Work Allocation Reports

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Project Management Context

In order to mitigate any potential lack of visibility and communication leading to challenges for project team members, BrightWork 365 provides an easy method to find and report on work using a team-focused project management approach.

Managing resource allocation effectively is fundamental to project success as it helps in controlling costs, optimizing productivity, minimizing risks, ensuring quality, maintaining timelines, and satisfying stakeholders.

BrightWork 365 provides a number of rollup work-related reports for the various types of work that can be assigned to project team members.

Power Apps Dashboards

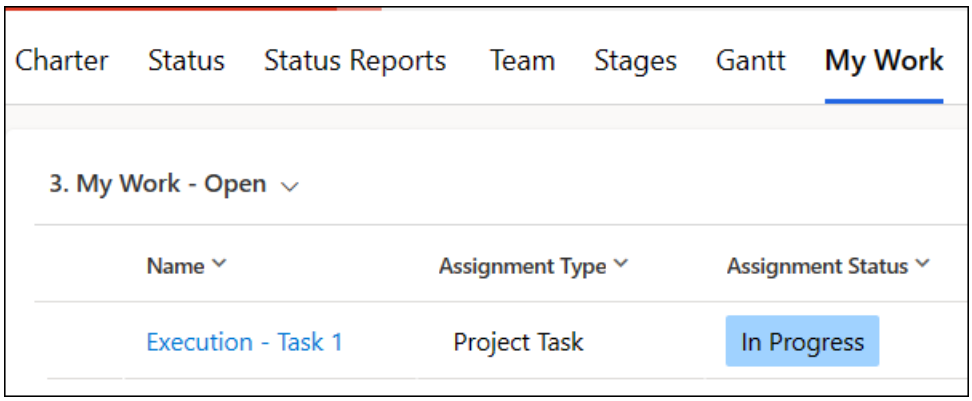
> **Tip** When grouping is applied in Views, you will need to double-click on links in order to open them.

My Work

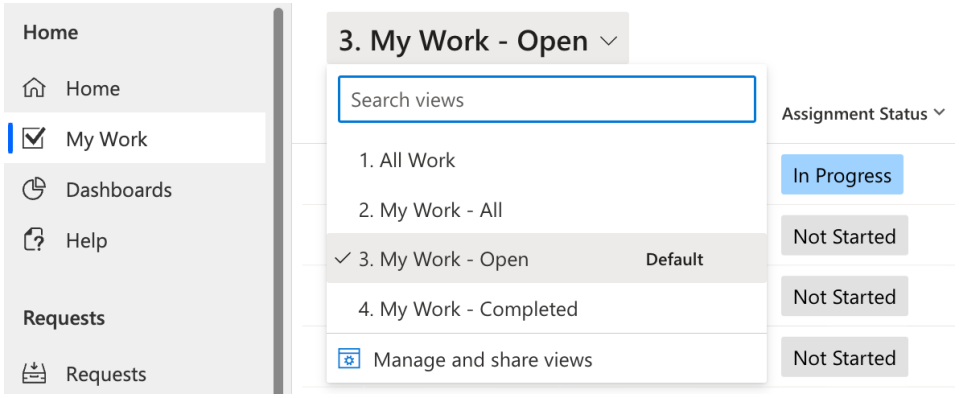
A quick way to find the work assigned to you is to use the My Work report. This report displays all the work items where the user viewing the report is the assignee of the work item in question.

The My Work report rolls up all assignments for the logged in user either in an individual project or across all projects, depending on where the **My Work** link is clicked.

To view all work assigned to you as the logged in user for one specific project, click into the **My Work** tab within the project.



To view all work assigned to you as the logged in user across all projects, click into the **My Work** link on the main nav. Users can choose from a variety of report views with use of the drop-down selector (including the 'All Work' view to view work assigned to all assignees), and with the sorting and filter options.



