

Senior Executive

Who Is This Guide For?

This guide is aimed primarily at Senior Executives and Program Managers who need to maintain oversight of work and projects across an entire project portfolio in the organization. In this training guide you'll learn about reporting features available with BrightWork 365.

Prerequisites

If you are new to BrightWork 365 and the Microsoft Power Platform, we recommend you first complete the [Basic Orientation](#) and [Team Member](#) training guides.

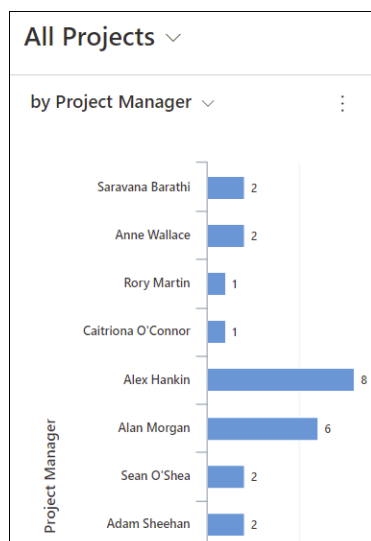
If you will be more directly involved in managing projects, we recommend that you complete the [Project Manager](#) training guide prior to using this guide.

Report Types

In this section you will learn about the different report types available in BrightWork 365. There are a number of cross-table and cross-project report types that can be used for a range of scenarios.

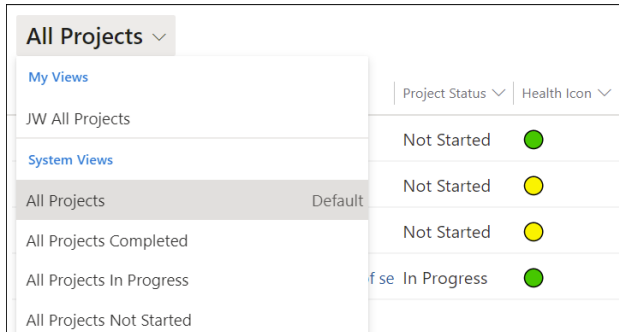
Chart Reports

Chart reports can be [configured](#) to display data from across project records in visual reports such as Pie, Bar, and 3D.



Area Report Views

Through the use of [System](#) views and [Personal "My"](#) views in the Requests, Projects, and Portfolios areas, you can easily obtain crucial project and portfolio information from a single screen. These reports have multiple variations allowing you to zoom in on just the specific data you need.



View	Project Status	Health Icon
Not Started	Not Started	Green
Not Started	Not Started	Yellow
Not Started	Not Started	Yellow
In Progress	In Progress	Green

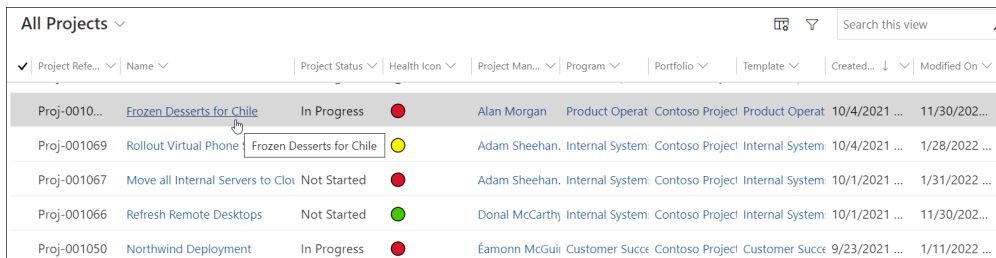
Power BI Dashboards

If your organization is licensed for Microsoft Power BI, there are a number of additional [dashboard reports](#) available in BrightWork 365.

Project Management Reports

Project

BrightWork 365 Project reports, which can be accessed from the Projects link in the nav bar, display high-level information about individual projects. These reports are best for focusing on high-level details, but they also offer an easy way to drill down into very specific project information by clicking on various hyperlinks in each row.



