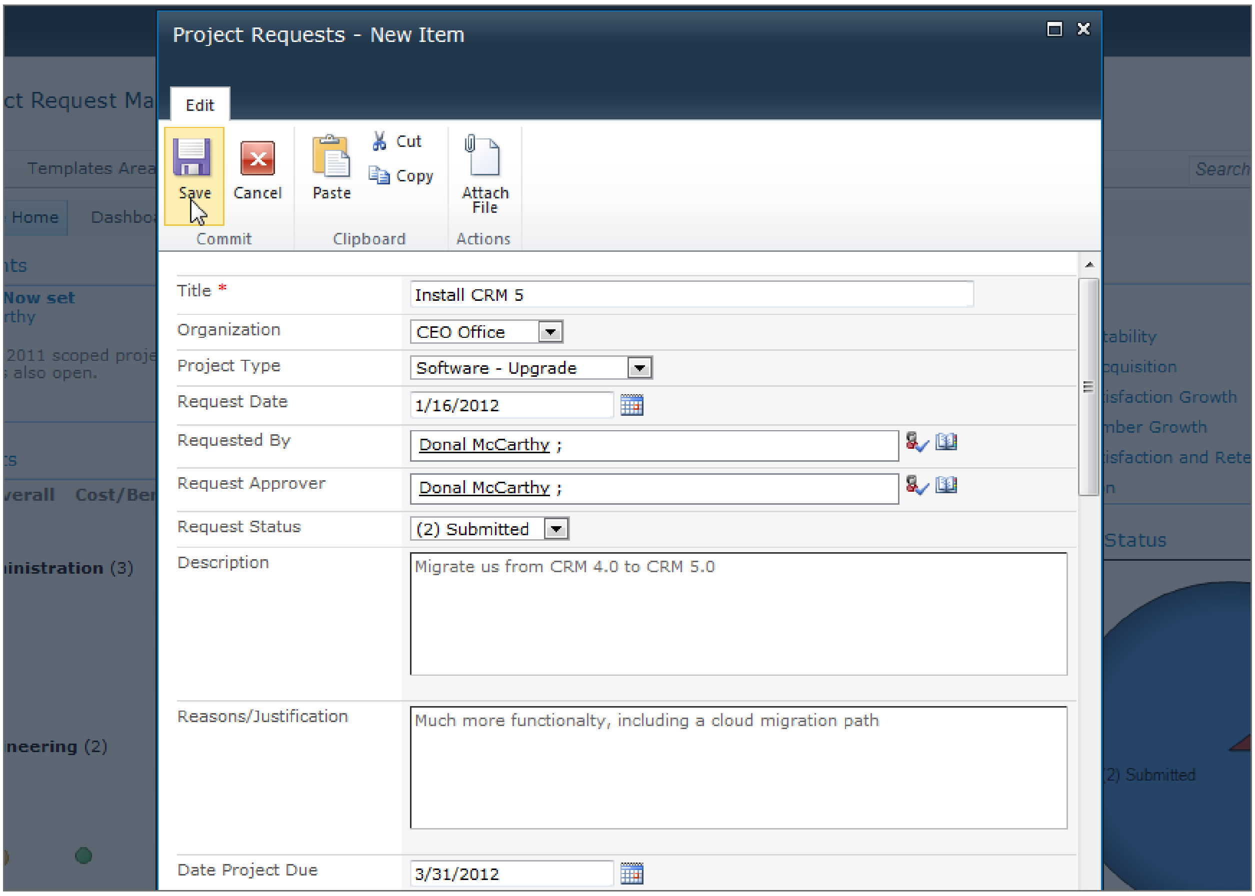
4. Continue to fill out the form, supplying as much detail as possible as far down as the Estimated Cost column.

Note: Everything from the Overall Rating column down is for the Request Approver to use.

5. Double-click on a Business Goal and/or a Supporting Document to select them and associate them with this Project Request.



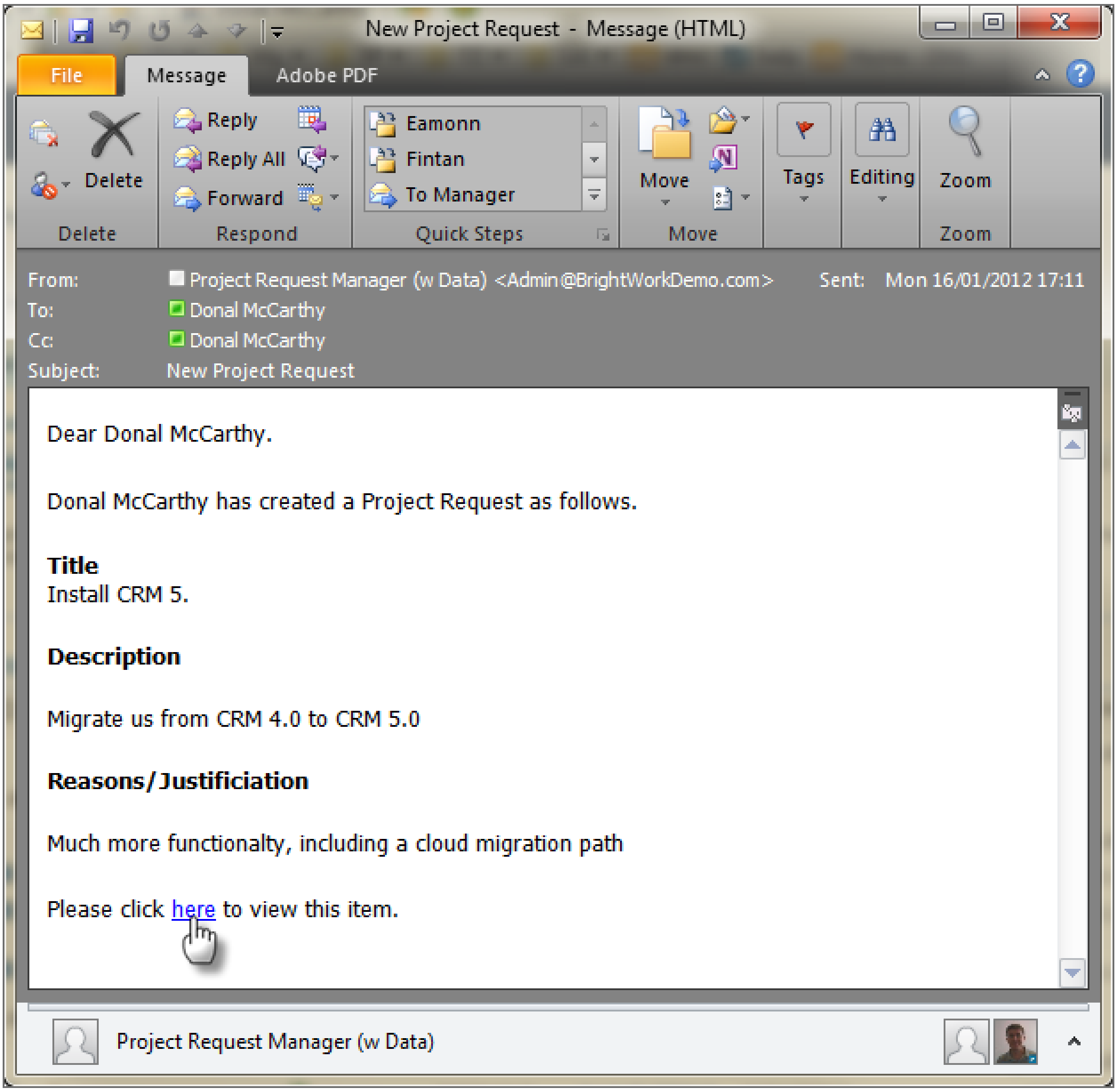
6. Select **(2) Submitted** from the Request Status column when you are ready to submit the request.
7. Click **Save**.



3.6 Assess a Request

If you are responsible for assessing project requests it would be important to have a good understanding of your organization's goals and be able to rate projects against them.

