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# Leveraging SharePoint for Project Budget Management

*presented by*



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SharePoint Project Management  
Consultant



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**QUICK POLL**

**Are You Using  
SharePoint for Project  
Budgeting?**



# BrightWork

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# Projects • Portfolios • SharePoint •

**Start** managing projects with best-practice templates and dashboards.

**Evolve** project management with one complete SharePoint solution.



# BrightWork

Some of the companies we work with and have provided Project Management Solutions

The Amazon logo, featuring the word "amazon" in a bold, black, sans-serif font with a curved orange arrow underneath it.The Dimensional logo, featuring a red stylized play button icon to the left of the word "Dimensional" in a bold, black, sans-serif font.The Camden National Bank logo, featuring the word "Camden" in a large, blue, serif font with a blue anchor icon above the "n", and the words "NATIONAL BANK" in a smaller, blue, sans-serif font below it.The Siemens Healthineers logo, featuring the word "SIEMENS" in a green, sans-serif font above the word "Healthineers" in an orange, sans-serif font, with a cluster of orange dots to the right.The AMSURG logo, featuring the word "AMSURG" in a large, blue, serif font.The Ascend Performance Materials logo, featuring a stylized blue and yellow "A" icon above the word "ASCEND" in a large, blue, sans-serif font, with the words "PERFORMANCE MATERIALS" in a smaller, blue, sans-serif font below it.The Schneider Electric logo, featuring the word "Schneider" in a large, green, sans-serif font above the word "Electric" in a smaller, green, sans-serif font, with a green circular icon to the left of "Electric".The United States Postal Service logo, featuring a blue eagle head icon above the words "UNITED STATES" and "POSTAL SERVICE" in a blue, sans-serif font, with a red horizontal line between the two lines of text.

## Agenda

- **Project Request Management** – Set and approve budgets during Project Selection.
- **Create a Project Site With an Approved Budget** - Managing Budget and Costs using a team site
- **Cross Project Budget Reporting** – Use BrightWork Portfolio Management Templates to rollup Costs and Budgets and manage at Departmental level.
- **Q&A**

# Project Request Management

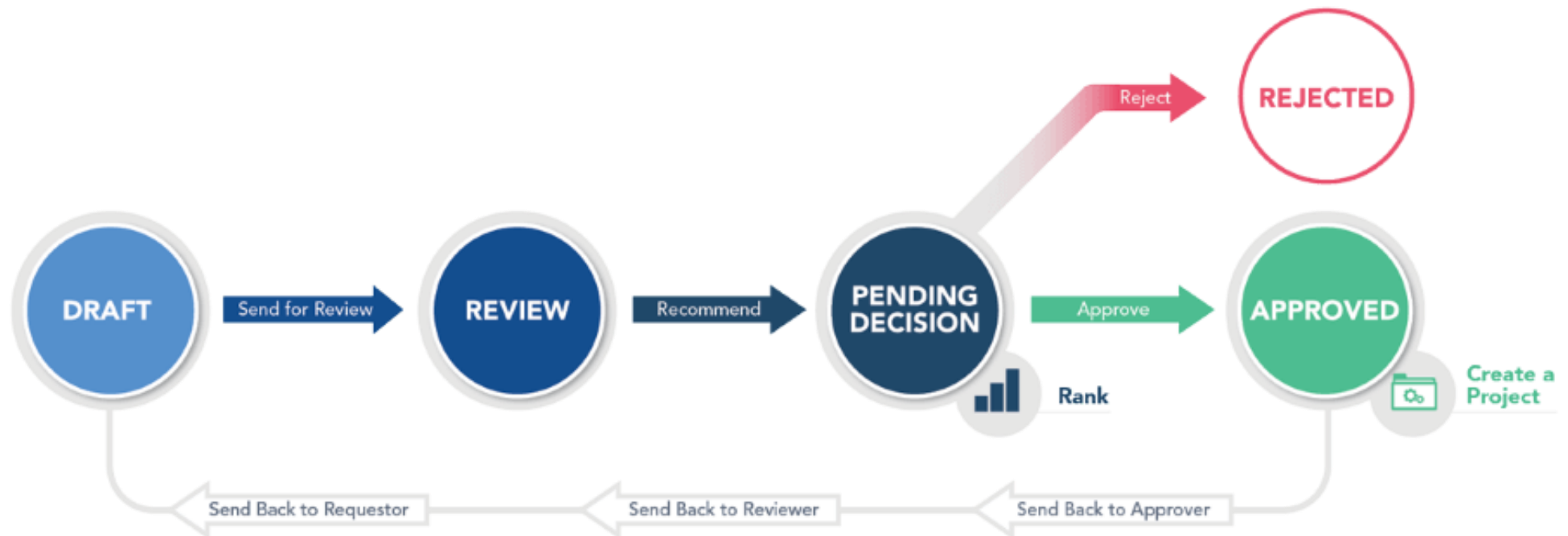
The screenshot shows a SharePoint web application interface for Project Request Management. The top navigation bar includes links for Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, Free Template Site, and New Proj Area. A search bar is located on the right. The main content area is titled "Sample Project Requests" and features a "Get started" section with six tiles: Log a Request, My Requests, Review Requests, Rank Requests, Approve Requests, and Create Projects. Below this is a "Configure process" section with three tiles: Configure Process, Departments, and Overview Diagram. On the right, a "For Your Attention!" section displays a table of project requests.