Project Refe...	Name	Project Status	Health Icon	Project Man...	Program	Portfolio	Template	Created...	Modified On
Proj-0010...	Frozen Desserts for Chile	In Progress	Red	Alan Morgan	Product Operat	Contoso Project	Product Operat	10/4/2021 ...	11/30/202...
Proj-001069	Rollout Virtual Phone	Not Started	Yellow	Adam Sheehan	Internal System	Contoso Project	Internal System	10/4/2021 ...	1/28/2022 ...
Proj-001067	Move all Internal Servers to Clo	Not Started	Red	Adam Sheehan	Internal System	Contoso Project	Internal System	10/1/2021 ...	1/31/2022 ...
Proj-001066	Refresh Remote Desktops	Not Started	Green	Donal McCarthy	Internal System	Contoso Project	Internal System	10/1/2021 ...	11/30/202...
Proj-001050	Northwind Deployment	In Progress	Red	Éamonn McGuil	Customer Succ	Contoso Project	Customer Succ	9/23/2021 ...	1/11/2022 ...

Issues

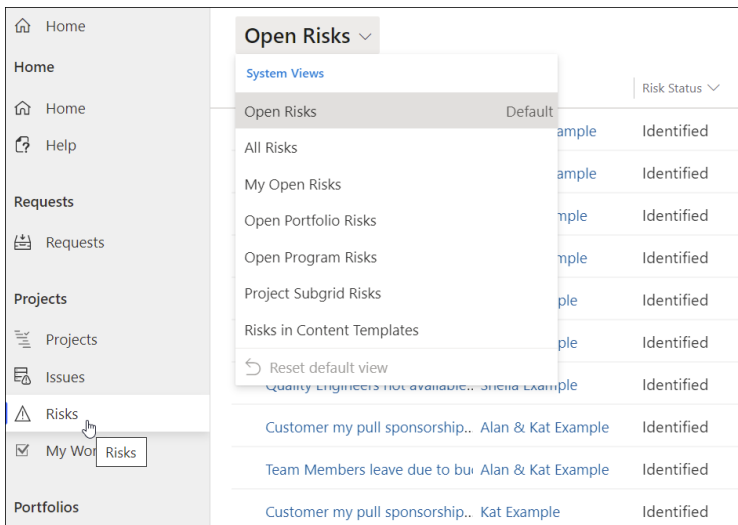
The Issues reports display all the issue items created within project records, with the option to switch between different views.

Issues Report View in the Projects Area

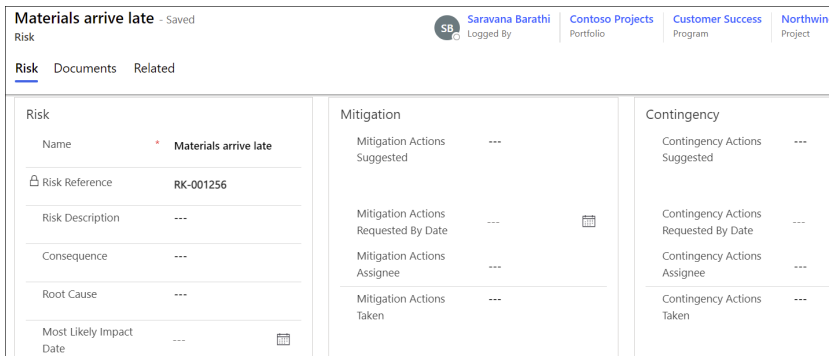
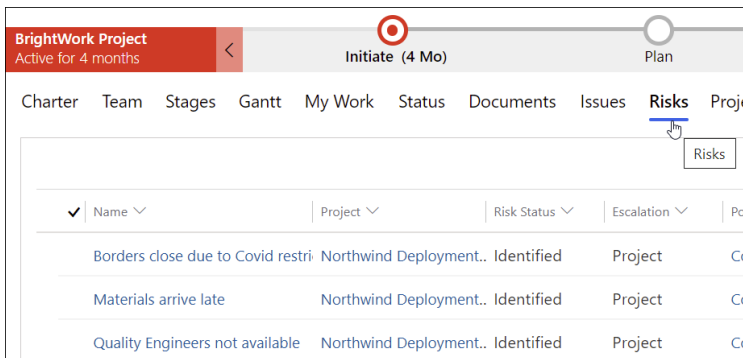
Issues Tab in the Project Record

Risks

Project Area Risk reports allow you to quickly see items across projects that have been identified as potential future issues, with Status, Impact, Exposure, and other relevant risk details. There are also various report views available for viewing the risks.