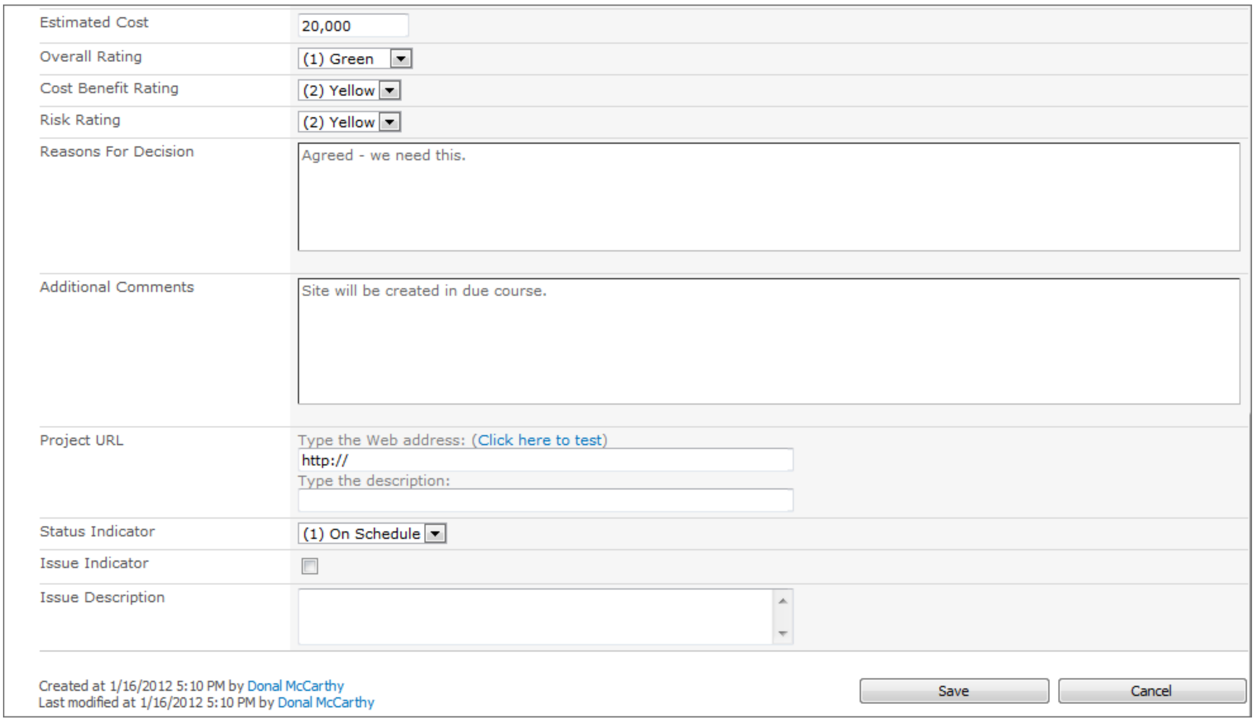
If you are assigned a request, you will receive an email like the one below. Click the link to open the actual request item.



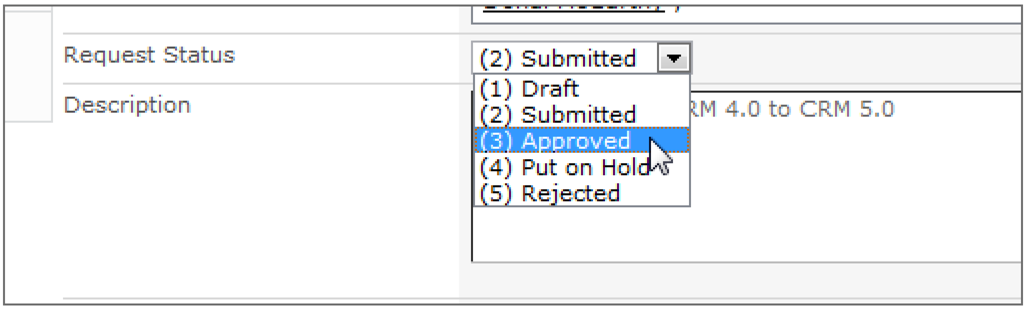
Project Management Notes

You should review the request and assess it against the criteria your organization has decided upon. Each organization will likely have its own criteria for deciding how to assess a project request. The Request Manager allows you assess the request against its alignment with specific organizational goals. If the request has any supporting documents, you should review these and include them in your assessment.

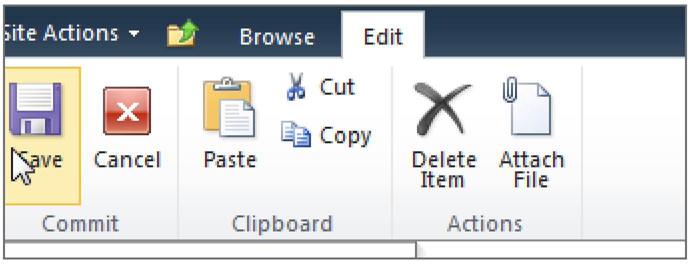
When you have made your decision, click **Edit Item** and add your assessment of the request to the area under the Estimated Cost column. If there are any particular issues with the request, select the **Issue Indicator** check box and enter an Issue Description.



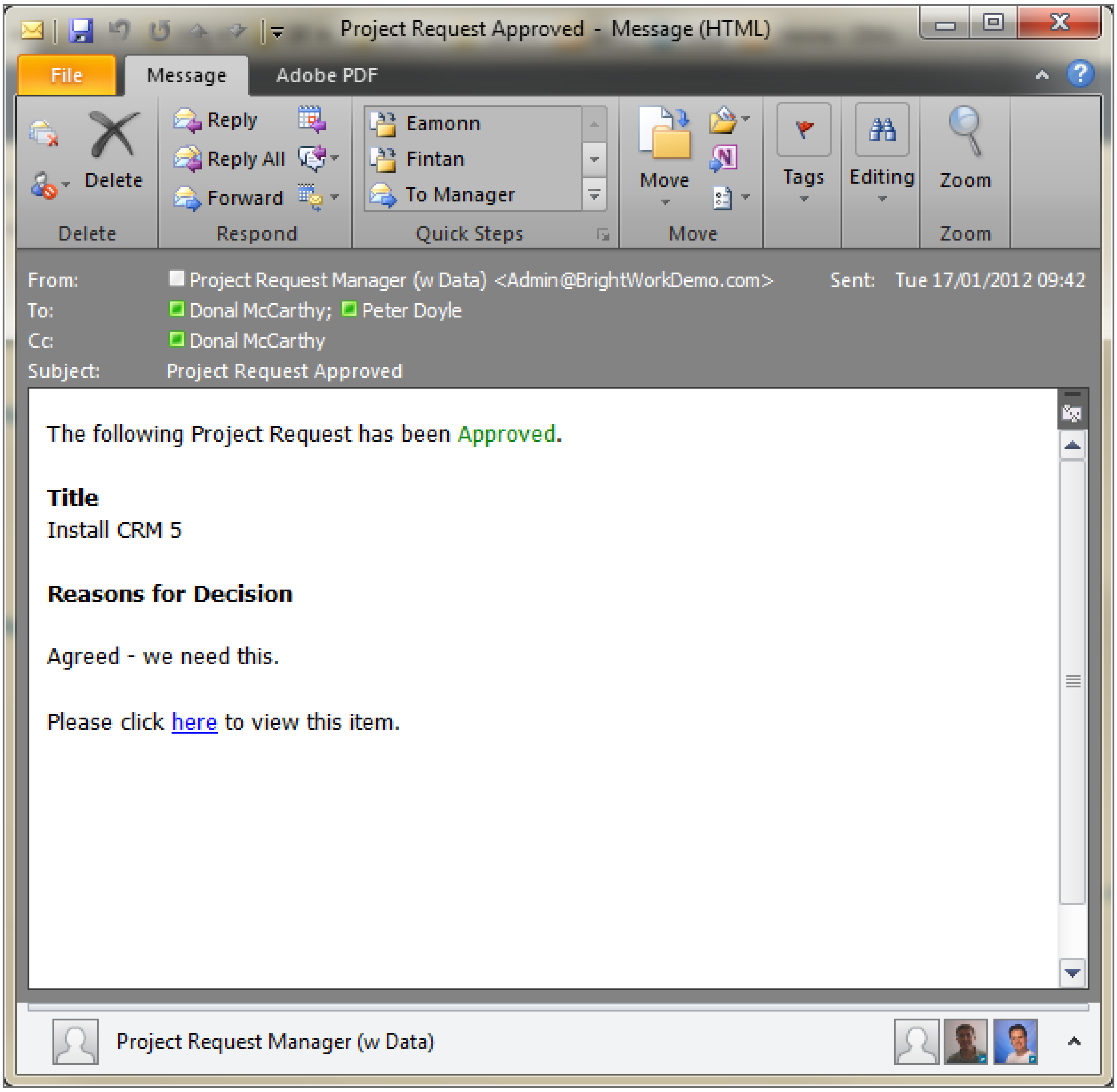
Select your decision from the **Request Status** column at the top of the form.



