

# BrightWork Champion

## Training Introduction

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.

Confirm attendees have all relevant Security Roles and Licenses to successfully access their BrightWork 365 environment prior to the first session.

**Tip** The training items in this article can be completed via your own hands-on exercises or via observation of the trainer's actions. However, as hands-on training is the most effective method of learning, at a minimum we recommend completing the items noted below in **green color** as hands-on exercises.

### Estimated Duration: 2 hours

#### BrightWork 365 Introduction

## BrightWork 365 Introduction

### Project Management Context

Built on Microsoft 365 and the Microsoft Power Platform, BrightWork 365 is a flexible, complete project and portfolio management solution.

BrightWork 365 leverages Microsoft 365 as the collaboration and work hub for project teams with Power Platform delivering data-driven reports and business processes for project teams and stakeholders.

With BrightWork 365, anyone in your organization can easily plan, manage and report on projects, programs and portfolios.



## Exercises

Below are exercises to help reinforce the concepts in this category. The lines in **green color** are suggested hands-on exercises you can try on your own using your organization's BrightWork 365 environment.

### Essentials

- Review the list of the various technologies integrated into the Microsoft 365 and BrightWork 365 solutions. [\[Topic info\]](#)
- **Navigate to the Home Screen of your organization's BrightWork 365 app.** [\[Topic info\]](#)
- Review the list of open requests. [\[Topic info\]](#)
- View all projects in progress. [\[Topic info\]](#)
- Review the list of open risks. [\[Topic info\]](#)

### Advanced

- Review the various BrightWork 365 security roles and the differences between them. [\[Topic info\]](#)
- **Switch to the Templates Area and review a Project Template's configuration (if you have relevant permission).** [\[Topic info\]](#)
- Switch to the Admin Area and review the various links (if you have relevant permission). [\[Topic info\]](#)

### Security & Access

# Security & Access

- Learn about BrightWork 365 user management. [\[Topic info\]](#)
- Review user security roles, map roles to your organization's users, and give users relevant roles. [\[Topic info\]](#)
- Review the [portfolio](#) and [project](#) security & access content.

## Initial Setup

# Initial Setup

## Essentials

- **Create a Portfolio and fill in the relevant fields.** [\[Topic info\]](#)
- **Create a child Program for the Portfolio and fill in the relevant fields.** [\[Topic info\]](#)
- Change the Priority level to Medium in the portfolio and the program. [\[Topic info\]](#)

## Advanced

- In the Program's Status tab, change the field values. [\[Topic info\]](#)
- **In the Program's Documents tab, create a new MS Word document.** [\[Topic info\]](#)

## Configuration

# Configuration

## Project Management Context

As BrightWork is built on the Microsoft Power Platform, a highly configurable and customizable platform, customers have the option to choose either configuration or customization (or both) to deliver on project management requirements. Request Templates and Project Templates can be preset with business process flows, stakeholder identities, and portfolio hierarchy information. These preset values can be easily reused within every new request or project that gets created.

## Exercises

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## Essentials

- **Decide the project management process and design some project template form configuration changes.** [\[Topic info\]](#)
- **Navigate to Personalization Settings and confirm the Time Zone setting is accurate.** [\[Topic](#)

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- Configure a Personal Chart starting from an existing System Chart. [\[Topic info\]](#)

## Advanced

- **In a current or new project template, use the Form Configurator to implement several configuration changes.** [\[Topic info\]](#)
- Within a project, after setting up the Gantt Chart, and Risks and Issues, create a Content Template for use in future projects. [\[Topic info\]](#)
- In a current or new Request Template, make a configuration setting change. [\[Topic info\]](#)
- In a current or new Project Template, make a configuration setting change. [\[Topic info\]](#)

## Success Tips

# Success Tips

## BrightWork pre-install assistance

- It is strongly recommended to work alongside the [BrightWork Support](#) team to initiate the pre-install process, as this will ensure proper procedures are followed; this service is included as part of the [BrightWork 365 Start Service](#). Customers are encouraged to schedule a pre-install technical call using this link: <https://calendly.com/d/ckvb-zsc-sz7/bw365-pre-install-call>

## Customization levels

- It's typically preferable to take on less rather than more in the Start (first) iteration. You and your Customer Success Partner will develop a practical Evolve plan to chart a roadmap of future customizations for your BrightWork 365 solution.

## Schedule recurring project status review meetings with senior executive stakeholders and project managers

- Project status transparency and clarity are key to the successful execution of projects.
- Projects tend to be more consistently actively managed when there is more involvement from stakeholders.

## Full team project involvement

- Planning a project prior to completing the build out of tasks in the Gantt will pay dividends throughout the full duration of the project. Planning is a team sport, and gaining input and understanding from the larger project team will be invaluable and avoid the pitfalls present when a project manager tries to complete this crucial process piece on their own.
- It's imperative for subject matter expert team members to confirm the completeness of task lists, task durations, and the completion dates, so as to not jeopardize the deployment's agreed Go-Live date.

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## What's Next?

Complete [Project Manager](#) role training

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