Reference	Title	Department	Estimated Budget	Requested By
			<b>Sum=\$60,000.00</b>	
<b>Status : Draft (2)</b>				
PR-0003	New Promotional Materials	Marketing	\$10,000.00	<input type="checkbox"/> Alan Morgan
PR-0061	Scott Example		\$50,000.00	<input type="checkbox"/> Alan Morgan
			<b>Sum=\$20,000.00</b>	
<b>Status : Pending Decision (1)</b>				
PR-0001	New Request	IT	\$20,000.00	<input type="checkbox"/> Alan Morgan

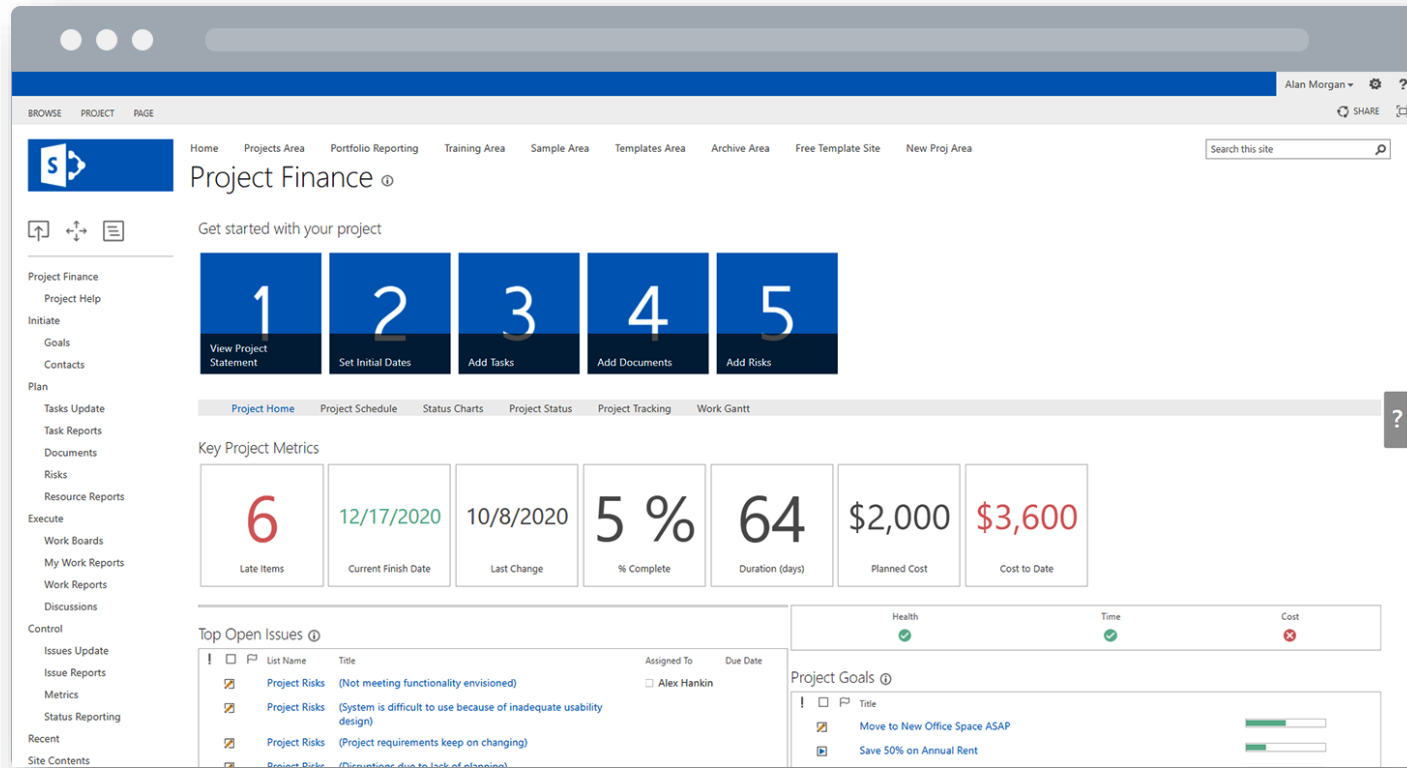
Highly configurable, SharePoint is ideal for project and portfolio management.

