Catalog of Customizations

Introduction

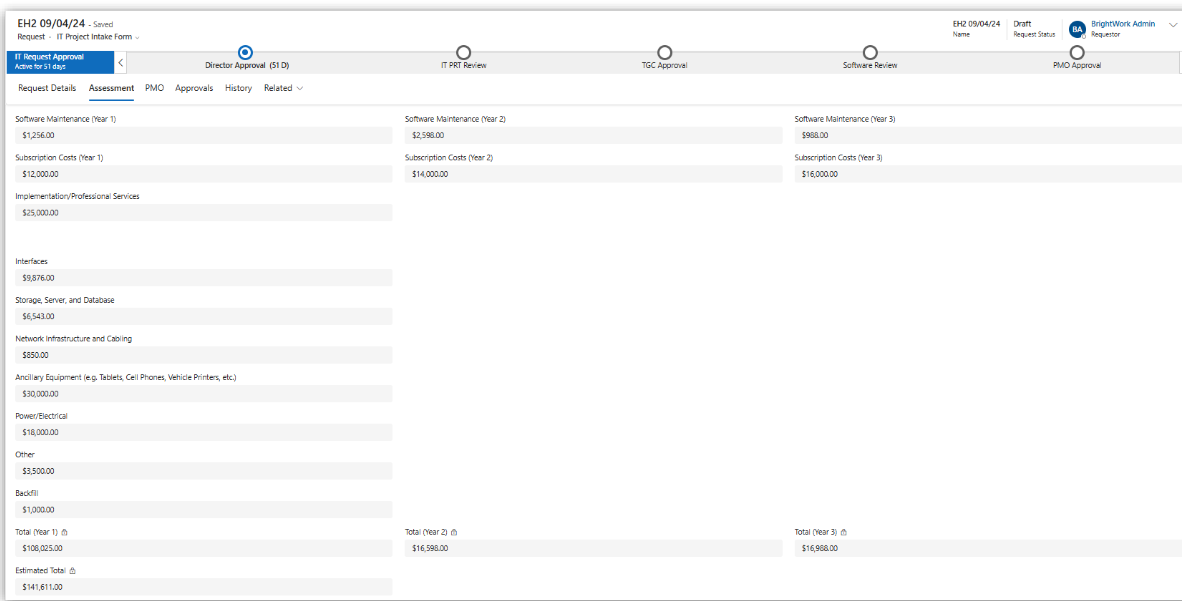
BrightWork 365 out of the box can satisfy the most critical aspects of project and portfolio management and can be configured to provide the added flexibility your organization may need. To take the solution even further, and to provide even more capabilities as your organization's needs adapt over time, BrightWork offers paid solution customization services. This article provides a catalog of some of the customizations that have been successfully deployed for customers.

We hope this article helps you think of new and interesting ways that BrightWork 365 can be used to power your projects. Please contact your Customer Success Partner for additional information.

> **Tip** New customization examples will be added to this article periodically.

