

Sample Training Syllabus

Note For BrightWork 365 versions older than v1.6 see [Prior Release Training Guides](#).

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 2 hours

BrightWork 365 Overview

- [What is a BrightWork Champion?](#)
- [What is BrightWork 365?](#)
- [BrightWork 365 Structure](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)
- [BrightWork User Management](#)
- [Frequently Asked Questions](#)

Portfolios & Programs

- [Use Case Discussion](#)
- [Create a Portfolio](#)
- [Create a Program](#)
- [Exercise](#)

Requests

- [Use Case Discussion](#)
- [Project Request Approval Process](#)
- [Create a Project Without a Request](#)
- [Exercise](#)

Starter Project Templates

- [Starter Template Details](#)
- [Project Stage Approval Process](#)
- [Task Management](#)
- [Documents](#)
- [Status Reporting](#)
- [Exercise](#)

Work Reports (Issues, Risks, My Work)

- Use Case Discussion
- Work Allocation Reports
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Customization

- Customization Overview
 - Request Template & Project Template Configuration
 - Content Templates
 - Power BI Customization
-

Open Forum Q&A

2-Project Manager

Approximately 2 hours

BrightWork 365 Overview

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- Frequently Asked Questions

Requests

- Use Case Discussion
- Project Request Approval Process

- [Create a Project Without a Request](#)
- [Exercise](#)

Starter Project Templates

- [Starter Template Details](#)
- [Project Stage Approval Process](#)
- [Task Management](#)
- [Documents](#)
- [Status Reporting](#)
- [Exercise](#)

Work Reports (Issues, Risks, My Work)

- [Use Case Discussion](#)
- [Work Allocation Reports](#)
- [Demo](#)
- [Exercise](#)

Interface

- [System & Personal Views & Charts](#)
- [Document Management](#)
- [Microsoft Teams](#)
- [Microsoft Excel](#)
- [Search](#)

Power BI Reports

- [Use Case Discussion](#)
 - [Power BI Reports Overview](#)
 - [Demo](#)
 - [Exercise](#)
-

Open Forum Q&A

3-Team Member

Approximately 1 hour

Training Topics

- [Navigating BrightWork 365](#)
- [Find Assigned Work and Update Work Progress](#)
- [Document Management](#)
- [Microsoft Teams](#)
- [Configure a Personal View](#)

- Exercise
-

Open Forum Q&A

4-Senior Executive

Approximately 1 hour

BrightWork 365 Overview

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- Frequently Asked Questions

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
 - Power BI Reports Overview
 - Demo
 - Exercise
-

Open Forum Q&A