- Draft
- Review
- Pending Decision
- Approve/ Rejected

# Project Request Management



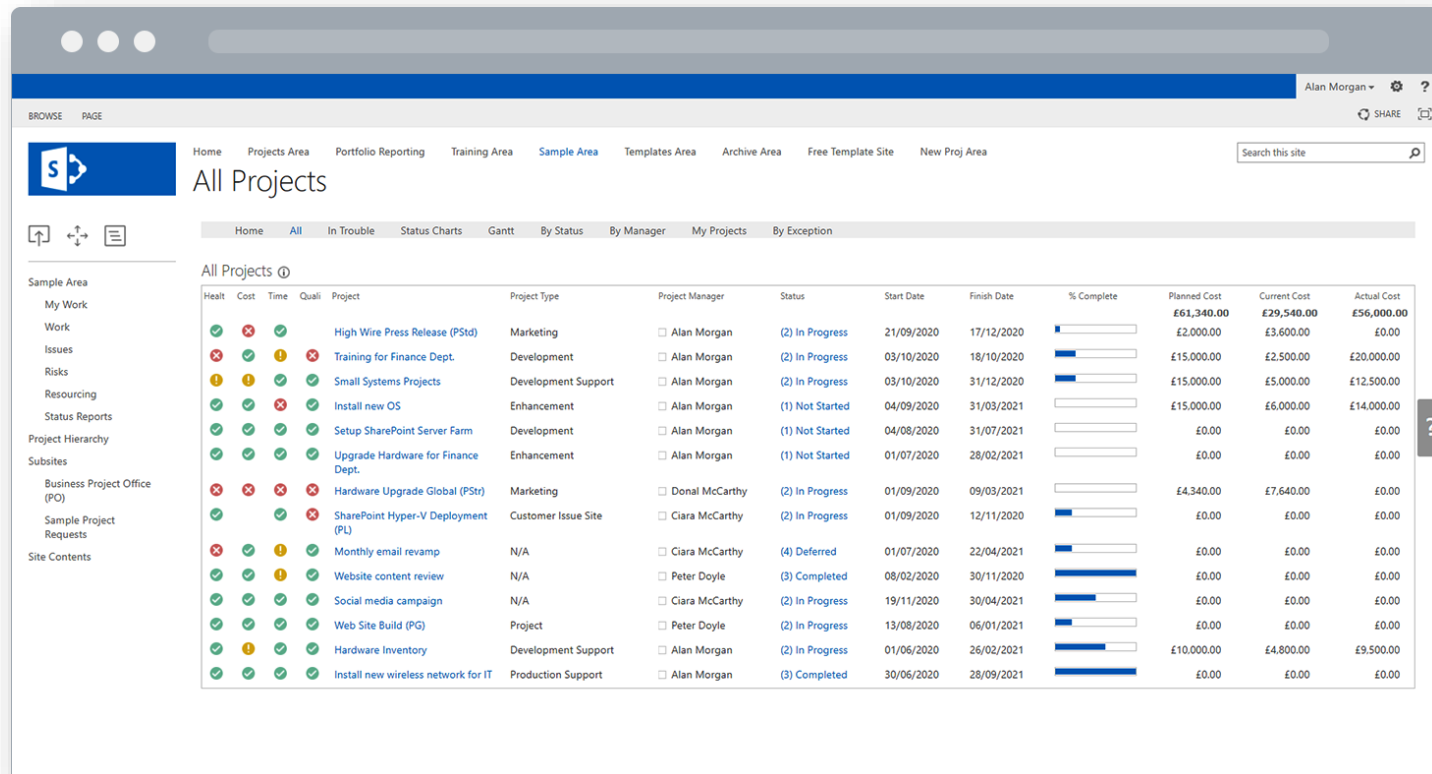
# Project Cost and Budget Management



Get control over projects and deliver more business value.

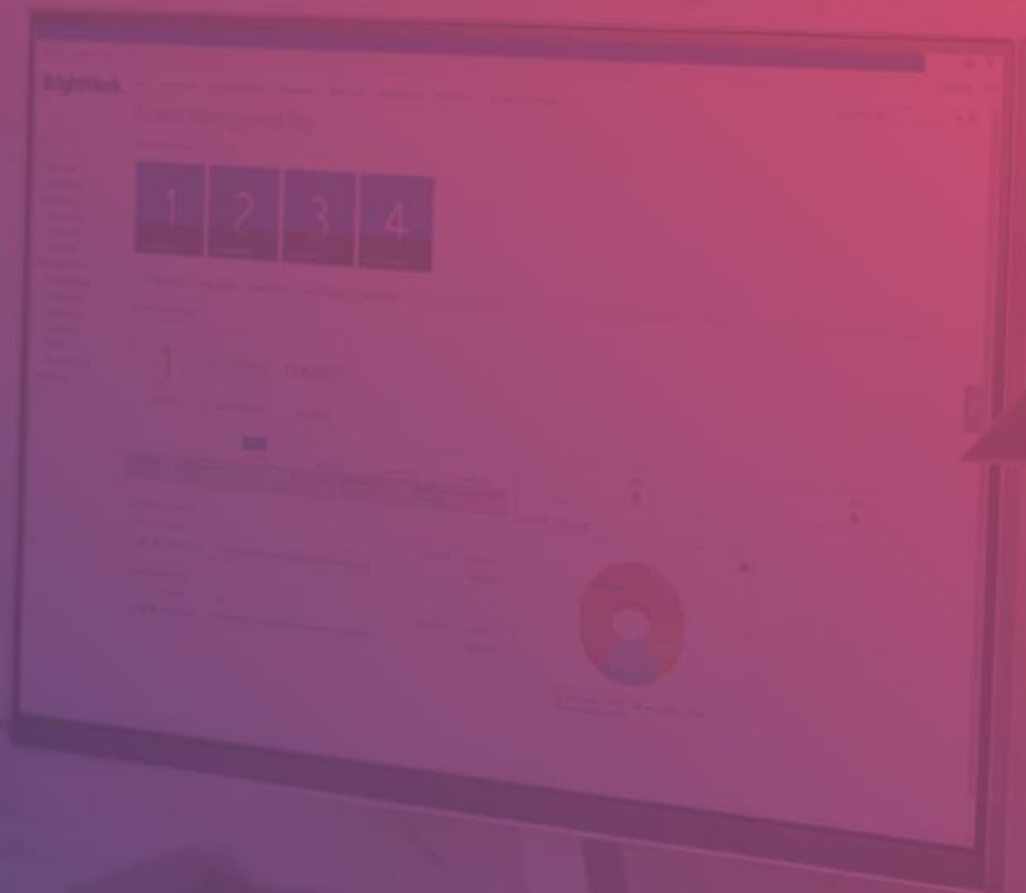
- Planned cost
- Actual (expected) cost
- Current cost
- Earned Value Management (EVM)

