Sample Training Syllabus

Introduction

This role-based training content is used by our BrightWork Customer Success Partners as part of BrightWork 365 Service Offerings. This sample content can be adjusted by the BrightWork Champion along with the Customer Success Partner to ensure proper tracking with the customer's custom solution.

We recommend working through the roles in the order presented, starting with the BrightWork Champion role to setup the necessary app elements for further use by the other roles.

1-BrightWork Champion

Approximately 4 hours

BrightWork Champion Introduction

- What is a BrightWork Champion?
- What is a BrightWork Customer Success Partner?
- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- BrightWork User Management
- BrightWork Security Roles Details
- Frequently Asked Questions (see bottom of page)

Portfolios & Programs

- Portfolios Overview
- Create a Portfolio
- Create a Program
- Practical Exercise:
    - Create one portfolio and a program within the portfolio.
    - Change the Priority level to Medium in the portfolio and program.

Requests

- Request Process Overview
- Create a Project Without a Request
- Practical Exercise:
    - Submit a project request using the Project Structured template.
    - Create a project without a request.

Projects

- Projects Overview
- Schedule Settings
- Task Management
- Project Stage Approval Process
- Risks & Issues
- Actions
- Costs
- Communications
- Document Management
- Status Reporting
- Practical Exercise:
    - In the project created earlier, add a Stage type task and several child tasks.
    - Create dependencies between the child tasks.
    - Assign yourself to the tasks.
    - Add a risk and an issue to the project and assign yourself to them.

Work Allocation Reports (My Work, Tasks, Issues, etc.)

- Work Allocation Reports Overview
- Resource Utilization Overview
- Practical Exercise:
    - Find the work assigned to you within the project and also from the main nav.
    - Change the status or the work assigned to you.

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search
- Practical Exercise:
    - Post a comment in a project's Microsoft Teams Channel.
    - Export work assignments to a spreadsheet.

Power BI Dashboards

- Power BI Dashboards Overview
- Practical Exercise (if you have Power BI access):
    - Find the work assigned to you in all relevant Power BI Dashboards.

Customization

- Customization Overview
- Request Template & Project Template Configuration

- [Form Configurator](#)
- [Content Templates](#)
- [Power BI Customization](#)

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2-Project Manager

Approximately 4 hours

Project Manager Introduction

- [What is BrightWork 365?](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [Projects Area Components](#)
- [Frequently Asked Questions](#)

Requests

- [Request Process Overview](#)
- [Create a Project Without a Request](#)
- Practical Exercise:
  - Submit a project request using the Project Structured template.
  - Create a project without a request.

Projects

- [Projects Overview](#)
- [Schedule Settings](#)
- [Task Management](#)
- [Project Stage Approval Process](#)
- [Risks & Issues](#)
- [Actions](#)
- [Costs](#)
- [Communications](#)
- [Document Management](#)
- [Status Reporting](#)
- Practical Exercise:
  - In the project created earlier, add a Stage type task and several child tasks.
  - Create dependencies between the child tasks.
  - Assign yourself to the tasks.
  - Add a risk and an issue to the project and assign yourself to them.

Work Allocation Reports (My Work, Tasks, Issues, etc.)

- [Work Allocation Reports Overview](#)

- Resource Utilization Overview
- Practical Exercise:
    - Find the work assigned to you within the project and also from the main nav.
    - Change the status or the work assigned to you.

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search
- Practical Exercise:
    - Post a comment in a project's Microsoft Teams Channel.
    - Export work assignments to a spreadsheet.

Power BI Dashboards

- Power BI Dashboards Overview
- Practical Exercise (if you have Power BI access):
    - Find the work assigned to you in all relevant Power BI Dashboards.

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3-Team Member

Approximately 1 hour

Team Member Training Topics

- What is BrightWork 365?
- Navigating BrightWork 365
- Projects Area Components
- Find Assigned Work and Update Progress
- Document Management
- Microsoft Teams
- Configure a Personal View
- Practical Exercise

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4-Senior Executive

Approximately 1 hour

Senior Executive Introduction

- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- Frequently Asked Questions

Requests

- Request Process Overview
- Create a Project Without a Request
- Practical Exercise:
    - Submit a project request using the Project Structured template.
    - Create a project without a request.

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search
- Practical Exercise:
    - Post a comment in a project's Microsoft Teams Channel.
    - Export work assignments to a spreadsheet.

Power BI Dashboards

- Power BI Dashboards Overview
- Practical Exercise (if you have Power BI access):
    - Find the work assigned to you in all relevant Power BI Dashboards.

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