

Project Manager

Who Is This Guide For?

This guide is primarily aimed at Project Managers who will be using BrightWork 365 to manage projects. However, this guide will also be useful for any member of the organization who will be using BrightWork 365 extensively.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- [What is BrightWork 365?](#)
- [BrightWork 365 Structure](#)
- [Technologies Used](#)
- [Navigating BrightWork 365](#)

Submit a New Project Request

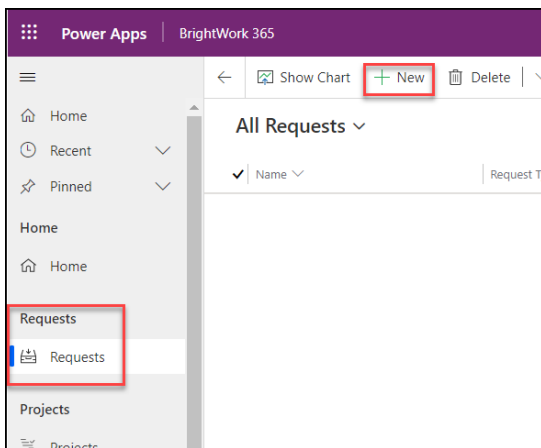
Tip

- An element of project governance is determining which projects might be an exception to the need for a formal project request, e.g., a project being moved into BrightWork 365 from outside the solution. For these projects you can consider using a Project Request No Approval template or by [creating a project directly](#) without a request.
- For more information beyond what is in this Getting Started section, see the [Requests category](#) and [videos](#).

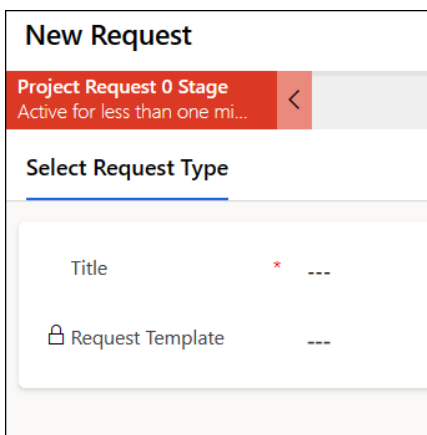
The BrightWork 365 project management process typically begins in **Requests**. Here you can choose from different [project templates](#) for an efficient and consistent way to create new projects.

To submit a new project request:

1. On the main nav click **Requests** and then click **+ New**.



2. Provide a **Title** for the request and select a **Request Template** to serve as the foundation from which to base the new project.

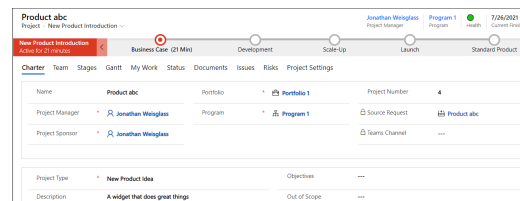
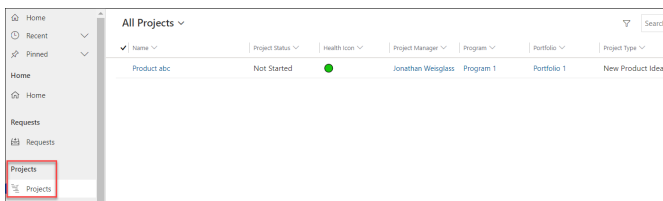


3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request** to start the [project request approval process](#).

Manage a Project

Tip For more information beyond what is in this Getting Started section, see the **Projects** knowledge base [category](#) and [videos](#).

After your new project is created click into **Projects** on the main nav to see a list report of all projects. Click on your project link and its various tabs to display project information and to make any necessary updates as the project flows through its lifecycle.