# Cross-Project Budgeting Reporting



- Cross Project costs
- Report costs at a departmental level
- Live Dashboards
- Metric Scorecards
- Resource Usage

# DEMO



# QUESTIONS?

➤ Use the Question pane in GoToWebinar to ask questions

# THANK YOU

➤ Talk to our Solution Specialists about your project management needs



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# APPENDIX

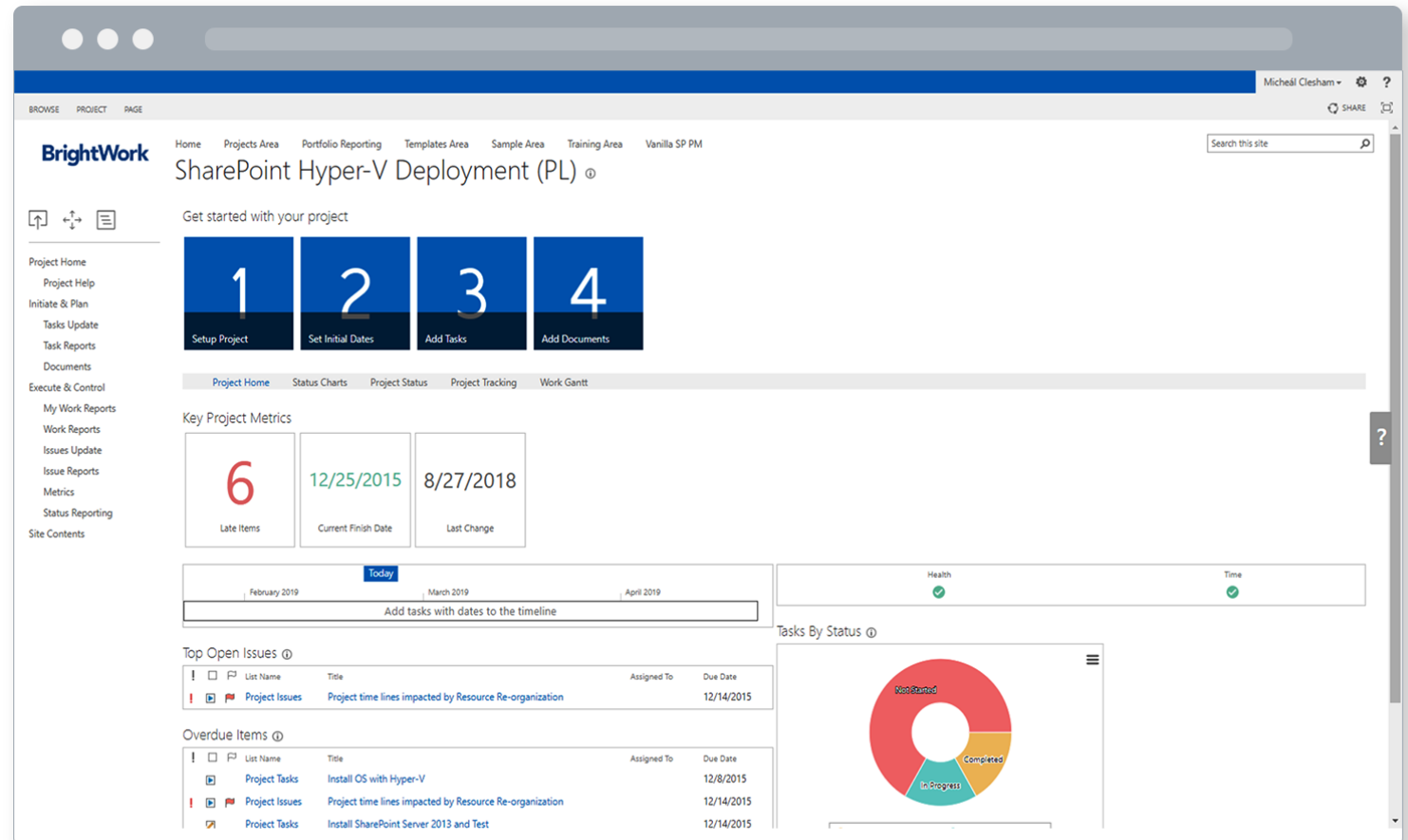
➤ BrightWork model explained

# PROJECTS

## Start with Standardized Project Management Templates

BrightWork includes a range project management templates that help you get projects started the right way every time, with the right amount of project management for the project and team in question.

Increase productivity by centralizing all project information into a single, cohesive tool.



# PROJECTS

## Collaborate with a Team-focused Project Site

Team members can find, do and report on their work in a team-focussed project site with BrightWork.

Manage your schedule with instant visibility into project and non-project tasks.

