BrightWork 365 Knowledge Base PDF

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Project Request Approval Process

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

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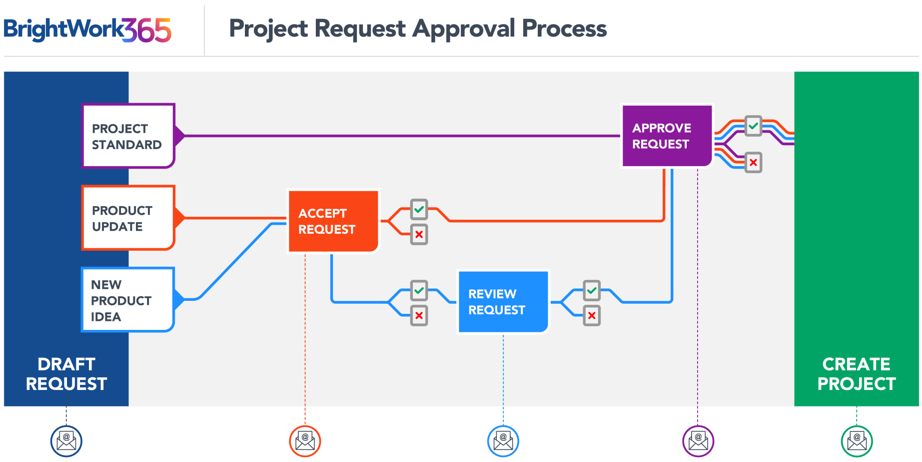


Request Approval Process

Here's a summary of the project request approval process from start to finish as it operates out of the box:

1. (Optional) A user given the BrightWork Template Editor security role configures the default properties for Request Templates and/or corresponding Project templates.
2. A Requestor creates a draft request by filling out a Request form, entering a request title and choosing a request template (which in turn is associated with a project template behind the scenes).
3. The Requestor clicks **Submit** on the Request form to take the request out of Draft mode and send the request to Approvers #1 for a decision. The Approvals Coordinator (a user chosen in the Approvals Coordinator field and also given the BrightWork Approvals Coordinator security role) and Approvers #1 receive an approval notification.
4. (Optional) The Approvals Coordinator clicks into the request to make changes to various field values found in the request's tabs.
5. Approvers #1 make a decision (Accept, Reject, Back to Draft) and the Request Submitter, Approvals Coordinator, and Approvers #1 receive an approval notification.
6. If Approvers #1 accept the request, depending on the Request Template that was chosen, the process will either proceed to project creation, or there will be one or two additional request

stages with additional required approvals.

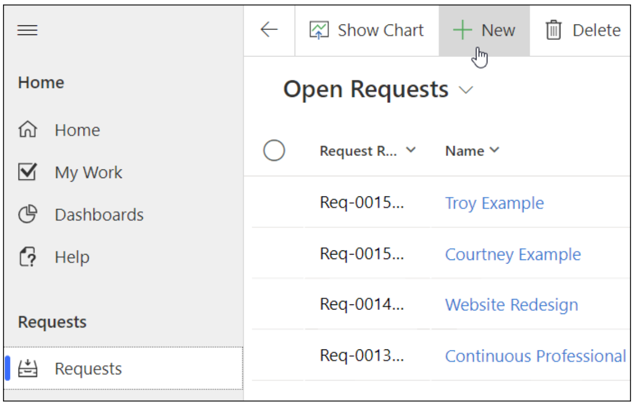
Details - Request Approval Process

The project management lifecycle typically begins in BrightWork 365 Requests, where a requestor submits a new project request along with details needed for an approval decision. Through workflows, notifications and reports, the request process provides users with an efficient method for starting the project management process.

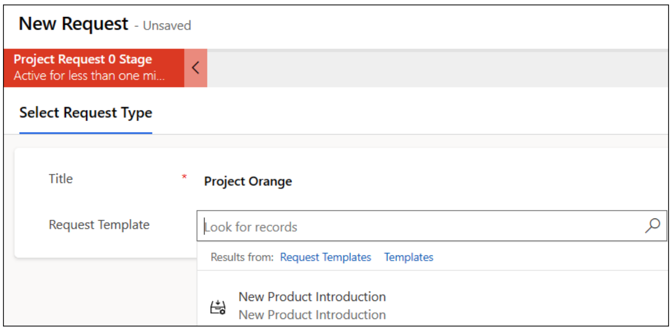
> **Note**
>
> - To submit a project request, at a minimum the user will need the security role Basic User and either BrightWork Request Submitter if only accessing the limited Requests app, or BrightWork Team Member if accessing the full BrightWork 365 app.
> - The request process and form settings can be configured differently than the out of the box versions by users with appropriate permissions.

To start the request approval process:

1. In **Requests** click **+ New**.

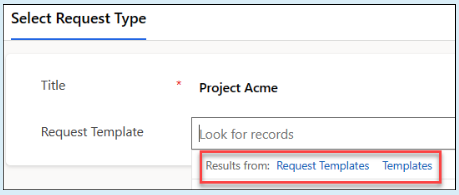


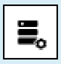
2. A preliminary short form displays where a request title is entered, and a template from which to create the request is chosen. Titles must be unique, have a maximum of 50 characters, and should not contain any special characters including < > : * ? |



> **Note**

- BrightWork 365 ships with 3 starter Request Templates out of the box: Project Standard, Product Update, New Product Idea. For details about the Project Templates these Request Templates are associated with, see the Templates Overview article.
- Customers that have upgraded from BrightWork 365 versions prior to v1.6 will have the option to choose either a new version template included in a later version of BrightWork 365 from the **Request Templates** table, or one of the older version templates from the **Templates** table. To choose, click the search icon and click one of the options.



The newer version Request Templates can be identified by icon , and older version Request Templates by icon .

The selected **Request Template** defines:

- For the **Request**:
  - The forms to apply to the request. The form is all the columns and tabs used to display information about the request.
  - The Business Process Flow (BPF) to apply to the request (the BPF is the process map at the top of the form).
  - The number of approval stages in the request.
- For the **Project** that will be created at the conclusion of the request process:
  - The Project Template that will be used when the project gets created at the conclusion of the project request process.
  - The forms to apply to the project. The form is all the columns and tabs used to display information about the project.
  - The Business Process Flow (BPF) to apply to the project (the BPF is the process map at the top of the form).
  - The number of stages in the project.
  - The Content Template that will be used to create the project if one is linked to the associated project template. Content Templates include starter content, e.g., stages, deliverables, tasks, issues, and risks.

3. The user will then be presented with additional tabs for more details to be entered. The number of tabs displayed will be determined by the requestor's BrightWork security role. The user fills in any remaining request fields they have access to (and adds documents if desired) and has the option to then activate the **Submit** switch.
4. The user will enable the Submit switch and the request will proceed through its stage approval process.

Note

- The Project Template selection in the request can be changed up until project creation. If you need to change the Project Template selection in the Project Details tab of the request, do

> not clear the existing template choice, rather hover over the existing template choice and click the search icon to find the replacement template. If by accident you do clear the existing template, you will be returned to the new form with the original selection in the Request Template column. Select the Template that you want, and you will be sent to the correct form and BPF.
>
> - The Request Template selection cannot be changed after the request is submitted.

Each of the three out of the box starter Request Templates (Project Standard, Product Update, New Product Idea) uses a different stage approval process Business Process Flow:

Project Standard: The Project Standard Request Template uses a 1-Stage approval process Business Process Flow: **Draft ---> Approved**

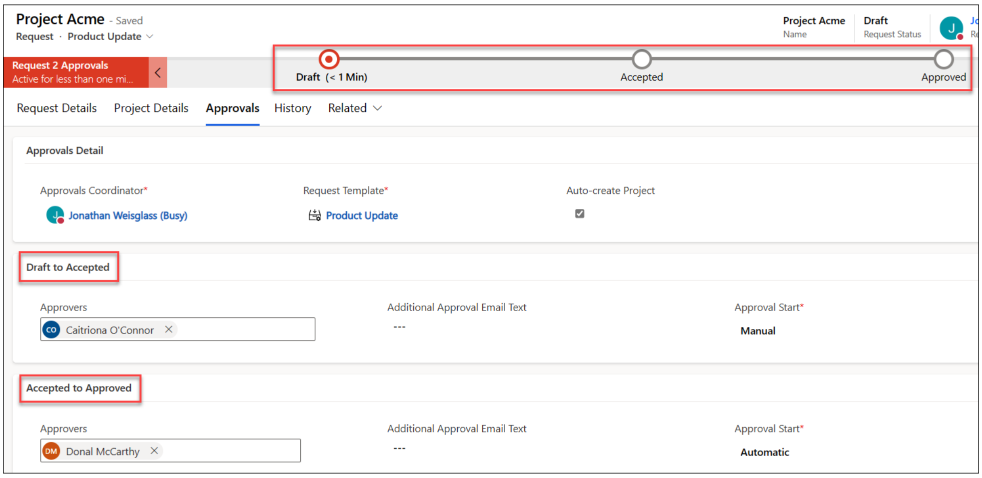
Product Update: The Product Update Request Template uses a 2-Stage approval process Business Process Flow: **Draft ---> Accepted ---> Approved**

New Product Idea: The New Product Idea Request Template uses a 3-Stage approval process Business Process Flow: **Draft ---> Accepted ---> Reviewed ---> Approved**

Each stage has several configuration options available to it, including the selection of nominated Approvers, additional details email text, and whether the **Approval Start** should be **Manual** or **Automatic**.

> **Tip** Request approval processes time-out after 28 days. You can accommodate for this by setting an approval stage's **Approval Start** setting to **Manual** to begin the process when you're ready. See screenshot below.

Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the Approvals tab. The default settings are controlled by the configuration that is set for the template in **Templates Area | Request Templates**. Additional stages beyond what is included out of the box can be added through Business Process Flow customization for up to a total of 10 stages.



> **Note**
> - The approval emails come from the BrightWork 365 installation account's email.
> - If there are multiple Approvers, all of them must approve the Request in order for the stage to be approved.
> - In order for the project to be created at the conclusion of an accepted request, all required fields in the request's tabs must contain values.
> - At the conclusion of the request process, the Request will be set to read-only mode. If the request is approved, a project will be created either automatically or manually by the Approvals Coordinator. An email will be sent when the project is ready to be used.

Request Status

The Request Status will be **For Approval** while the process is waiting for all the Approvers to be done with their approval decisions. The Request Status will be **Approved** when the process is in between approval decisions. If **Approval Start** is set to **Automatic**, then a status of **Approved** will only be present until the next screen refresh, at which point it will be automatically changed to **For Approval**.

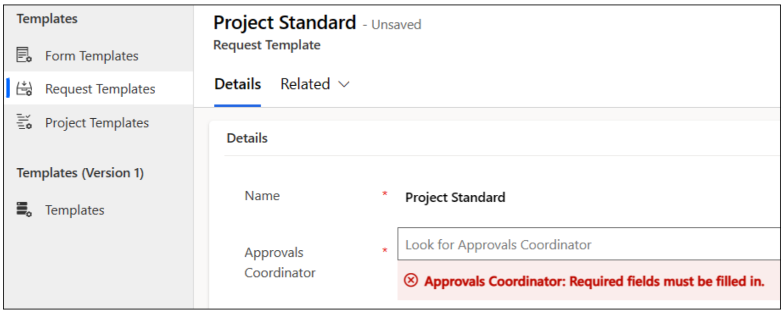
The **Back to Draft** approval submission sets the approval process back to the initial **Draft** stage and unlocks the Request fields so that field value updates can be made.

> **Note**
> - Users with the **BrightWork Stage Mover** security role cannot manually move stages through the Business Process Flow in Requests; stage approval by the nominated Approvers is always required in Requests.
> - System Administrator movement of stages via the Business Process Flow is not supported in Requests.

Troubleshooting

Script Errors When Filling Out the Request Form

Ensure there is a value in the **Approvals Coordinator** field in the associated Request Template.



Approval Emails are not Actionable and the User is Taken to the Flow Portal

See Issues with flow approval emails in Outlook - Power Automate | Microsoft Learn

Request Form Details

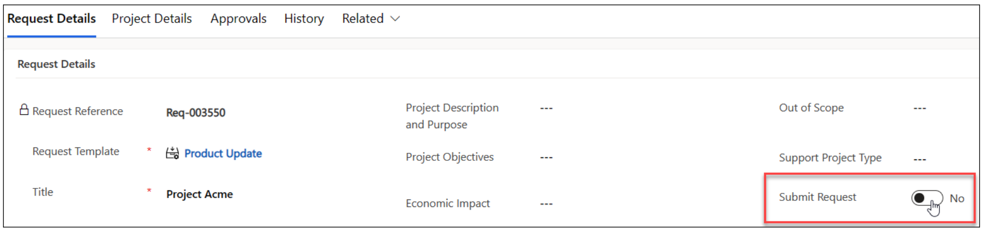
> **Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Request Tabs

Request Details

The Request Details tab contains fields relevant to moving the request process forward as well as fields that will be copied over to the related new project that eventually gets created.

After the Requestor clicks the **Submit** switch on the Request Details tab, an email with request details will be sent to the Request Submitter, Approvals Coordinator and the nominated Approvers.

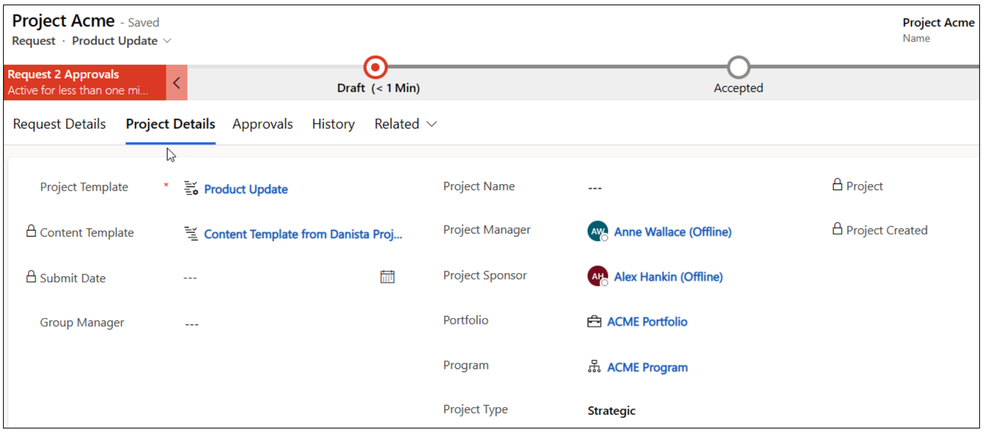


Project Details

The **Project Details** tab in Requests will be visible for users given the **BrightWork Team Member** security role.

The values for the following fields in Project Details can be specified in the Project Template and will automatically populate the corresponding columns in the Project Details tab of new Requests:

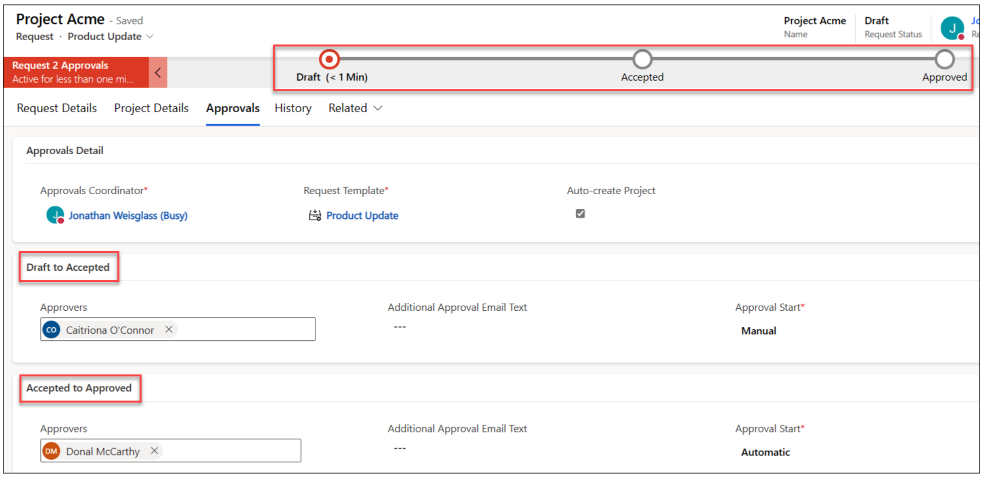
- Content Template
- Portfolio
- Program
- Project Manager
- Project Sponsor
- Project Type



Approvals

The **Approvals** tab in Requests will be visible for users given the **BrightWork Approvals Coordinator** security role.

Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the Approvals tab. The default settings are controlled by the configuration that is set in **Templates Area | Request Templates**.



Approvals Coordinator

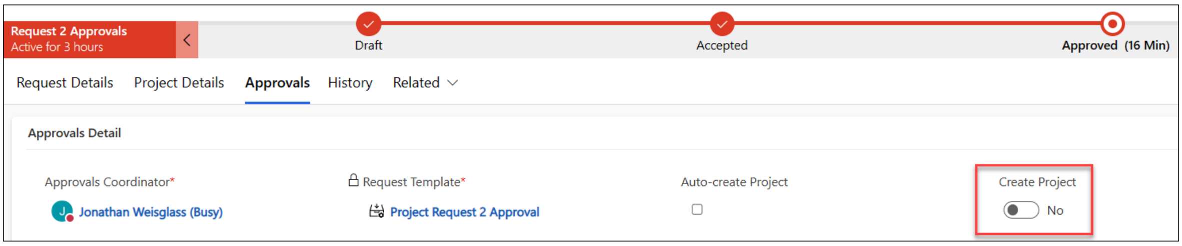
The Approvals Coordinator helps to keep the approval process moving along. The Approvals Coordinator field is a lookup field and security role. This user must be given the BrightWork Approvals Coordinator security role in addition to being selected as the Approvals Coordinator in the Request Template.

The Approvals Coordinator does not make approval decisions; all stage approvals are done by the nominated Approvers. The Approvals Coordinator also does not move the process from one stage to the next via the Business Process Flow; this must be done via approvals completed by the nominated Approvers.

The Approvals Coordinator will be sent approval related notifications.

Create Project

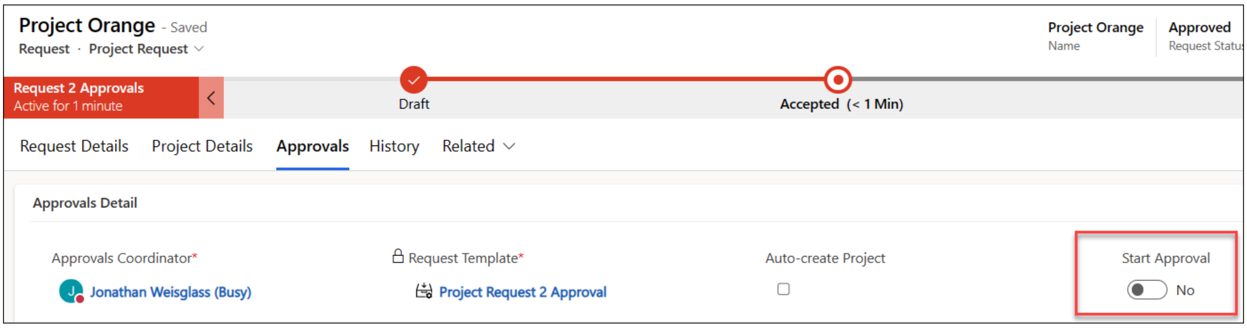
The **Create Project** toggle button will appear in the Approvals tab of a request that has been configured to not auto create projects. The Approvals Coordinator can toggle the button to create a project when the button becomes enabled.



Approval Start

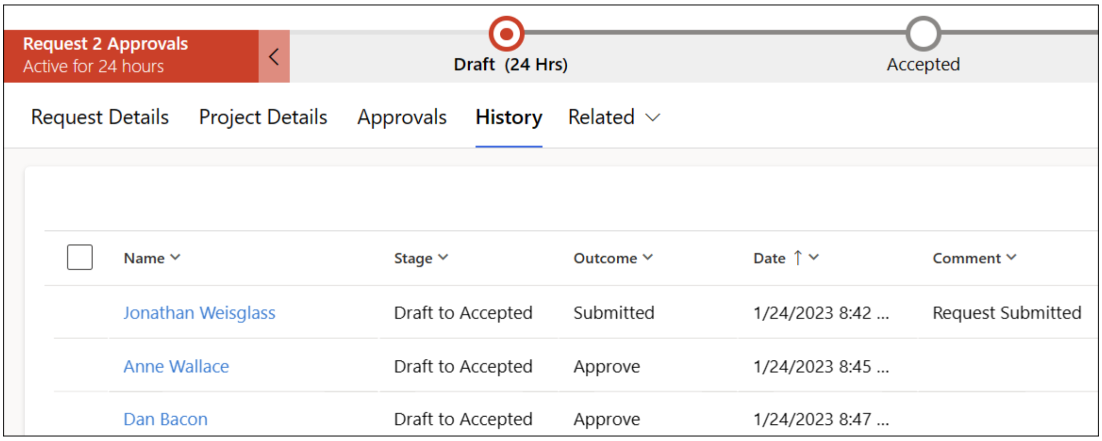
If **Approval Start** is set to **Automatic**, the approval process starts as soon as the previous approval gets approved.

If **Approval Start** is set to **Manual**, the Approvals Coordinator gets notified that they have an approval to manually start after the previous approval gets approved, and the **Start Approval** button on the **Approvals** tab will become enabled.



History

The History tab displays a history of the approvals process.


Request 2 Approvals
Active for 24 hours
Draft (24 Hrs)
Accepted
Request Details
Project Details
Approvals
History
Related
Name
Stage
Outcome
Date
Comment
Jonathan Weisglass
Draft to Accepted
Submitted
1/24/2023 8:42 ...
Request Submitted
Anne Wallace
Draft to Accepted
Approve
1/24/2023 8:45 ...
Dan Bacon
Draft to Accepted
Approve
1/24/2023 8:47 ...

BrightWork 365 Requests App

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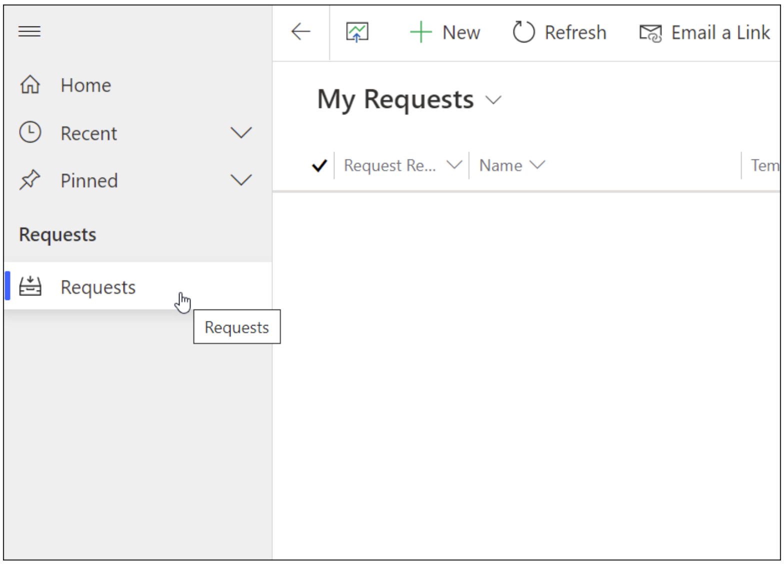

In addition to the full BrightWork 365 app, organizations have the option to also install and assign users to the limited Requests app. The Requests app provides users who have only been given a free BrightWork 365 license and assigned the **BrightWork Request Submitter** role a means with which to log requests outside of the full BrightWork 365 app. Users of this app will have access to much of the same request functionality as found in the Requests Area of the full BrightWork 365 app for paid users, but they will not see the other full app areas on the Site Map such as the sections Projects, and Portfolios. However, note that these users still have access to these other app areas by navigating to them through other routes such as by clicking on linked columns, e.g., the Program column in the Request form.