Requests

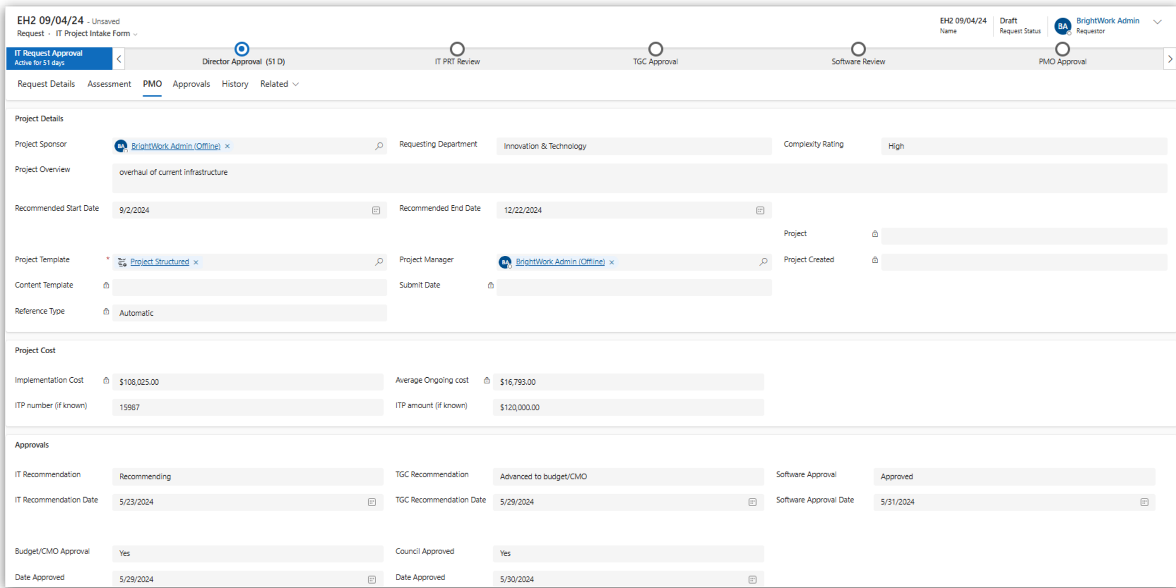
Request Assessment Tab



Challenge	Solution

• Request approvers require a good deal of extra preliminary information in order to make an informed approval decision. • Without the specific additional data required for the decision-making process, projects may be erroneously approved or denied, or projects may be approved without the proper planning information.	• Creation of a custom Assessment tab in a request template, with all the necessary fields required for the organization to make the correct approval decisions.

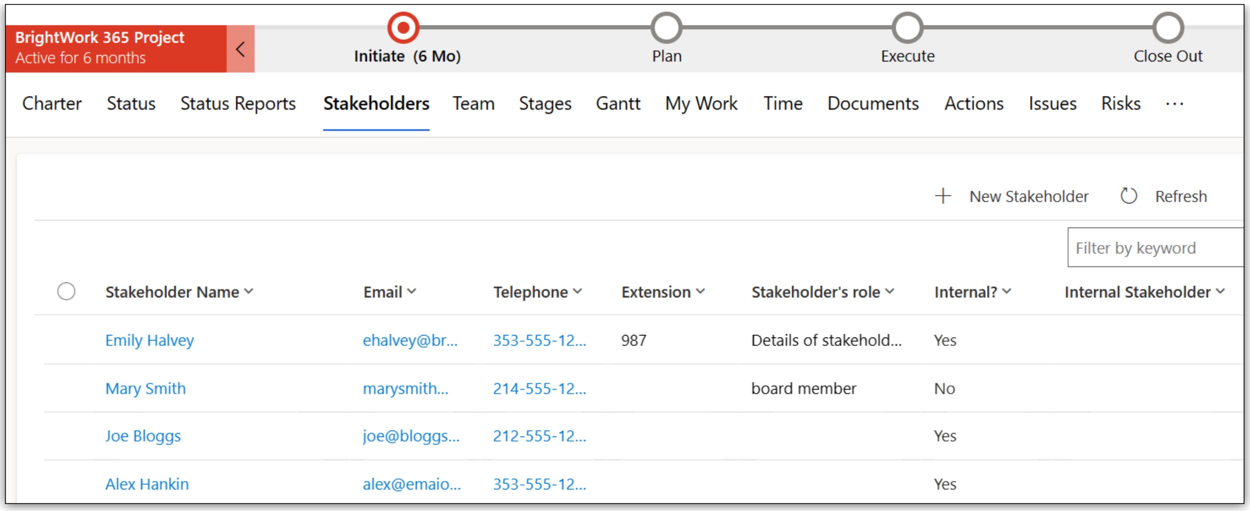
Request PMO Tab



Challenge	Solution
• After an initial assessment of a new project request is completed, the next level of stakeholders (Project Management Office, Senior Executives, etc.) require an additional set of data in order to make the final approval decision.	• With the addition of a PMO tab on the Request form, additional information can be gathered and reviewed to further inform the decision of whether or not to approve a new project request.