Manage your schedule with instant visibility into project and non-project task

The screenshot displays the BrightWork interface for a project site titled "Selected Project Open Work". The user is logged in as Anne Wallace. The dashboard is organized into several sections:

- Navigation:** Includes tabs for BROWSE, PAGE, and BOARD. A top navigation bar lists areas like Home, Projects Area, Portfolio Reporting, Training Area, Sample Area, Templates Area, Archive Area, and Manage User Accounts.
- Left Sidebar:** Contains navigation links for Marketing Mini-Projects (PWT), Selected Project, All Projects, All My Work, All Tasks, All Documents, All Issues, and Site Contents.
- Project Selection:** A dropdown menu allows selecting a project, currently set to "Website content review". Below it, tabs show "Selected Project Open Work", "Selected Project My Work", and "Selected Project All Work".
- Projects Section:** A table lists project items with columns for Health, Time, Title, Project Manager, % Complete, Start Date, and Finish Date. One item, "Website content review", is shown with a green status and 0% completion.
- Project Documents Section:** A table lists documents with columns for Name, Modified, Modified By, and Project. Two documents are listed: "Revised Messaging Framework 2019" and "SEO Keyword Stats", both modified 2 hours ago by Anne Wallace.
- Project Tasks Section:** A table lists tasks with columns for Task Name, Finish Date, Assigned To, and Project. Six tasks are listed, including "Review first draft design", "Create second design", "Review second design", "Select version and send test", and "Kick-off Project", assigned to various team members.
- Tasks Priority Section:** A visual task board categorized by priority: (1) High, (2) Normal, and (3) Low. Each task card shows the task name, assignee, completion percentage, and finish date.

# PROJECTS

## Track and Share Progress with Automated Reports

Project Managers spend too much time on administration instead of the project itself!

BrightWork templates come with automated reporting and dashboards to provide project visibility to the people who need it.

SharePoint

Micheál Clesham

SHARE FOLLOW

Home Projects Area Portfolio Reporting Training Area Sample Area Templates Area Archive Area

Search this site

### Projects In Trouble

Home All In Trouble Status Charts Gantt By Status By Manager My Projects By Exception

Projects in Trouble ⓘ

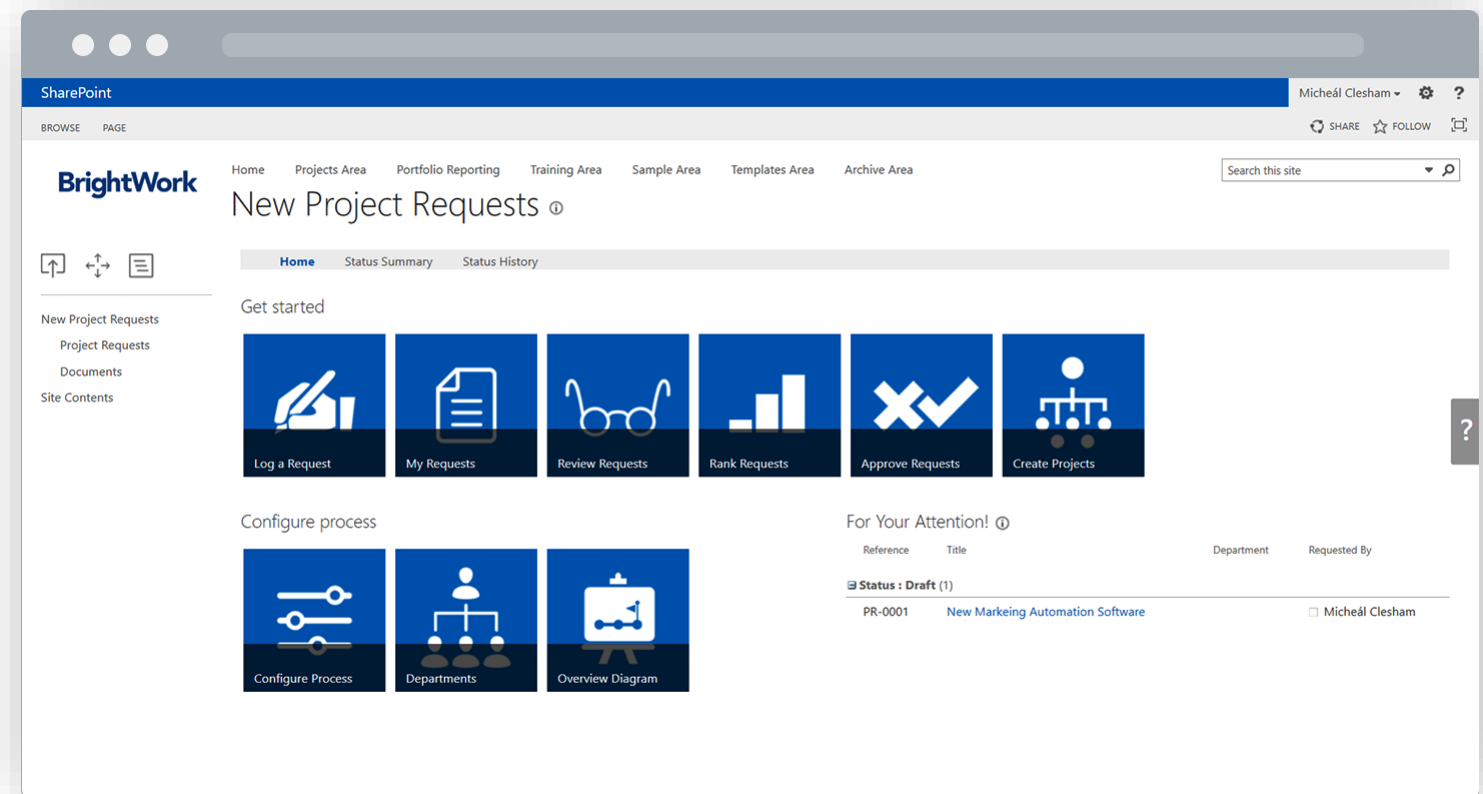
Health	Time	Cost	Issues	Project	Project Manager	Start Date	Finish Date	Due Date
!	✗	✓	✓	Setup SharePoint Server Farm		12/12/2019	2/26/2020	2/27/2020
!	!	✓	✓	Hardware Upgrade Global (PStr)		9/2/2019	12/20/2019	
!	✗	✓	✓	Install new OS		12/10/2019	2/24/2020	2/24/2020
!	!	✓	✗	Install new wireless network for IT		12/11/2019	2/25/2020	2/25/2020