- Work assignments from Cost, Issues, Risks, Actions, and Tasks in the My Work report can be opened by clicking on the assignment name.
- Percent Complete is editable in the form for Tasks, Stages, Deliverables and Milestones. The percent complete slider can be adjusted in the form, but no updates will be made until the changes are saved via the toolbar option i.e., Save / Save & Close.
- The Mark Complete action for work assignments provides users with the ability to mark work as Complete or Not Started with a single click interaction. If a work assignment has multiple assigned users and it is being marked Complete by one of the assignees, an alert will be presented asking for confirmation of the status change.
- The field **Task Work (Hours)** is present on work-related forms, allowing resources to view the

individual work hours specifically assigned to them when work tasks are split with other resources.



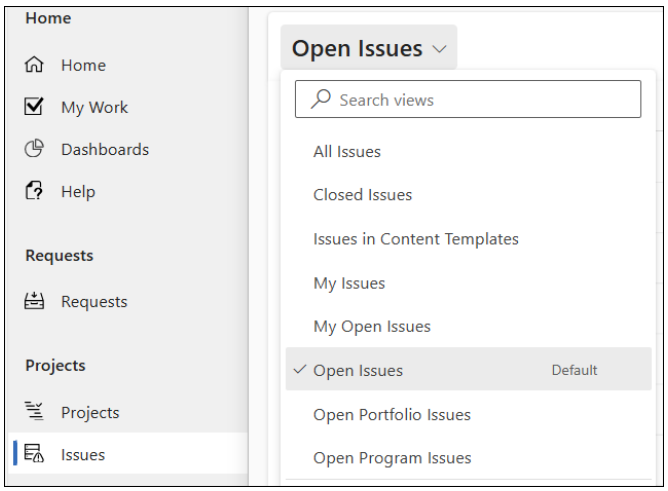
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Note

- Deleting a work item from My Work only deletes the assignment to the resource, not the underlying work item itself.
- Summary Tasks (tasks that have child tasks indented under them) are not editable in My Work views.
- Parent tasks will be updated accordingly when its child tasks are set to Not Started or Complete in My Work.
- If an Issue, Cost or Action has a status of Cancelled or On Hold, then the user will not be able to mark the assignment as Complete/Not Started in My Work. They will need to manually go into the assignment and change the status.
- If a summary task contains a milestone task in the associated Gantt Chart, in addition to a regular task that is complete, the summary task will display 'In Progress' instead of Complete. The value will be 99. This is known behavior.
- Filtering and sorting are not available on the Complete column. Sorting is not available on any calculated columns, i.e., Due Date.
- Concurrency is not supported for marking tasks as complete.

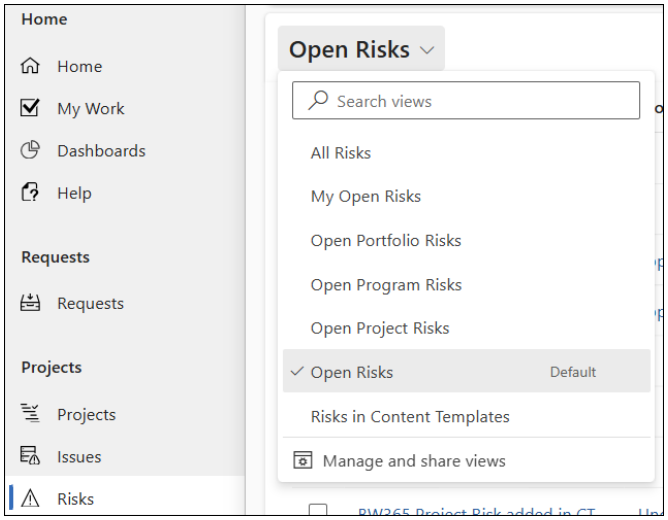
Issues

The Issues report rolls up all issues recorded throughout all projects. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



Risks

The Risks report rolls up all risks recorded throughout all projects. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



> **Tip** Assignments for Risks can be marked Complete for the individual Mitigation Action Assignments and Contingency Action Assignments without the overall Risk Status being set to Closed.