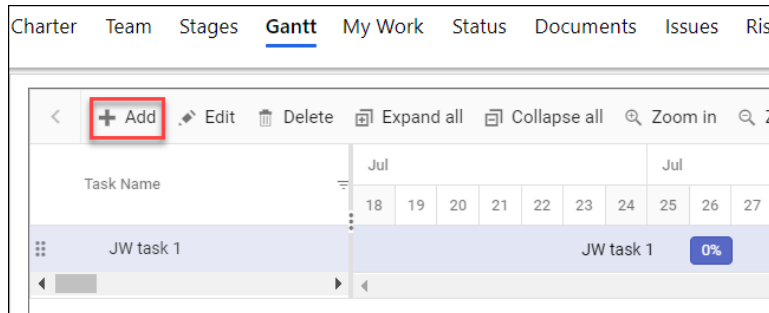


Charter

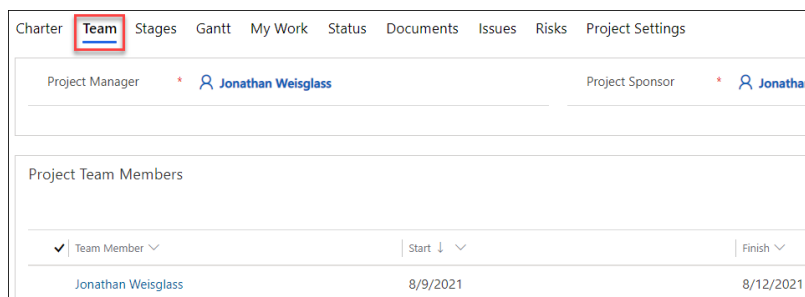
After your project is created you will find Charter columns available for you to add high level details about the project, beyond what was included in the project request form.

Gantt

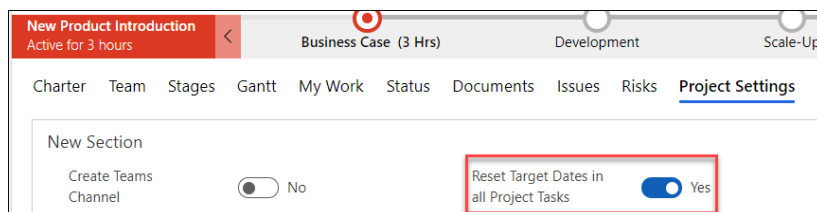
Click into the Gantt tab and update any tasks that were included as part of the template that the project was based on and add new tasks you and the team decide should be included in the project.



As you assign tasks to colleagues the Team section of the project will automatically populate associated assignee and task date information.



After the project team agrees on the task structure and dates, you can lock-in the schedule by baselining it - in the **Project Settings** tab choose **Yes** for **Reset Target Dates in all Project Tasks**.



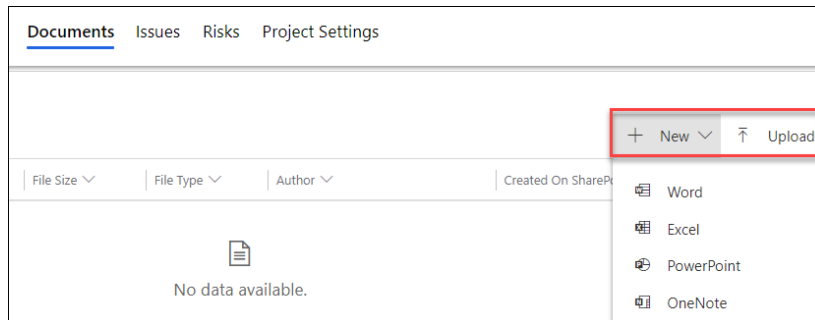
Risks

Prior to finalizing your Gantt Chart and tasks, it's advisable to conduct a risk identification exercise with your project team to determine if additional task planning is necessary,

including the addition of more tasks and/or adjusting existing task details.

Documents

In the Documents section you have the option to create a new Microsoft Office document or upload external documents to the project's associated SharePoint library as deliverables get drafted.

