Senior Executive Syllabus

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** as hands-on exercises.

Estimated Duration: 1 hour

BrightWork 365 Introduction

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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]
- **View various Dashboards.** [Topic info]

Initiate the Project

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Project Management Context

Projects may start with a decent idea, but that doesn't guarantee their success. Starting the wrong project at the wrong time is the best way to waste valuable time and resources. Project Managers need to know what projects are in progress and what resources are allotted to them. Project governance is a core building block of successful project

management, and you need to have a process in place for collecting and ranking all potential projects and weighing them up against the stated strategic goals of the organization.

Essentials

- **Submit a request to create a project that will use one of the available project templates.** [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]

Advanced

- Select your project request to view the active stage of the request, i.e., Draft, Accepted, Approved. [Topic info]

Interface

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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]

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.

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]