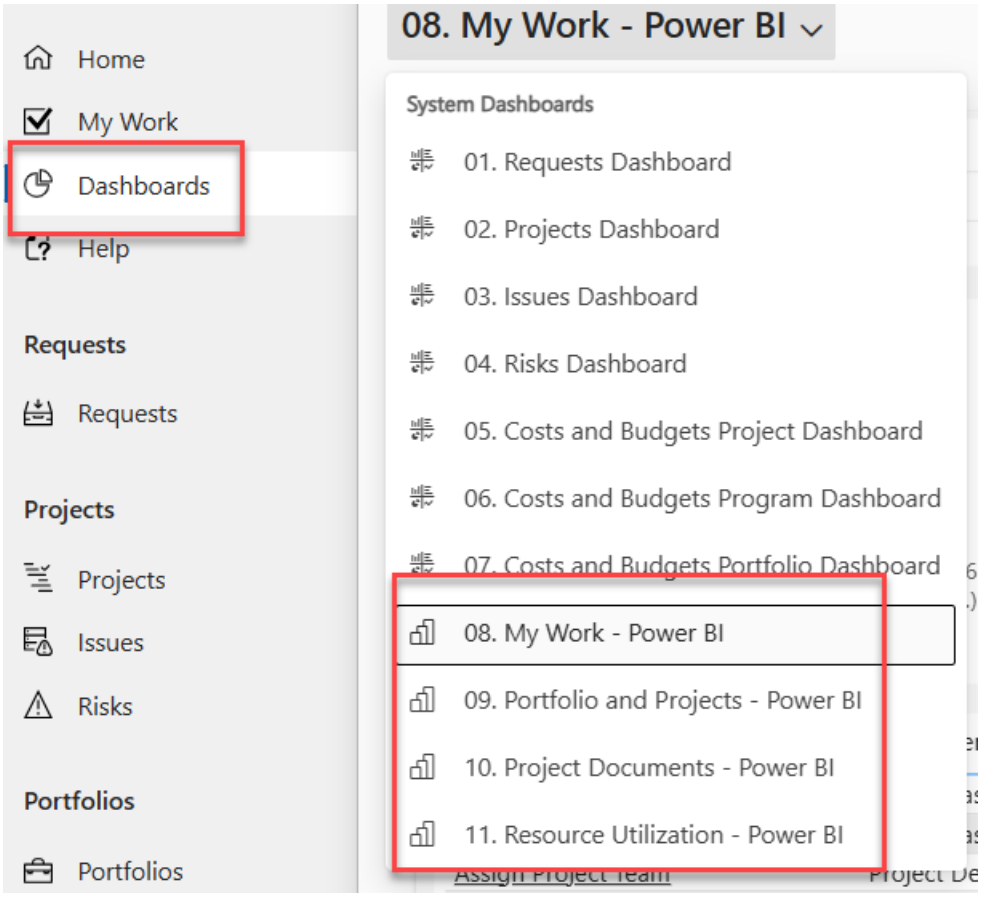
Power BI Dashboards

Work Allocation Reports

> **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 Power BI), and at least Viewer permission for the relevant Power BI Workspace.
- For dashboards that indicate Late and Overdue work: "Late" means the Start Date has been missed, and "Overdue" means the Finish Date has been missed.

With the pairing of BrightWork 365 and Microsoft Power BI, there are many resource-related dashboard report options available for your team to review and analyze. As with other Power BI reports, the work reports are interactive, and details can be zoomed into by clicking into the various chart regions.



Note As referenced in the Install Guide, in order for the My Work Power BI reports to function properly for a user they must be added to the Power BI Workspace with Viewer access (Admin access will display work for all users, not just for themselves), and to the user security group for the report dataset.