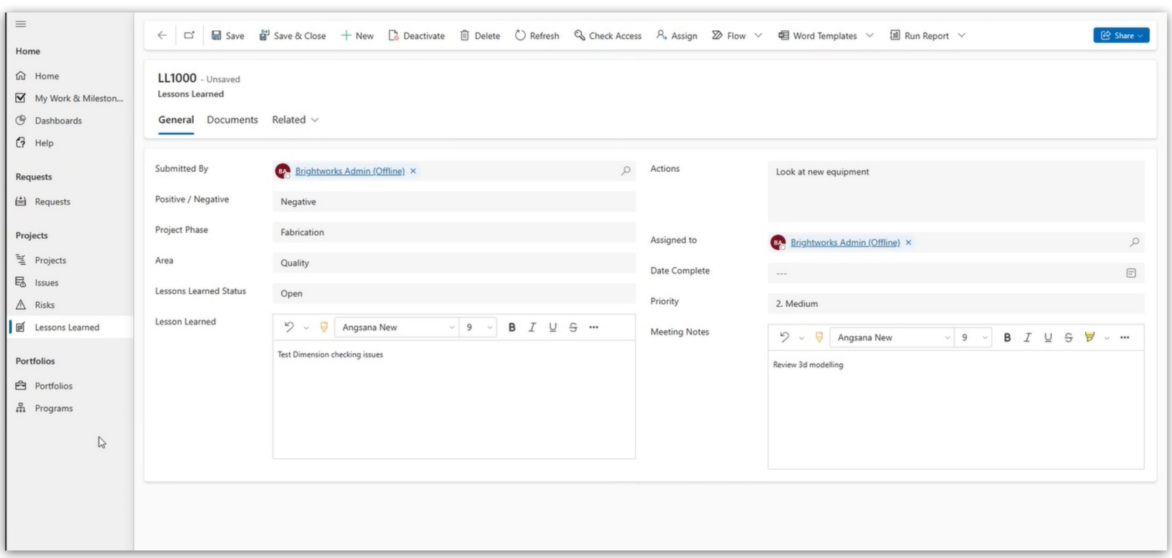
Projects

Stakeholders



Challenge	Solution
• It's crucial to keep track of all stakeholders on projects, along with their contact details and other pertinent information. • Project stakeholders need to be in a table of their own so as not to be confused with other types of team members.	• Creation of a Stakeholders table conveniently exposed to users as a tab within a project form. • The Stakeholders table contains contact details and other important information about the stakeholders. • Ability to categorize whether the stakeholder is internal or external to the organization.

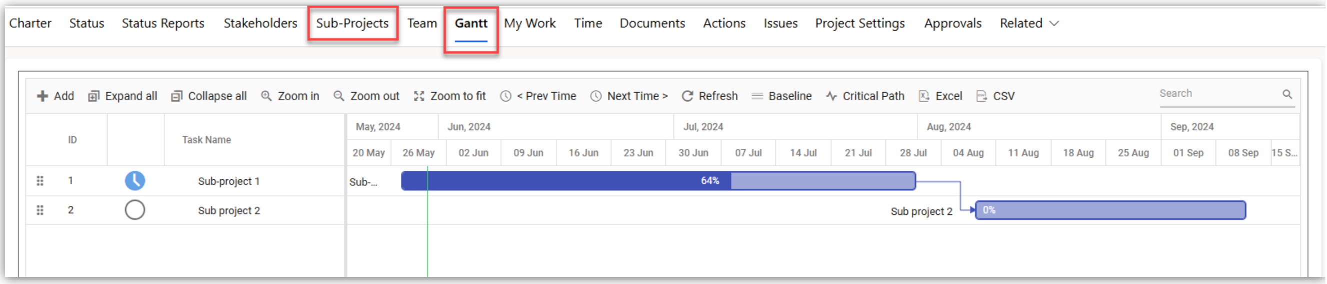
Lessons Learned



Challenge	Solution

• Without a proper process or location to store critical lessons learned gathered from the project team at the conclusion of a project, the organization runs the risk of repeating the same mistakes or actions that require improvement.	• Creation of a Lessons Learned table conveniently exposed to users as a tab within a project form. • Fields included in the table to capture critical information in a consistent manner.

