

# Sample Training Syllabus

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

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 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 | BrightWork Security Roles Details](#)
- [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](#)
- [Document Management](#)
- [Status Reporting](#)
- [Exercise](#)

## Work Reports (My Work, Tasks, Issues, Risks)

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

- [Navigating BrightWork 365](#)
- [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](#)
- [Document Management](#)
- [Status Reporting](#)
- [Exercise](#)

## Work Reports (My Work, Tasks, Issues, Risks)

- [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

---