Project Manager 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: 2-4 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]

Initiate the Project

Why would you be interested in formally initiating a project? As a project manager, you want to know what you are getting before you officially start. At this stage, you need to secure resources for the project and ideally enlist the support of a project sponsor. Once the project is approved, you need to decide how to manage the project and how much project management rigor you will apply.

Essentials

- Get a project approved, sponsored, and resourced. [Topic info]
- Decide a project management process and map this to a template choice. [Topic info]
- Click the main nav Requests link. [Topic info]
- Choose the My Requests view to see the current status of your requests. [Topic info]
- Manually create a collaborative project site using the Project Structured project template. [Topic info]

Advanced

- Select your project request to view the active stage of the request, i.e., Draft, Accepted, Approved. [Topic info]
- Add text to the Additional Approval Email Text field in a request (requires the BrightWork Approvals Coordinator security role). [Topic info]
- Create a Request template, either as a copy of an existing Request template or a new one, with yourself or a colleague as the Approver and submit a request using it. [Topic info]

Plan and Setup the Project

Once the project is approved, you need to decide how to manage the project and how much project management rigor you will apply.

Essentials

- In the Gantt tab of a Project Structured type project, create Stages using the same names as those found in the project's Business Process Flow. [Topic info]
- Create several indented child tasks under each of the Stages. [Topic info]
- Change the durations of the tasks. [Topic info]
- Create dependencies between all of the tasks. [Topic info]
- Assign yourself to each of the tasks. [Topic info]
- Create several risks in the project's Risks tab and assign them to yourself. [Topic info]

Advanced

- Enter project budget related values. [Topic info]
- Baseline the Gantt schedule. [Topic info]
- Create a Microsoft Teams Channel for a project. [Topic info]
- In the Status tab, change the field values. [Topic info]
- In the Status Reports tab, create a draft status report. [Topic info]

Work the Project

Why do we need a stage “Work the Project”? Well, this is where the bulk of the project work takes place. This is where the actual project work occurs. You also need to be mindful that team members are extremely distractible. In summary, you want to give the team members some direction on how to proceed, how to work on the project, and how to collaborate. This will enable the team members to step up to the plate and help you to manage the project collaboratively.

Essentials

- Find the work assigned to you within the project and from the main nav. [Topic info]
- Create an issue within the project and assign to yourself. [Topic info]
- Change the status of work assigned to you. [Topic info]
- Enter Communication related items such as notes, emails, and appointments. [Topic info]

Advanced

- Update cost values to reflect project progress. [Topic info]
- Create a personal My Work report by editing the columns and filters and share it. [Topic info]

Track and Re-Plan the Project

Why do we need to track and re-plan the project? Remember the advice cited earlier from the Prussian Army General when he said that no plan will ever survive the first encounter with the enemy? What do we do in this fourth stage? We actively track and honestly re-plan the project with the team. It is quite difficult to do this sometimes, but it is that simple. This is what we need to do.

Essentials

- Find the work assigned to you across projects from the main nav. [Topic info]
- Change the status of the work assigned to you. [Topic info]

Advanced

- In a Portfolio's Status tab, change the field values. [Topic info]
- In a Portfolio's Status Reports tab, create a draft status report. [Topic info]

Track Projects with Power BI Dashboards

Essentials

- Find the work assigned to you in the My Work - Power BI dashboard. [Topic info]

Advanced

- Review BrightWork 365 Power BI dashboards, including work allocation and costs and budgets. [Topic info]
- View the reports in all of the tabs of the Resource Utilization - Power BI dashboard. [Topic info]
- Use the Microsoft Open in Power BI Service to utilize the additional options available to interact with BrightWork 365. [Topic info]

Interface

Essentials

- Cycle through several of the Requests system views. [Topic info]
- Cycle through several of the Projects system views. [Topic info]

Advanced

- Post a new entry in a project's Micrsoft Teams channel. [Topic info]
- Export the Open Projects view to Microsoft Excel. [Topic info]
- Add a Microsoft OneNote entry to a project in the Communications tab. [Topic info]

Close the Project

Why formally close the project? By definition, a project has a start and finish, so it needs to be closed out. If you do not shut it down who will? In the immortal words of Francis Drake, this is where you get the glory! What do you do in this stage? You and your team will learn from the project as you close the project together.

- Close Out the Project
- Run Project Post-mortem
- Track Lessons Learned and Capture any Useful Modifications

Open Forum Q&A and Training Feedback