Risks can be easily logged from within project records.



Portfolio Reports

Portfolio reports allow you to see the highest level information about the portfolios that have been created within BrightWork 365.

All Portfolios								Search this view
Name	Portfolio Status	Health	Portfolio Mana...	Current Start	Current Finish	Portfolio Type	Modified On	
Contoso Projects	In Progress	●	Christine Chang	7/2/2021	9/13/2022	Regular	1/31/2022 11:...	

Program reports display high-level information about the programs that fall under the portfolio(s). There are various views available to focus on programs with different criteria, and new personal views can be created as well.

All Programs							
My Views							
All Programs	Program Status	Health	Program Man...	Current Start			
System Views	Projects. Not Started	●	---	9/6/2021			
All Programs (Default)	Projects. In Progress	●	Eamonn McGuinn	7/2/2021			
Inactive Programs	Projects. In Progress	●	Adam Sheehan	7/2/2021			
Reset default view	Projects. In Progress	●	Alan Morgan	9/6/2021			
Company Operations	Contoso Projects. Not Started	●	Scott Footlik	9/6/2021			
Marketing	Contoso Projects. Not Started	●	Fintan Manning	9/6/2021			
Accounts Receivable	Contoso Projects. Not Started	●	Christine Chang	1/17/2022			

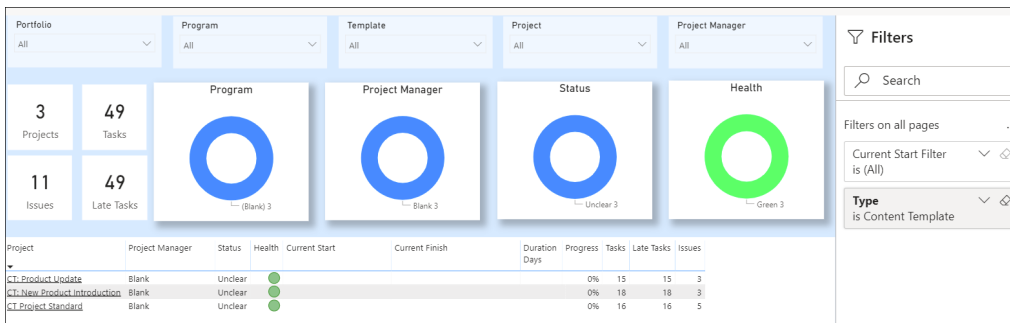
BrightWork 365 Dashboard with Power BI

Note In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

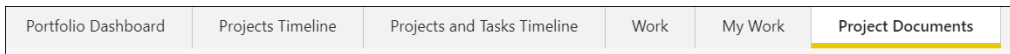
Together BrightWork 365 and the Microsoft Power BI business analytics tool provide exceptional data visualization functionality.

To view the [Dashboard](#) and use out of the box reports, click into **Portfolios | Dashboard**. Additional Power BI reports can be added as desired.

The Dashboard includes detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart objects, or with the **Filters** configuration options on the side of the screen.



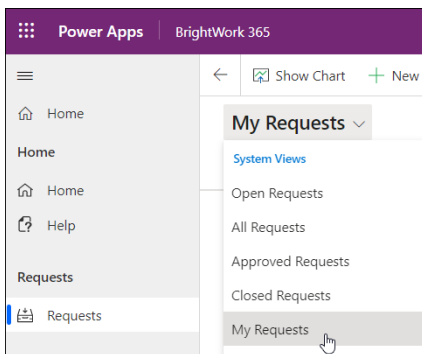
At the bottom of the Dashboard screen there are tabs for additional report focus options.



Project Requests

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests in the navigation area and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down list.



Manage Project Requests

As part of your role in program and project management you may be asked to participate in the project request approval process. BrightWork 365 has a robust solution for managing the entire lifecycle of project requests including an approval mechanism. For detailed project request submission and approval details see the [Requests](#) section of this knowledge base.

For additional detailed information see our related [articles and videos](#).

