BrightWork Champion Syllabus

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.

Decide with your assigned trainer which of these items will be done as hands-on training, and whether they will be done during or after the training session

Estimated Duration: 2 hours

BrightWork 365 Introduction

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]

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

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.

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 info]
- Configure a Personal Chart starting from an existing System Chart. [Topic info]

Advanced

- Use the Form Configurator to implement some project template form 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]
- In a current or new Project Template, use the Form Configurator to change the display setting of a Form Tab, a Section, and a Column. [Topic info]

Open Forum Q&A and Training Feedback

What's Next?

Complete Project Manager role training