Click **Save**.

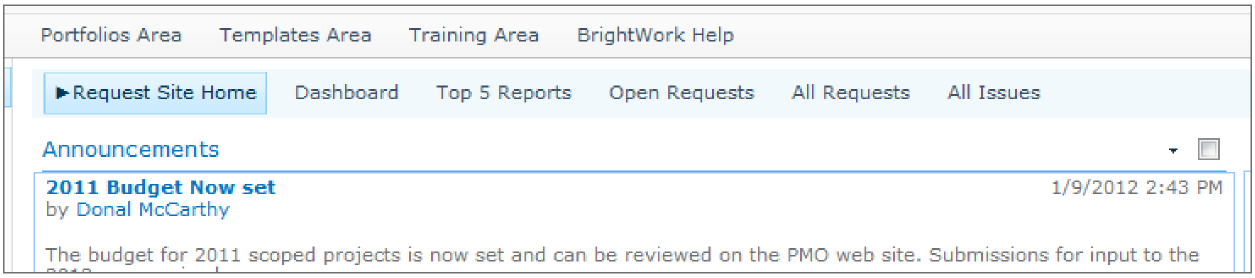


An email like the below will be sent to the Project Requestor and the person nominated as the Project Manager in the request.



3.7 Examine Reports

The Project Request Manager includes a number of report tabs. The content on each tab is explained in greater detail below.



- Request Site Home – this brings you to the Request Manager home page where the main high-level reports are displayed.
- Dashboard – this page includes some high-level charts about the active requests in the site.
- Top 5 Reports – this page displays the top 5 open Issues and open Project Requests.
- Open Requests – this page displays all the open Project Requests in the site. An open request is one that has a Request Status of (2) Submitted or (4) Put on Hold.
- All Requests – this page displays all the Project Requests that exist in the site.
- All Issues – this page displays all the Business Goals or Project Requests that have had their Issue Indicator selected.

4 Semi-Structured Approach: Customize Workflow Email

Note: This is an optional section for users interested in customizing the workflow email. Ideally, you should be using your own login here, so you can actually receive the email to appreciate the impact of the changes

The emails you saw in the previous section were generated by a SharePoint Designer workflow that is associated with the Project Requests list. This workflow triggers when the Request Status of an item changes.

- If the Request Status of an item is changed to **(2) Submitted**, an email is sent to the person nominated as the Request Approver.
- If the Request Status of an item is changed from **(2) Submitted** to **(3) Approved**; **(4) Put on Hold**; or **(5) Rejected** the Project requestor an email is sent to the persons nominated as the Requested By and the Project Manager.

You can control the content of this email, including the text in the body of the email and the content that is automatically added to the email from the Request item that triggered the workflow. In this section we will describe how to do just that.

4.1 Set-Up for SharePoint Designer

Follow the below steps to use SharePoint Designer 2010 in this exercise.

4.1.1 Download and Install SharePoint Designer 2010

If you do not already have SharePoint Designer 2010 installed on your computer, you can download and install it from the below link:

http://www.microsoft.com/download/en/details.aspx?id=16573

4.1.2 Enable Basic Authentication for Microsoft Office

To ensure that all users can get access, the TrainingZone environment uses Basic Authentication. By default, Microsoft Office applications such as Microsoft Word and SharePoint Designer cannot access SharePoint via Basic Authentication without applying a fix.

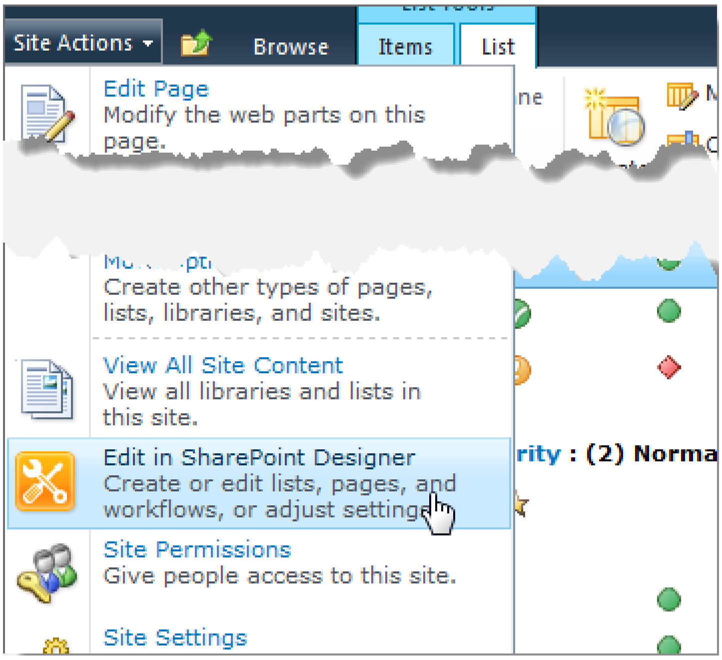
The details regarding this fix can be found at http://support.microsoft.com/kb/2123563. To apply the fix automatically, click the **Fix it** button on the page should it appear.

4.2 Configure Workflow

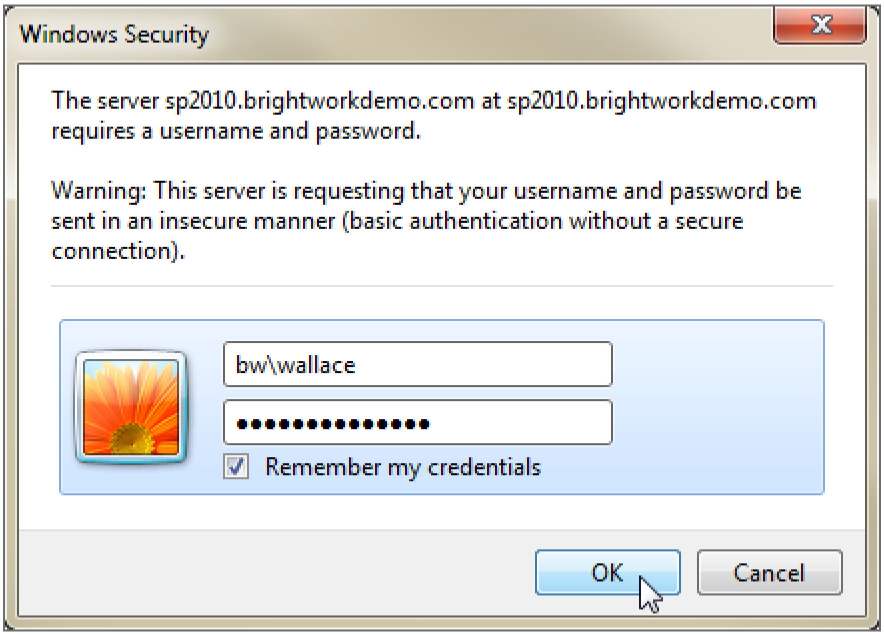
In this exercise, we will get you to add the Additional Comments column to the body of the notification email.