# PORTFOLIOS

## Approve with Scalable Project Request Management

BrightWork gives you a simple process for deciding which projects get approved and automatically creates the new project site.

Develop a transparent ranking process to ensure alignment with business objectives

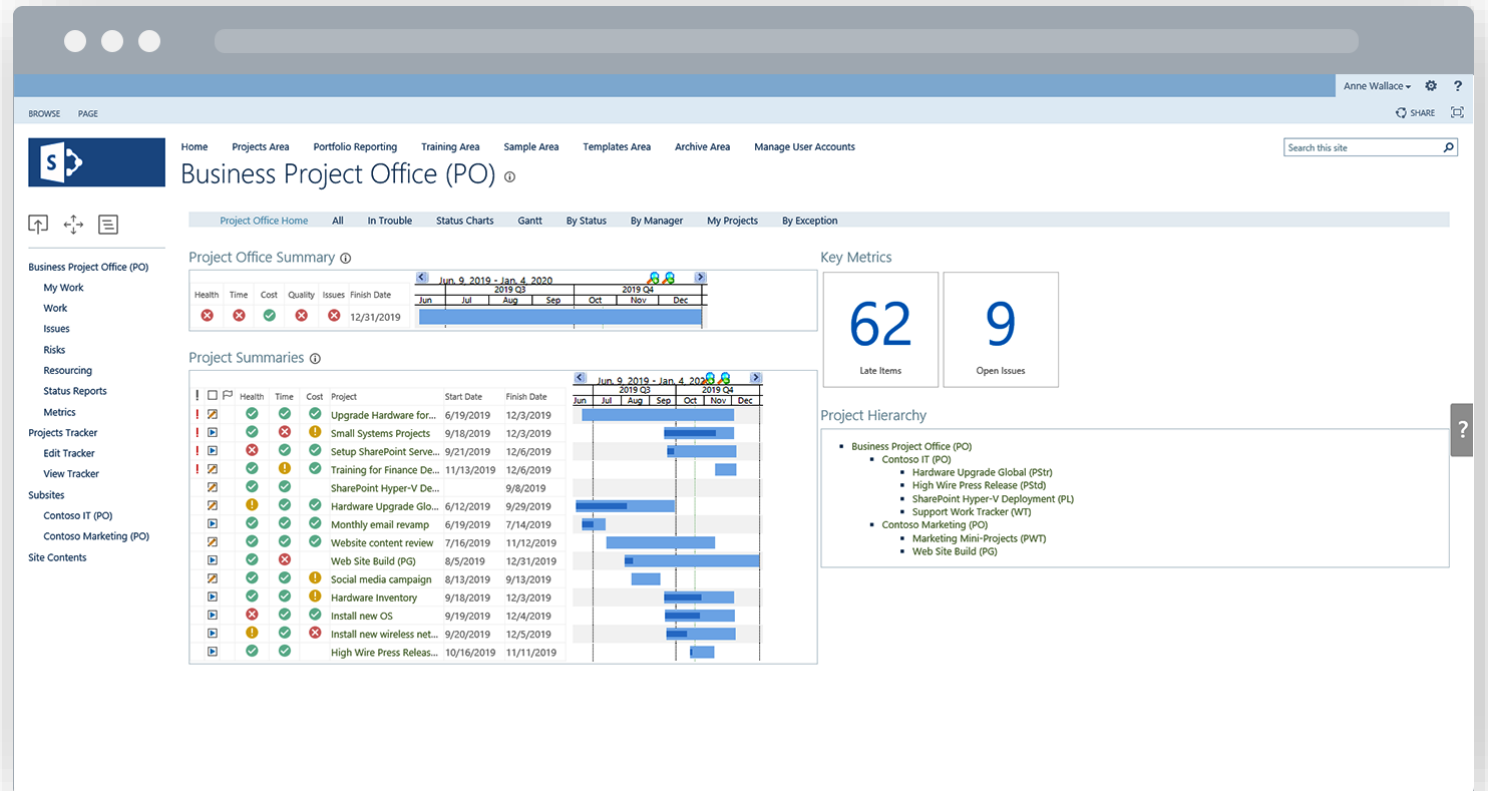


# PORTFOLIOS

## Track with Real-Time Portfolio Dashboards

BrightWork reporting dashboards allow you to quickly track the health and progress of all projects across the organization.