Note As with all other functionality in BrightWork 365, Requests App users will need one of the following licenses from Microsoft: Power Apps Premium/Power Apps per user, Power Apps per App, or Dynamics.

Approvals in Microsoft Teams

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Approvals in Microsoft Teams

In addition to reviewing and acting on approval requests via the automatically generated approval request emails, you can also do so within Microsoft Teams by installing Approvals in Microsoft Teams.

See the articles below for more information about Approvals in Microsoft Teams:

- https://learn.microsoft.com/en-us/power-automate/teams/native-approvals-in-teams
- https://learn.microsoft.com/en-us/power-automate/teams/manage-approvals-app

Canceling In Progress Approvals

An approval that is still in progress can be cancelled by the Request Submitter from within Approvals in Microsoft Teams. To do so, from the **Sent** tab in the Approvals app the user selects the approval they want to cancel and then selects the **Cancel** option. Only approvals that are currently in progress can be canceled.

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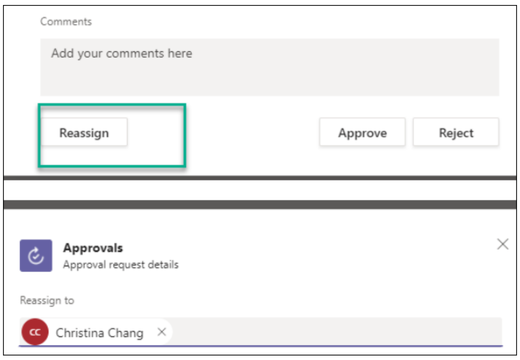
Reassigning In Progress Approvals

In progress approvals can be reassigned from within the Approvals app in Microsoft Teams by clicking the **Reassign** button.



Although the new approver will receive notifications to take an approval action and their actions will show in email history logs, the original approvers will be maintained in the email **Approvers** field.

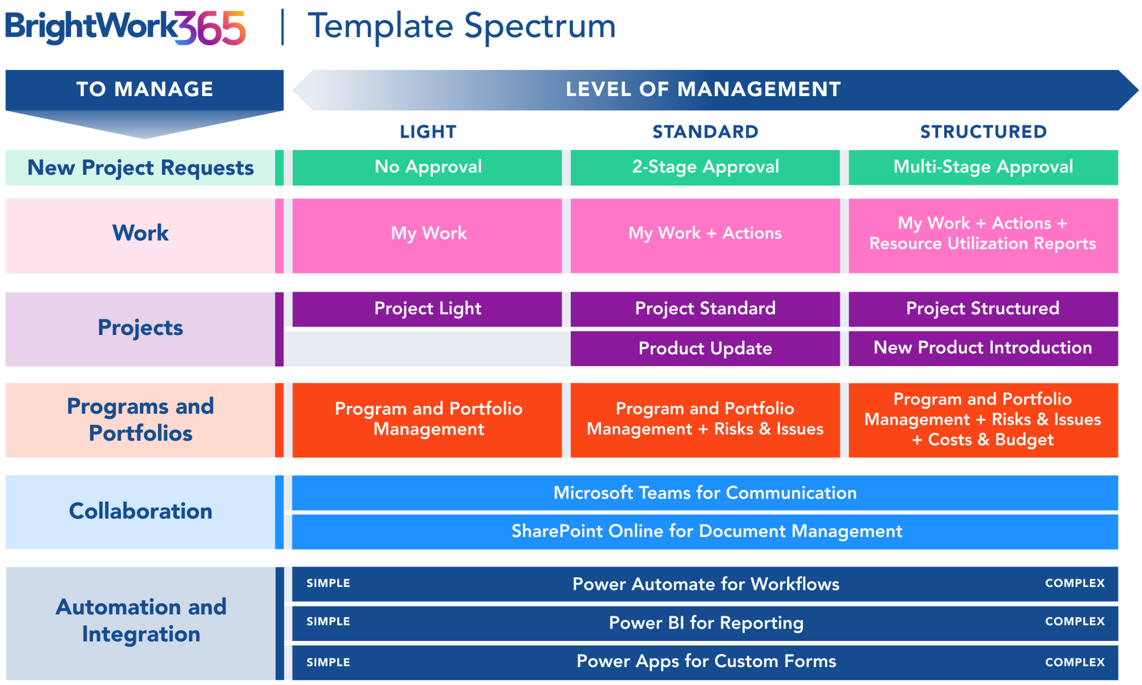
Hi Anne,

A project stage approval that you submitted has been approved. See below for the details:

- Project: Proj-001611: Product Update with CT
- Approval Stage: Close Out to Closed
- Approvers: Caitriona O'Connor;

User	Stage
Christina Chang	Execution to Close Out
Christina Chang	Chartering to Execution
Christina Chang	Execution to Close Out
Christina Chang	Close Out to Closed

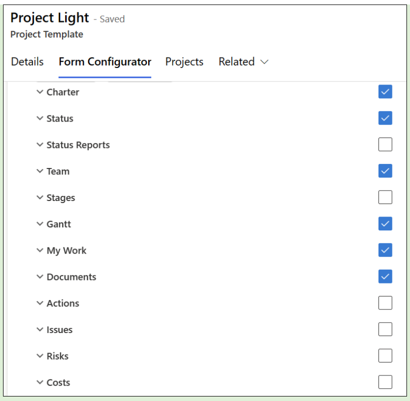
BrightWork 365 Starter Project Templates



Note BrightWork 365 comes with five starter project templates to help you get started managing projects quickly:

- The **Project Light** starter template is for managing projects that are at the low end of the complexity spectrum for projects that require small amounts of project management.
- The **Project Standard** starter template provides a semi-structured process that is useful for a range of business departments to run their projects including sales, marketing, engineering, finance, etc. This template is in the middle of the complexity spectrum.
- The **Product Update** starter template is typically used for projects related to updates of existing products or technologies, and for complex support issues.
- The **Project Structured** starter template is for managing projects that are in the high end of the complexity spectrum.
- The **New Product Introduction** starter template relates to the submission of a new product idea and managing the delivery of the new product. This template is on the higher end of the project management process maturity scale.

Tip Different Tabs, Sections, and Columns are hidden in Project Starter Templates (depending on the specific template) via the Form Configurator; the display options for these elements can be adjusted by users with appropriate permissions.



All Templates

Note

- Templates that are associated with a Content Template will be prepopulated with project data.
- User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.

The elements below are common to all Starter Project Templates:

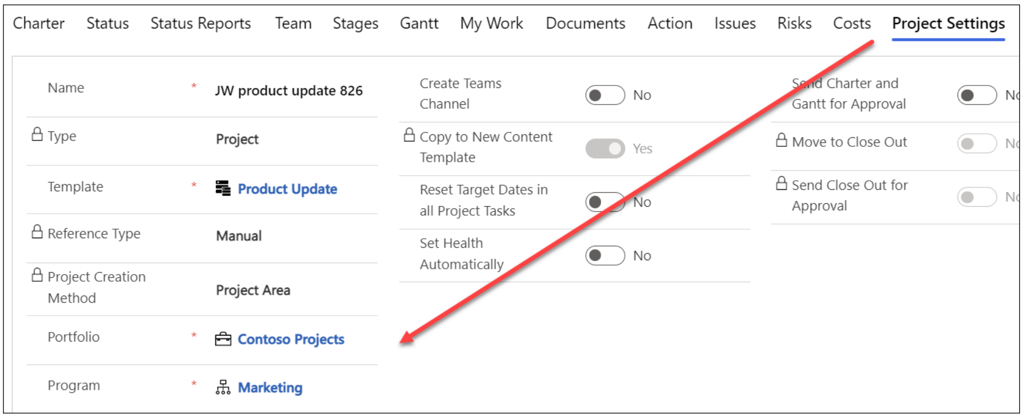
Charter

The Charter tab contains high level metadata about the project, including the project title and stakeholder information.

The following columns limit their user lookup values to the corresponding mapped BrightWork security role:

- Project Sponsor column mapped to BrightWork Team Member security role
- Project Manager column mapped to BrightWork Project Manager security role

The **Charter** tab also contains the mandatory columns **Program** and **Portfolio**. The values for these columns can later be changed in the **Project Settings** tab by a user with elevated privileges (see the **Project Settings** section below). All associated child items will be automatically adjusted to reflect these value changes.

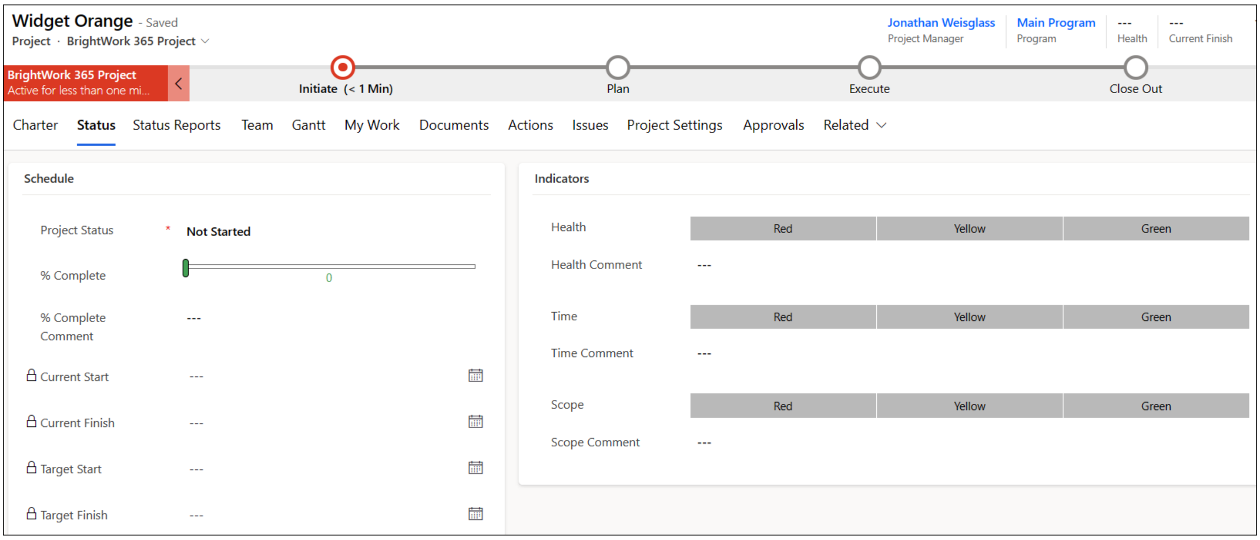


The following can be specified in Project Templates and will populate corresponding columns in the **Charter** and **Project Settings** tabs of new Projects:

- Content Template
- Portfolio
- Program
- Project Manager
- Project Sponsor
- Project Type

Status

The **Status** tab allows the project manager to set current project metrics and KPIs.

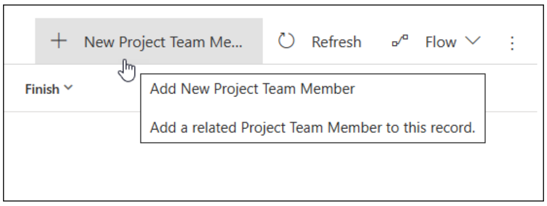


See the Project Status Reporting article for more information.

Team

The **Team** tab automatically populates with the names of work item assignees, and the earliest start dates and latest finish dates across all the work assigned to them.

To manually add a team member that has not yet been automatically added from being assigned a work item, click **+ New Project Team Member**.



Note

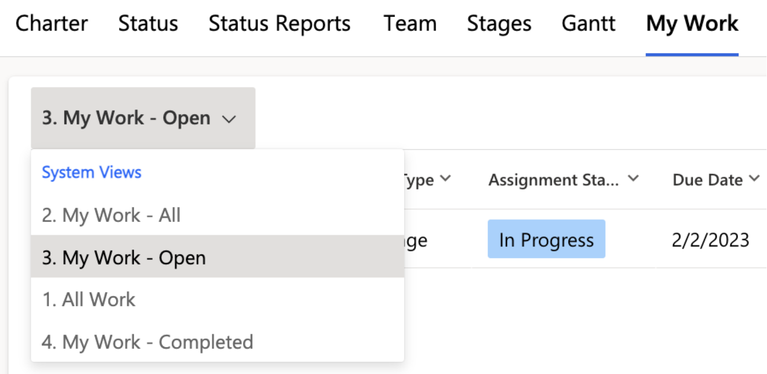
- To manually delete a Project Team Member from the **Team** tab in a project, you will first need to remove the user from all work assignments in the project.
- Dates may not update in the Teams tab until an update of some kind is made in the Gantt tab, which will trigger the date update.

Gantt

List of project tasks with a corresponding bar chart that represents the project schedule with task start and end dates. Visually depicts dependency relationships between the tasks as well as task status. See the Task Management article for more information.

My Work

To view all work assigned to you within a project, click into the project's **My Work** tab. You can enter a specific piece of work by clicking on the Name of the assignment.



Note After opening and closing an assignment, you will be brought back to the default view of the My Work tab.

Documents

The Documents tab is where you can create new Microsoft Office documents and upload existing documents. These files are stored in your organization's SharePoint document library that is associated with BrightWork 365.

Caution

- By default, files deleted from the Documents tab will be permanently deleted from the SharePoint site associated with BrightWork 365 and cannot be restored from a recycle bin. Contact your Microsoft Support representative to discuss activating the associated SharePoint Recycle bin to be able to restore deleted documents.
- SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

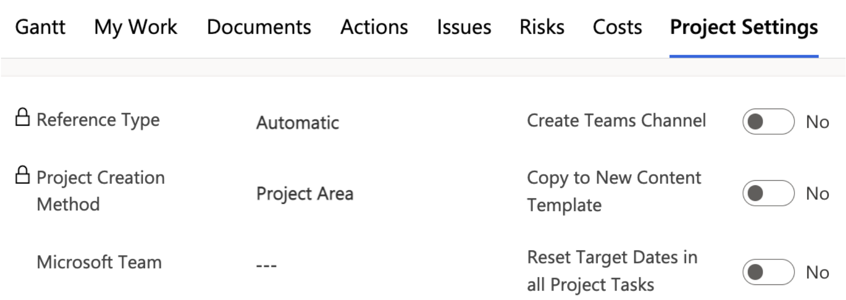
Project Settings

Only users with the **BrightWork Project Manager**, **BrightWork PMO Manager** or **BrightWork Program Manager** security role can access the **Project Settings** tab.

The **Project Settings** tab provides additional project information and gives the manager the ability to change the portfolio or program associated with the project, reset the target dates in all project tasks (baseline the schedule), and other administrative tasks.

Microsoft Teams

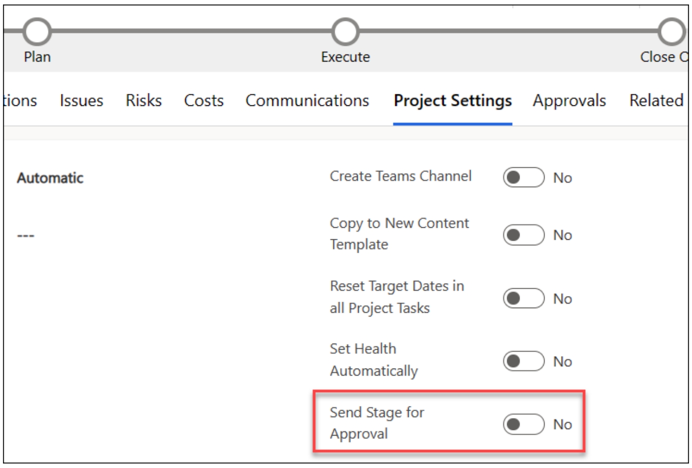
Project Settings also allows the project manager options with regards to **Microsoft Teams**, e.g., they can create a Microsoft Teams Channel for the defaulted associated Microsoft Team (which is based on the project's parent program Microsoft Team setting), or they can connect to a different Microsoft Team if a Channel has not yet been created for the project.



Note If the project is later moved to a different program, the project's Microsoft Team Channel will not move to the new program's Microsoft Team.

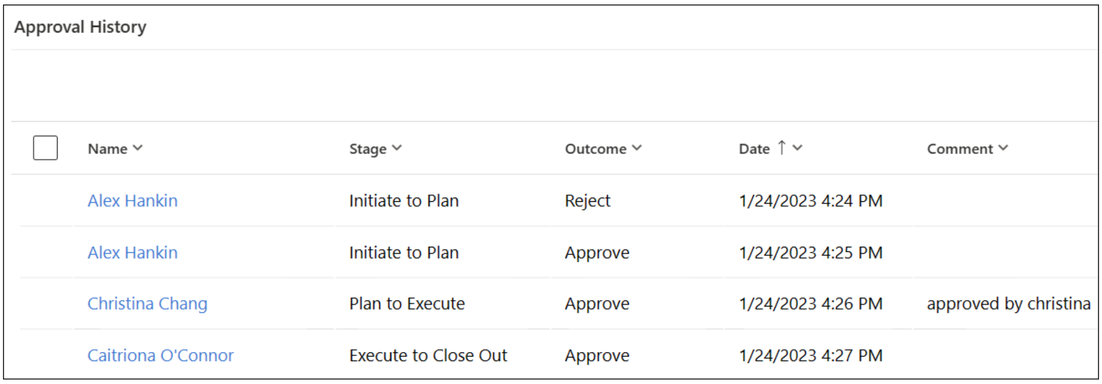
Send Stage for Approval

If approval is required for a stage, the approval process will need to be started manually by the Project Manager by clicking the **Send Stage for Approval** button in the **Project Settings** tab. When a stage is sent for approval, some sections of the project will be made read-only, and a related message will display on the **Charter** tab. The Business Process Flow will not be disabled, but users will be prevented from moving a stage forward or backward.



Approval History

The Approval History section of the Project Settings tab includes a history of the approval process for each stage of the Business Process Flow.



Approval History

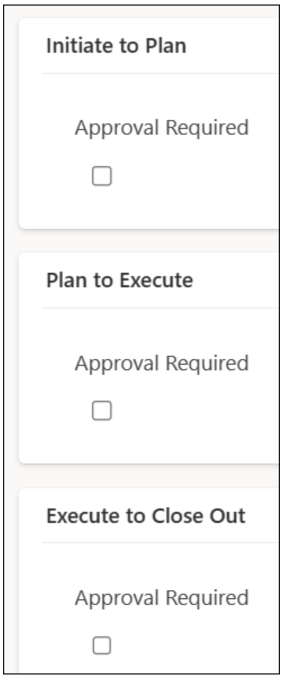
Name	Stage	Outcome	Date	Comment
Alex Hankin	Initiate to Plan	Reject	1/24/2023 4:24 PM	
Alex Hankin	Initiate to Plan	Approve	1/24/2023 4:25 PM	
Christina Chang	Plan to Execute	Approve	1/24/2023 4:26 PM	approved by christina
Caitriona O'Connor	Execute to Close Out	Approve	1/24/2023 4:27 PM	

Approvals

The Approvals tab is only visible to users given the **BrightWork Approvals Coordinator** security role.

Approvals Coordinator is a lookup and security role - the nominated user must be chosen in the **Approvals Coordinator** field and also be given the **BrightWork Approvals Coordinator** security role. The Approvals Coordinator will be notified of approval process progress.

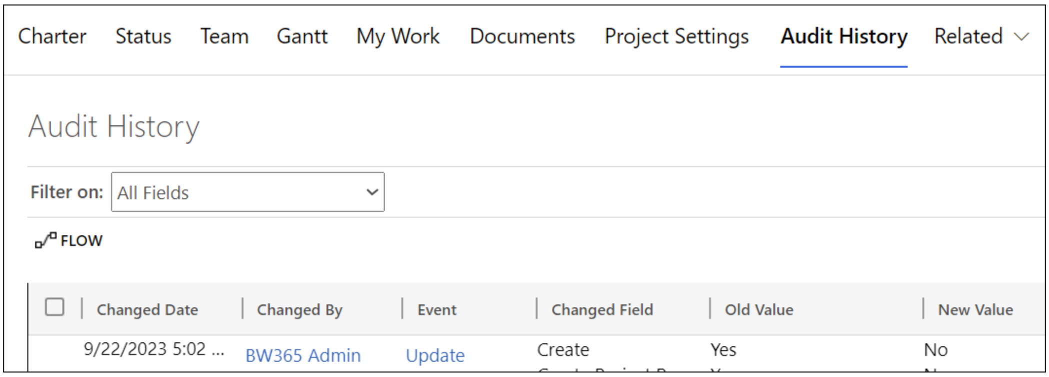
Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the **Approvals** tab. The default settings are controlled by the configuration set in **Templates Area > Project Templates** by a user given the **BrightWork Template Editor** security role.



See the Project Stage Approval Process article for related information.

Related | Audit History

The Related tab contains the Audit History link that allows you to view changes that were made throughout the project.