To configure the workflow:

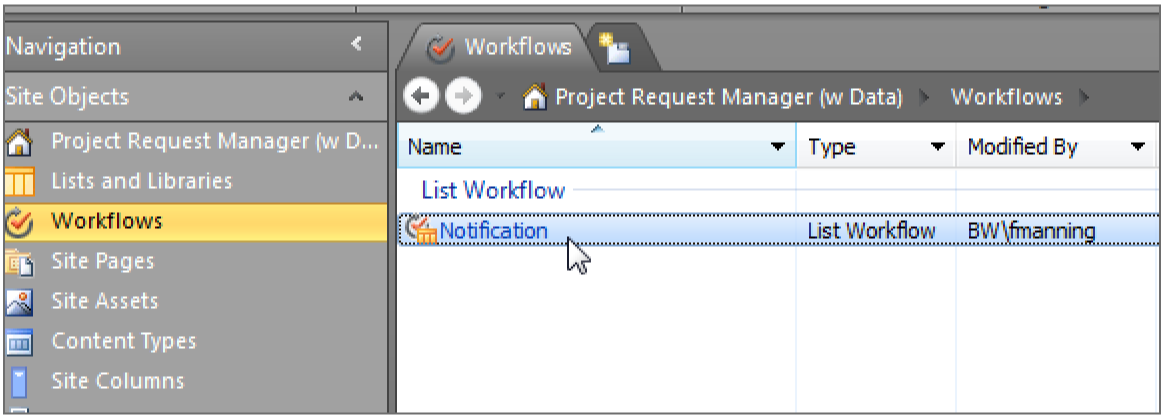
1. Click Site Actions | Edit in SharePoint Designer.



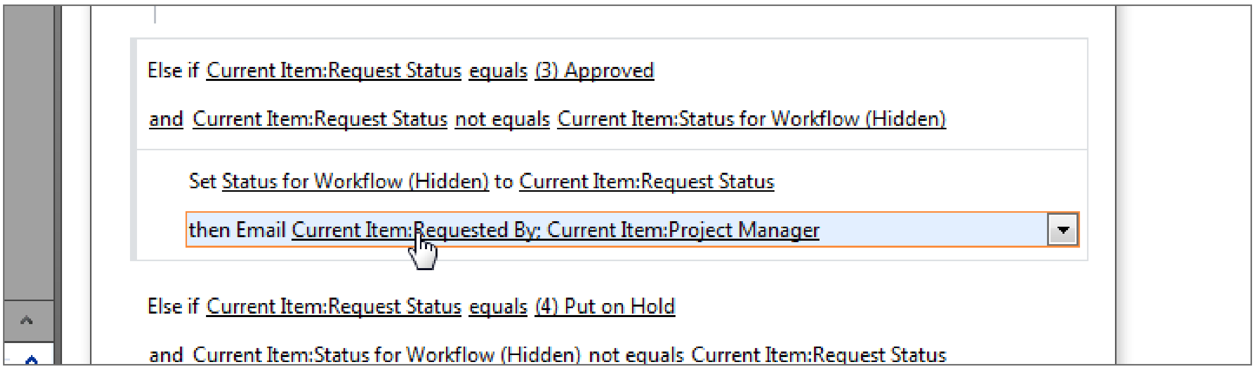
2. If requested, enter your User name and Password and click OK.



3. In SharePoint Designer, click **Workflows** in the toolbar on the left.
4. Click the **Notification** workflow.

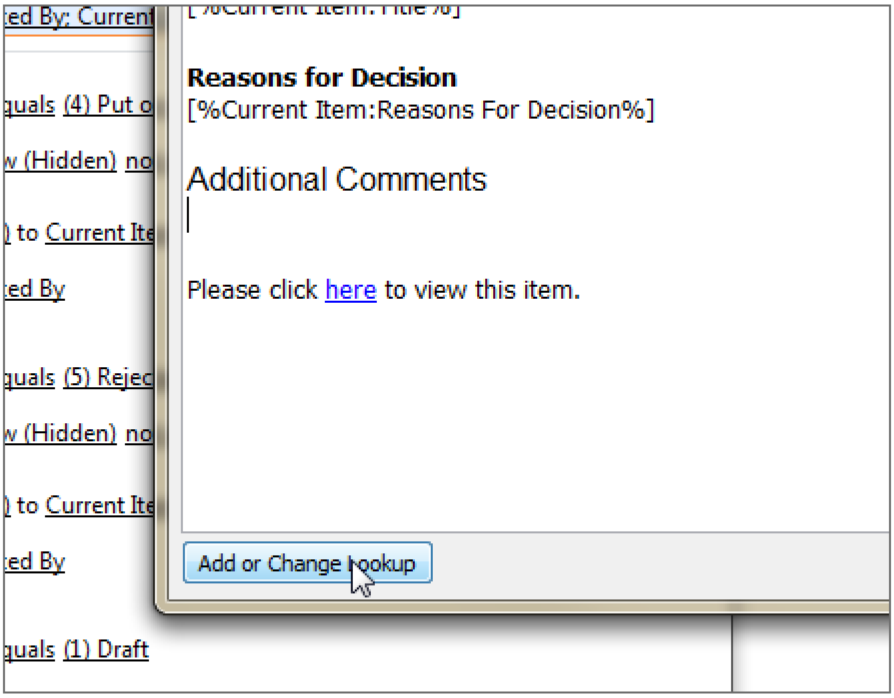


5. Click **Edit Workflow**.
6. Double-click on **then Email Current Item:Requested By: Current Item:ProjectManager**.

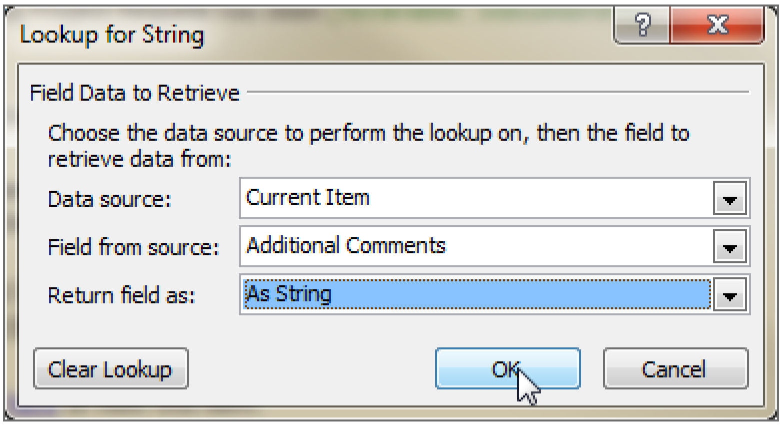


7. Create a new line under the Reasons for Decision block and enter Additional Comments.

8. Click **Return** on your keyboard and then click **Add or Change Lookup**.



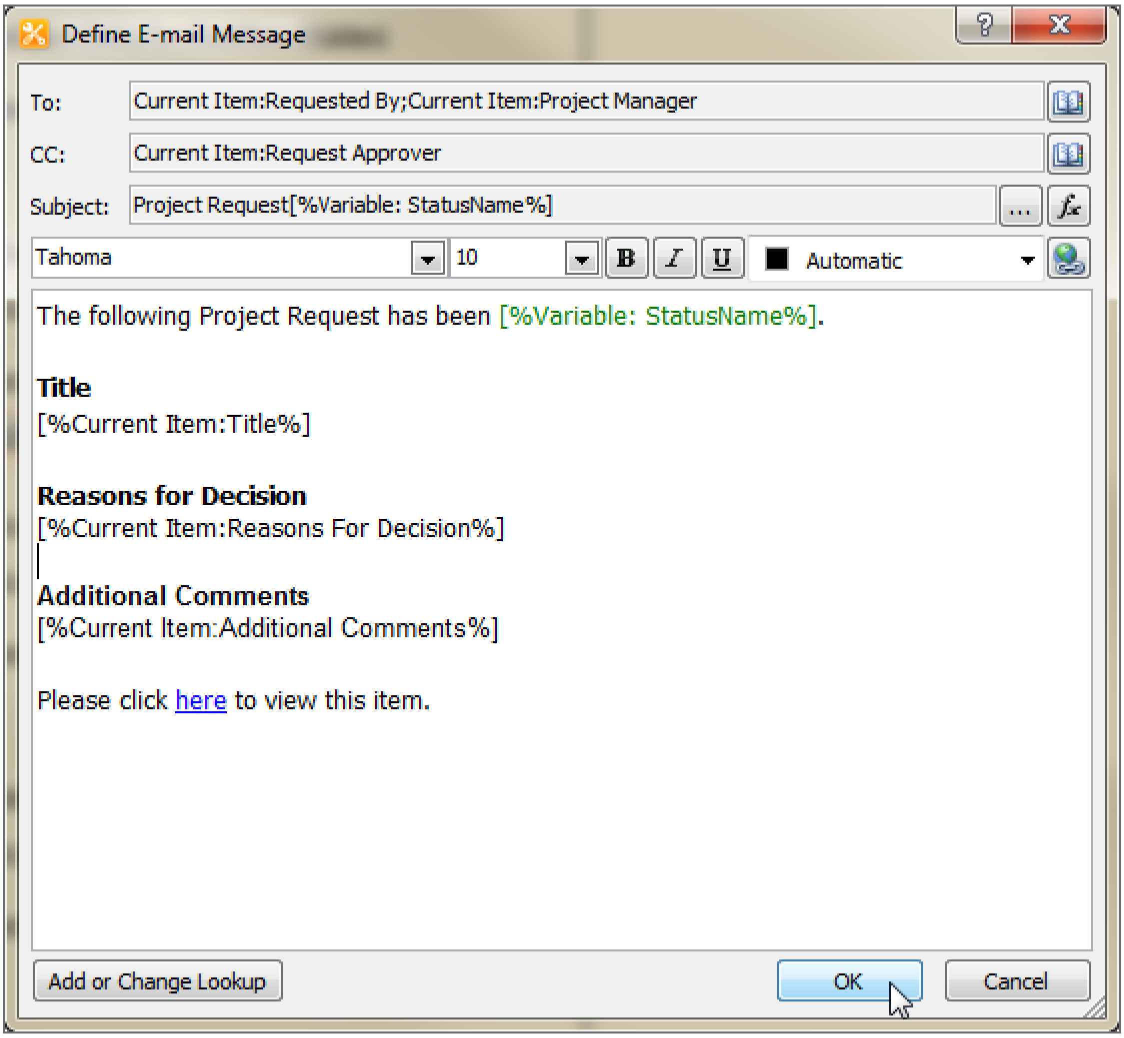
9. Select **Additional Comments** from the Field from source menu and click **OK**.