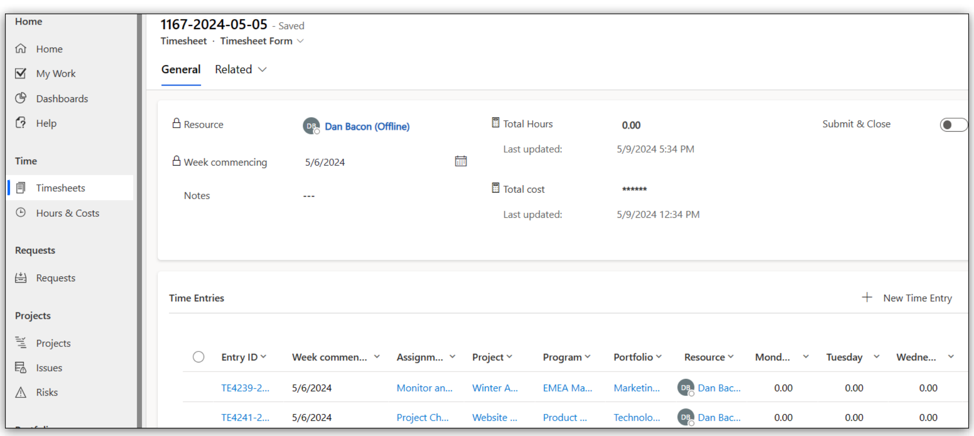
Sub-Projects



Challenge	Solution
• There are sets of projects that are all related to one another, each one a sub-project of a larger initiative, but there is no easy way to link the sub-projects together for viewing or scheduling purposes. • There's a requirement to view all the sub-projects conveniently together in a single tab.	• Add a custom Sub-Projects tab to a parent project for the easy inclusion of the related projects. • Chosen sub-projects automatically appear in the parent project's Gantt tab for visualization purposes, and to manage them in a manner similar to typical Gantt tasks.

Work Assignments

Timesheets



Challenge	Solution

• It can be very difficult for organizations to keep track of all the work that gets done across a portfolio of projects, by many different resources. • Many person hours are left unaccounted for due to the myriad assortment of tools different team members use to keep track of their time. • A lack of administrative control and oversight makes it easy for confidential billing related content to be seen by unauthorized people. • Reporting on whatever hours do get captured across various tools is near impossible.	• Timesheets that get created automatically for select users given a specific security role (does not need to be every user). • Security enhanced - the standard role can only see their own entries. Confidential billing info can be configured to be hidden from unauthorized team members. • Automatically detects open assignments and creates timesheets in the relevant week. • Allocate people to a position which has an Hourly cost pegged to it. • Hours & Costs reports at the project, program, and portfolio levels.

Project Assignment Notifier

Project Sponsor: Dear BrightWork365 Admin, You have been assigned as the Project Sponsor for a new project: New Feature Development Please take a moment to review the details at your earliest convenience. Thank you!	**Project Manager:** Dear BrightWork365 Admin, You have been assigned as the Project Manager for a new project: New Feature Development Please take a moment to review the details at your earliest convenience. Thank you!
Challenge	**Solution**
• When a number of projects rare assigned to Project Sponsors and Project Managers, it is not possible for them to manually check for these new assignments.	• Custom automated notifications that are sent whenever new projects are assigned to these critical members of the project team. The messages can be altered as part of the customization work.

Status Report Reminder

When the due date is in 2 days: Hi, BrighWork365 Admin! This is a reminder that the project **Update release** deployment status report is due on 08/30/2024. Please ensure you submit the status report on time. Thank you!	**After the due date has passed by more than 2 days.** **Daily notification** Hi, BrighWork365 Admin! The project **Update release** deployment status report which was due on 08/30/2024, is now overdue. Timely submission is crucial for the project's success. Please submit it as soon as possible. Thank you!
Challenge	**Solution**

• With many projects under their management, it can be very difficult for managers to remember all the due dates for timely Status Report submission.	• Creation of automated reminders that are triggered at various relative dates to send custom reminder messages to the relevant managers.

Work Assignment Notifier

Subject: New Action Assignment

Dear Emily,

You have been assigned a new Action.
See below for the details:

- Assignment: Update site
- Project: BrightWork Internal Projects
- Date Due: Friday, May 17, 2024
- Assigned By: BrightWork Power Platform Service Principal

Challenge	Solution
• Team members are often unaware when new work items get assigned to them, and as a consequence the start of work for these new tasks gets delayed. • It is inefficient and unrealistic to expect the person assigning tasks to notify each team member of new assignments. • There are some projects that require instant notifications of new assignments, and some for which this would be counterproductive.	• Team members receive an automated email at the time of work assignment. • Flexibility to turn notifications on and off within Project Settings. • Convenient direct links to assignments to obtain additional details and to make updates.