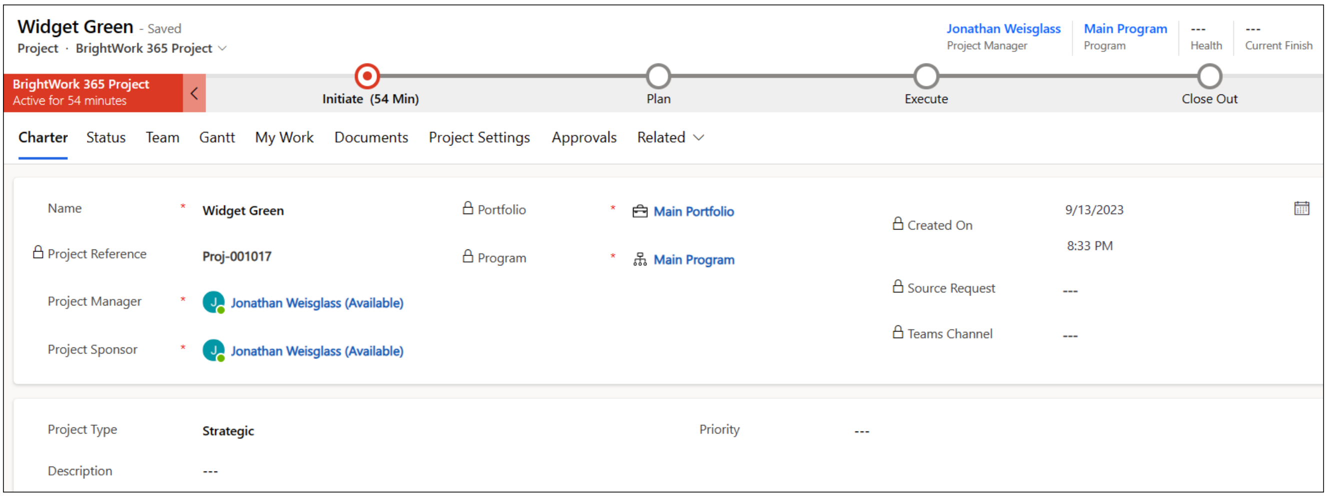


Project Light

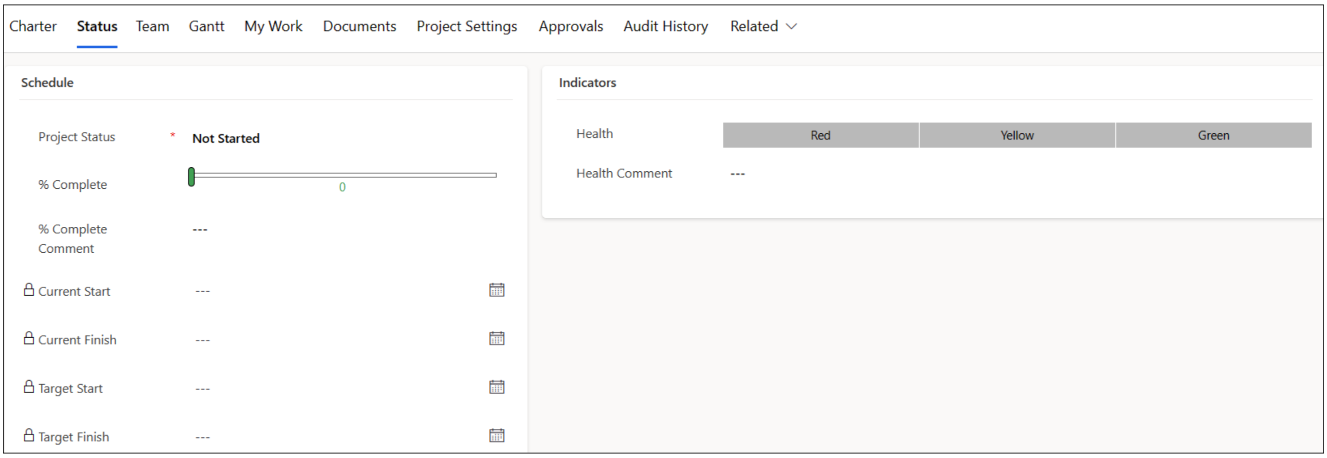
The elements below are also included in this template:

Header, Business Process Flow, Project Management

Tabs and Charter Columns



Status

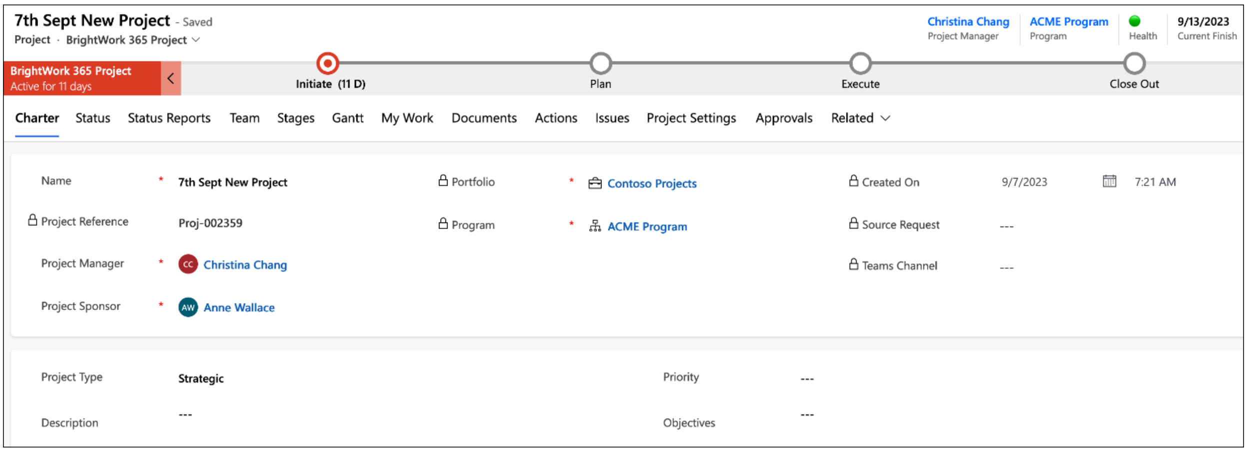


See the Project Status Reporting article for more information.

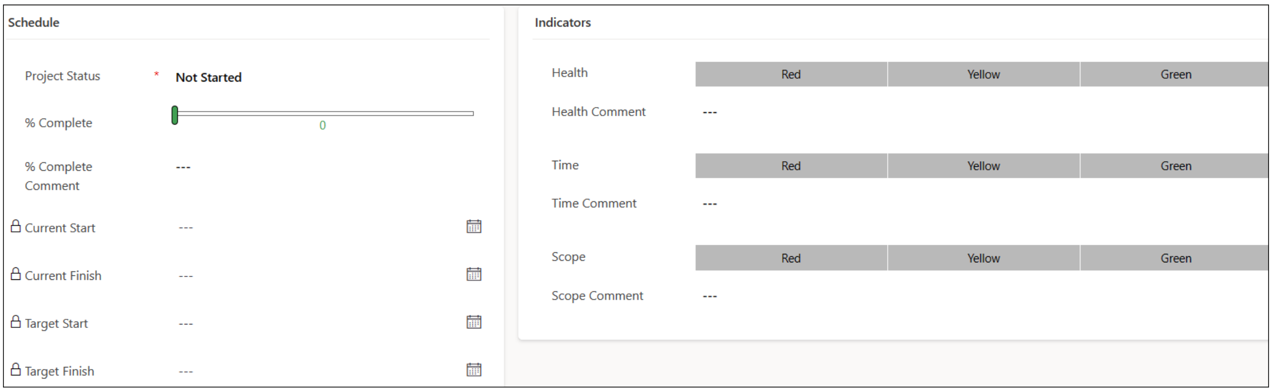
Project Standard

The elements below are also included in this template:

Header, Business Process Flow, Project Management Tabs and Charter Columns



Status



See the Project Status Reporting article for more information.

Status Reports

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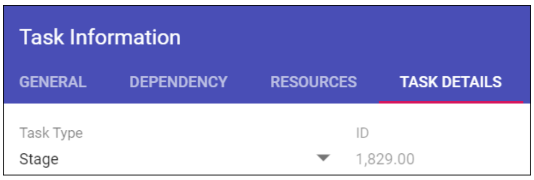

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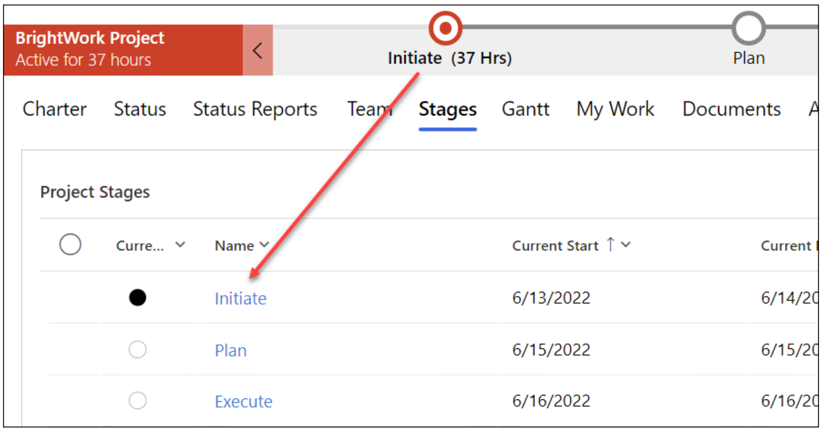

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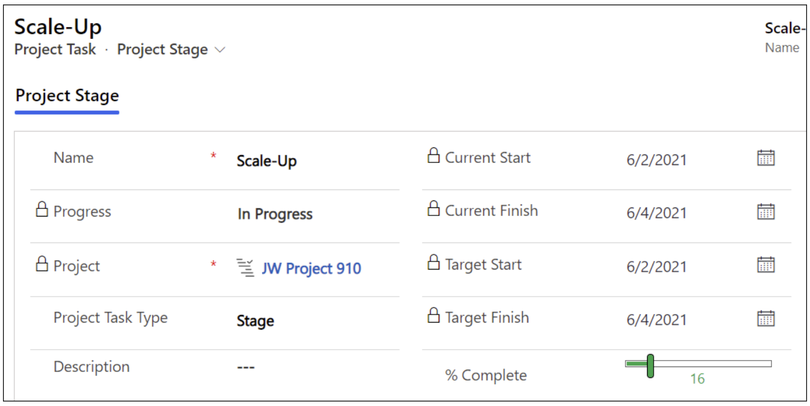

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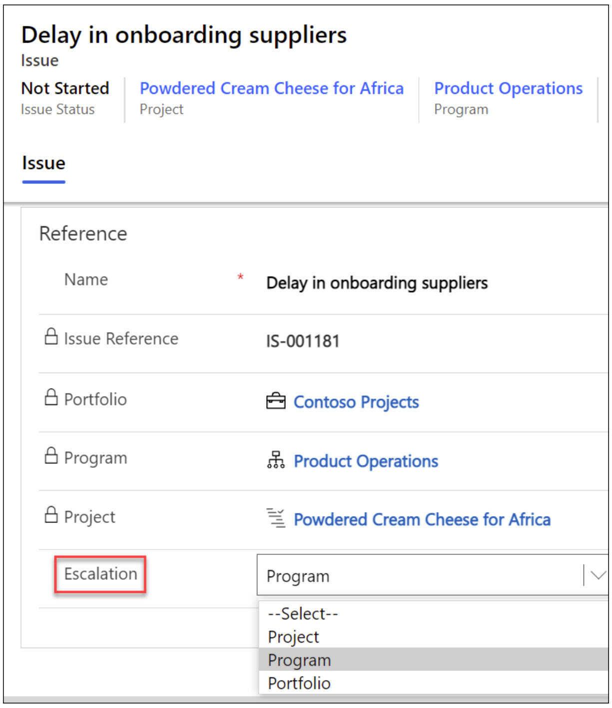
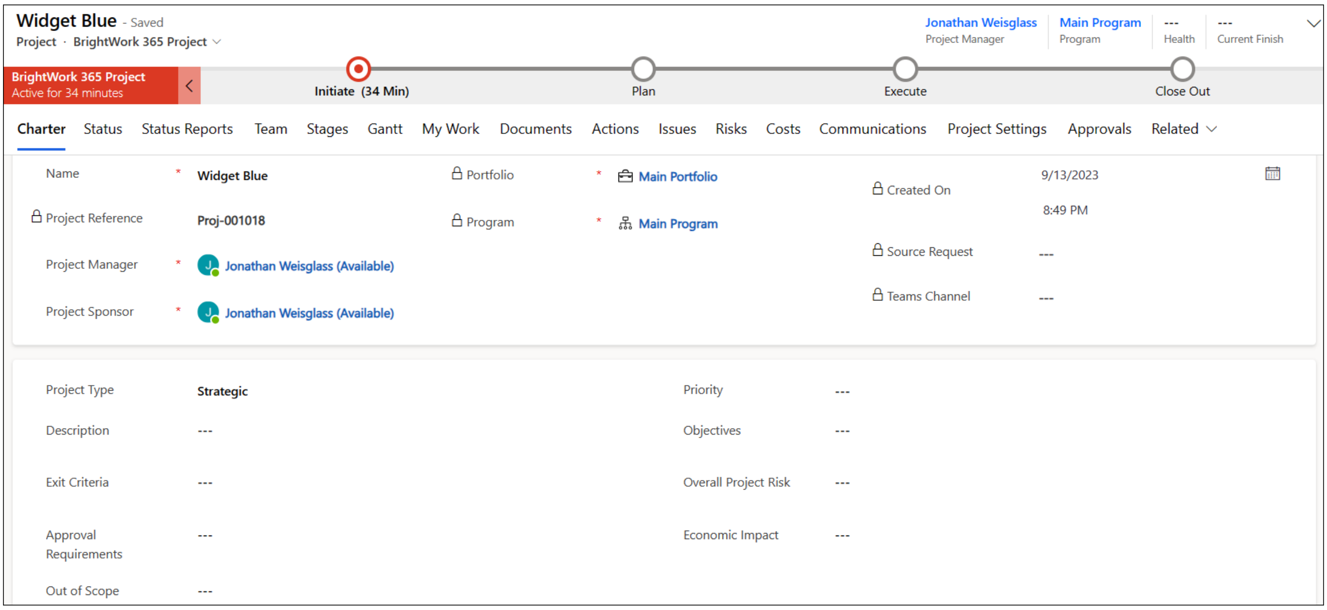


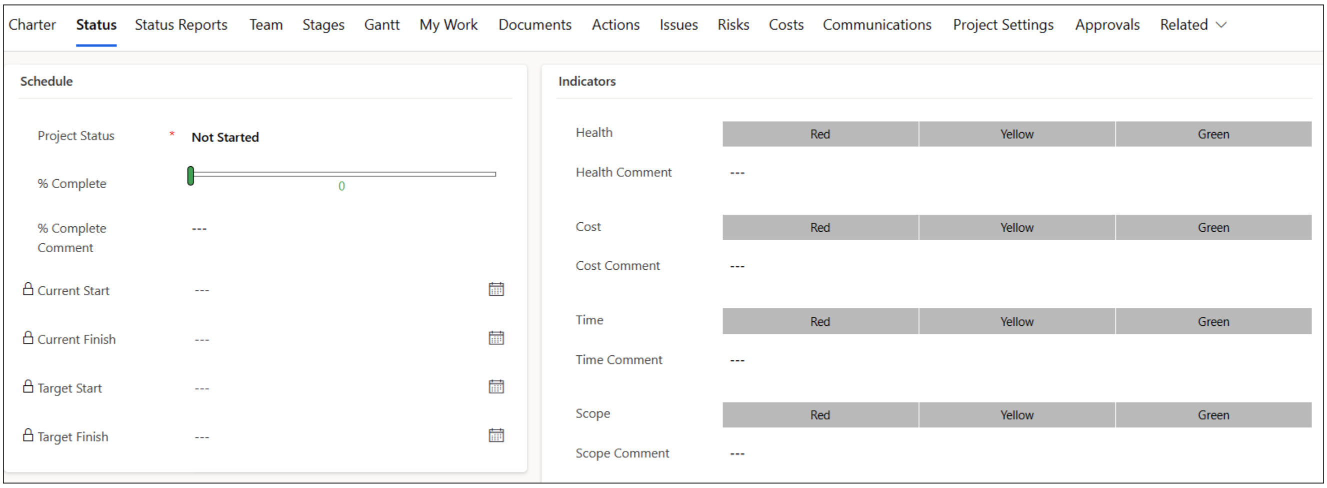
Project Structured

The elements below are included in this template:

Header, Business Process Flow, Project Management Tabs and Charter Columns



Status



See the Project Status Reporting article for more information.

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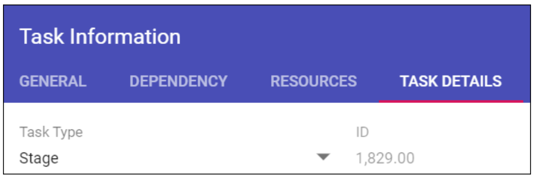

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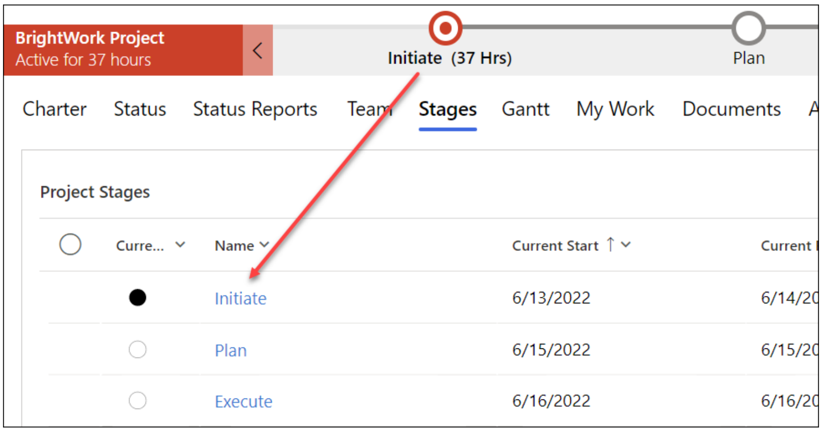

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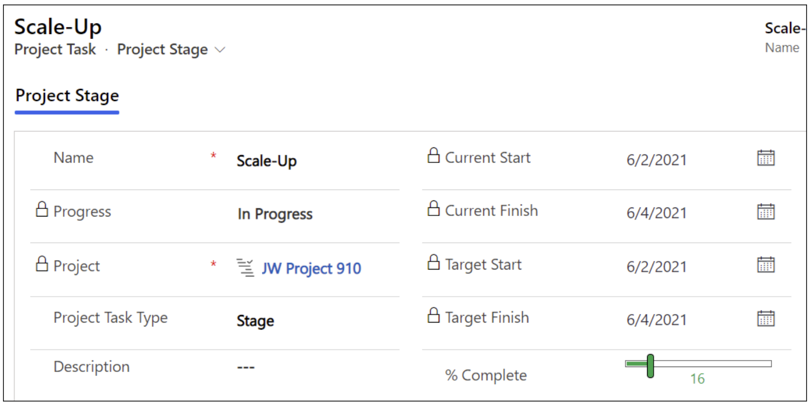

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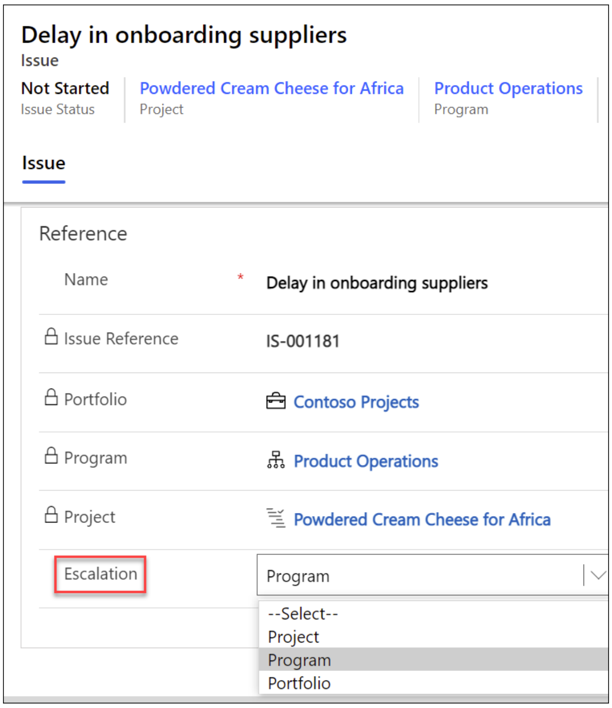

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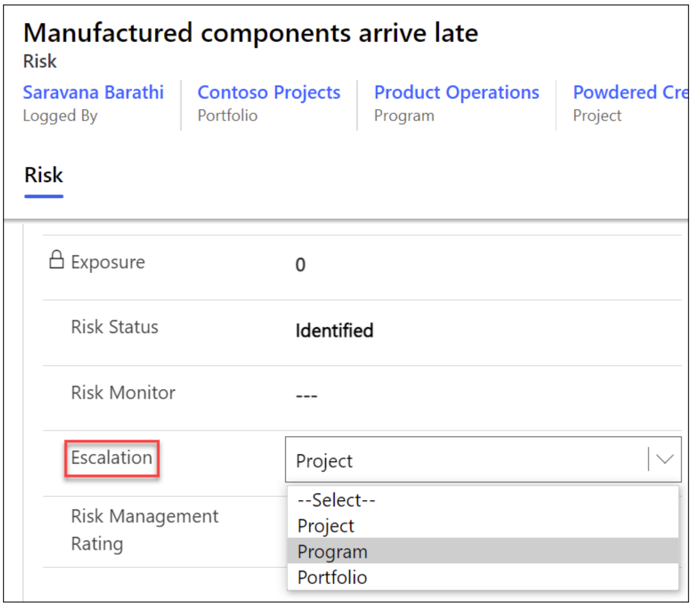

Costs

The Costs tab provides a comprehensive method for capturing and tracking project budgets and actual costs at the project and individual item levels. See the Costs article for details.

Communications

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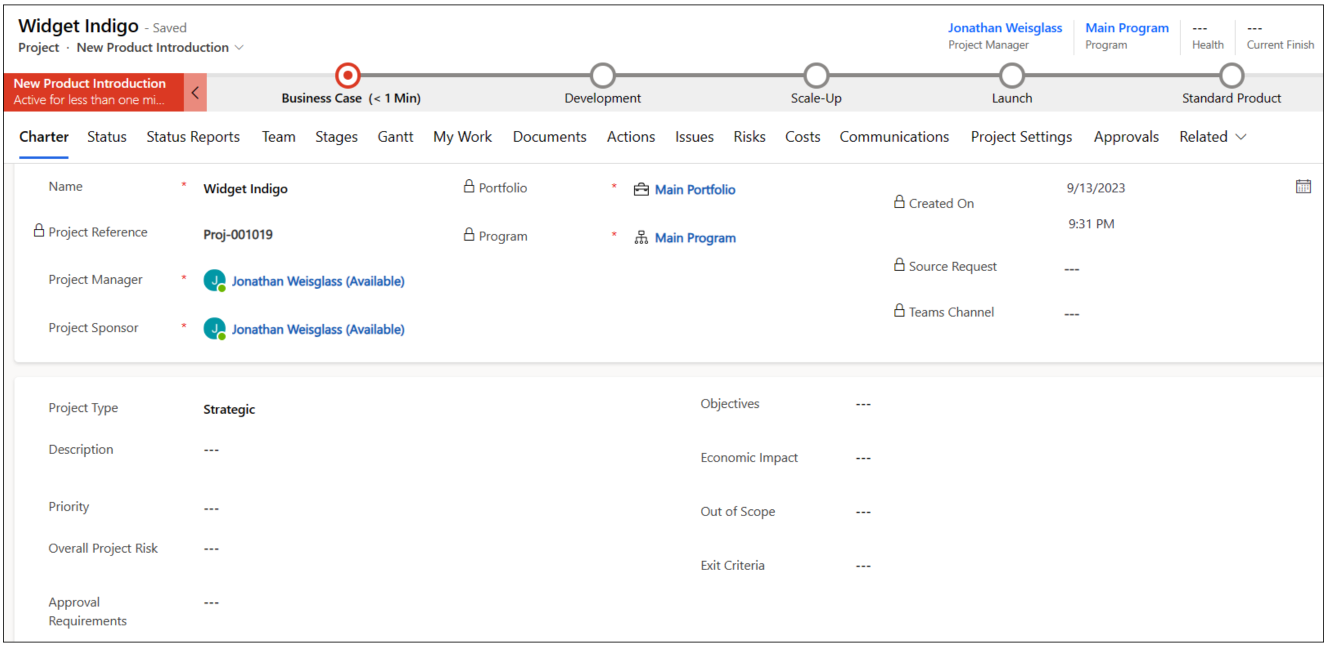
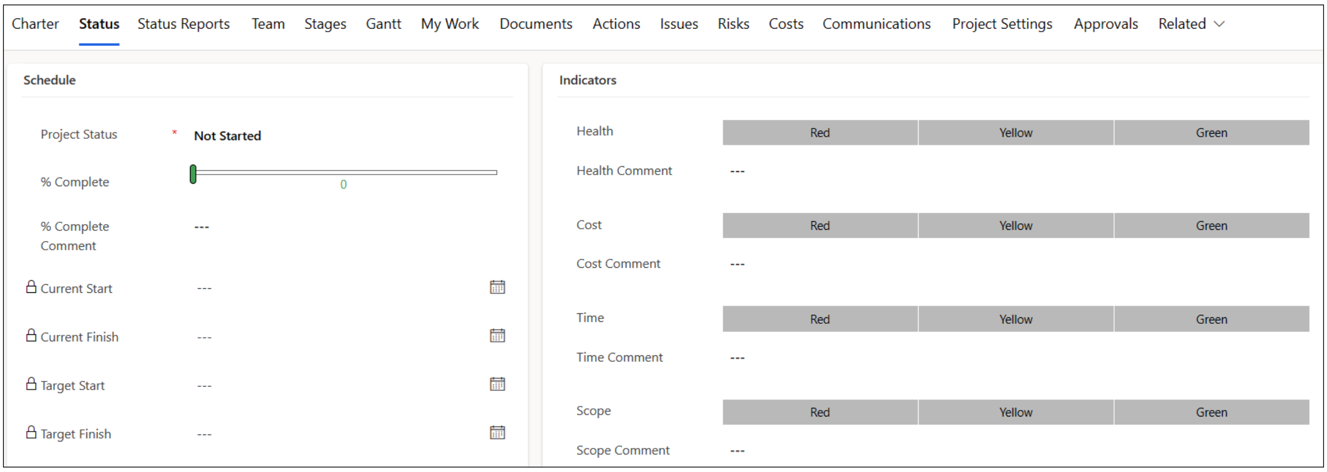
New Product Introduction

The elements below are included in this template:

Header, Business Process Flow, Project Management Tabs and Charter Columns



Status



See the Project Status Reporting article for more information.