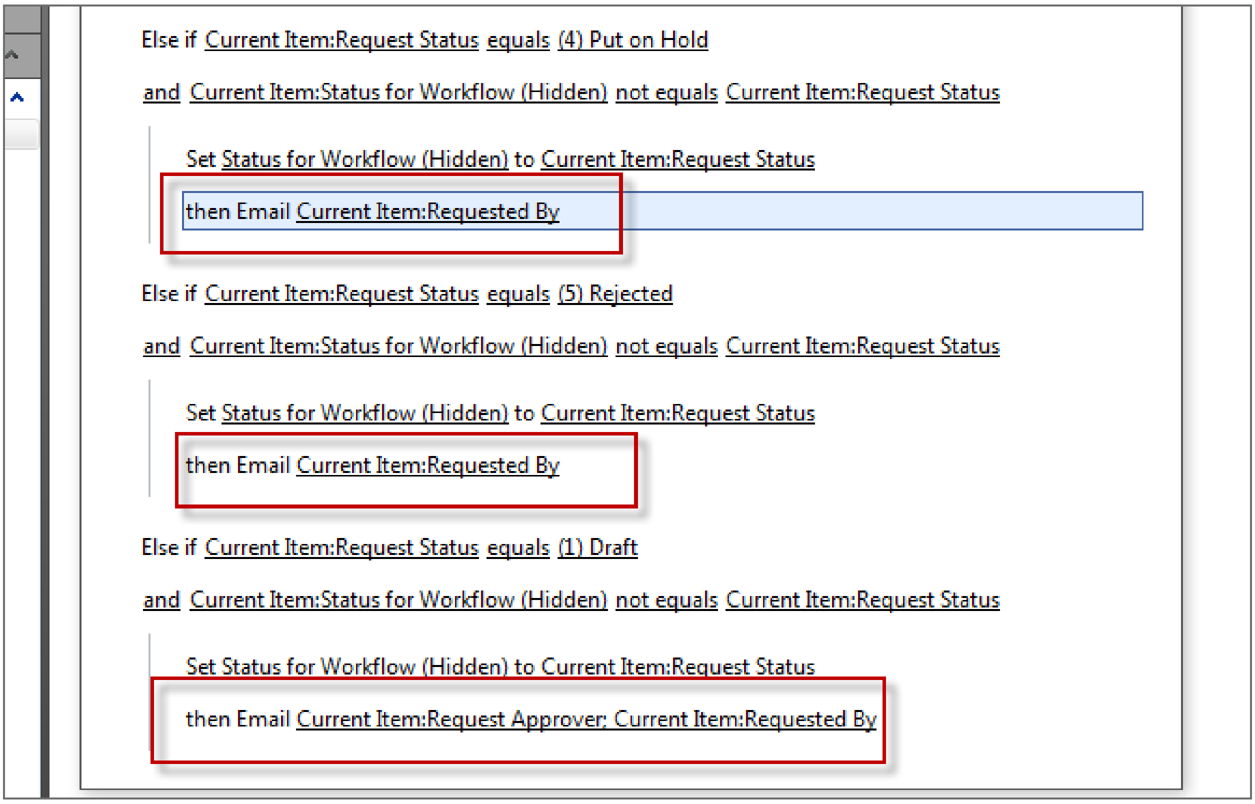
10. Select both lines and reduce the size to 10.

11. Select the Additional Comments line and bold it.

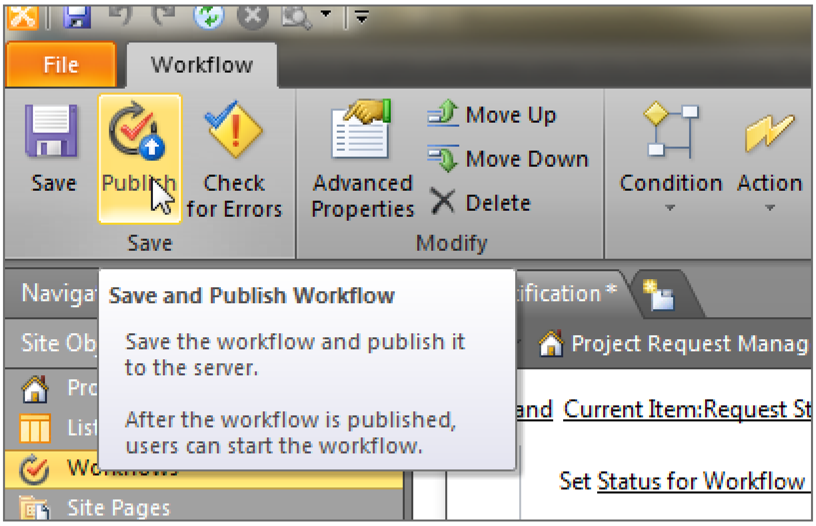
12. Click **OK**.