New Work Assignment Report

Dear Alex,

The following item(s) have been newly assigned to you.

Project Ref No.	Project Name	Assignment Type	Assignment	Due Date	Days Remaining	Status	Assignee
Proj-001004	Winter Advertising Campaign	Project Task	Revenue Impact analysis	09/06/2024	72	Not Started	Alex Hankin
Proj-001004	Winter Advertising Campaign	Project Task	Budget allocation sign off	05/31/2024	2	Not Started	Alex Hankin
Proj-001009	Website UI Upgrade	Project Task	Prototype Development	06/19/2024	15	Not Started	Alex Hankin

Challenge	Solution

• Resources of assigned work have a difficult time keeping up with the volume of new work assigned to them from across all the projects to which they are contributing. • The planning and commencement of newly assigned work can be delayed due to a lack of awareness of the assignments.	• Create a custom email report that neatly lays out all of the new assignments created in the previous 24 hours. • Flexible scheduling of the sending of the email that can be set to whichever time works best for the organization.

Overdue Work Report

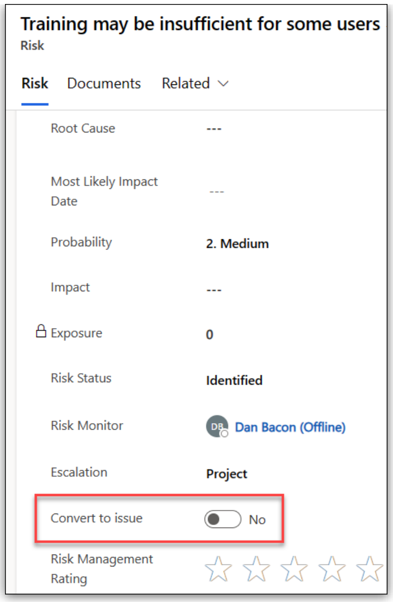
Dear Alex,

The following assignment(s) are overdue, kindly take immediate action to close these at the earliest:

Project Ref No.	Project Name	Assignment Type	Assignment	Due Date	# Days Overdue	Status	Assignee
Proj-001004	Winter Advertising Campaign	Action	Content Creation	11/06/2023	147	Not Started	Alex Hankin
Proj-001004	Winter Advertising Campaign	Action	Client and Stakeholder Review	11/09/2023	146	Not Started	Alex Hankin
Proj-001007	2024 App Updates	Issue	Additional Time for Testing Required	11/03/2023	150	Not Started	Alex Hankin
Proj-001009	Website UI Upgrade	Project Task	Project Kick-off	02/27/2024	67	Not Started	Alex Hankin
Proj-001009	Website UI Upgrade	Project Task	Resource Allocation	03/13/2024	56	Not Started	Alex Hankin
Proj-001009	Website UI Upgrade	Project Task	Review	11/09/2023	145	Not Started	Alex Hankin
Proj-001009	Website UI Upgrade	Project Task	Final Report	11/13/2023	142	Not Started	Alex Hankin
Proj-001008	2024 Recruitment	Action	Define Roles and Responsibilities	10/23/2023	157	Not Started	Alex Hankin
Proj-001008	2024 Recruitment	Action	Develop Onboarding Plan	11/08/2023	147	Not Started	Alex Hankin
Proj-001008	2024 Recruitment	Issue	Budget Constraints	10/27/2023	155	Not Started	Alex Hankin
Proj-001004	Winter Advertising Campaign	Action	Launch Online Advertisements	11/06/2023	147	Not Started	Alex Hankin
Proj-001007	2024 App Updates	Issue	Release Coordination	11/10/2023	145	Not Started	Alex Hankin
Proj-001004	Winter Advertising Campaign	Project Task	Marketing channels brainstorm	04/19/2024	29	Not Started	Alex Hankin
Proj-001004	Winter Advertising Campaign	Project Task	Campaign strategy creation	05/03/2024	19	Not Started	Alex Hankin
Proj-001004	Winter Advertising Campaign	Action	Define Campaign Objectives	11/01/2023	152	Not Started	Alex Hankin
Proj-001004	Winter Advertising Campaign	Action	Budget Assessment and Relocation	11/10/2023	145	Not Started	Alex Hankin

Challenge	Solution
• It's very difficult for team members to stay on top of the myriad of work assigned to them. They need a notification of overdue work to avoid affecting the execution of projects.	• An individual overdue work report can be scheduled to be emailed to any team member who currently has work that is past its planned finish date.