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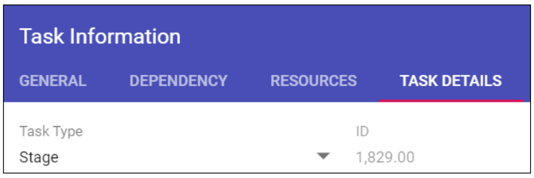

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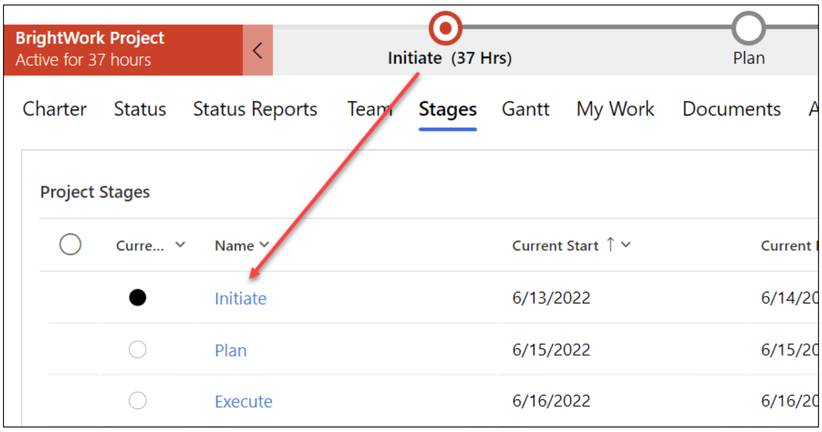

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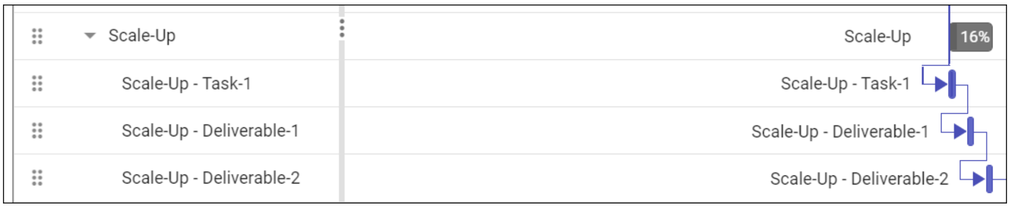

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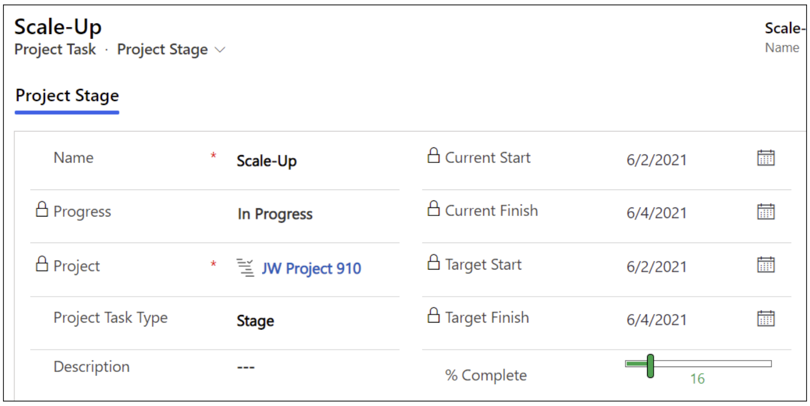

Actions

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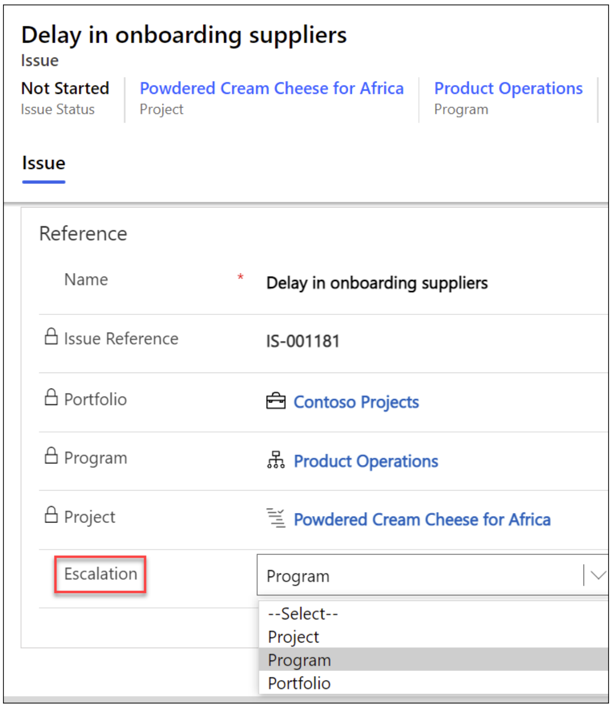

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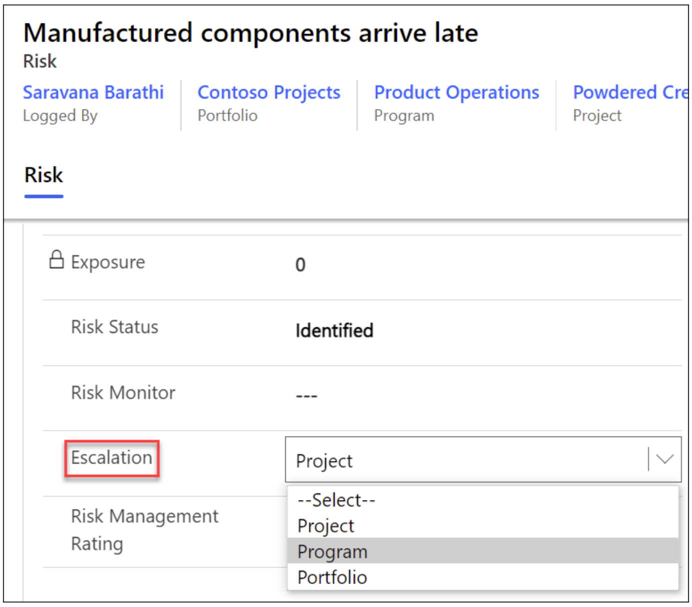

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Product Update

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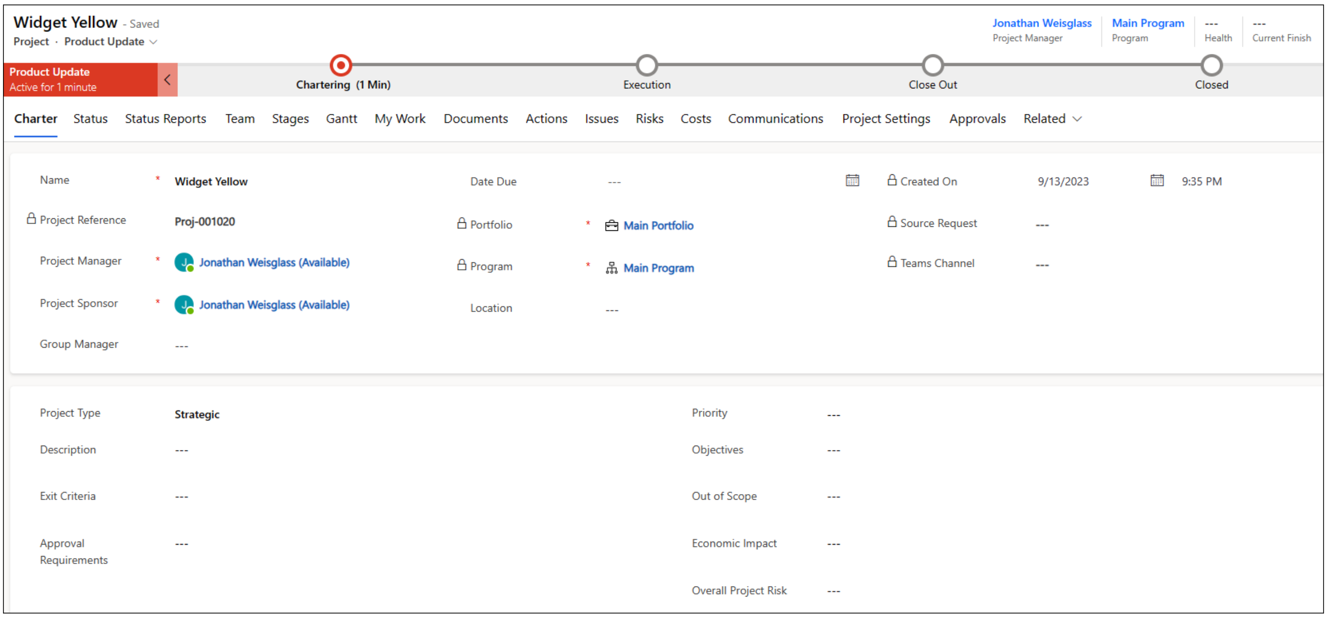
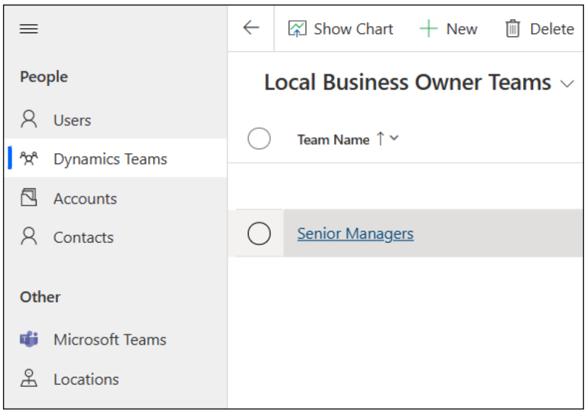


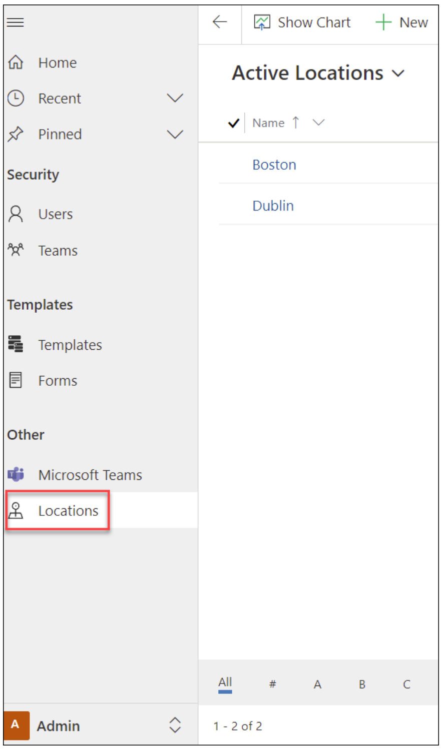
Group Manager Field

The list of users returned in the **Group Manager** drop-down field that is in the **Charter** tab of Product Update projects is limited to the users added to the **Senior Managers** Dynamics Team found in **Admin Area | Dynamics Teams**.

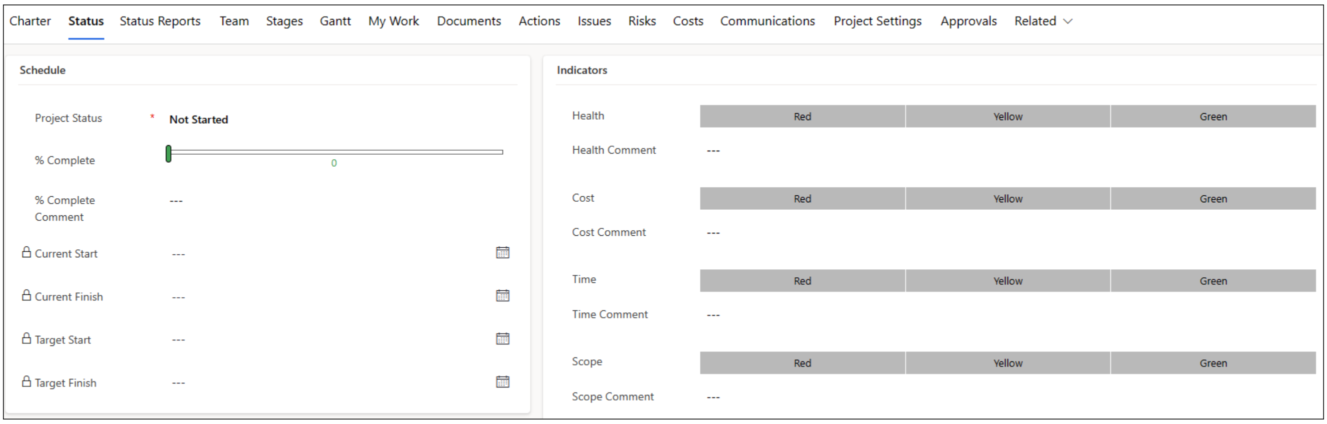


Location Field

The **Location** drop-down menu choices that are found in the Charter tab of the Product Update template are configured in **Admin Area | Locations**.



Status



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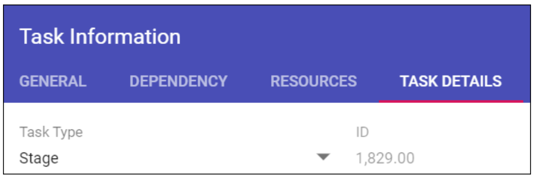

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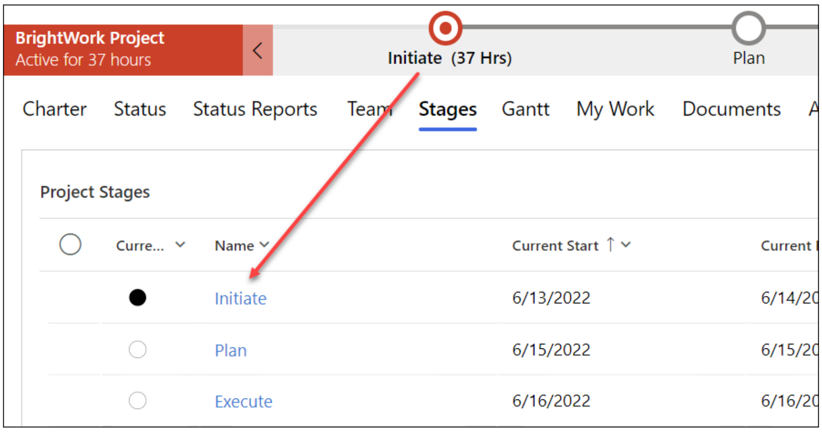

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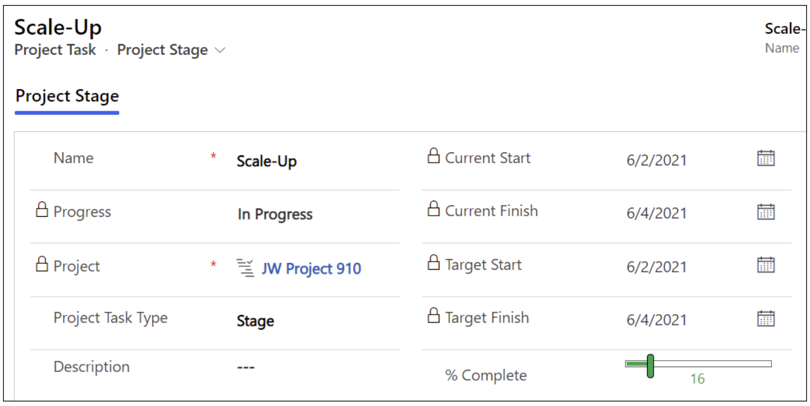

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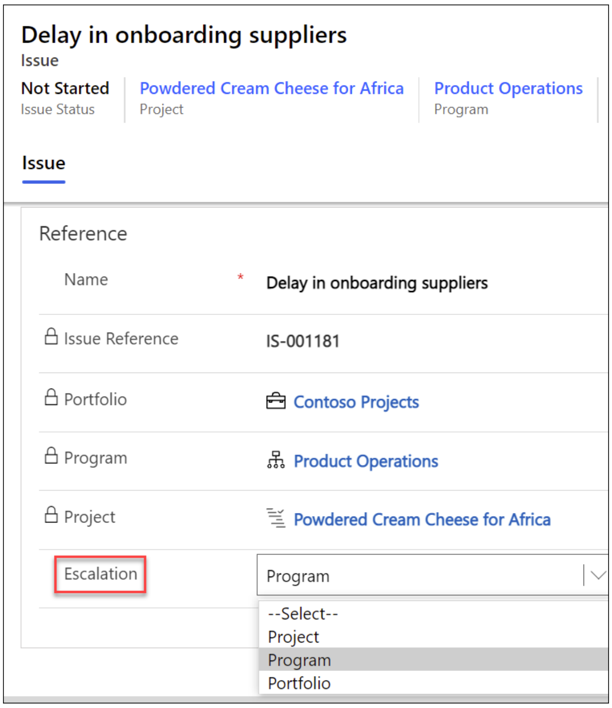

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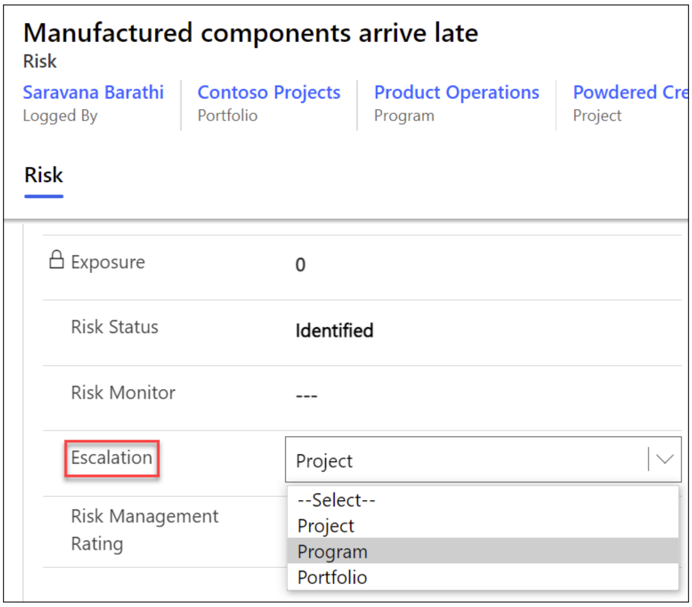

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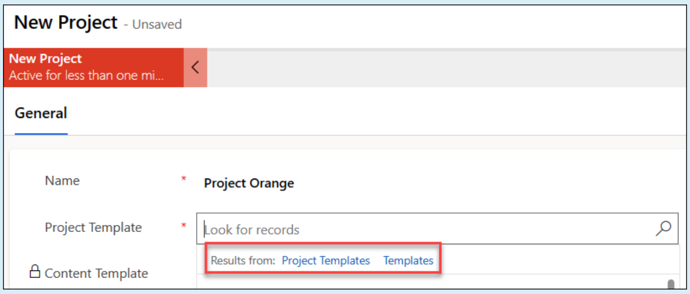
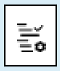
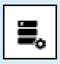
Create Projects

Note

- BrightWork 365 ships with 5 Starter Project Templates out of the box: Project Light, Project Standard, Project Structured, Product Update, and New Product Idea. For template details, see the Templates article.
- Customers that have upgraded from prior version of BrightWork 365 have the option to choose either a new version template included in a later version of BrightWork 365 from the **Project Templates** table, or one of the older version templates from the **Templates** table. To choose, click the search icon and click one of the options.



The newer version Project Templates can be identified by icon  , and older version Project Templates by icon  .

Note Project titles must be unique, have a maximum of 50 characters, and should not contain any special characters including < > : * ? |

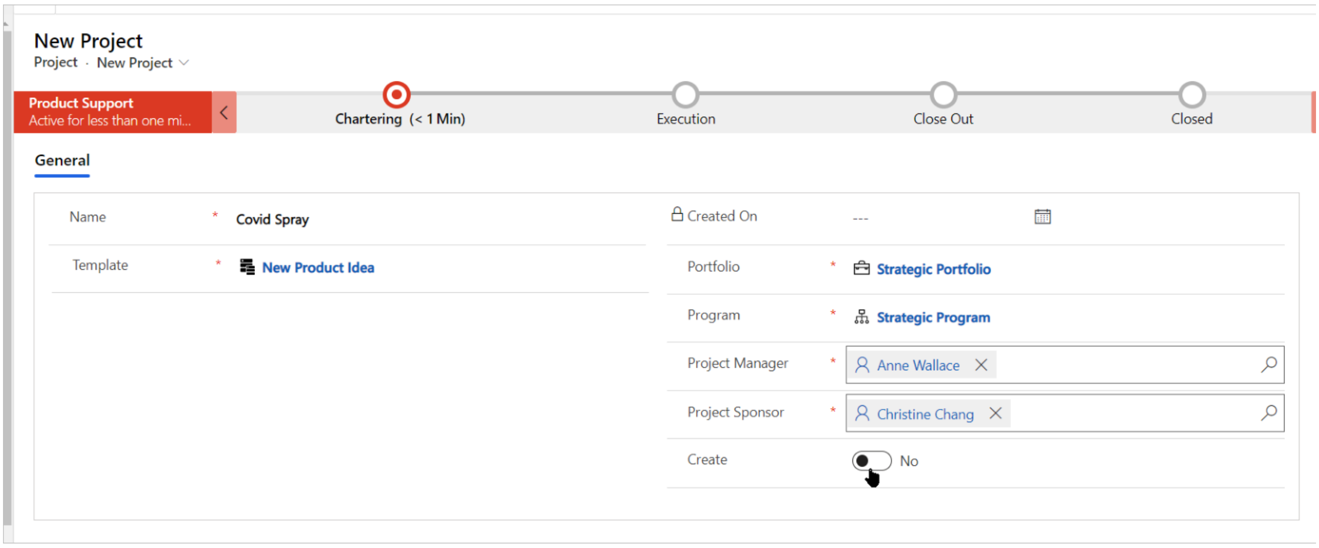
Method 1: Create Projects With a Request

The project management lifecycle will typically begin with BrightWork 365 Requests, where a Requester submits a new project request along with details needed for an approval decision. Through workflows, notifications and reports, the request process affords users an efficient method for starting the project management process. You can find detailed information about the formal request process in the Requests section of the Knowledge Base.

