

# BrightWork New Release: Introducing Boards!

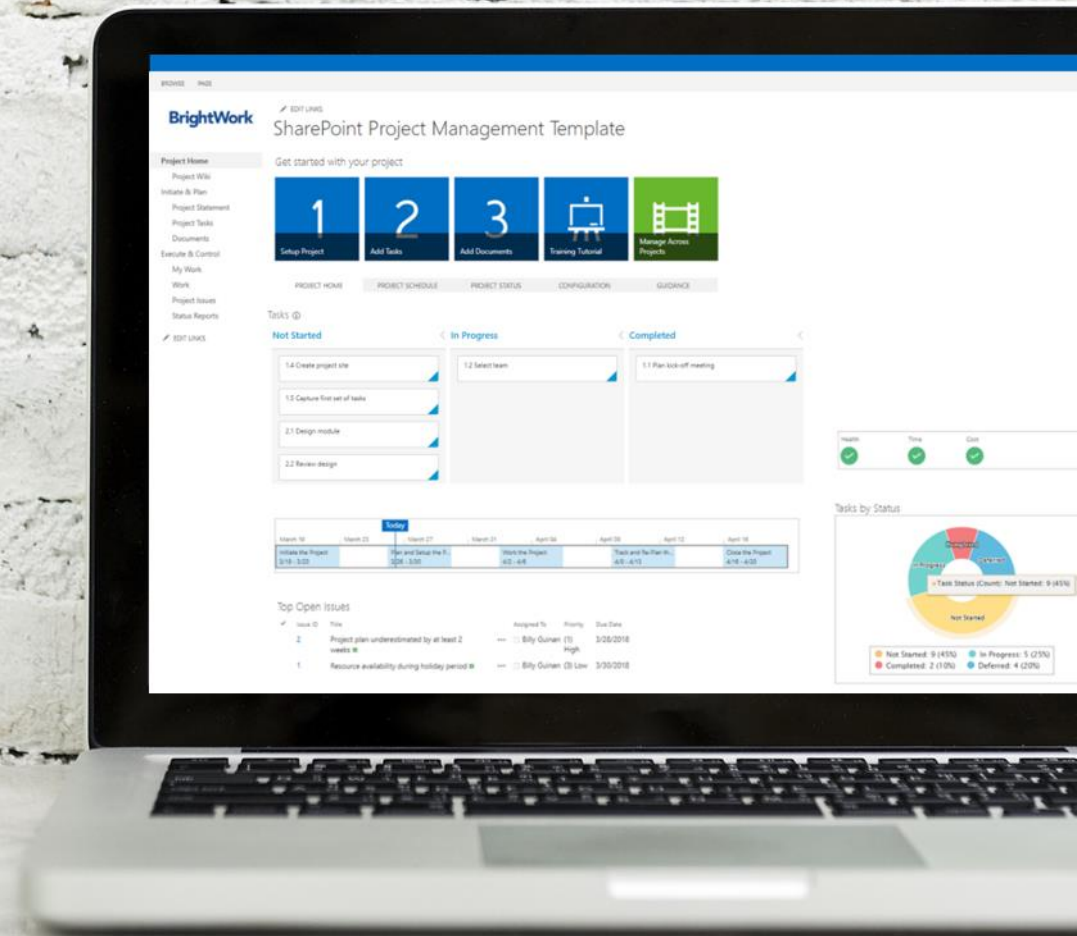
PRESENTED BY:



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**QUICK POLL!**

What version of SharePoint do you use?

# AGENDA

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## ✓ Quarterly Releases

## ✓ What's new in the BrightWork Q2 2018 Release – Demo

1. Manage Work Quickly – Cards on Boards
2. Best Practices in Project Templates – Copy 2013 workflows
3. Project Office Navigation
4. Extending Project Request Manager
5. Nintex Forms – Extending Support
6. Nightly Project Scheduling
7. Chrome Date Jumps
8. Additional Columns in the Cache
9. Release Notes!

## ✓ Q&A covering:

- Latest Release
- Anything ... BrightWork for Project and Portfolio Management

A person is sitting at a desk, writing on a notepad with a yellow highlighter. A laptop is open to the right. The background is slightly blurred, showing a wooden desk and a person's arm in a light blue shirt.