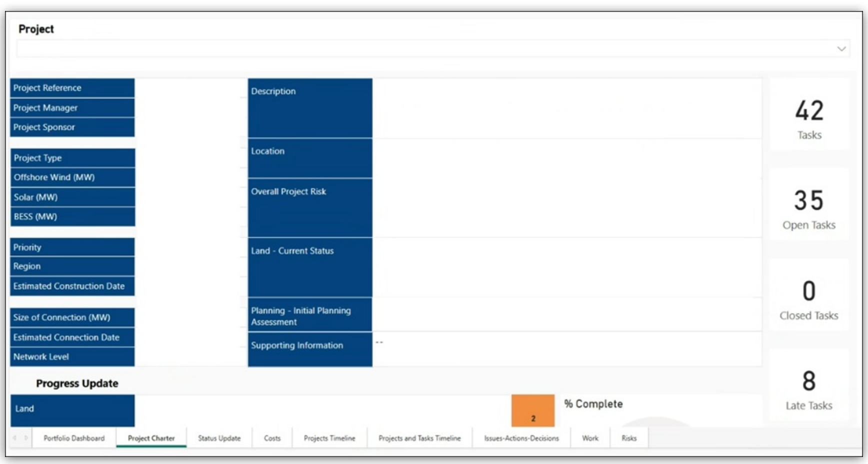
Convert Risk to Issue



Challenge	Solution
• Risk management is a critical component of managing projects, yet escalating a risk that has occurred into an issue is often not done, due to lack of process and/or inefficient methods. • If the list of issues is missing risks that have occurred, there can potentially be a very large impact to the project.	• Inclusion of a switch within projects to enable the easy conversion of risks to issues. • Risks automatically get set to Occurred and Inactive status, and the issues automatically get created in the project.