Get visibility and drill into the detail of specific projects.



# PORTFOLIOS

## Allocate with High-Visibility Resource Management

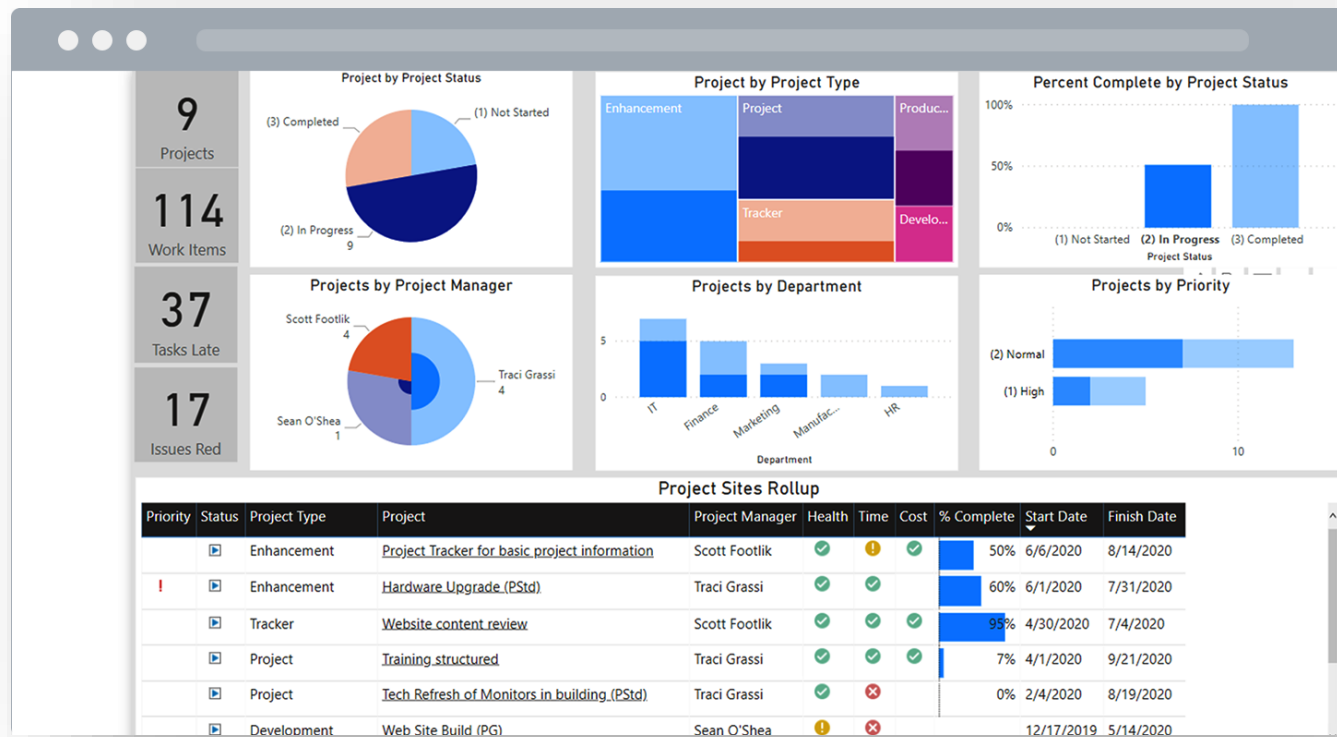
Simple resource reports help you track and forecast resource allocation to make sure you have optimal resource utilization across projects.

Prevent burnout and boost team morale with more transparency around workloads and commitments.

The screenshot displays the BrightWork Resource Management interface. The top navigation bar includes links for Home, Projects Area, Portfolio Reporting, Templates Area, Sample Area, Training Area, and Vanilla SP PM. The left sidebar shows a menu with Requests Home, Project Requests, Documents, Resource Management (highlighted), Resource Allocation, and Site Contents. The main content area is titled 'Resource Management' and features two icons: 'Resource Allocation' and 'Overview Diagram'. Below these icons is a 'Resource Report' table.

	<input type="checkbox"/>	Title	Start Date	Finish Date	Work	Q2, 2019	Q3, 2019			Q4, 2019
						Jun/2019	Jul/2019	Aug/2019	Sep/2019	Oct/2019
Assigned To : <input type="checkbox"/> Anne Wallace (1)						80.00	184.00	176.00	168.00	40.00
Assigned To : <input type="checkbox"/> Christine Chang (1)						40.00	92.00	88.00	84.00	20.00
Assigned To : <input type="checkbox"/> Jim Corbin (1)						80.00	184.00	176.00	120.00	

# BrightWork Power BI Pack



The BrightWork Power BI Pack comes pre built with six central dashboards.

- Portfolio Dashboard
- Portfolio Timeline
- Project Task Timeline
- Work Reports
- Status Report Dashboard
- Issue Report

# SHAREPOINT

## Deploy with a Low IT Burden

As BrightWork is built on the industry SharePoint platform, organizations can leverage existing and investments in infrastructure and training.

Reduce the learning curve and accelerate user adoption with a familiar environment.