**QUICK POLL!**

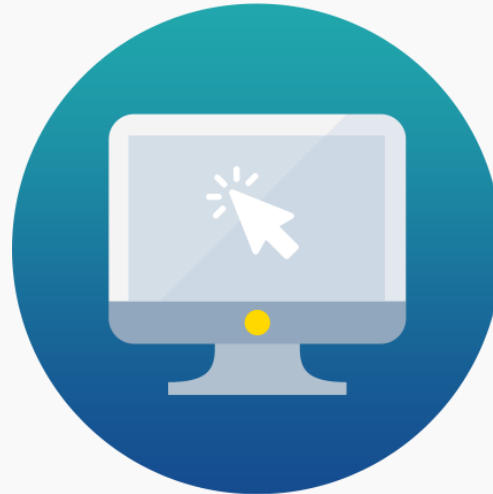
Which of these new capabilities will you find most useful?

# More from 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 Solution Specialist to discuss your requirements.

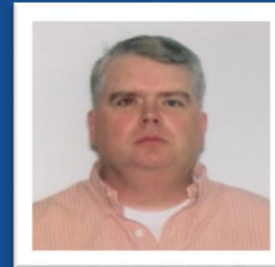
If you would like to set up this call, please leave a comment now (noting any specific needs or challenges) and we will follow up with you shortly!



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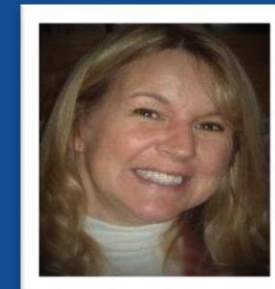
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THANK YOU FOR ATTENDING.

It's time for Q&A!

[WWW.BRIGHTWORK.COM](http://WWW.BRIGHTWORK.COM)

# What's New!



# Boards View

Tasks ⓘ

Not Started

1.4 Create project site

1.5 Capture first set of tasks

2.1 Design module

2.2 Review design

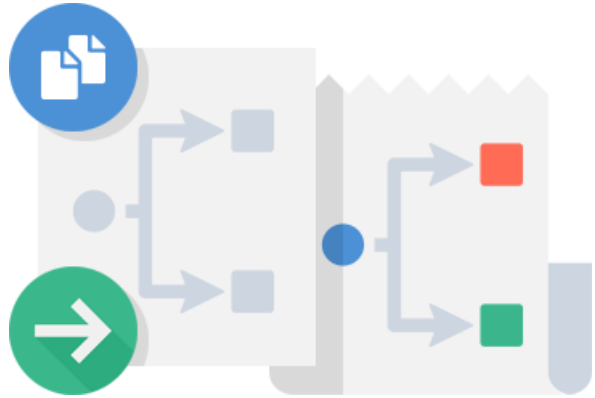
< In Progress

1.2 Select team

< Completed

1.1 Plan kick-off meeting

# Copying and Syncing Workflows



The screenshot shows the SharePoint Workflow Settings page. The top navigation bar includes links for Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, and Templates Area. The main heading is "Settings Workflow Settings". Below the heading are three icons: a copy icon, a sync icon, and a list icon. The page content is divided into two main sections: "Workflows" and "Workflows in Progress".

**Workflows**

Show workflow associations of this type:  
This List

Select a different type to see its workflows.

Workflow Name (click to change settings)

SharePoint 2013 Workflows  
Create n Similar Items

SharePoint 2010 Workflows  
There are no SharePoint 2010 Workflows associated with this list.

▫ Add a workflow

▫ Remove, Block, or Restore a Workflow

**Workflows in Progress**

0

**Project Lite with 2013 W/F**

- Project Help
- Initiate & Plan
  - Tasks Update
  - Task Reports
  - Documents
- Execute & Control
  - My Work Reports
  - Work Reports
  - Issues Update
  - Issue Reports
  - Metrics
  - Status Reporting
- Site Contents

# Project Office Navigation

**Title**  
Type a title and description for your new site.  
[Learn more](#)

**1** Title:  →

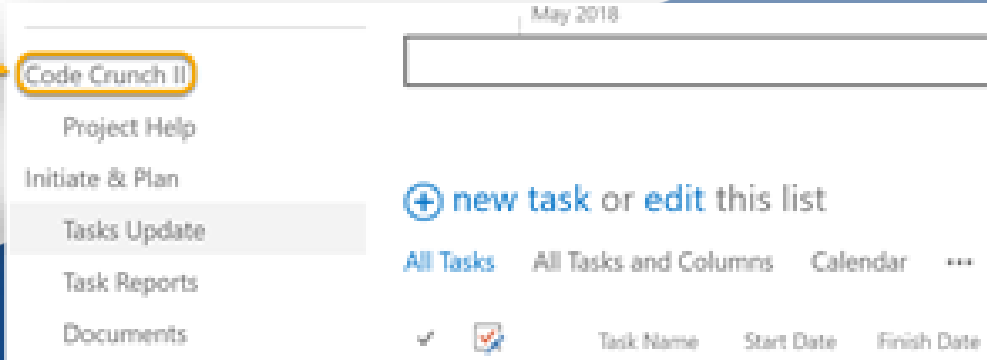
Description:

**2**  Rename Project Home Link → [Create a Project](#)

**Project Title on Quick Launch**  
Select to set the first header link on the Quick Launch to the Project Title.

**Project URL**  
Specify a short URL name for this project site.

URL name:



The screenshot shows a navigation menu with the following items: Code Crunch II (highlighted with a dashed orange arrow from step 1), Project Help, Initiate & Plan, Tasks Update (highlighted with a green arrow from step 3), Task Reports, and Documents. To the right, there is a 'May 2018' calendar header, a '+ new task or edit this list' button, and a list of task links: All Tasks, All Tasks and Columns, and Calendar. Below these are columns for Task Name, Start Date, and Finish Date.

**Project Site Name**



# BrightWork for Project and Portfolio Management.

# 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, and several key sections:

- Project Office Home:** Includes links for All, In Trouble, Status Charts, Gantt, By Status, By Manager, My Projects, and By Exception.
- Get started:** Features two main tiles: "Projects Tracker" and "New Project Site".
- Key Metrics:** Shows two large tiles: "85 Late Items" and "9 Open Issues".
- Project Office Summary:** A table showing project health, time, cost, quality, issues, and finish dates for various projects.
- Project Summaries:** A detailed table listing project names, start/finish dates, and progress bars.
- Status Charts:** A pie chart showing the distribution of project statuses.
- Late Items:** A section at the bottom right showing a list of 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**

# High-level Project Office Dashboards

**BrightWork** Business Project Office (PO) ☰

Home Projects Area Portfolio Reporting Training Area Sample Area Templates Area Archive Area Manage User Accounts

Search this site

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

**Project Office**

- My Work
- Work
- Issues
- Risks
- Resourcing
- Status Reports
- Metrics

**Get started**

- Projects Tracker
- New Project Site

**Key Metrics**

- 62 Late Items
- 9 Open Issues

**Project Hierarchy**

- Business Project Office (PO)
  - Contoso Marketing (PO)
    - Marketing Mini-Projects (PWT)
    - Web Site Build (PG)
  - Contoso Project Office
    - Hardware Upgrade Global
    - High Wire Press Release (PStd)
    - SharePoint Hyper-V Deployment (PL)
    - Support Work Tracker (WT)

**Project Office Summary** ☰

Feb 11-Aug 11, 2018

Health	Time	Cost	Quality	Issues	Finish Date
✖	✖	✔	✖	✖	8/10/2018

**Project Summaries** ☰

Feb 11-Aug 11, 2018

Health	Time	Cost	Project	Start Date	Finish Date
✔	✔	✔	Upgrade Hardware for ...	2/20/2018	8/6/2018
✔	✔	✖	Small Systems Projects	5/22/2018	8/6/2018
✔	✔	✔	Setup SharePoint Serve...	5/25/2018	8/9/2018
✔	✔	✔	Training for Finance Dept.	7/17/2018	8/9/2018
✔	✔	✔	SharePoint Hyper-V De...	5/12/2018	5/12/2018
✔	✔	✔	Hardware Upgrade Glo...	2/13/2018	6/2/2018
✔	✔	✔	Monthly email revamp	2/20/2018	3/17/2018

# Department-level views

**BrightWork** Contoso Marketing (PO)

Home Projects Area Portfolio Reporting Training Area Sample Area Templates Area Archive Area Manage User Accounts

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**

17 Late Items 2 Open Issues

**Project Hierarchy**

- Contoso Marketing (PO)
  - Marketing Mini-Projects (PWT)
  - Web Site Build (PG)

**Project Office Summary**

Health	Time	Cost	Quality	Issues	Finish Date
✖	✖	✔	✖	🚩	8/10/2018

**Project Summaries**

Health	Time	Cost	Project	Start Date	Finish Date
✔	✔	✔	Monthly email revamp	2/20/2018	3/17/2018
✔	✔	✔	Website content review	3/19/2018	7/16/2018
✔	✔	🚩	Social media campaign	4/16/2018	5/17/2018
✔	✔	✔	Web Site Build (PG)	4/16/2018	8/10/2018



