Project Manager

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 customer's BrightWork Champion along with the assigned Customer Success Partner to ensure proper tracking with the customer's custom solution.

Confirm learners have all relevant BrightWork 365 environment Security Roles and BrightWork and Microsoft Licenses to successfully use the BrightWork 365 solution 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: 2-4 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]

Initiate the Project

Initiate the Project

Project Management Context

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.

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

- 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

Plan and Setup the Project

Project Management Context

As you enter this stage, your project is approved and you have already decided how to manage the project, or at least you have an outlined approach. Now it is time to create the project from the most appropriate project template, communicate next steps including the scheduling of planning sessions with your team, and start thinking at a high level what

your project plan will look like.

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

- **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

Work the Project

Project Management Context

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.

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

- **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

Track and Re-Plan the Project

Project Management Context

Why do we need to track and re-plan the project? Remember the old Prussian Army saying 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.

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

- **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

Track Projects with Power BI Dashboards

Project Management Context

Power BI Dashboards assist in our ability to track all the projects in portfolios, and plan for

adjustments that must be made based on current status. Why is this so important? Remember the old Prussian Army saying that no plan will ever survive the first encounter with the enemy. With Power BI reporting tools we can 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.

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

- 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

Interface

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

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

Advanced

- 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

Close the Project

Project Management Context

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.

- Confirm All Work has been Closed
- Run Project Post-mortem with the Project Team
- Track Lessons Learned and Capture any Useful Modifications