Senior Executive

Who Is This Guide For?

This guide is aimed primarily at Senior Executives and Program Managers who need to maintain oversight of work and projects across an entire project portfolio in the organization. In this training guide you'll learn about reporting features available with BrightWork 365.

Prerequisites

If you are new to BrightWork 365 and the Microsoft Power Platform, we recommend you first complete the Basic Orientation and Team Member training guides.

If you will be more directly involved in managing projects, we recommend that you complete the Project Manager training guide prior to using this guide.

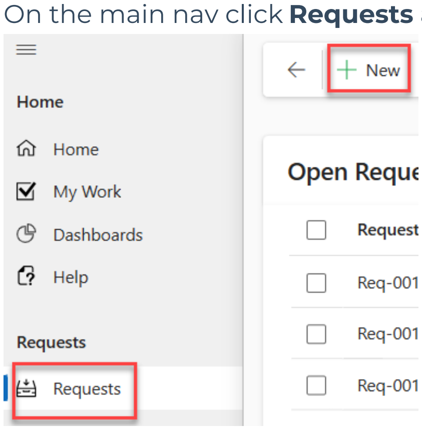
Submit a New Project Request

Tip For more information beyond what is in this Getting Started section, see the **Requests** knowledge base category and videos.

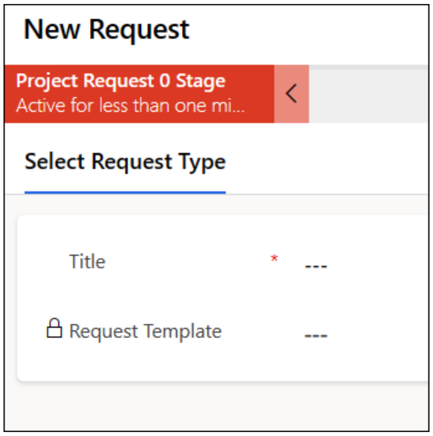
The BrightWork 365 project management process typically begins in the Requests Area. Here you can choose from different project templates for an efficient and consistent way to create new projects.

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.

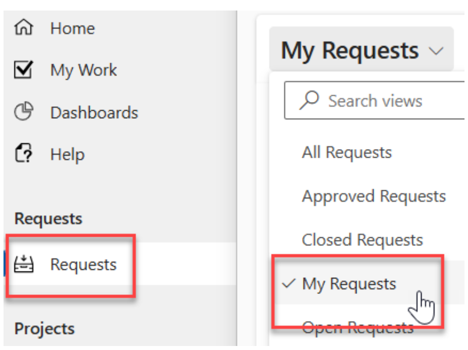


3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request**.

Note: Users who only have the **BrightWork Request Submitter** security role will only see the **Requests** link on the main nav and not the other sections of the full app such as **Projects** and **Portfolios**.

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests on the nav and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down view list.



Manage Project Requests

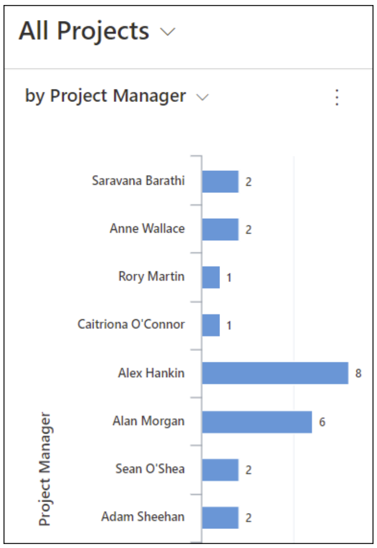
As part of your role in program and project management you may be asked to participate in the project request approval process. BrightWork 365 has a robust solution for managing the entire lifecycle of project requests including an approval mechanism. For detailed project request submission and approval details see the Requests section of this knowledge base.

Report Types

In this section you will learn about the different report types available in BrightWork 365. There are a number of cross-table and cross-project report types that can be used for a range of scenarios.

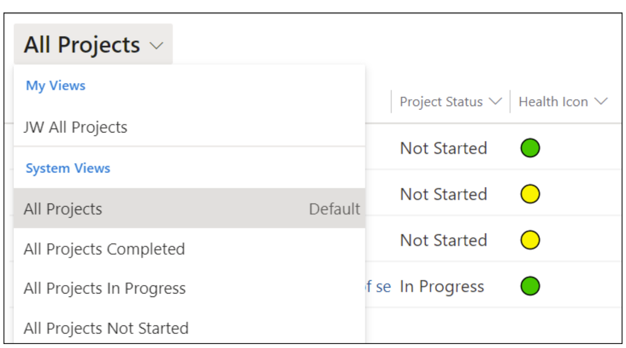
Chart Reports

Chart reports can be configured to display data from across project records in visual reports such as Pie, Bar, and 3D.



Area Report Views

Through the use of System views and Personal "My" views in the Requests, Projects, and Portfolios areas, you can easily obtain crucial project and portfolio information from a single screen. These reports have multiple variations allowing you to zoom in on just the specific data you need.