# Track work, issues and risks by project

**BrightWork** Issues - Open Items

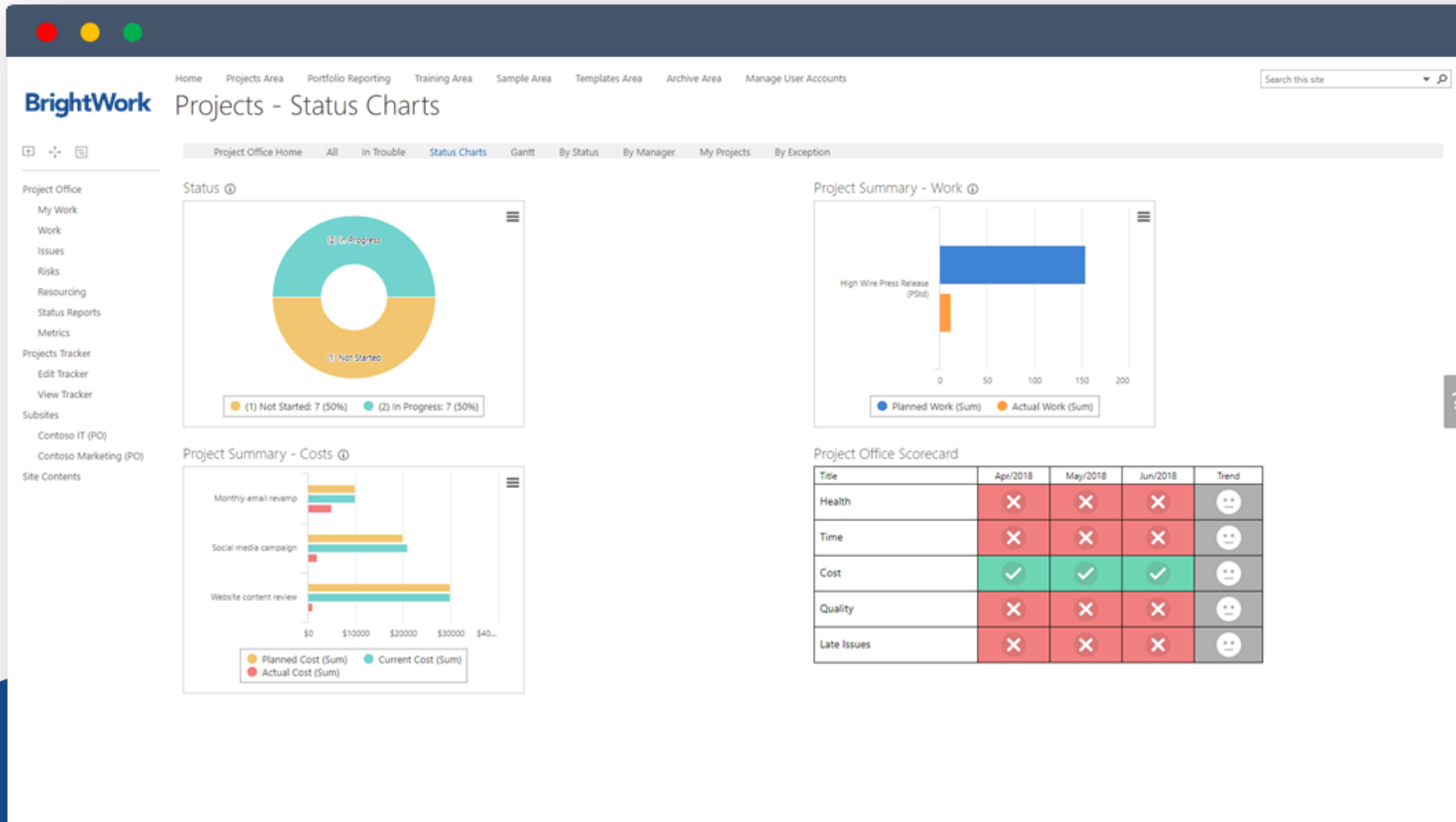
Home Projects Area Portfolio Reporting Training Area Sample Area Templates Area Archive Area Manage User Accounts

Open Issues Red & Yellow Issues Overdue Issues My Issues Issues By Status Closed Issues All Issues