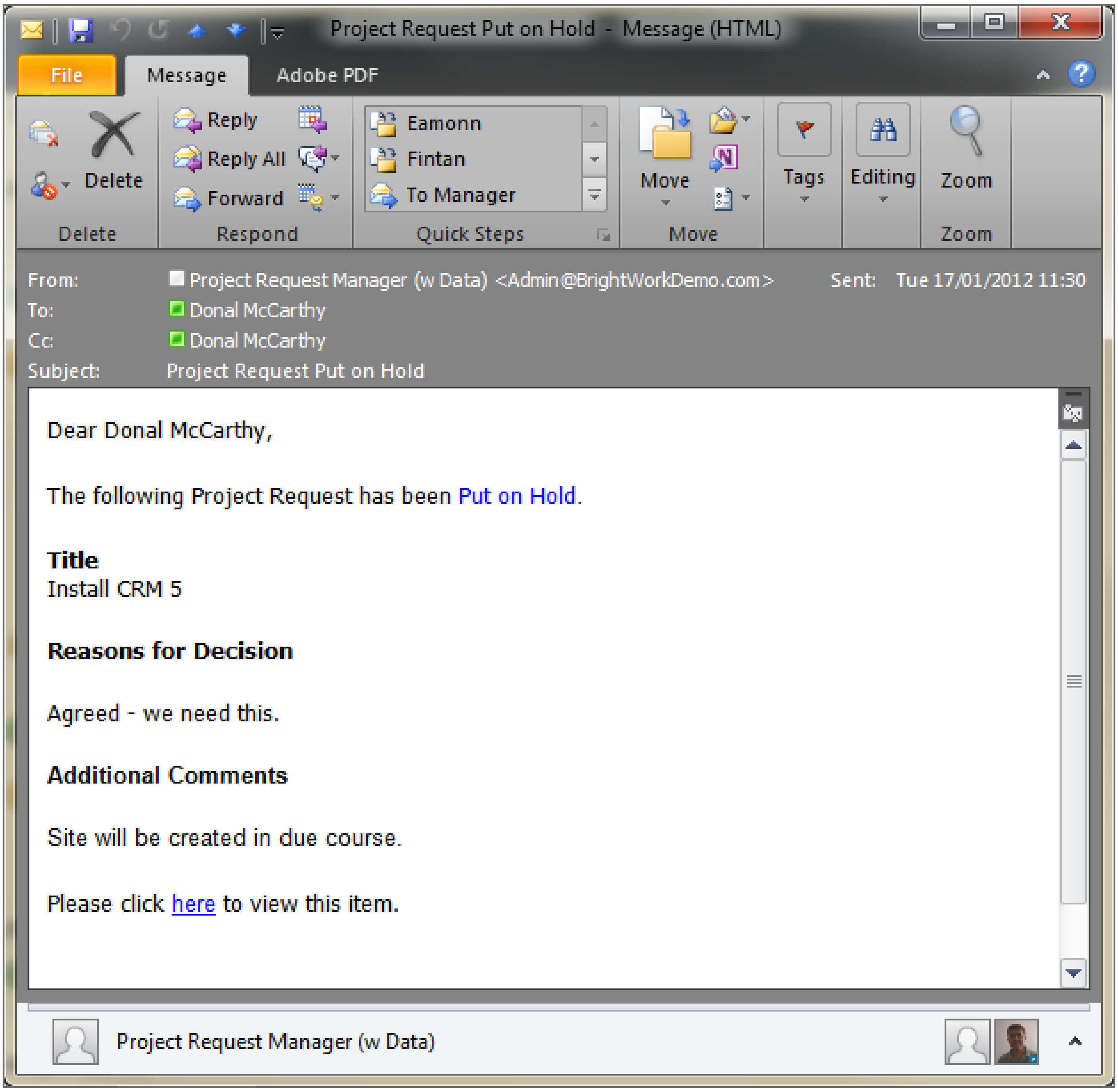
13. Ideally, you would repeat steps 6-12 for the emails highlighted below; however you can skip this step if you like for the purposes of this exercise.



14. Click Publish.



From now on, notification emails will look similar to the one displayed below that now has the Additional Comments added.



5 Fully Structured Approach: Project Forecast Manager

Previously we used criteria like alignment to goals, risk involved and a cost/benefit indicator to help us differentiate between the different projects being proposed and to manage the demand.

Among the other criteria that organizations might want to use when selecting projects is the impact a potential project will have on available resources. The Project Forecast Manager provides this ability.

Note: In this section we will not get you to do any exercises. We will just explain the Project Forecast Manager and get you to visit an example of it.

5.1 Scenario

You have a stream of project requests that need to be managed. You need to look at the goal alignment and other criteria for assessing the projects requested but you also need to determine if you have the resources available to allow a project go ahead.

The projects vary in size and in terms of the resources and skills they need in order to run. You have finite resources and only certain numbers of people in certain key roles, such as technical architects for example.

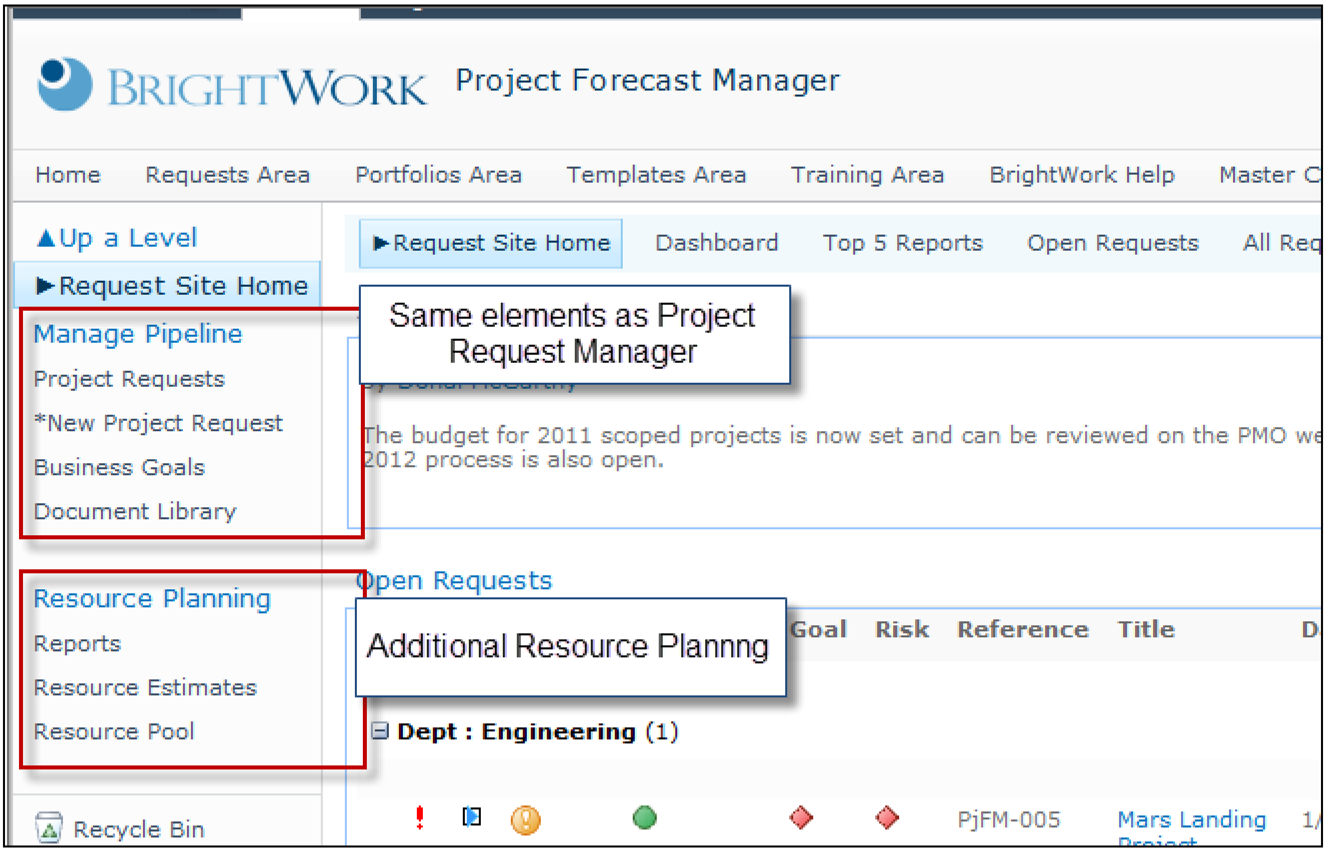
You will also want to be able to see the trade-offs that would happen to certain projects if other projects that draw on the same resources were to go ahead.

For such a fully structured approach, we recommend the Project Forecast Manager.

URL: http://sp2010.brightworkdemo.com/sites/pmPoint/Requests/pfm/default.aspx

5.2 Similarities to Project Request Manager

The Project Forecast Manager template delivers all the functionality of the Project Request Manager template plus Resource Planning for those that need it.