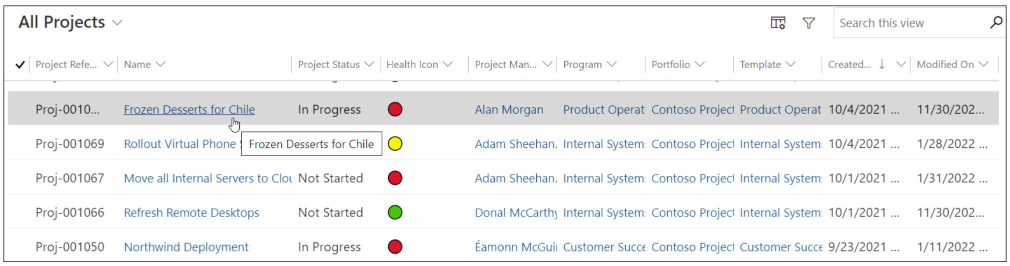
Power BI Dashboards

If your organization is licensed for Microsoft Power BI, there are a number of additional dashboard reports available in BrightWork 365.

Project Management Reports

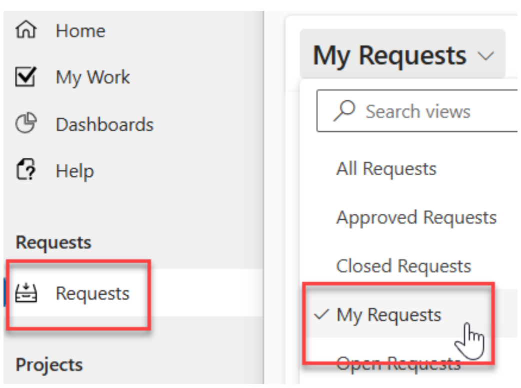
Project

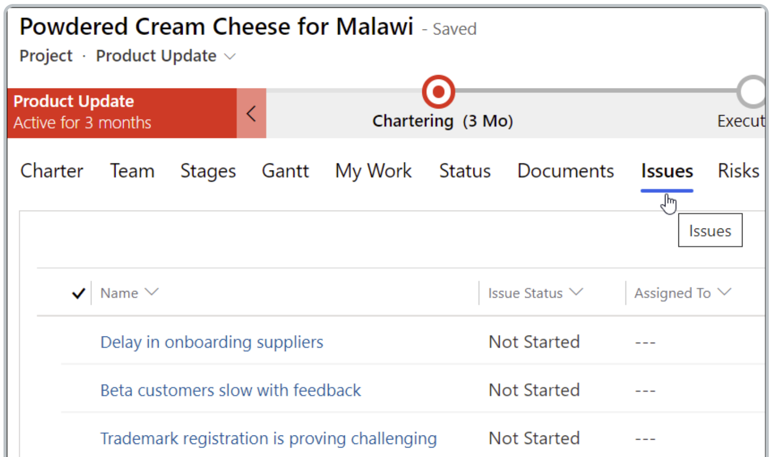
BrightWork 365 Project reports, which can be accessed from the **Projects** link on the nav bar, display high-level information about individual projects. These reports are best for focusing on high-level details, but they also offer an easy way to drill down into very specific project information by clicking on various hyperlinks in each row.



Issues

The Issues reports display all the issue items created within project records, with the option to switch between different views.

