

Senior Executive 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: 1 hour

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. [\[Topic info\]](#)
 - View various Dashboards. [\[Topic info\]](#)
-

Initiate the Project

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

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 Microsoft 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. [\[Topic info\]](#)
-

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. [\[Topic info\]](#)
-

Open Forum Q&A and Training Feedback