5.3 Extra Demand Management: Resource Planning

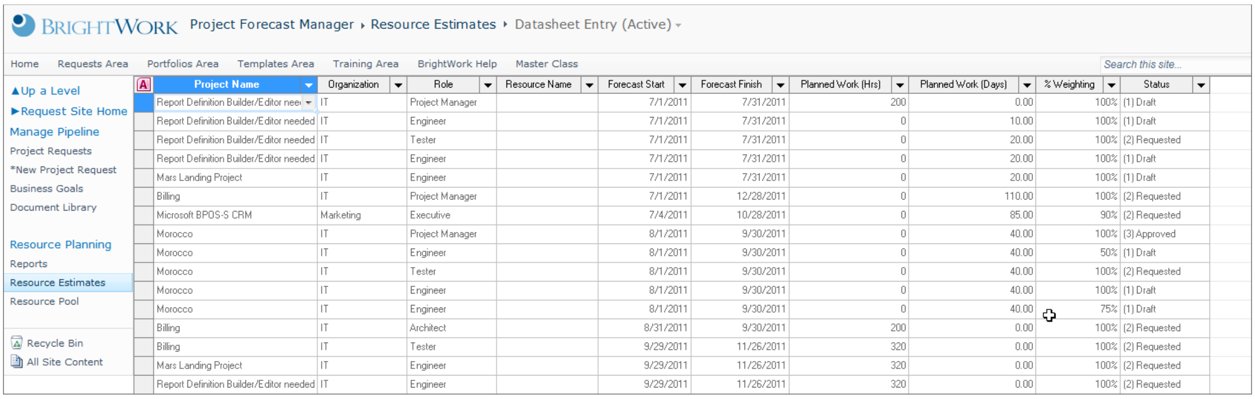
The Resource Planning aspect of the Project Forecast Manager enables you to create Resource Estimates for each project in the pipeline, giving you some oversight of the demands that will be made on your resources from the combined weight of all the projects in the pipeline.

You can further extend this by detailing resource availability in the Resource Pool.

The Reports supplied in the Project Forecast Manager use the information in the Resource Estimates and Resource Pool lists to generate a series of reports that enable you to visualize the effect the demands that potential projects will have on available resources.

5.3.1 Resource Estimates

The Resource Estimates list is where you detail the resources you think you will need for projects in the Project Requests list.



Project Name	Organization	Role	Resource Name	Forecast Start	Forecast Finish	Planned Work (Hrs)	Planned Work (Days)	% Weighting	Status
Report Definition Builder/Editor nee	IT	Project Manager		7/1/2011	7/31/2011	200	0.00	100%	(1) Draft
Report Definition Builder/Editor needed	IT	Engineer		7/1/2011	7/31/2011	0	10.00	100%	(1) Draft
Report Definition Builder/Editor needed	IT	Tester		7/1/2011	7/31/2011	0	20.00	100%	(2) Requested
Report Definition Builder/Editor needed	IT	Engineer		7/1/2011	7/31/2011	0	20.00	100%	(1) Draft
Mars Landing Project	IT	Engineer		7/1/2011	7/31/2011	0	20.00	100%	(1) Draft
Billing	IT	Project Manager		7/1/2011	12/28/2011	0	110.00	100%	(2) Requested
Microsoft BPOS-S CRM	Marketing	Executive		7/4/2011	10/28/2011	0	85.00	90%	(2) Requested
Morocco	IT	Project Manager		8/1/2011	9/30/2011	0	40.00	100%	(3) Approved
Morocco	IT	Engineer		8/1/2011	9/30/2011	0	40.00	50%	(1) Draft
Morocco	IT	Tester		8/1/2011	9/30/2011	0	40.00	100%	(2) Requested
Morocco	IT	Engineer		8/1/2011	9/30/2011	0	40.00	100%	(1) Draft
Morocco	IT	Engineer		8/1/2011	9/30/2011	0	40.00	75%	(1) Draft
Billing	IT	Architect		8/31/2011	9/30/2011	200	0.00	100%	(2) Requested
Billing	IT	Tester		9/29/2011	11/26/2011	320	0.00	100%	(2) Requested
Mars Landing Project	IT	Engineer		9/29/2011	11/26/2011	320	0.00	100%	(2) Requested
Report Definition Builder/Editor needed	IT	Engineer		9/29/2011	11/26/2011	320	0.00	100%	(2) Requested

5.3.2 Resource Pool

The Resource Pool list is where you specify the resources available to your organization and detail their availability.

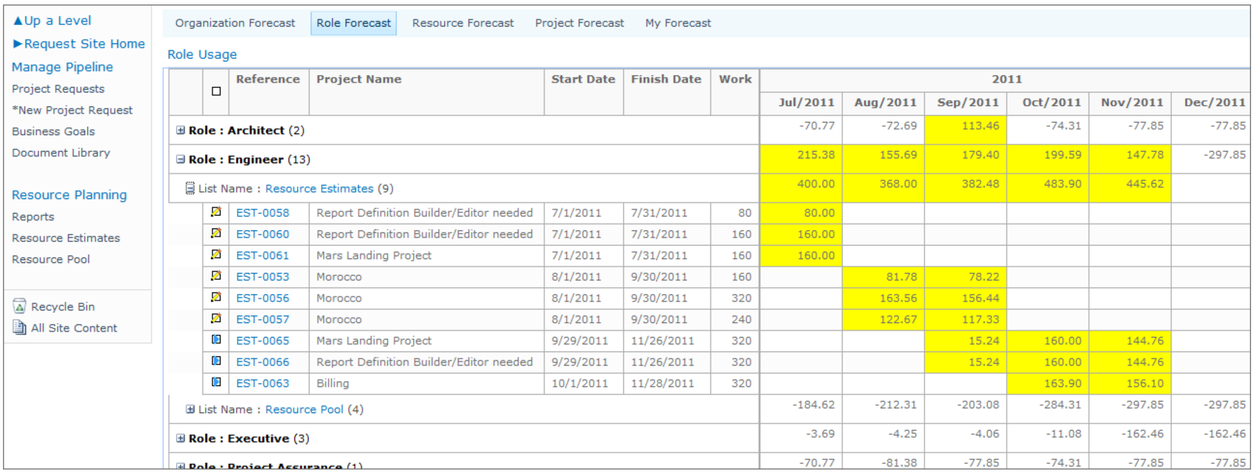
Note: The Resource Pool is optional, as you can use the Resource Estimates list without creating or maintaining a Resource Pool. The Resource Pool enables you to estimate constraints on resource availability.

Department	Role	Resource Name	Resource Type	Start Date	Finish Date	Work (Hrs)	Work (Days)	% Weighting	Status
Services	Project Manager	Peter Doyle	FTE	1/1/2011	12/30/2011	0	230.00	100%	(2) Planned
IT	Project Manager	Alex Hankin	FTE	7/4/2011	9/30/2011	0	60.00	75%	(2) Planned
IT	Tester	Anne Wallace	FTE	7/4/2011	9/30/2011	0	60.00	100%	(2) Planned
IT	Team Manager	Chris Ashton	FTE	7/4/2011	9/30/2011	0	60.00	100%	(2) Planned
IT	Team Member	Dan Bacon	FTE	7/4/2011	9/30/2011	0	60.00	100%	(2) Planned
Marketing	Executive	Tomas Staunton	FTE	7/4/2011	9/30/2011	0	60.00	100%	(2) Planned
IT	Team Manager	Christine Chang	FTE	7/4/2011	9/30/2011	0	60.00	100%	(2) Planned
IT	Project Manager	Fintan Manning	Part-Time	7/4/2011	9/30/2011	0	60.00	75%	(2) Planned
IT	Engineer	Brittany Kwait	FTE	7/4/2011	9/30/2011	0	60.00	100%	(2) Planned
IT	Engineer	Donal McCarthy	Contractor	7/4/2011	9/30/2011	0	60.00	25%	(2) Planned
IT	Architect	Elizabeth Dann	FTE	7/4/2011	12/30/2011	0	115.00	50%	(2) Planned
IT	Project Assurance	Eric Parkinson	FTE	7/4/2011	12/30/2011	0	115.00	50%	(2) Planned
IT	Tester	Jim Corbin	FTE	10/3/2011	12/30/2011	0	55.00	100%	(2) Planned
IT	Engineer	Jonathan Browne	FTE	10/3/2011	12/30/2011	0	55.00	100%	(2) Planned
Marketing	Executive	Eamonn McGuinness	FTE	10/3/2011	12/30/2011	0	60.00	100%	(2) Planned
IT	Engineer	Angela Klee	Consultant	10/3/2011	12/30/2011	0	55.00	100%	(2) Planned
IT	Project Manager	Fintan Manning	FTE	10/3/2011	12/30/2011	0	60.00	100%	(2) Planned

5.3.3 Resource Reports

The Resource Reports enable you to visualize the impact that planned projects (Resource Estimates) will have on available resources (Resource Pool).