The screenshot displays the BrightWork application interface within a SharePoint web browser. The top navigation bar includes the BrightWork logo and a list of menu items: Home, Projects Area, Portfolio Reporting, Templates Area, Sample Area, Training Area, and Vanilla SP PM. A search bar is located on the right. The left sidebar shows a tree view with 'Requests Home' expanded, containing 'Project Requests', 'Documents', 'Resource Management' (selected), 'Resource Allocation', and 'Site Contents'. The main content area is titled 'Resource Management' and features two tiles: 'Resource Allocation' and 'Overview Diagram'. Below these tiles is a 'Resource Report' table. The table has columns for Title, Start Date, Finish Date, Work, and a breakdown of hours by quarter (Q2, 2019; Q3, 2019; Q4, 2019). The data shows three resources: Anne Wallace, Christine Chang, and Jim Corbin, with their respective hour allocations across the quarters.

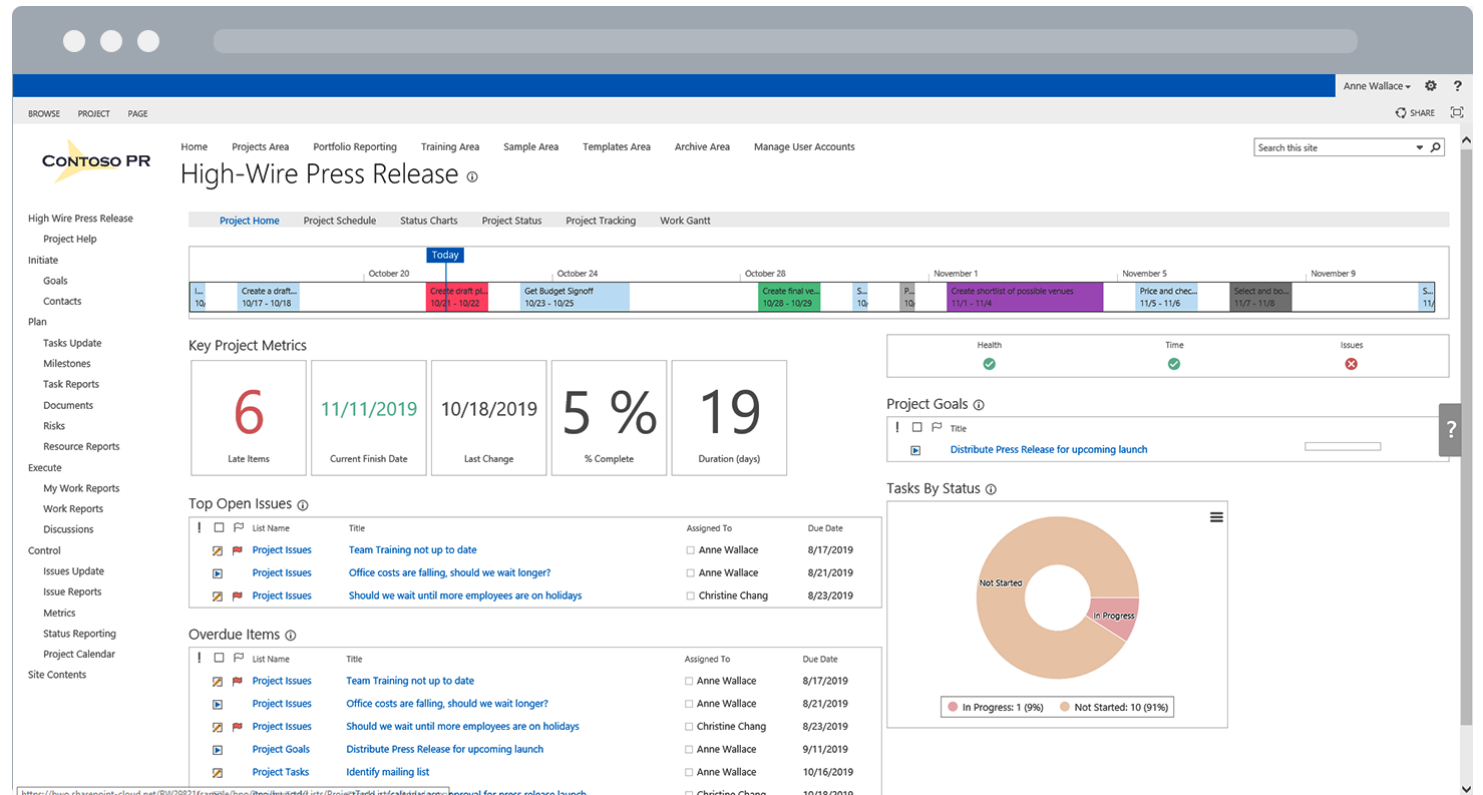
	Title	Start Date	Finish Date	Work	Q2, 2019	Q3, 2019			Q4, 2019
					Jun/2019	Jul/2019	Aug/2019	Sep/2019	Oct/2019
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Assigned To : Christine Chang (1)					40.00	92.00	88.00	84.00	20.00
Assigned To : Jim Corbin (1)					80.00	184.00	176.00	120.00	

# SHAREPOINT

## Start with local, best-practice templates and BrightWork Assistance.

Taking a template based approach to projects makes it easy to improve project standards.

Reduce resistance to change with training resources for new project managers and team members.



# SHAREPOINT

## Evolve with Easy-To-Configure Templates

Easily create, use, reuse, and update your project management best-practices on an organizational scale.

Expand BrightWork into new teams and departments without any impact on performance or reporting.

Evolve to the desired level of organizational project management quickly and easily.