Method 2: Create Projects Without a Request

Some organizations will not need a formal request process for all of their projects and will therefore allow certain users to create projects directly in the Projects app section. Users with the BrightWork Project Manager or BrightWork PMO Manager security role will be able to create projects from a template using a simple interface skipping the formal request process.

If a user with the necessary security role clicks **+ New** in **Projects**, they will be presented with a project creation form. After filling in all necessary column values, switching the **Create** switch to **Yes** will initiate the project creation process.



- If the Template selected is not associated with a Content Template (a template with predefined data), the project will be created instantly, and the form will transition to the Project form. When the project is ready to be used, the user that initiated the creation process will receive an email.
- If the Template selected is associated with a Content Template, the form will not transition to the Project form until the Create Project Flow has completed processing. The user that initiated the project creation process will receive an email when the flow has completed. The duration of the project creation process will depend on the number of child rows (Tasks, Issues, Risks, etc.) present in the Content Template. When the project is ready to be used, the user that initiated the creation process will receive an email.

Troubleshooting

Script Errors When Creating a Project

In the associated Project Template, ensure there are values in the **Approvals Coordinator** field and in all of the **New Project Defaults** fields.

Project Stage Approval Process

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Your browser does not support HTML5 video.

In a Nutshell - Project Stage Approval Process

Here's a summary of the project stage approval process from start to finish as it operates out of the box:

1. (Optional) A user given the BrightWork Template Editor security role configures the default properties for Project Templates.
2. (Optional) A user given the BrightWork Approvals Coordinator security role (a user chosen in the Approvals Coordinator field and also given the BrightWork Approvals Coordinator security role) configures approval related properties for a specific project from the project's Approvals tab.
3.
    1. If approval is not required for a stage, the project can be moved to the stage by a user with the BrightWork Project Manager or BrightWork Stage Mover security role.
    2. If approval is required for a stage:
        1. The project cannot be moved to the stage manually, and a user given the BrightWork Project Manager security role can activate the Send Stage for Approval button in the project's Project Settings tab when it's time to move the project to the stage.
        2. The stage Approvers make a decision (Accept, Reject), and the Project Manager, Approvals Coordinator, and Approvers receive an approval notification.
        3. If the Approvers accept the request, the project moves to the next stage. If the Approvers reject the request, the project stage does not change.
4. When the Project Manager is ready, steps 3 through 6 will be repeated until the closing of the project.

Details - Project Stage Approval Process

The default field values for the users chosen for approving the movement of the project from one stage to the next (e.g., from Initiate to Plan), the nominated **Approvals Coordinator**, the approval button labels, and any additional approval email text, are all configured in **Templates Area | Project Templates**. Many of these settings can be overridden in the **Approvals** tab of a project by the Approvals Coordinator.

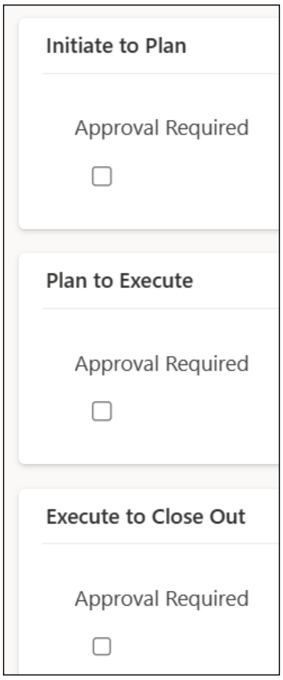
Project stages can be moved backward by a user given the **BrightWork Project Manager** or **BrightWork Stage Mover** security role. Project stages can also be moved forward by one of these users unless the field **Approval Required** is set to **Yes** in the Approvals tab for the next stage, in which case stages can only progress forward via completed approvals by nominated Approvers.

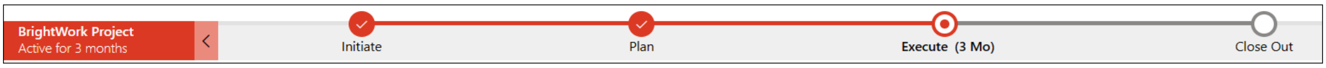
While a stage is out for approval some areas of the project will be read-only and a message will display in the Charter tab until the approval process completes. The Business Process Flow will not be disabled, but users will be prevented from moving a stage forward or backward.

If the stage is Approved, the project will move to the next stage, relevant users will be notified, and the project will no longer be read-only.

If the stage is Rejected, the project stage will not be changed, all listed users will be notified, and the project will no longer be read-only.

Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the **Approvals** tab. The default settings are controlled by the configuration set in Templates Area > Project Templates; different project templates have different stages. Additional stages beyond what is included out of the box can be added through Business Process Flow customization for up to a total of 10 stages.





The Approvals Coordinator and stage Approvers will be sent approval related notifications when the process for moving from one stage to the next is initiated.

Note

- The approval emails come from the BrightWork 365 installation account's email.
- If there are multiple Approvers, all of them must approve in order for the stage to be approved.

Approvals in Microsoft Teams

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Approvals in Microsoft Teams

In addition to reviewing and acting on approval requests via the automatically generated approval request emails, you can also do so within Microsoft Teams by installing Approvals in Microsoft Teams.

See the articles below for more information about Approvals in Microsoft Teams:

- https://learn.microsoft.com/en-us/power-automate/teams/native-approvals-in-teams
- https://learn.microsoft.com/en-us/power-automate/teams/manage-approvals-app

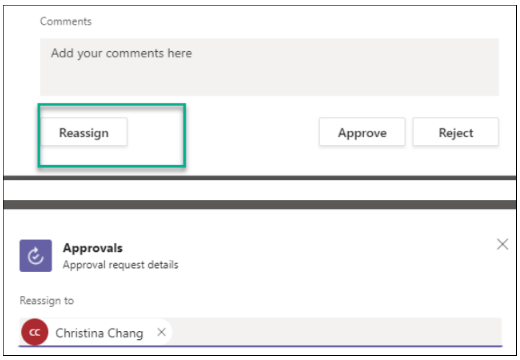
Canceling In Progress Approvals

An approval that is still in progress can be cancelled by the Request Submitter from within Approvals in Microsoft Teams. To do so, from the **Sent** tab in the Approvals app the user selects the approval they want to cancel and then selects the **Cancel** option. Only approvals that are currently in progress can be canceled.

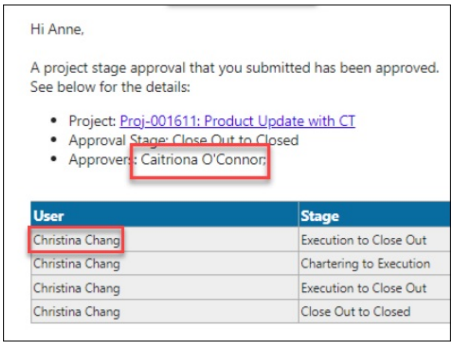
Your browser does not support HTML5 video.

Reassigning In Progress Approvals

In progress approvals can be reassigned from within the Approvals app in Microsoft Teams by clicking the **Reassign** button.



Although the new approver will receive notifications to take an approval action and their actions will show in email history logs, the original approvers will be maintained in the email **Approvers** field.



Hi Anne,

A project stage approval that you submitted has been approved. See below for the details:

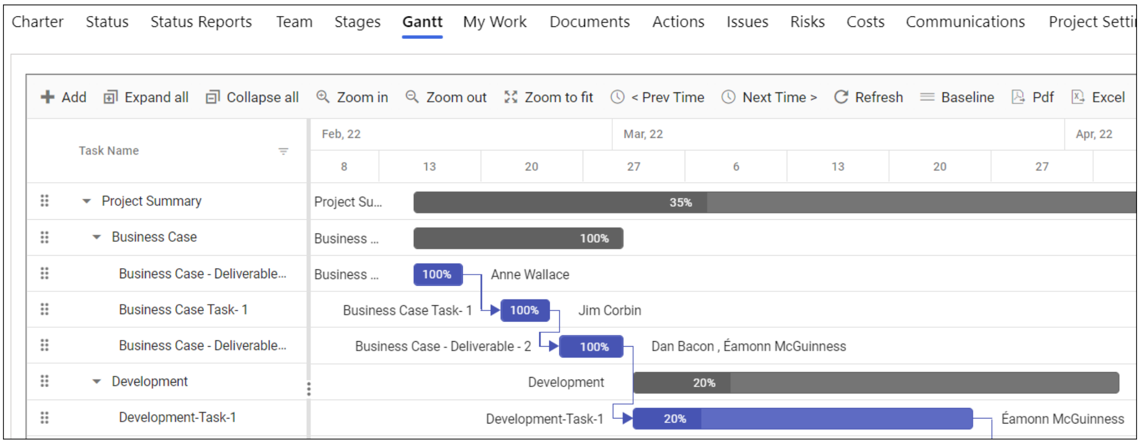
- Project: Proj-001611: Product Update with CT
- Approval Stage: Close Out to Closed
- Approvers: Caitriona O'Connor;

User	Stage
Christina Chang	Execution to Close Out
Christina Chang	Chartering to Execution
Christina Chang	Execution to Close Out
Christina Chang	Close Out to Closed

Task Management

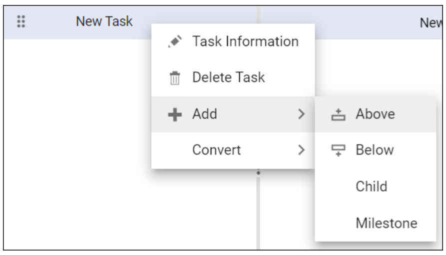
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Overview Demo	Extra Features
	Your browser does not support HTML5 video.



Create a New Gantt Task

1. Click into the Gantt tab within a project.
2. You can add a new task in a couple of ways:
    1. In the Gantt menu click + Add.
       Or,
    2. Right-click near an existing task and click + Add and choose from the available options.



3. Fill in the task details as explained in **Gantt Sections** below.

Note

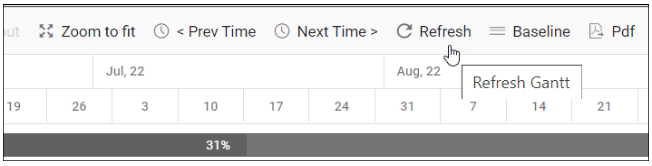
- When adding a new task below another task, the new task copies the start date of the task above it and sets Percent Complete to 0%.
- When a milestone that is less than 100% complete is a child to a parent summary task, the summary task in the Gantt will treat the milestone as 100% complete; in other lists the milestone percent complete will be used in calculations using its actual percent complete.
- There is a technical limit of 1,000 tasks for the Gantt.

Edit a Gantt Task

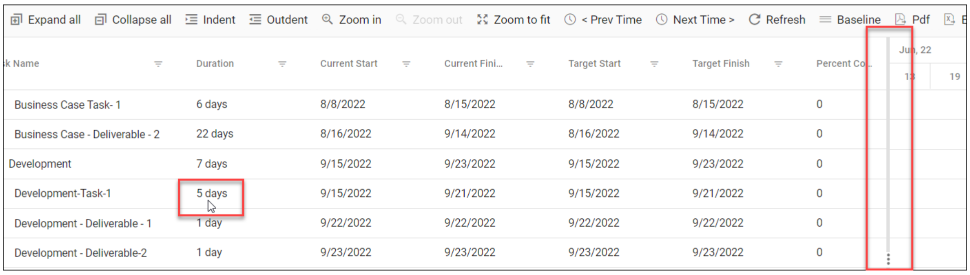
Note

- If there are concurrent editors of tasks in the same Gantt, the last save will win.
- In order to see other users' changes to Gantt data, a browser refresh is required.

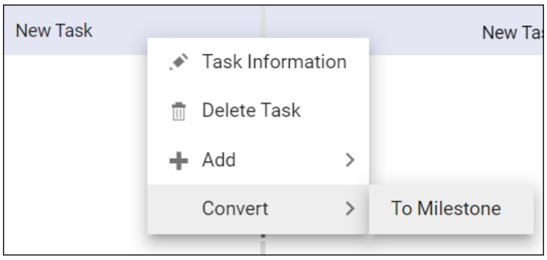
To edit an existing task either single-click next to the task name and then click **Edit** in the menu bar, or double-click in the row of the task in the Gantt section of the window. If the Gantt is not displaying updates you made to underlying data, click the **Refresh** button in the Gantt ribbon.



You can also make inline grid edits by dragging the Gantt divider line to the right to expose additional grid columns, and then double-clicking an existing value.

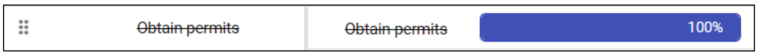


Additionally, with a right-click on an existing task you can access task-related options.



Multiple tasks in the Gantt can be selected for deletion by holding down the Ctrl key and selecting the relevant tasks. Multi-delete of tasks will not be allowed if the tasks are sorted, filtered, or searched.

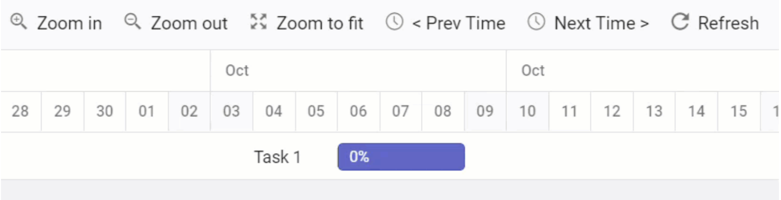
To clearly see which tasks are completed and which are not, strikethrough is applied for tasks on the grid and on the Gantt when % Complete is 100; the strikethrough is removed when % Complete is less than 100.



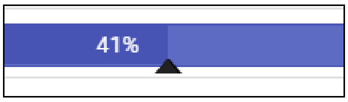
Gantt Sections

General

- Task Name: The given name of the task.
- Duration: The number of days between the Current Start and Current Finish dates. When dates are updated in the Task record, the Duration will be automatically calculated upon saving the task. When Duration is updated in the Task record, the Finish Date will be automatically calculated upon saving the task. The Duration value cannot be less than 0.13 of a Day as the Gantt does not support durations of less than 1 hour.
- Current Start and Current Finish: The Start and Finish dates entered at the time of task edit, or that were automatically set through a dependency. Task dates can be changed by dragging the left, center, or right part of the date bar and dragging. Task dates cannot fall on a weekend.



- Target Start and Target Finish: The target dates entered manually, or automatically entered when the project was last baselined. See section **Baseline the Schedule** below.
- Percent Complete: Add an estimated Percent Complete - this will be part of the algorithm used to automatically calculate the task's parent (summary task) overall percent complete. The Percent Complete value can also be set in the left-side grid portion of the Gantt, as well as in the Gantt Chart section by dragging the Percent Complete bar (it cannot be set from within work reports).

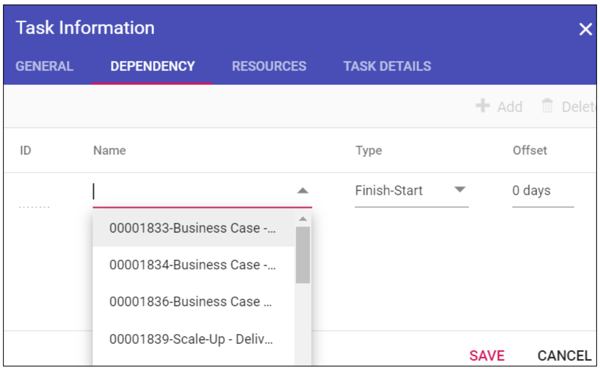


- ID: System generated value, not editable.

> **Note**
> - User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.
> - The date format displayed in the Gantt uses the format specified in the logged in user's personal options settings.

Dependency

Add a task dependency (aka Predecessor) from the dropdown **Name** list, and set the dependency **Type** and any necessary **Offset** days.



Dependency Types:

- Finish-Start: The predecessor task must be completed before the successor task can start.
- Start-Start: The successor task cannot begin until the predecessor task begins.
- Finish-Finish: The successor task cannot be completed until the predecessor task is completed.
- Start-Finish: The successor task cannot be completed until the predecessor task begins.

> **Note** A successor milestone task that has a Finish-Start relationship with its predecessor will have a Start Date and Finish Date that is equal to the Finish Date of the predecessor.

> **Caution** If a task with dependencies (predecessor or successor tasks) later becomes a summary task, the dependencies will be removed.

Resources

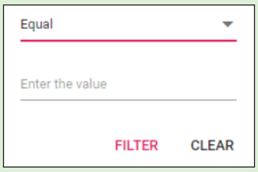
Choose one or more resources to be assigned to the task.

The **Resources** list of users is limited to users given the **BrightWork Team Member** security role.

Note

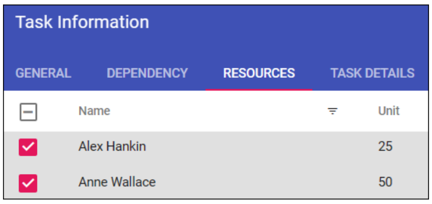
- If the user assigning the resource does not have sufficient privileges, the assignment will not be saved.

Tip To easily view tasks that still require an assignment, on the **Assigned To** grid column use the filter **Equal** and set it to a blank value.



Task - Unit %

- Gantt Task Unit % values can be set by Team Members and Project Managers to something other than 100% so that project managers can more realistically track resource utilization. This is the percentage of 8 hours a day the resource will be working on the task. The Unit value can be changed either in an Assignments view, or within the Gantt Task Information dialog.

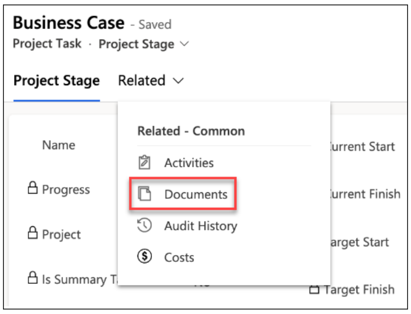


- When viewing the Resource Utilization Power BI reports, the Task Unit % for a resource that was entered in the Gantt or Assignment will be applied to the reports, which account for the variation of % utilization. For example, a Monday to Friday task (equal to 40 hours of work), with a Task Unit % of 50 for a resource, will show up as 4 hours per day for 5 days duration for the resource.

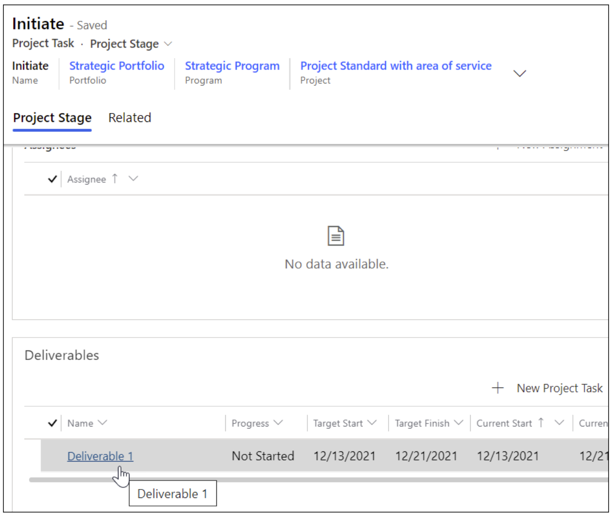
Task Details

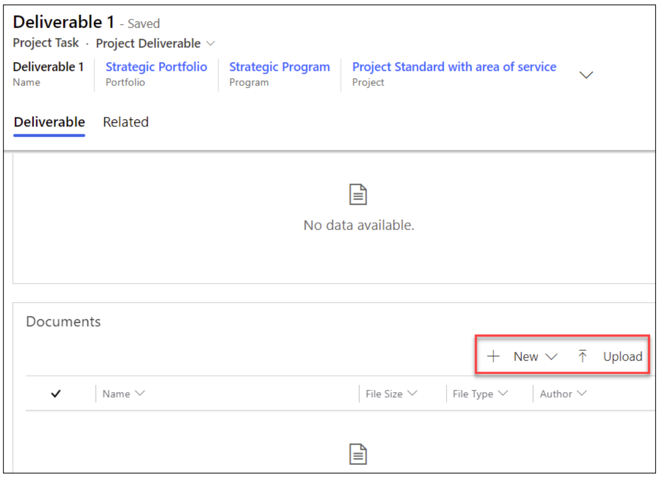
- **Task Type:** Choose the relevant Task Type from the drop-down:
  - **Task:** The lowest level piece of work that needs to be completed.
  - **Stage:** Configures the task as a Stage which will automatically get added to the **Stages** tab of the project. Use the Stage designation when creating a parent task for indented child tasks. It is recommended to match the Gantt stage names with the stages of the project's Business Process Flow.

Documents can be added directly to a stage by clicking into the **Stages** tab, clicking on the stage name, clicking on the **Related** tab, and then clicking **Documents**.



- **Deliverable:** If a task is set to the **Deliverable** task type, documents can be attached to the task by clicking into its parent stage in the **Stages** tab, clicking on the task name in the **Deliverables** section on the displayed Project Stage form, and then choosing to create a new document or upload an existing document.



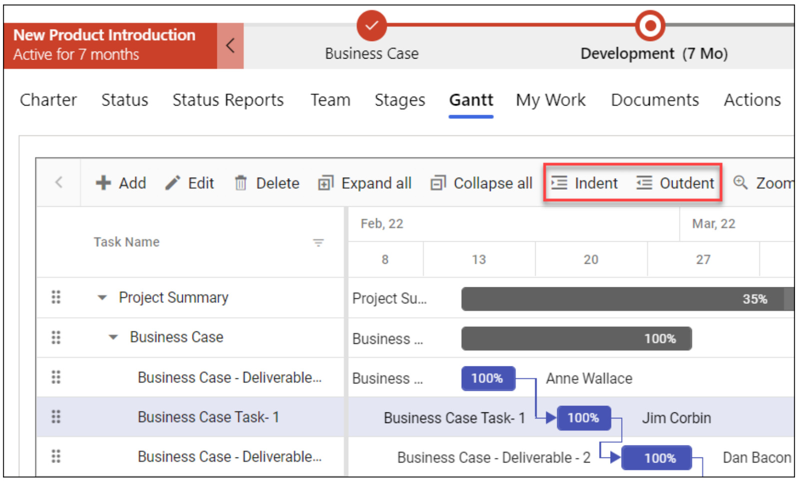


Note We do not support adding a new task with the **+ New Project Task** option found on the **Project Stage** form.

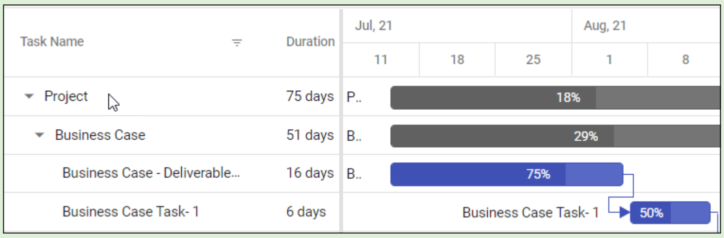
- **ID:** System generated value, not editable.
- **Description:** Add notes to the task.

Indent a Task (Child Task) or Outdent a Task (Parent Task)

To indent or outdent a task, choose the related tool at the top of the Gantt, or right-click on the task. Indenting a task will automatically set the task above it as a parent task.