Dashboards & Views

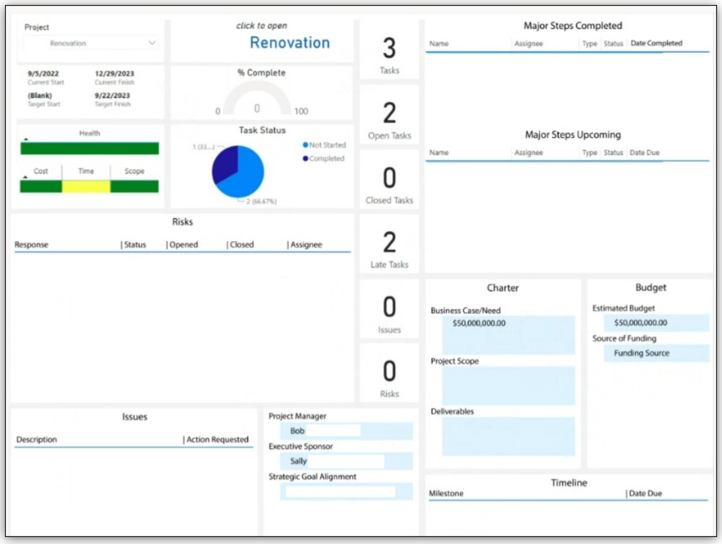
Power BI Charter Dashboard



Challenge	Solution

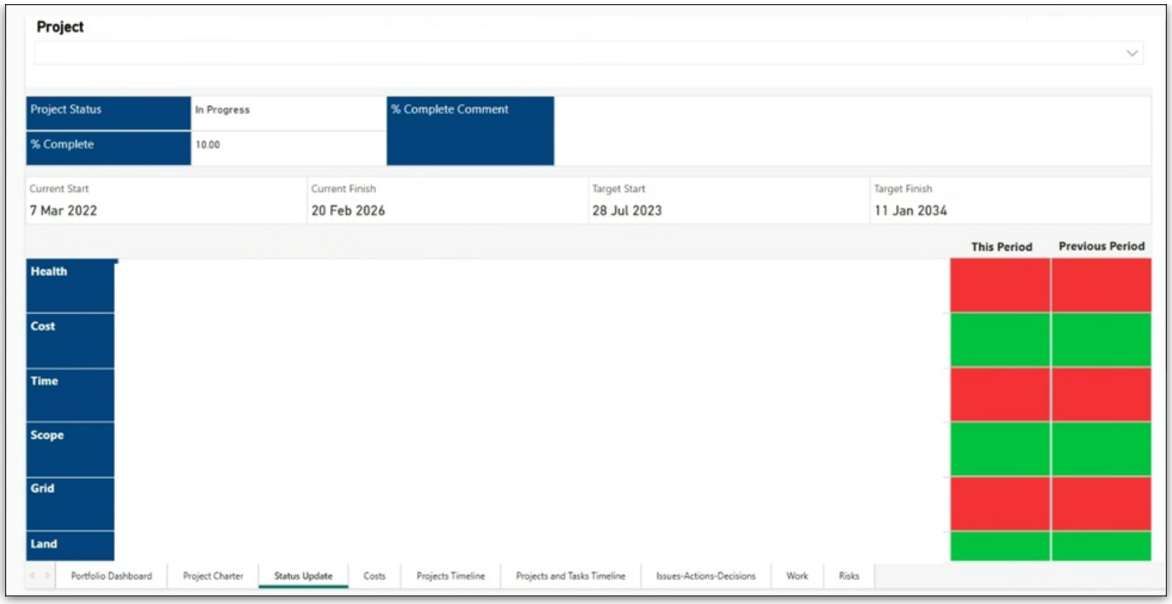
• It can be time consuming and inefficient for some stakeholders to have to enter each project individually in order to view Project Charters and high-level Progress Updates. • Organizations need to use their own specific nomenclature in the dashboard.	• Add a new Project Charter Power BI dashboard tab to the app for quick and easy access to this customized content for individual projects.

Power BI Status Dashboard



Challenge	Solution
• Senior executives would like a one-page dashboard report with very specific status elements they and the larger stakeholder community require to make informed decisions.	• Creation of a custom Power BI dashboard report that brings in content from across many different records.

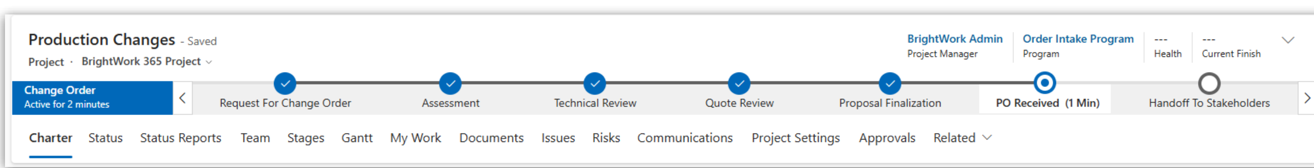
Power BI Status Update Dashboard



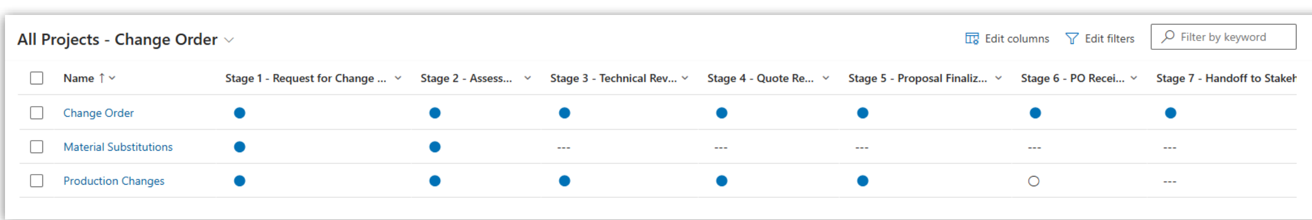
Challenge	Solution
• Organizations can have their own specific requirements as to what should be included in individual Project Status Update dashboards. • A custom Status Update tab is necessary for how the organization's meetings are run, and for how they efficiently keep stakeholders informed.	• Add a new Status Update Power BI dashboard tab that meets the organization's specific needs.

Project Stage Status View

Project:



View:



Challenge	Solution

• It's time consuming and inefficient to find and click into every project that uses a specific Business Process Flow in order to check project stage progression in real-time.	• With a custom stage status view, stakeholders can very quickly find all projects that share a specific Business Process Flow and check stage status all on the same screen.