The screenshot below shows you a comparison of the Resource Pool vs. the Resource Estimates, with the highlighted cells showing the time periods where you have an undersupply of a particular Role. You might wish to review the other reports provided in this template. You should also remember that you can modify, subtract or add reports at any time using the BrightWork Reporter web part.



	Reference	Project Name	Start Date	Finish Date	Work	2011					
						Jul/2011	Aug/2011	Sep/2011	Oct/2011	Nov/2011	Dec/2011
Role : Architect (2)						-70.77	-72.69	113.46	-74.31	-77.85	-77.85
Role : Engineer (13)						215.38	155.69	179.40	199.59	147.78	-297.85
List Name : Resource Estimates (9)						400.00	368.00	382.48	483.90	445.62	
	EST-0058	Report Definition Builder/Editor needed	7/1/2011	7/31/2011	80	80.00					
	EST-0060	Report Definition Builder/Editor needed	7/1/2011	7/31/2011	160	160.00					
	EST-0061	Mars Landing Project	7/1/2011	7/31/2011	160	160.00					
	EST-0053	Morocco	8/1/2011	9/30/2011	160		81.78	78.22			
	EST-0056	Morocco	8/1/2011	9/30/2011	320		163.56	156.44			
	EST-0057	Morocco	8/1/2011	9/30/2011	240		122.67	117.33			
	EST-0065	Mars Landing Project	9/29/2011	11/26/2011	320			15.24	160.00	144.76	
	EST-0066	Report Definition Builder/Editor needed	9/29/2011	11/26/2011	320			15.24	160.00	144.76	
	EST-0063	Billing	10/1/2011	11/28/2011	320				163.90	156.10	
List Name : Resource Pool (4)						-184.62	-212.31	-203.08	-284.31	-297.85	-297.85
Role : Executive (3)						-3.69	-4.25	-4.06	-11.08	-162.46	-162.46
Role : Project Assurance (1)						-70.77	-81.38	-77.85	-74.31	-77.85	-77.85

6 Portfolio Management: What-if Forecasting

A BrightWork Portfolio is a special type of Project Office that only reports on the sites that you add to it. This is great for creating reporting portfolios of projects that make sense to you; however, you can also use a Portfolio for what-if forecasting.

Note: In this section we will not get you to do any exercises. We will just explain the possibilities and get you to visit an example.

6.1 Scenarios

BrightWork Portfolios support two possible what-if forecasting scenarios:

- Portfolio with Placeholder Sites
- Portfolio with Forecast Manager

6.1.1 Portfolio with Placeholder Project Sites

In this scenario, you have a number of proposed projects, but they warrant more detailed investigation and estimation than is offered by the Resource Estimate list in the Project Forecast Manager template described above.

With the Portfolio approach, you create a placeholder project site, with a WBS and also add estimates for the tasks in the WBS.

You then add these placeholder project sites to a Portfolio. Turning these projects on and off in the Portfolio enables you to visualize the impact the projects would have on your resources.

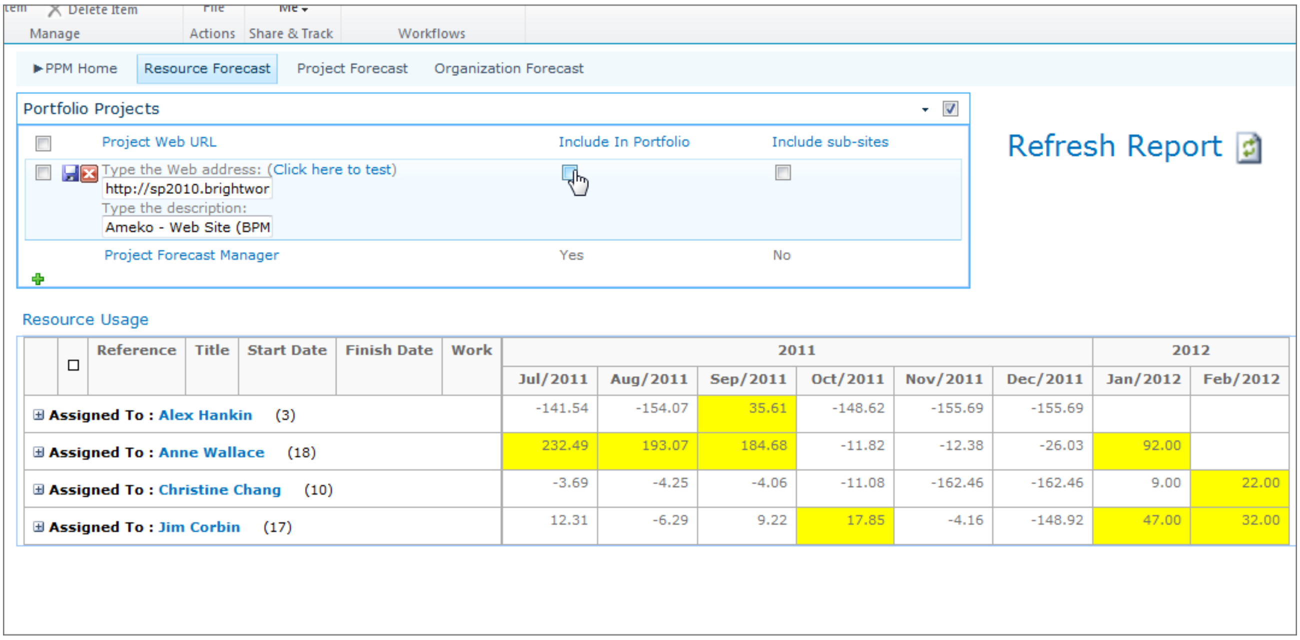
6.1.2 Portfolio with Forecast Manager

In the second scenario you could use the Portfolio to report on all the current projects, but also include the Project Forecast Manager site in the Portfolio.

You could of course also have an element of the first scenario included, i.e. include some project sites that contain estimates only and turn them on and off to see the impact they would have.

You can see an example of a Portfolio site, that also includes a Project Forecast Manager site here: http://sp2010.brightworkdemo.com/sites/pmpoint/Portfolios/ppm/default.aspx

The following screenshot shows existing projects combined with a Project Forecast Manager template. This Portfolio has been customized to emphasize Resource Reports and to better facilitate dynamic changes. For example, the Portfolio Projects view has inline editing enabled, so you can edit the items in the view. There is also a Refresh Report button.



Reference	Title	Start Date	Finish Date	Work	2011 Jul/2011	2011 Aug/2011	2011 Sep/2011	2011 Oct/2011	2011 Nov/2011	2011 Dec/2011	2012 Jan/2012	2012 Feb/2012
Assigned To : Alex Hankin (3)					-141.54	-154.07	35.61	-148.62	-155.69	-155.69		
Assigned To : Anne Wallace (18)					232.49	193.07	184.68	-11.82	-12.38	-26.03	92.00	
Assigned To : Christine Chang (10)					-3.69	-4.25	-4.06	-11.08	-162.46	-162.46	9.00	22.00
Assigned To : Jim Corbin (17)					12.31	-6.29	9.22	17.85	-4.16	-148.92	47.00	32.00

7 Summary and Next Steps

Congratulations on completing the Demand Management with BrightWork training guide.

7.1 Summary

With this guide, you have seen that BrightWork enables you to:

1. Track requests for new projects in a simple Project Requests list added to a Project Office.
2. Track requests with goal mapping, supporting documents and notification workflows in the semi-structured Project Request Manager site template.
3. Track requests as in the Project Request Manager site template, but also move to a fully structured model that includes Resource Estimates, Resource Pool and associated Reports, using the Project Forecast Manager template.
4. Perform what-if analysis using a BrightWork Portfolio, with the option of including Project Forecast Manager.

7.2 Next Steps

Please do contact us about further training and support or so we can talk through and perhaps do a personal live demo showing how BrightWork can meet your specific work and project management needs. Any questions whatsoever can be addressed to info@brightwork.com.

You should also explore TrialZone Sample at http://sp2010.brightworkdemo.com/sites/BrightWork/default.aspx.

7.3 Feedback

Please send any feedback you would like to share with us about this guide, or the templates you exercised in this guide, to feedback@brightwork.com.