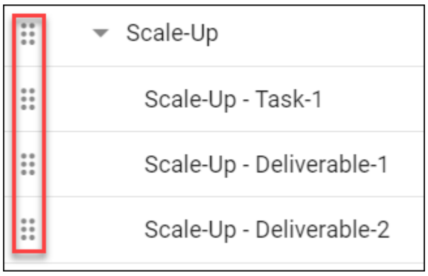


Tip You can get a full rollup of all task data, including overall percent complete, by creating a top-level task and indenting all other tasks underneath it. Note that you will still need to manually enter the **% Complete** value in the **Status** tab of the project.



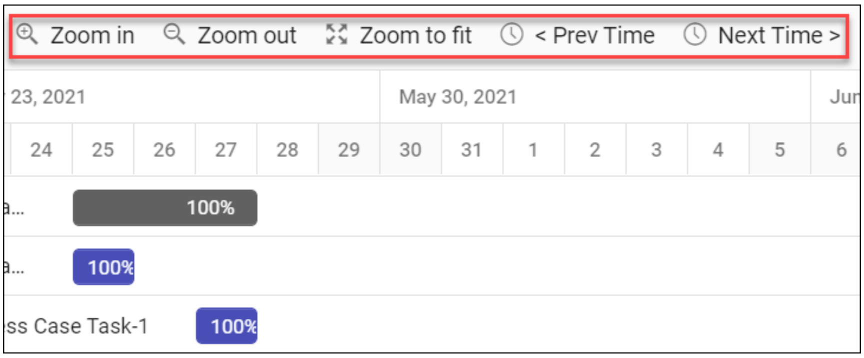
Move Tasks

To move a task simply click to grab the handle on the left side of the task and move the task up or down.



Change the Date Focus in the Gantt Chart

Prev Time and Next Time will display the previous or next day, week, month, or year, depending on the Zoom level chosen for the Gantt.

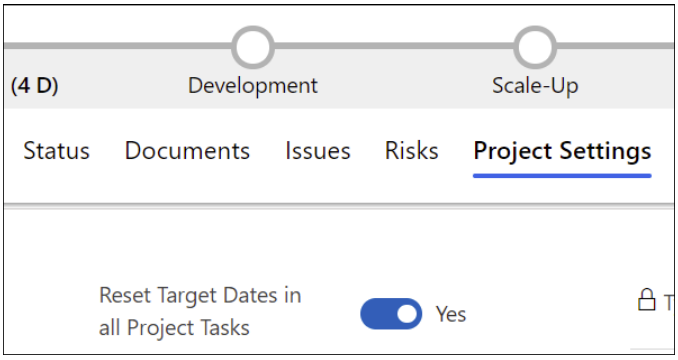


The following zoom options are available in the Gantt toolbar:

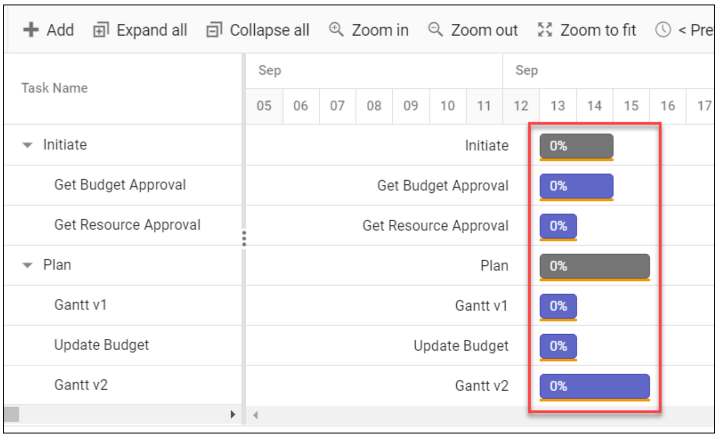
- Zoom In - To perform zoom in action on Gantt timeline.
- Zoom Out - To perform zoom out action on Gantt timeline.
- Zoom To Fit - To show all tasks with timeline fit into the available chart width.

Reset Target Dates in all Project Tasks (Baseline the Schedule)

To baseline the task schedule, click into Project Settings and choose **Reset Target Dates in all Project Tasks**.

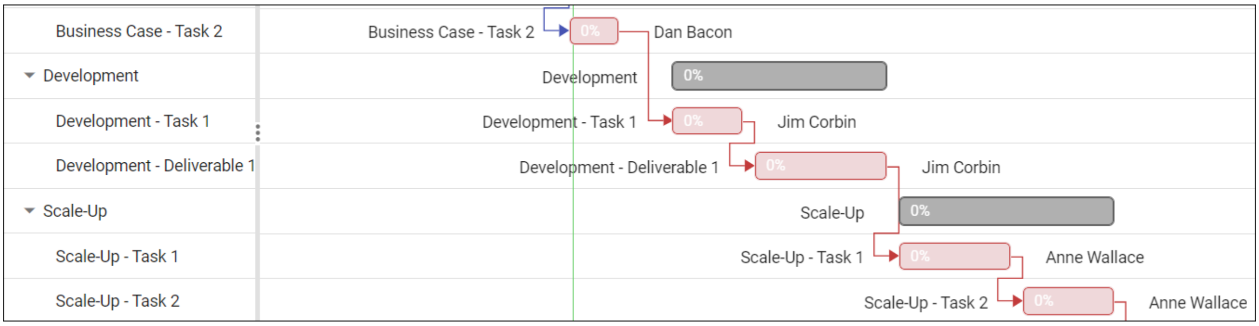


You can verify the successful completion of the baseline reset by checking that the task date bar and the colored baseline bar below it are in alignment with one another.



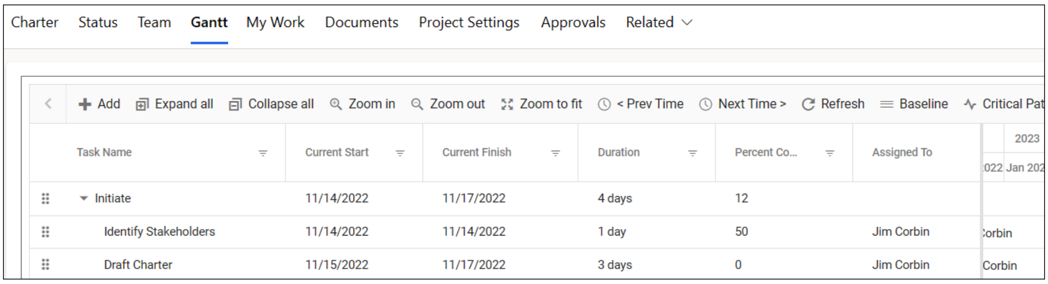
Critical Path

With the click of a button, you have the option to highlight the longest sequence of tasks that must be finished on schedule to complete the entire project on schedule.

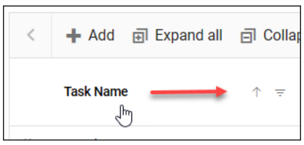


Gantt Grid

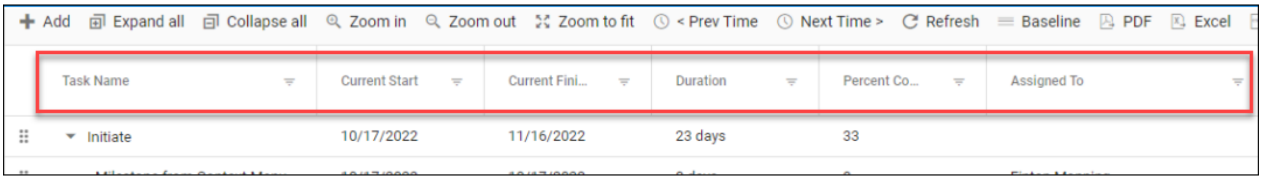
The Gantt Grid is on the left side of the Gantt tab screen. The Gantt grid surfaces important task information without clicking into individual tasks and allows for inline editing of task information.



- **Assigned To Column:** Easily view and search for task assignees and for tasks that still require an assignment.
- **Sort Gantt Tasks:** You can sort Gantt tasks in ascending or descending order.
  1. Expand the Grid window if necessary, by dragging the Gantt divider line to the right.
  2. Click on the **Task Name** column heading to cycle through sorting ascending, sorting descending, and no sorting.



- **Filter Gantt Tasks:** The columns on the grid side of the Gantt can be filtered to limit the tasks displayed.



- **Search Gantt Tasks:** You can run a search query against the following Gantt Grid columns:
  - Task Name
  - Assignee
  - Dates (Current Start, Current Finish, Target Start, Target Finish)

Gantt Chart Keyboard Navigation

The below table lists Gantt keyboard navigation shortcuts. For best results, click on the timeline side of the screen (right-side) prior to using the navigation shortcuts. Certain keys will not work in older versions of BrightWork 365.

Keys	Description
Home	First Row Selection
DownArrow	Move Row Selection Down
UpArrow	Move Row Selection Up
Ctrl + UpArrow	Collapse All
Ctrl + DownArrow	Expand All
Ctrl + Shift + UpArrow	Collapse Row
Ctrl + Shift + DownArrow	Expand Row
Enter	Save Request
Esc	Cancel Request
Insert	Add Record
Ctrl + Insert	Add Record By Dialog
Ctrl + F2	Edit Record By Dialog
Delete	Delete Row
Ctrl + Shift + F	Focus Search TextBox
Shift + F5	Focus Task

Troubleshooting

Duplicate Task

If a task is manually created immediately after a project first gets created, this can occasionally result in the creation of a duplicate task.

Gantt Row Display

When your browser display zoom is set to a value below 100% you may notice the task names not aligning with their corresponding Gantt bars when scrolling vertically. Setting the browser display zoom to 100% fixes this issue.

New Task Added Between Existing Tasks Instead Gets Added to Bottom of Gantt

This issue can be caused by a user adding a task to the Gantt without refreshing the screen after another user added a task to the same Gantt. To resolve this issue:

1. Drag and drop the newly created task from the bottom of the Gantt to the top of the Gantt.
2. Drag and drop each of the other two tasks to the top of the Gantt Chart.
3. Drag and drop the tasks to the desired positions.

Deliverables

- If you change a **Deliverable** type task into a task of a different type (**Stage** or **Task**), in order to view any documents that were attached to the original deliverable you will need to temporarily change the task type back to **Deliverable** so you may once again have access to the document. When done saving the document you can change the task type again as desired.
- If you change a **Stage** type task into a **Deliverable** type task, this new Deliverable will not automatically attach itself to its parent Stage. You will not be able to view this deliverable within its parent stage until you make an update to the Deliverable beyond changing the task type, such as updating its name or one of the date field values.

Gantt Baseline Resets and Milestone Dates

After a Gantt baseline reset, the Target Date values of milestone tasks may not equal Current Date values.

Right-Click "Task Information" Does Not Display Information

After right-clicking on a task row and selecting **Task Information**, no information is displayed.

Workaround

Double-click the task row on the Gantt chart side (right side) of the Gantt window to display the Task Information screen.

Row Highlighting

If a row is highlighted and then another task is collapsed, the row is no longer highlighted. This behavior is inherent to the Gantt Chart.

Vertical Scrolling

When scrolling vertically through the Gantt, a dependency line between tasks occasionally temporarily disappears. This behavior is inherent to the Gantt Chart.

Searching for Dates Does Not Yield Any Results

It is not possible to search for date strings.

Import Project Gantt Tasks

Note

- The **BrightWork Team Member** security role is required to import tasks.
- There is a technical limit of 1,000 tasks for the Gantt, but in order to have a reasonably responsive Gantt there is likely to be a practical lower limit based on performance in your environment.

Caution Only import tasks into a project that has an empty Gantt task list.

Import Tasks Into a BrightWork 365 Project Gantt

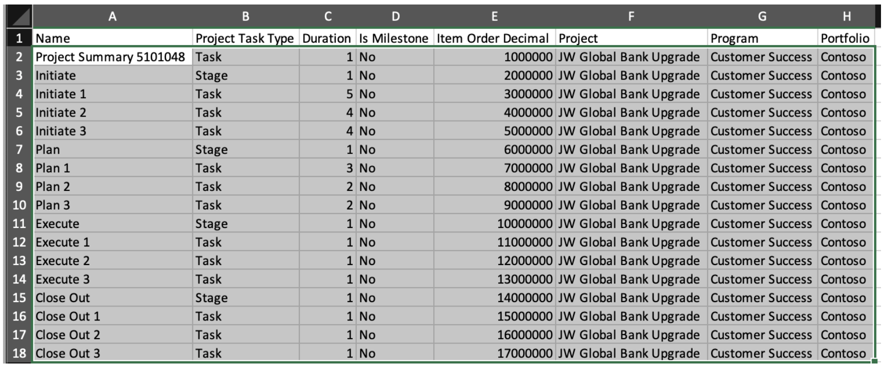
This import method will result in a flat task list in a specified order with durations, but without dependencies or parent-child relationships.

Create a new empty project from a template that is not associated with any Content Template.

1. Open the supplied spreadsheet 📎 file that contains the required column headings and sample values in the proper format. Select the spreadsheet tab that relates to the template type of your project, e.g., Project Standard, Product Update, New Product Idea.
2. Add your tasks to the spreadsheet in the order you want them to appear in the Gantt.
3. Specify the **Project Task Type:** Use **Stage**, **Task**, or **Deliverable**.
4. Enter a **Duration** in **Days**.
5. If you want the task to be a **Milestone**, specify a **Duration** of **0** and enter **Yes** in the **Is Milestone** cell, otherwise enter **No** in the **Is Milestone** cell.
6. Enter **1000000** (1 followed by six 0s) in the first **Item Order Decimal** cell and **2000000** (2 followed by six 0s) in the second cell beneath it. Select both cells and drag down to the bottom to automatically increment the numbers, e.g., **1000000, 2000000, 3000000,** etc.

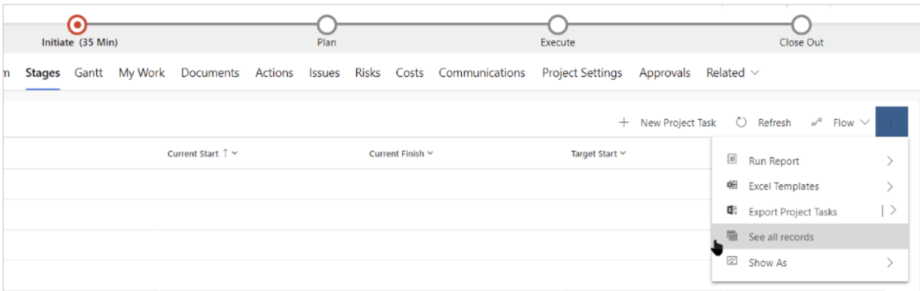
E
Item Order Decimal
1000000
2000000
3000000
4000000
5000000
6000000
7000000
8000000

7. Enter the **Project, Program and Portfolio** names exactly as they appear in BrightWork 365. Each of these names must be unique in the environment – if they are not unique, the import will fail.
8. Select all the rows that you added.

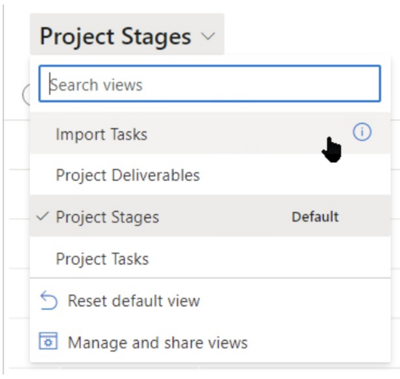


	A	B	C	D	E	F	G	H
1	Name	Project Task Type	Duration	Is Milestone	Item Order Decimal	Project	Program	Portfolio
2	Project Summary 5101048	Task	1	No	1000000	JW Global Bank Upgrade	Customer Success	Contoso
3	Initiate	Stage	1	No	2000000	JW Global Bank Upgrade	Customer Success	Contoso
4	Initiate 1	Task	5	No	3000000	JW Global Bank Upgrade	Customer Success	Contoso
5	Initiate 2	Task	4	No	4000000	JW Global Bank Upgrade	Customer Success	Contoso
6	Initiate 3	Task	4	No	5000000	JW Global Bank Upgrade	Customer Success	Contoso
7	Plan	Stage	1	No	6000000	JW Global Bank Upgrade	Customer Success	Contoso
8	Plan 1	Task	3	No	7000000	JW Global Bank Upgrade	Customer Success	Contoso
9	Plan 2	Task	2	No	8000000	JW Global Bank Upgrade	Customer Success	Contoso
10	Plan 3	Task	2	No	9000000	JW Global Bank Upgrade	Customer Success	Contoso
11	Execute	Stage	1	No	10000000	JW Global Bank Upgrade	Customer Success	Contoso
12	Execute 1	Task	1	No	11000000	JW Global Bank Upgrade	Customer Success	Contoso
13	Execute 2	Task	1	No	12000000	JW Global Bank Upgrade	Customer Success	Contoso
14	Execute 3	Task	1	No	13000000	JW Global Bank Upgrade	Customer Success	Contoso
15	Close Out	Stage	1	No	14000000	JW Global Bank Upgrade	Customer Success	Contoso
16	Close Out 1	Task	1	No	15000000	JW Global Bank Upgrade	Customer Success	Contoso
17	Close Out 2	Task	1	No	16000000	JW Global Bank Upgrade	Customer Success	Contoso
18	Close Out 3	Task	1	No	17000000	JW Global Bank Upgrade	Customer Success	Contoso

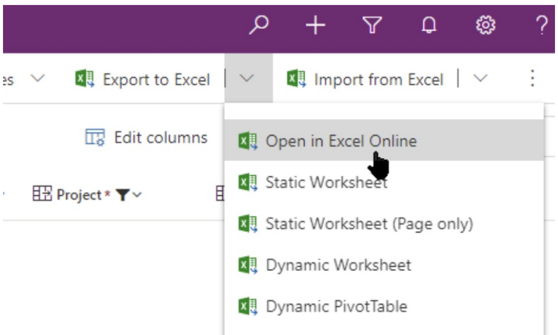
9. Right-click on the selected rows and click **Copy**.
10. Save the spreadsheet.
11. Click the **Stages** tab on a project and then click **See all records** on the three-dot menu.



12. Select the **Import Tasks** view.



13. Bookmark the page for future use.
14. Filter the **Project** column to the name of the relevant project.
15. Click **Export to Excel > Open in Excel Online** .



16. Paste the copied spreadsheet rows into the Excel Online sheet and click **Save**.
17. Click **Track Progress**.

18. On the tracking page click **Refresh** until the import has completed. Check for any errors.
19. Navigate to your project and click the **Gantt** tab to view the imported tasks. Next you will need to indent tasks under their parent tasks, and create dependencies.

> **Note** If you encounter failures during the above process, confirm you have appropriate permission to save the Excel Online sheet. You can do this by making an initial simple change in Excel Online, e.g., by slightly changing the name of a task and then saving the Excel Online sheet successfully.

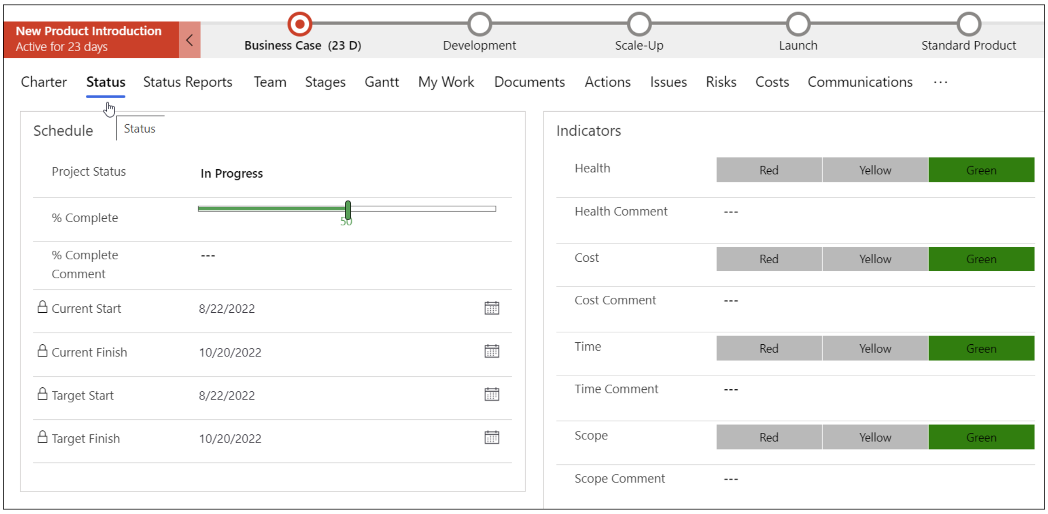
Project Status Reporting

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Your browser does not support HTML5 video.

Status Tab

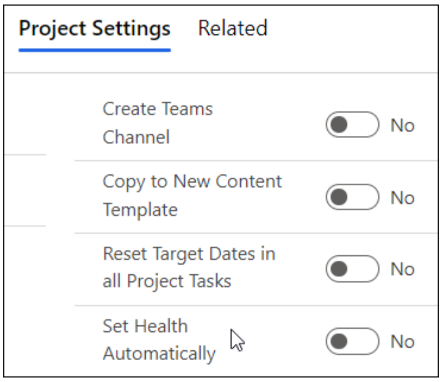
The Status tab displays current metrics and KPIs about the project.



The Schedule date values will automatically populate based on work item dates, and the values for Project Status, % Complete (Percent Complete), and other KPIs are manually set by the project manager.

The Health KPI can either be set manually by a user with appropriate privileges, or automatically by the system. If set automatically, the KPI color will match whatever is the "worst" color value among the other KPIs (Yellow is worse than Green and Red is worse than Yellow); any manual changes made to the KPI will not be saved permanently.

To toggle the automatic Health KPI setting on and off, in Project Settings use the Set Health Automatically switch.



Note **Set Health Automatically** will not go into effect unless a value is selected in one of the other indicator columns; this is to prevent locking Health as a blank value.

Status Reports Tab

In the Status Reports tab a snapshot record of the current status information can be saved, and the history of previously created status reports can be viewed.

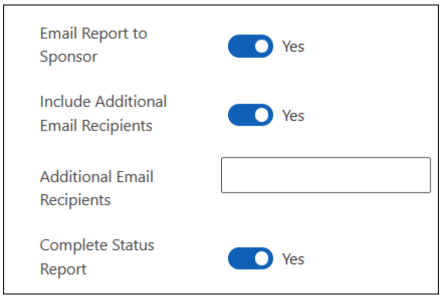
Saved status reports will be added to the list of any previously created status reports. The status report data is stored within your Microsoft 365 Dataverse.

To create a new status report:

1. In the Status Reports tab click the ellipses and **+ New Status Report**.
2. Fill in all relevant columns.
3. To save the status report:
    1. To save a draft of the status report, click **Save** or **Save and Close** in the ribbon.
    2. To save a final version of the status report, set **Complete Status Report** to **Yes**.

Note After saving a draft status report, values that were initially automatically copied in from the Status tab (i.e., the project's "Status" value) will not be updated with any new values from the Status tab upon subsequent edits of the draft status report.

When you first set **Email Report to Sponsor** to **Yes**, and then set **Complete Status Report** to **Yes** (in that order), an HTML report will be emailed to the Sponsor, the Project Manager and the person that set the report to the completed status. The email will be sent from the account that was used to install BrightWork 365.