Open Issues

Title	Owner	Assigned To	Start Date	Finish Date	Due Date	Planned Work	% Complete
<b>Project : Hardware Upgrade Global (3)</b>							
List Name : Project Issues (3)							
Initial Cost Estimate does not include developer tools				11/30/2017	11/30/2017		0%
Staff Leave				11/30/2017	11/30/2017		0%
Time could be delayed with install of new dev tools				12/1/2017	12/1/2017		10%
<b>Project : High Wire Press Release (PStd) (3)</b>							
List Name : Project Issues (3)							
Team Training not up to date	Billy Guinan			4/20/2018	4/20/2018		15%
Should we wait until more employees are on holidays	Billy Guinan		4/20/2018	4/26/2018	4/26/2018		75%
Office costs are falling, should we wait longer?	Billy Guinan		4/18/2018	4/24/2018	4/24/2018		25%
<b>Project : Marketing Mini-Projects (PWT) (1)</b>							
List Name : Project Issues (1)							
<b>Project : SharePoint Hyper-V Deployment (PL) (1)</b>							
List Name : Project Issues (1)							
<b>Project : Web Site Build (PG) (1)</b>							
List Name : Project Issues (1)							

# Metrics, KPIs and scorecards



# View projects by status (e.g. Projects In Trouble)

The screenshot displays the BrightWork software interface. At the top, there is a navigation bar with links for Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts. A search bar is located on the right side of the navigation bar. The main heading is 'Projects - In Trouble'. Below this, there is a sub-navigation bar with options: Project Office Home, All, In Trouble (selected), Status Charts, Gantt, By Status, By Manager, My Projects, and By Exception. The main content area shows a table of projects in trouble. The table has columns for Health, Time, Cost, Issues, Project, Project Manager, Start Date, Finish Date, Due Date, and progress bars. The projects listed are: Setup SharePoint Server Farm, Hardware Upgrade Global, Install new OS, and Install new wireless network for IT. The left sidebar contains a 'Project Office' section with links for My Work, Work, Issues, Risks, Resourcing, Status Reports, Metrics, Projects Tracker, Edit Tracker, View Tracker, Subsites (Contoso IT (PO), Contoso Marketing (PO)), and Site Contents.

Health	Time	Cost	Issues	Project	Project Manager	Start Date	Finish Date	Due Date	Progress
!	✓	✓		Setup SharePoint Server Farm		5/25/2018	8/9/2018	8/10/2018	<div style="width: 100%;"></div>
!	✓	✓	✗	Hardware Upgrade Global		2/13/2018	6/2/2018		<div style="width: 100%;"></div>
!	✓	✓		Install new OS		5/23/2018	8/7/2018	8/7/2018	<div style="width: 100%;"></div>
!	✓	✗		Install new wireless network for IT		5/24/2018	8/8/2018	8/8/2018	<div style="width: 100%;"></div>

# Automated project reporting

**BrightWork**

Project Office  
My Work  
Work  
Issues  
Risks  
Resourcing  
Status Reports  
Metrics  
Projects Tracker  
Edit Tracker  
View Tracker  
Subsites  
SharePoint Hyper-V Deployment (PL)  
High Wire Press Release (PStd)  
Hardware Upgrade Global (PStr)  
Support Work Tracker (WT)  
Site Contents

**Item Settings**  
Specify the Scheduled Report Item Title and whether this report will be processed by the timer job.  
Activate Scheduled Email to include this item in the Scheduled Report Email Timer Job.  
[Learn more about Scheduled Report Emails.](#)

**Schedule Frequency**  
Specify the frequency of the email.  
 Daily  
 Weekly  
 Monthly  
On:  Sun  Mon  Tue  Wed  Thu  Fri  Sat

**Email From**  
Specify the email address or the user that the email should come from.  
 Specify a User  
Anne Wallace  
 Specify an Address

**Email To**  
Specify who will be the recipients of the scheduled report.  
To:   
Billy Guinan

**Email Subject and Body**  
Specify the email subject and body.  
Subject:   
Body: 

```
Hi Anne,

Here is your daily update on all open issues in the Contoso Project Office
```

**URL Handling**  
This allows you to select the zone that the URLs contained in this scheduled email report will be associated with.  
Uri Zone:

Web Part Page  
BrightWork Pages/Issues - Open Items.aspx  
Web Part Title  
Open Issues  
Item Title \*  
  
Active  
 Activate Scheduled Email

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**BrightWork**

[www.brightwork.com](http://www.brightwork.com)