

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

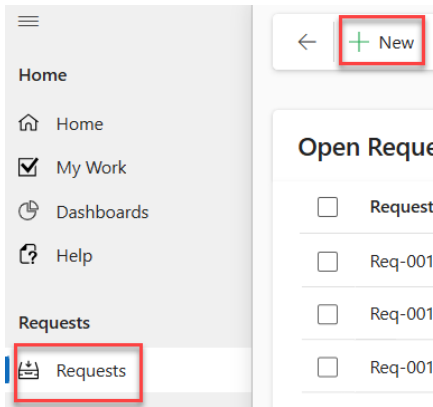
Tip

- 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.

A screenshot of a 'New Request' form. At the top, it says 'New Request' and 'Project Request 0 Stage' with a subtext 'Active for less than one mi...'. Below this is a section titled 'Select Request Type'. There are two input fields: 'Title' with a red asterisk and a dropdown arrow, and 'Request Template' with a dropdown arrow.

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.

The screenshot shows a project management dashboard. On the left is a sidebar with navigation options: Home, My Work, Dashboards, Help, Requests, Projects (highlighted), and Issues. The main content area is titled 'All Projects' and lists several projects with checkboxes: Name, Website Redesign, Acme Solution Dej, JTB Demo Project, Blue Yonder Soluti, Data Centre Server, and Employee Onboar. Below this is a detailed view for the 'BrightWork 365 Project', which is 'Active for 27 months'. It features a progress bar with 'Initiate' and 'Plan (26 Mo)' stages. A navigation bar includes tabs for Charter (selected), Status, Status Reports, Team, Gantt, My Work, Documents, and Related. Below the tabs is a table with project details:

Name	* AdventureWorks Office Move (Pro...	Portfolio	* Con
Project Reference	Proj-001019	Program	* Con

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.

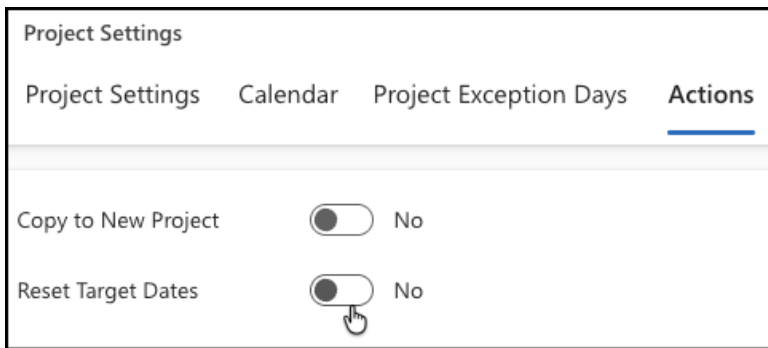
Tasks

Click into the Tasks tab and use either Gantt or Grid subtab to update any tasks that were included as part of the template that the project was based on (if any) and add new tasks you and the team decide should be included in the project.

As you assign tasks to colleagues the Team tab 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 choosing to Reset Target Dates:

1. Select the project's **Charter** tab.
2. Click the **Settings and Actions** link.
3. In the Actions tab, of Settings and Actions, click **Reset Target Dates**.

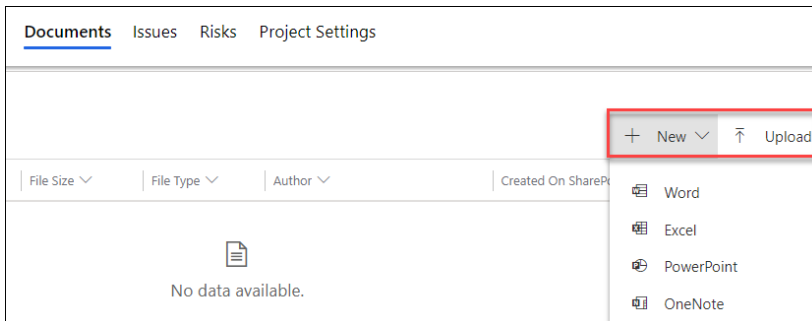


Risks

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 [connect](#) the project with one of your organization's pre-existing SharePoint document libraries, or Microsoft Teams Channel document libraries. Once connected, within the project you can create new Microsoft Office documents or upload external documents.



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.

Connect a Microsoft Teams Channel

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

Review Other Project Settings Elements

Click on the **Project Settings** tab and review all remaining elements such as Set Health Automatically and Schedule Settings.

Charter Status Status Reports Team Stages Gantt My Work Documents Actions Issues Risks Costs Communications **Project Settings**

Name	* Social Media Campaign (Project St...	Reference Type	Automatic	Create Teams Channel	Yes
Type	Project	Project Creation Method	Requests	Copy to New Content Template	No
Project Template	Contoso Project Standard	Microsoft Team		Reset Target Dates in all Project Tasks	No
Owner	Alex Hankin (Offline)	Schedule Settings	Social Media Campaign (Project...	Set Health Automatically	Yes

Note Only a project's actual project manager and users with the **BrightWork PMO Manager** or **BrightWork Program Manager** security role can access the **Project Settings** tab.

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	Portfolio Manager	Current Start	Current Finish	Portfolio Type	
Portfolio 1	Not Started	●	Jonathan	8/9/2021	8/12/2021	Regular	

Programs

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

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.

See [Power BI Dashboards Overview](#) 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](#).