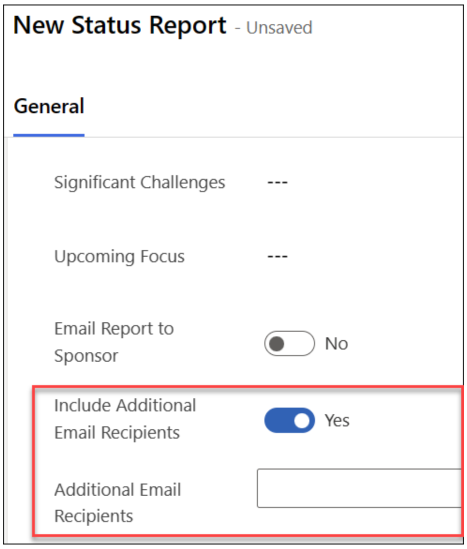


Note Status related icons may fail to load in older versions of the Outlook desktop client.

Send On Behalf Of

Out of the box, when a status report is emailed to Project Sponsors or other stakeholders, it will be sent from the account that was used to install BrightWork 365. This email sending account can be changed to the account of the user submitting the status report if that account has been given **Send On Behalf of** mailbox permission, which can be configured by your organization's Microsoft 365 System Admin; for instructions see Microsoft article Give mailbox permissions to another user.

Include Additional Email Recipients



When creating a new Status Report, BrightWork 365 provides the option to add additional users to a list that will receive the report, so that status reports can be distributed more widely.

Note

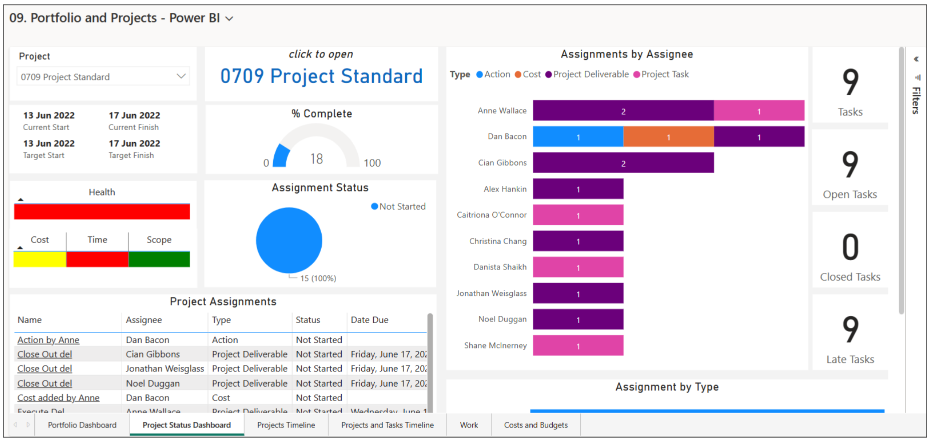
- You can only include additional users that are part of the BrightWork 365 environment.

- If you choose not to email the **Sponsor**, and also leave the **Additional Email Recipients** column empty, it will use the **Modified by** person's email for the **To** address.
- There is no imposed limit on the number of additional users that can be entered.

Project Status Dashboard - Power BI

The Project Status Dashboard helps keep users better informed about how projects throughout the system are progressing in a convenient single location, with the ability to quickly switch between projects. Status data is pulled from the **Status** tab in projects.

Users access the Power BI Project Status report by clicking the **Project Status Dashboard** tab in the report view **Portfolio and Projects - Power BI**. You can easily switch between projects with a convenient project selector.



Report components include:

- Project selector drop-down menu (Lists all projects)
- Project Dates (Current Start/Current Finish/Target Start/Target Finish)
- % Complete Chart (0% - 100%)
- List of Assignments (Title, Assignee, Type, Status, Date Due (Sorted by due soonest) (Day/Month/Year)
- Selected Project Link (Click to open)
- Health Indicators (Health/Cost/Time/Scope)
- Task Status Pie Chart (Not Started/In Progress/Completed)
- Tasks (Amount within selected project)
- Open Tasks (Amount within selected project)
- Closed Tasks (Amount within selected project)
- Late Tasks (Amount within selected project)
- Issues (Amount within selected project)
- Risks (Amount within selected project)
- Assignments by Assignee (Bar Chart) (Assignment Type) (within selected project)
- Assignment Type (by Type) (Bar Chart) (within selected project)
- Last Refresh Date

Actions

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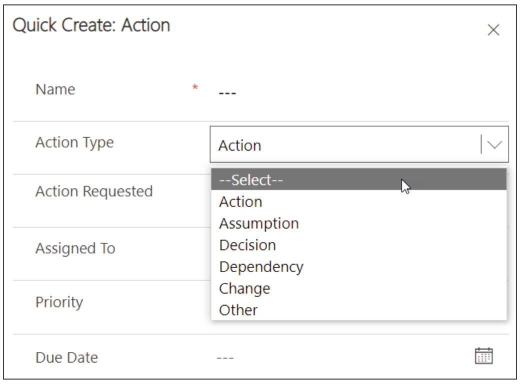
Actions

The Actions tab provides users with the ability to create, edit and view details in relation to an Action, a Resolution, an Approval, and to Notes, to help keep projects on track.

To access Actions, click on the **Actions** tab within a program, a portfolio, or a project created from one of the templates that contains this tab. Click **+ New Action** to create a new Action.

Clicking **+ New Action** brings up a Quick Create form with the most relevant fields. The form's **Action Type** field allows you to choose from several available types of actions.



Action Items

The Action tab within an individual Action item provides several sections to capture additional details about an Action.

Action

Fields include:

- Name: Provide a name for the action.
- Action Type: Choose either Action, Assumption, Decision, Dependency, Change, or Other.
- Action Requested: Enter the action requested.
- Assigned To: The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.
- Priority: Choose the priority level.
- Due Date: Choose the date the requested action is due.

Resolution

Fields include:

- Action Status: Choose from among the available Status choices.
- Progress Indicator: Choose from among the available schedule related choices.
- Action Taken: Describe any actions taken.
- Date Actioned: Choose the date the action was taken.

Approval

Fields include:

- Approver: Enter the name of the person responsible for approving the action. The list of available users to choose from in the **Approver** column is limited to those users given the **BrightWork Team Member** security role.
- Approval Date: Enter the date the approval was given.
- Resolution Rating: Choose a star rating for the resolution.
- Notes: A place to capture notes about the action.

Documents Tab

View, create, or upload documents associated with the action item. Documents will be saved in the project's SharePoint Online folder.

Related Tab

Click the **Related** tab to access the Audit History of the action item. The Audit History provides action item data change details including the change date, user who made the change, the changed field, and the old and new values.

Costs & Budgets

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Costs tab provides a comprehensive method for capturing and tracking budgets and costs at the project and individual cost item levels.

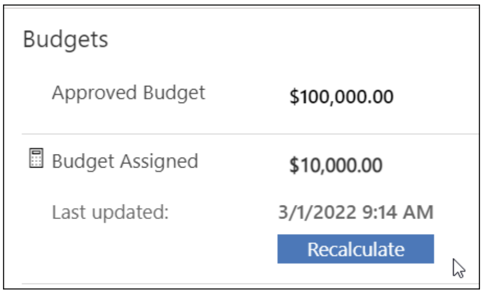
Project Level Cost Tracking

To enter the Costs module, click on the Costs tab within an individual project created from a template that contains this tab. The initial screen is comprised of many high-level cost tracking fields separated into several screen sections.

Budgets

Fields include:

- Approved Budget: Enter the overall approved budget for the project. This is the first step for setting up cost management for the project.
- Budget Assigned: Calculates the sum of the total budget assigned to all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the **Recalculate** button.



- Budget Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Current Forecast. Automatically calculated.

Costs

Fields include:

- Current Forecast: Calculates the total spend forecast of all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Actual to Date: Calculates the total money spent to date for all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Cost to Complete: Current Forecast - Actual to Date. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator

icon and then the Recalculate button, as noted above.

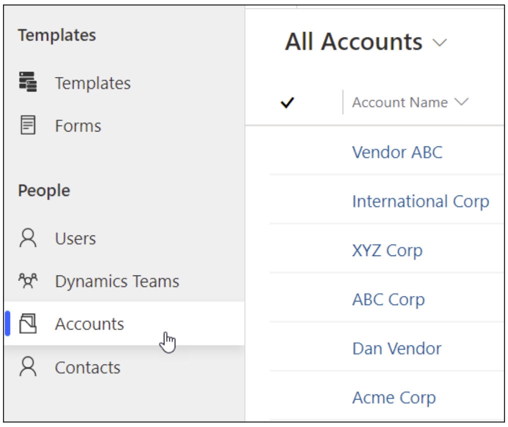
Individual Cost Item Tracking

The Cost Items section is where you will enter the individual cost items with associated details. The grid surfaces important details about each of these items. Click **+ New Cost** to enter the new cost form.

Cost Form

The **Cost** form is comprised of several cost tracking detail fields including:

- Name: Enter the name of the cost item.
- Cost Type: Choose from among the available Type choices.
- Cost Category: Choose from among the available Category choices.
- Vendor: The available vendor choices are pulled from the Accounts page in the Admin area.



- Assigned To: The list of available users to choose from in the Assigned To column is limited to those users given the **BrightWork Team Member** security role.
- Forecast Spend Date: Date by which the item's budget is expected to be spent.
- Related Task: Choose from a lookup to tasks on the project's Gantt chart.
- Cost Status: Choose from among the available Status choices.
- Current Forecast: The amount you believe the item will eventually cost in total.
- Actual to Date: Total spent on the item to date.
- Cost to Complete: Current Forecast - Actual to Date. Automatically calculated.
- Date Spend Complete: The date all costs associated with the cost item have been spent. Automatically sets the Cost Status column to Completed.
- Budget Assigned: The total approved and assigned budget for the cost item.
- Budget Assigned Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Budget Current Forecast. Automatically calculated.

- Timeline: A place to capture notes about the cost item.

Documents

View, create, or upload documents associated with the cost item. Documents will be saved in the project's SharePoint Online folder.

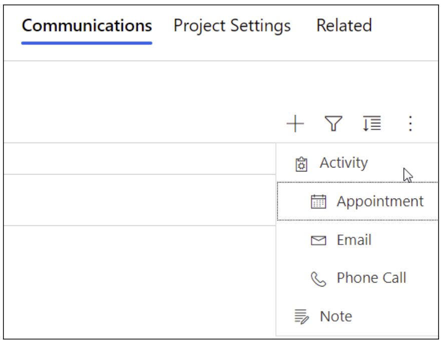
Related

Click the **Related** tab to access the Audit History of the cost item. The Audit History provides cost item data change details including the change date, user who made the change, the changed field, and the old and new values.

Communications

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Communications tab provides a comprehensive method for capturing various communication related activities at the project, program, or portfolio level. To access Communications, click on the **Communications** tab. The initial screen will display a history of previously entered Communications items. Click **"+"** to create a new Communications item of type Appointment, Email, Phone Call, or Note.



You can also access communications options from within the **Timeline** section of a **Project Stage** details screen.

Appointment

When creating a new Appointment the Quick Create form will display with relevant fields. If the creator's email and calendar are configured properly, an invite will be sent to the Attendees, and the appointment will be added to the creator's calendar and displayed as 'Free'.

The Appointment **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Appointments can be set as a Microsoft Teams meeting. If your organization is not yet

configured to work with Teams, see our Microsoft Teams Admin Guide.

Email

The new email screen presents the typical email fields such as To, CC, Subject, and email body. If the email creator's email is configured properly, an email will be sent to the addressees and a copy of the email will be saved in the Communications item record.

Phone Call

The Phone Call function provides a way to capture details about a call that was initiated outside the system. The details will be saved as part of the Communication record.

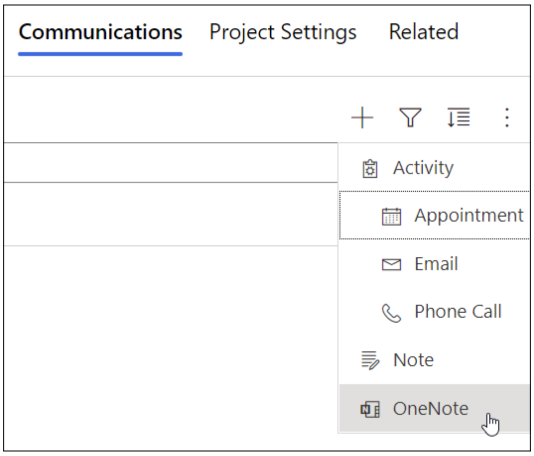
The Phone Call **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Note

You can create a note with a title, note body (with formatting), and attachments and save the note as part of the Communications record.

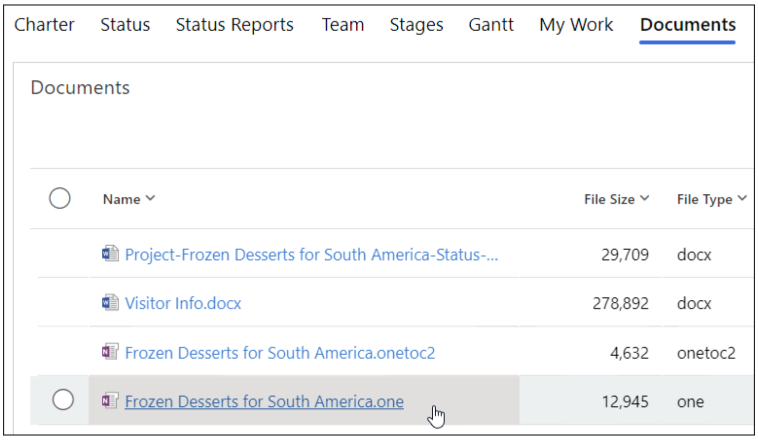
OneNote

In addition to the standard note mentioned above, you also have the option to create Microsoft OneNote notes that are saved as part of an associated OneNote notebook. To access the OneNote notebook after it's created, you can either click on the OneNote link displayed when you click the + sign in the Communications module:



Or,

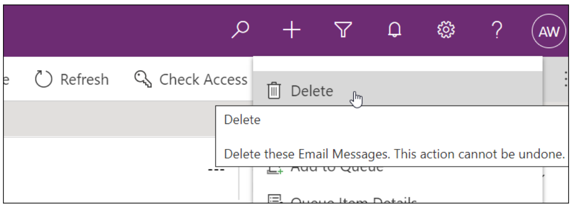
click on the **.one** file within the Documents tab:



Communications Tab - User Actions

You can take various actions on open Communications items directly in the main Communications screen.

If you need to delete a closed Communications item, e.g., delete an email after it was sent, you will need to do this from the toolbar within the item record instead of from the main Communications screen.



Note Users can only modify or delete their own Communications activities, not those of other users.

Dynamics 365 App for Outlook

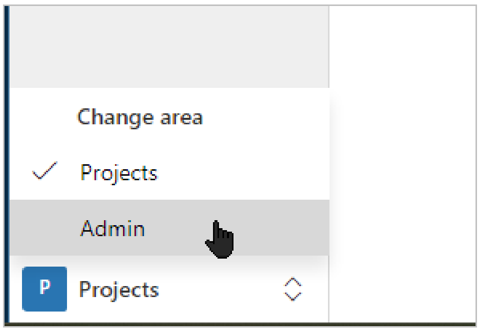
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf ✎), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web, or mobile. See Use Dynamics 365 App for Outlook for additional information.

Troubleshooting

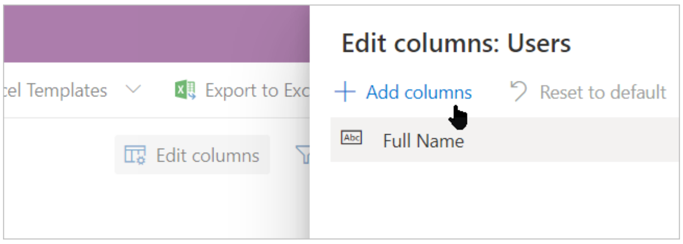
Communication activities not working for some users

A Power Platform Admin can check within the BrightWork 365 app if the affected user accounts are enabled for communication related activities:

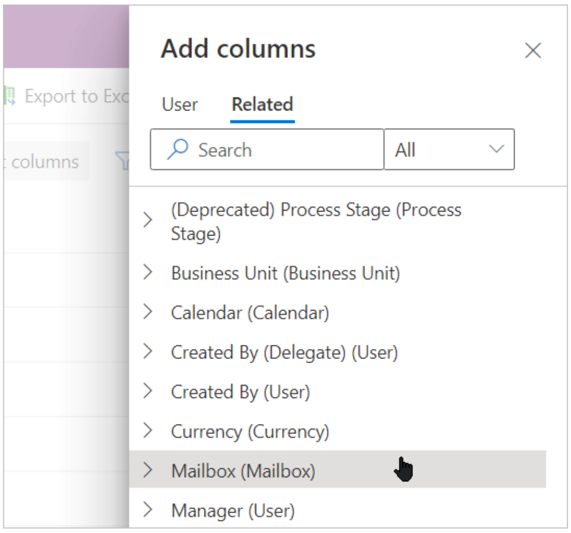
1. Click Projects in the bottom left of the page and click Admin.



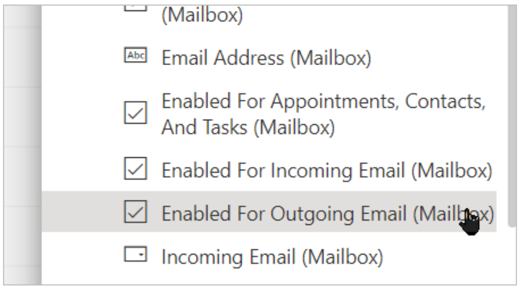
2. Click Users to load the BrightWork Users report.
3. Click Edit columns and then click Add columns.



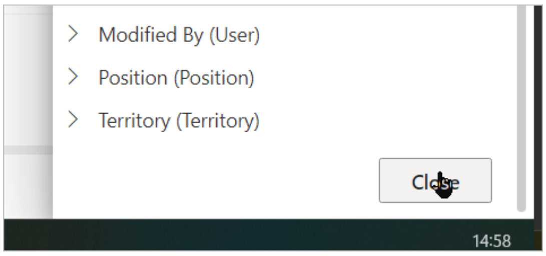
4. Click Related and Select Mailbox.



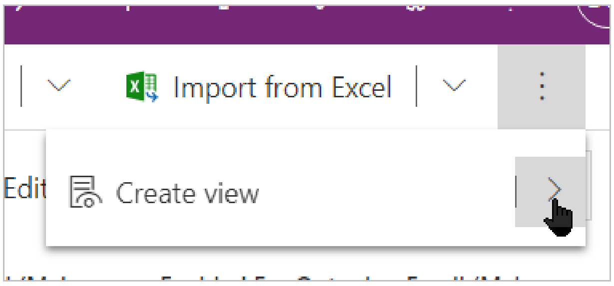
5. Add the three Enabled for... columns.



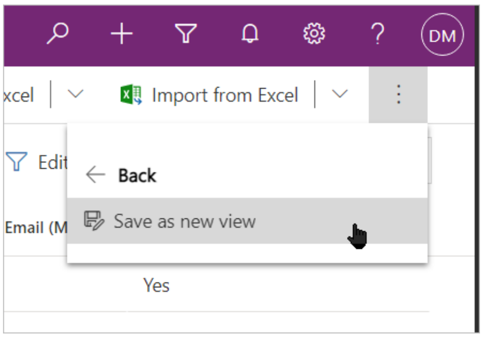
6. Scroll down to the bottom and click close.



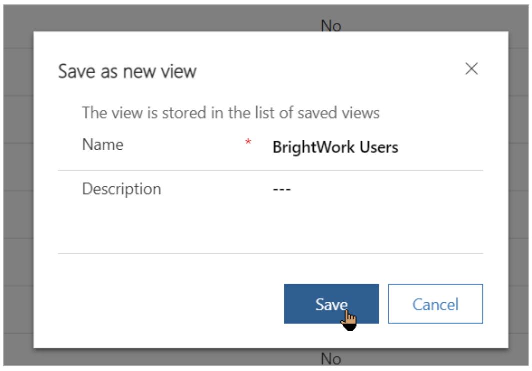
7. Click Apply.
8. Expand the three dots in the top right and click the arrow beside Create view.



9. Click Save as new view.

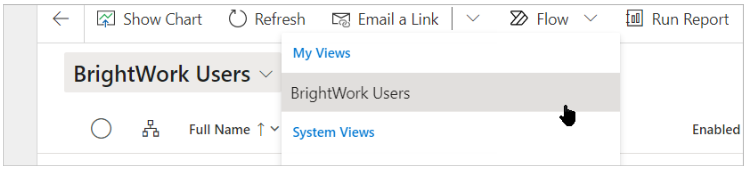


10. Rename the view if desired (optional), and click Save.



11. The new view is available to check if the user accounts are enabled for communication related

activities.



If further configuration is required, see the **Setup Dynamics Email** section of the BrightWork 365 Install Guide.pdf.

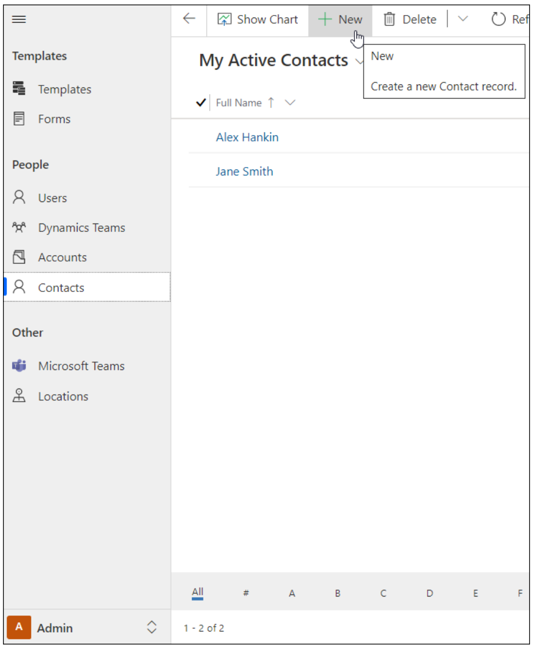
Contacts

Located in the Admin Area > People section of the app, the **Contacts** feature provides a location to store information about people external to your organization such as vendors and contractors. These contacts can also be used to assign primary contacts to Accounts.

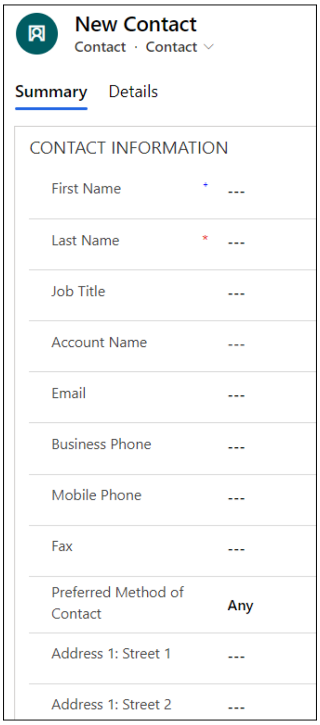
Contacts can be added, edited and deleted by the BrightWork Project Manager and BrightWork PMO Manager.

Add a Contact

1. Click into Admin Area > Contacts.
2. Click + New.



3. Fill in the relevant contact information.



Add a Primary Contact to an Account

If you assign a contact to an account and the contact has an email address attached to its record, you will be able to email the account by using the email feature of a project's Communications module.