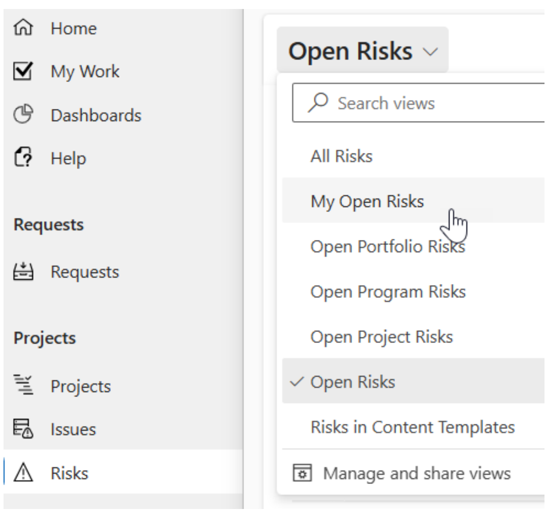




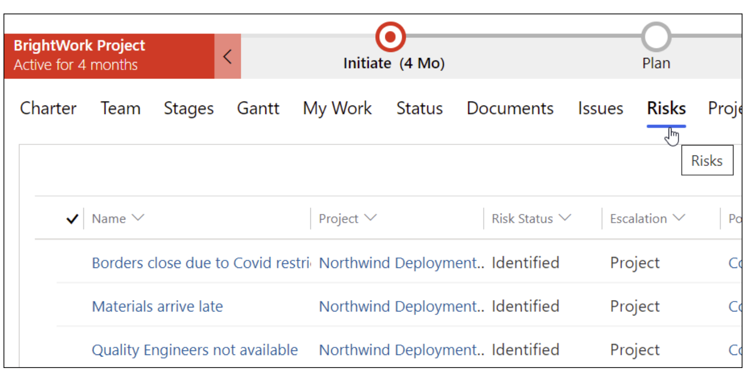
Issues Tab in the Project Record

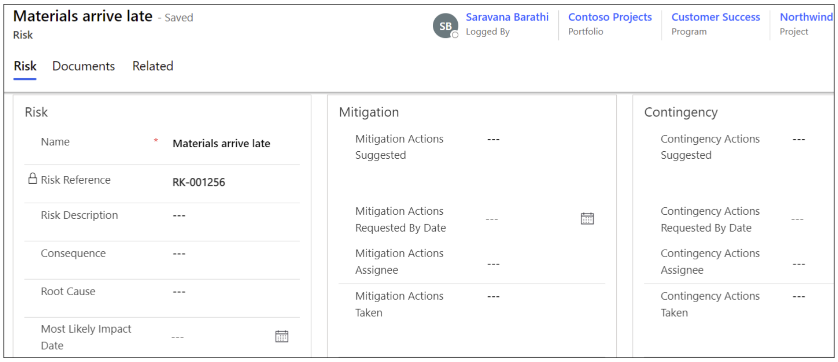
Risks

Project Area Risk reports allow you to quickly see items across projects that have been identified as potential future issues, with Status, Impact, Exposure, and other relevant risk details. There are also various report views available for viewing the risks.



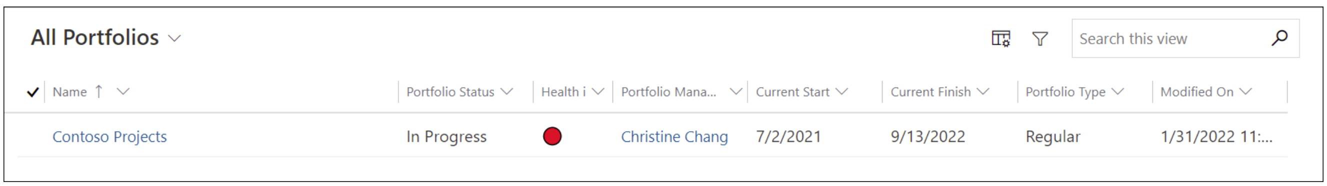
Risks can be easily logged from within project records.



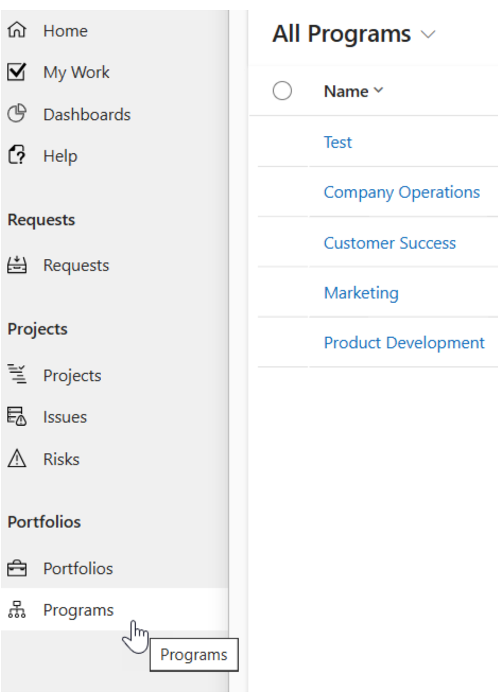


Portfolio Reports

Portfolio reports allow you to see the highest level information about the portfolios that have been created within BrightWork 365.



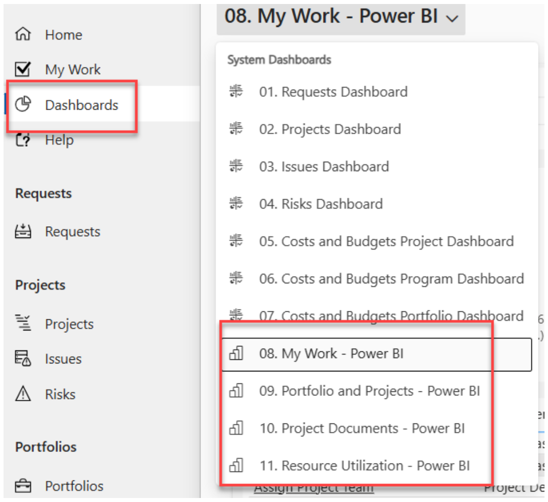
Program reports display high-level information about the programs that fall under the portfolio(s). There are various views available to focus on programs with different criteria, and new personal views can be created as well.



BrightWork 365 Power BI Dashboards

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.

With the pairing of BrightWork 365 and Microsoft Power BI, there are many 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.