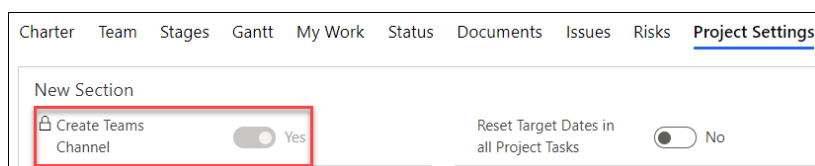


Issues

What's a project without issues? Unplanned events that negatively affect project scope, schedule, or quality are inevitable to arise throughout the execution of projects. Use the Issues tab to capture and manage these events and the activities employed to resolve them.

Create a Microsoft Teams Channel

It's a best practice to create a Microsoft Team for every program (see below), and to create a Team Channel in Project Settings for every project in the program.



See the [Microsoft Teams](#) article for more details about configuring Microsoft Teams integration.

View Reports

Tip For more information beyond what is in this Getting Started section, see the [Portfolios](#) knowledge base [category](#) and [videos](#).

Portfolio Reports

In the **Portfolios** section of BrightWork 365 you can check on the health and status of Portfolios, Programs, and all assigned work.

Portfolios

All Portfolios ▾							Search
✓ Name ↑ ▾	Progress Status ▾	Health i ▾	Portfolio Manager ▾	Current Start ▾	Current Finish ▾	Portfolio Type ▾	
Portfolio 1	Not Started	●	Jonathan Weisglass.	8/9/2021	8/12/2021	Regular	

Programs

All Programs ▾								Search
✓ Name ▾	Portfolio ▾	Program Status ▾	Health i ▾	Program Mana... ▾	Current Start ▾	Current Finish ▾	Program Type ▾	
Program 1	Portfolio 1	In Progress	●	---	8/9/2021	8/12/2021	Regular	

My Work

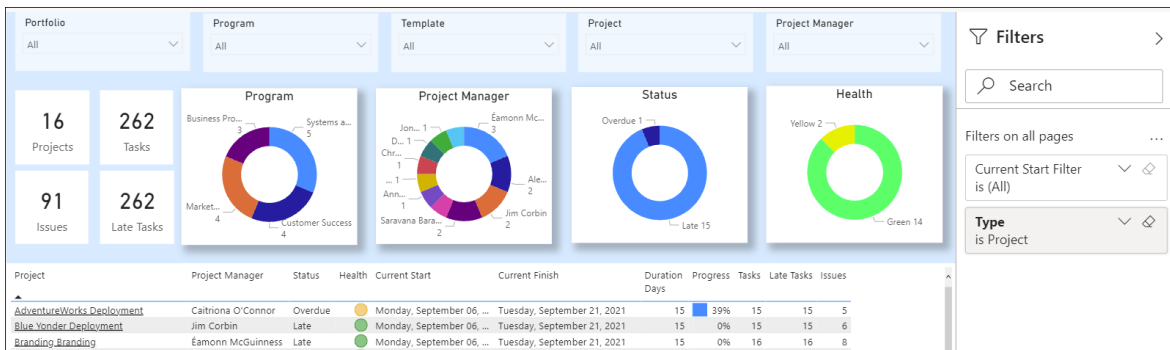
My Work + ▾						Search this view
✓ Created On ↓ ▾	Name ▾	Project ▾	Assignment Type ▾	Current Start ▾	Current Finish ▾	
8/6/2021 3:06 PM	JW task 1	Product abc	Project Task	8/9/2021	8/12/2021	

Power BI 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 PBI), and at least Viewer permission for the relevant Power BI Workspace.

Power BI dashboard reports allow for interactive analysis of critical project and portfolio data.

Dashboard



See the [Power BI Reports](#) article for more details.

What's Next?

If you'd like to dive into the granular details of Power Apps for business users, check out the related [article](#).