To assign a Primary Contact to an Account, in the Contact's **Account Name** field choose the relevant Account.

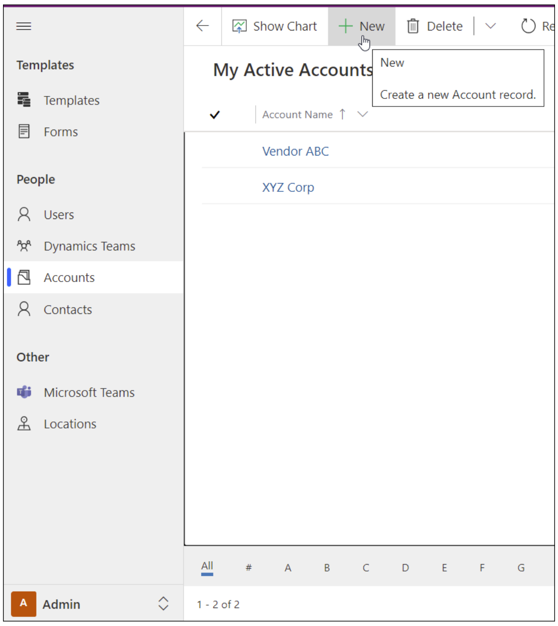
Accounts

Located in the Admin Area > People section of the app, the **Accounts** feature provides a location to store information about external organizations such as vendors and contractors. This data can be used in other areas of BrightWork 365 including a project's Costs module and the email function within a project's Communications module.

Accounts can be added, edited and deleted by the BrightWork Project Manager and BrightWork PMO Manager.

Add An Account

1. Click into Admin Area > Accounts.
2. Click + New.



3. Fill in the relevant Account information and save the record.

Add a Primary Contact to an Account

Among the fields present to capture all the details about these entities is the field Primary Contact. In addition to noting who is the primary contact, if the contact has an email address attached to their record, you will be able to email the account by using the email feature of a project's Communications module.

To assign a Primary Contact to an Account:

1. Create the contact in the Contacts list if not already present.
2. In the Account's **Primary Contact** field choose the relevant contact.

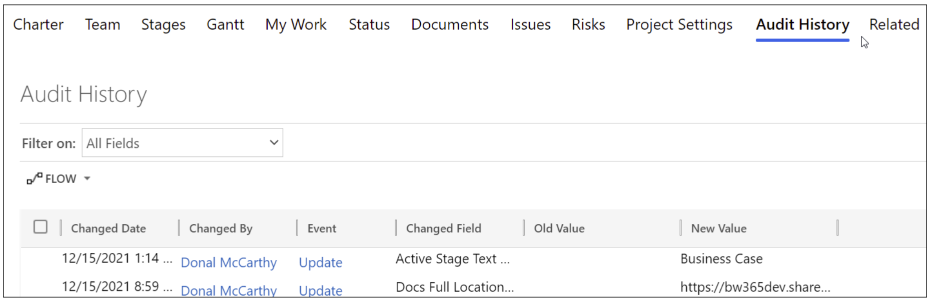
Audit History

BrightWork 365 together with the Microsoft Power Platform provides organizations with the ability to track data change history and activity logging for use in analysis and reporting purposes. BrightWork 365 audit history has been enabled in the following tables:

- Project Task
- Request
- Issue
- Risk

See Audit Tables.xlsx 📎 for a list of the columns that are audit-enabled.

To view Audit History, within a project click on the **Related** tab and choose **Audit History**.



Note that in the **Filter on:** drop-down, there are more fields listed than are actually available in the Audit History.

For additional Audit information see these related Microsoft articles:

- Auditing Overview
- Power Apps Activity Logging
- Configure Tables and Columns for Auditing

Archive or Delete a Project

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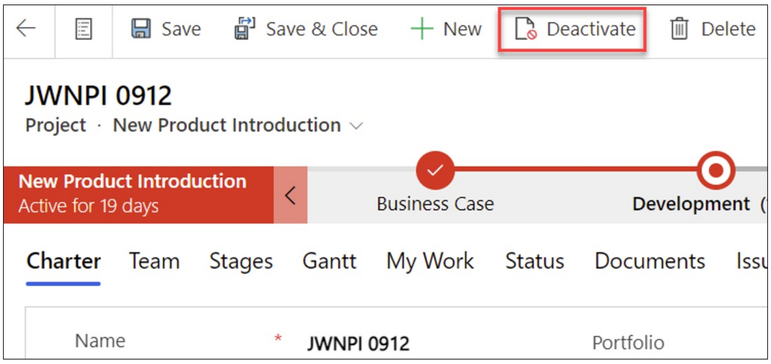
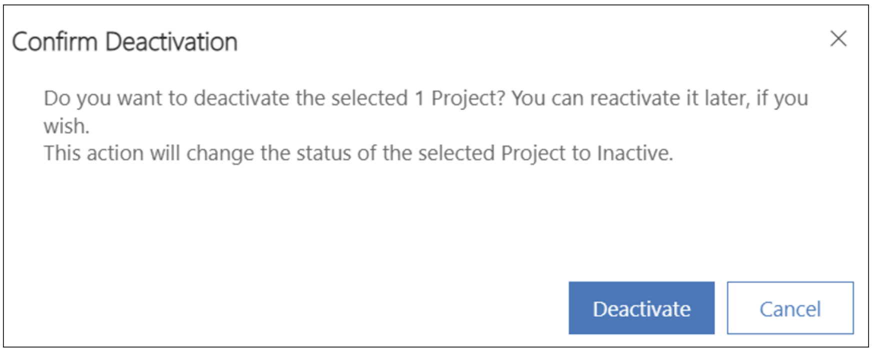
Archive a Project

When it is no longer necessary for a project to be in **Active** status, for example because it is deferred or closed, it can be archived and put into **Read-only** mode. Archiving is usually preferred over deletion of a project because deleted projects cannot be recovered. Only users with the **BrightWork PMO Manager** security role can delete projects.

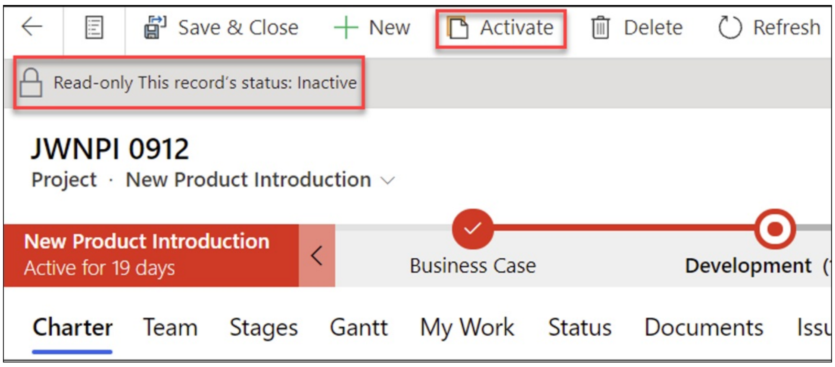
1. While in a project record click **Deactivate**.



2. Click **Deactivate** to confirm the deactivation request.



3. You can re-activate a project by entering the project record and clicking Activate.



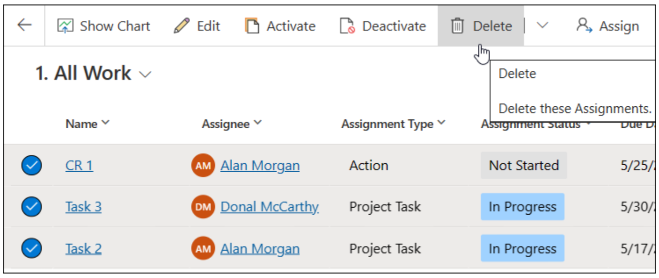
Delete a Project

Caution Deleted projects are permanently removed and cannot be recovered.

Remove Work Assignments

In order for a project to be deleted, there cannot be any work assignments present in the project. A relatively quick way to achieve this is via the **My Work** link in the Main Nav (the assignments will be permanently deleted):

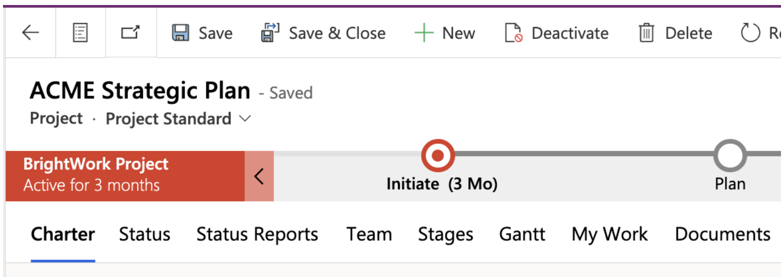
1. Click on **My Work** on the main nav.
2. Change the view to **All Work**.
3. Filter the **Project** column to the relevant project.
4. Select all the assignment rows and click **Delete** at the top of the screen.



Delete a Project

To delete a project permanently:

1. Click into the project and click **Delete** at the top of the screen.



Note After the project is deleted, you may see "Record not found" messages displayed on the screen; these messages can be safely ignored.

Portfolios

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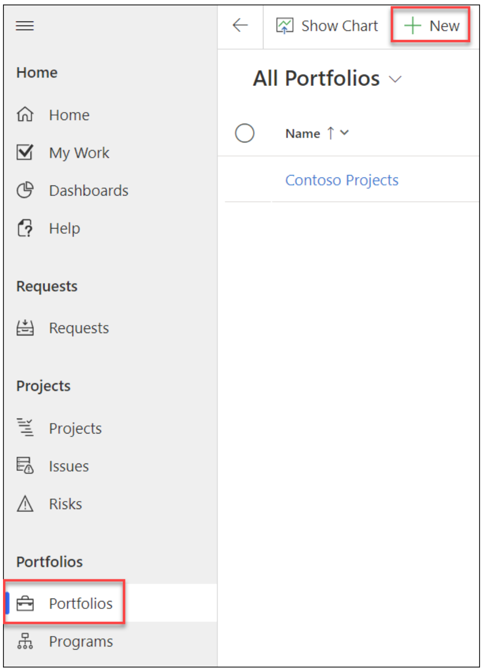
Portfolios Introduction

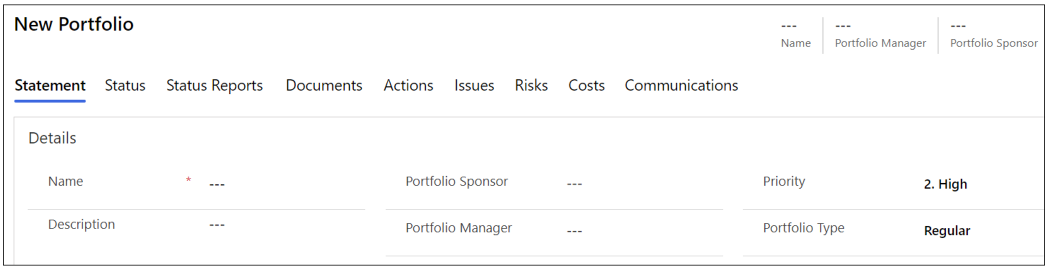
Portfolios are the highest parent level within the BrightWork 365 hierarchy. Portfolios consist of child programs and all of the projects within the respective programs. Your BrightWork 365 environment can have more than one portfolio.

Creating Portfolios

1. Click into the **Portfolios** page, and then click **+ New** at the top of the page.



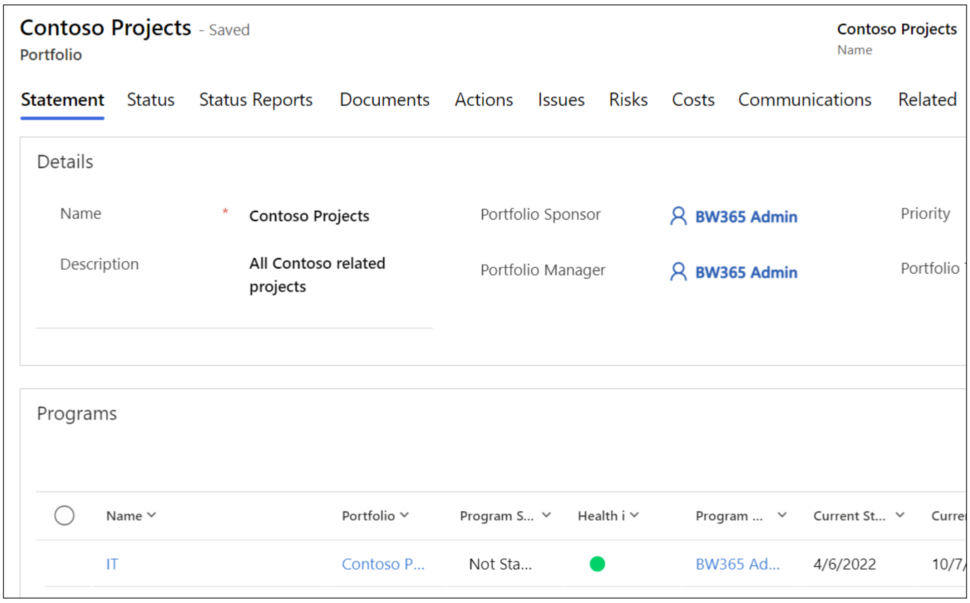
2. In the **Statement** screen, fill in all the required fields and click **Save**.



Portfolio Tabs

Statement

You can easily view the Portfolio Statement with all child Programs by clicking on the **Statement** tab.



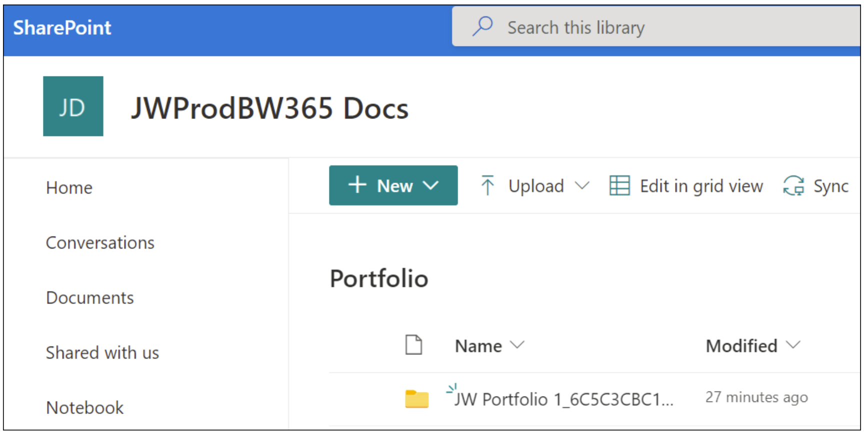
The list of available users to choose from in the **Portfolio Sponsor** and **Portfolio Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

Status & Status Reports

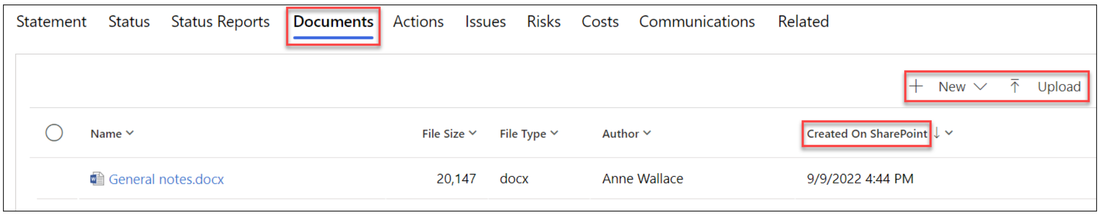
The **Status** tab allows the manager to set current project metrics and KPIs, and the **Status Reports** tab provides the manager with the ability to create snapshot status report. See the Status Reporting article for details.

Documents

During the installation of BrightWork 365 a SharePoint site and accompanying document library were created for the BrightWork 365 environment. A folder for each Portfolio exists in this library.



The Documents tab is where you can create new Microsoft Office documents and upload existing documents. These files are stored in your organization's SharePoint document library that is associated with BrightWork 365.



Caution

- By default, files deleted from the Documents tab will be permanently deleted from the SharePoint site associated with BrightWork 365 and cannot be restored from a recycle bin. Contact your Microsoft Support representative to discuss activating the associated SharePoint Recycle bin to be able to restore deleted documents.
- SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

Actions

See the Actions article for detailed information.

Issues

Click on the Issues link to view and create Portfolio related Issues.

The Assigned To lookup column is limited to users given the BrightWork Team Member role.

Risks

Click on the Risks link to view and create Portfolio related Risks.

The Risk Monitor lookup column is limited to users given the BrightWork Team Member role.

Costs

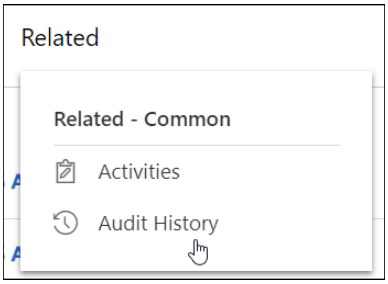
See the Costs article for detailed information.

Communications

See the Communications article for detailed information.

Related

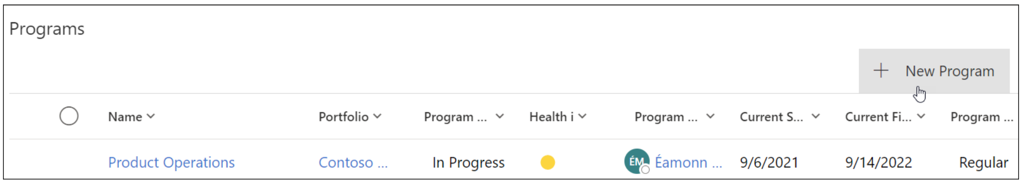
Click on Related > Audit History to view the audit change history.



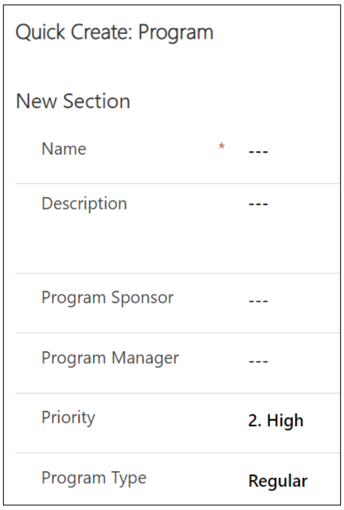
Quick Create - New Program from Portfolio Record

Managers can quickly create a new Program from a Portfolio record using Quick Create.

1. In the Portfolio's Programs section in the Statement tab, click **+ New Program**.



2. Fill in the form and click **Save and Close**.



Quick Create: Program

New Section

Name *	---
Description	---
Program Sponsor	---
Program Manager	---
Priority	2. High
Program Type	Regular

Programs

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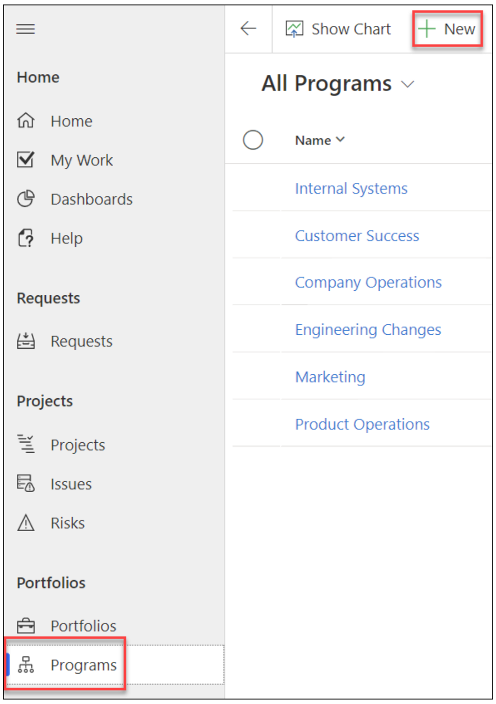
Your browser does not support HTML5 video.

Programs Introduction

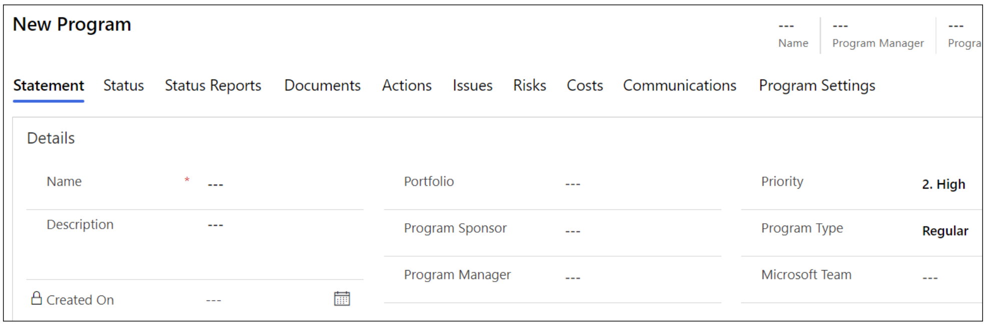
A Program is the first child level under a Portfolio. It allows users to group related projects together in order to manage and report on them in a coordinated way.

Creating Programs

1. Click into the **Programs** page and then click **+ New** at the top of the page.



2. In the **Statement** tab fill in all the required fields and click **Save**.



Program Tabs

You can easily view all Projects, Documents, Issues, Risks, and Program Settings that are related to a selected Program by clicking into the associated tabs within the Program record.

Statement

You can view the Program Statement and all child Projects by clicking on the **Statement** tab.

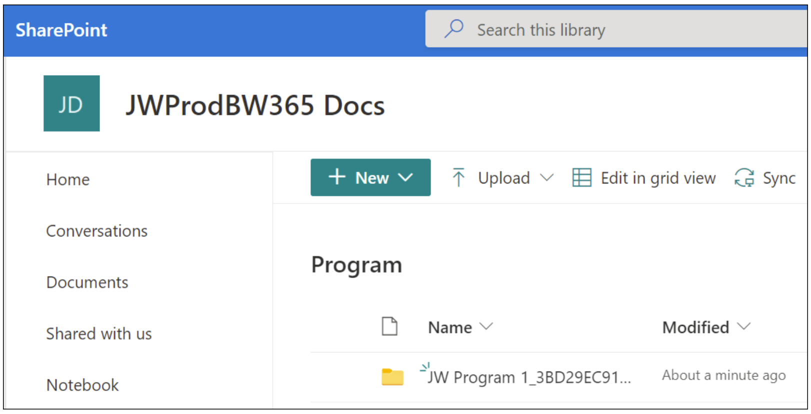
The list of available users to choose from in the **Program Sponsor** and **Program Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

Status & Status Reports

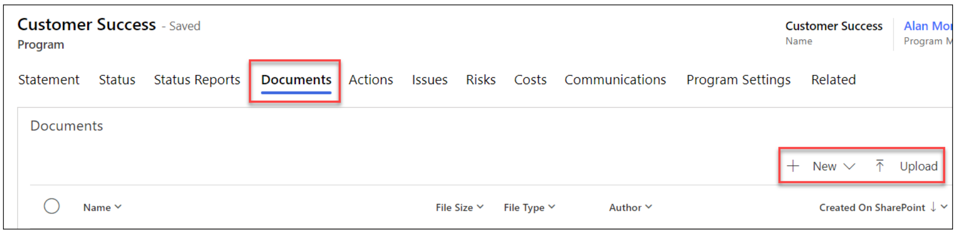
The Status tab allows the manager to set current project metrics and KPIs, and the Status Reports tab provides the manager with the ability to create snapshot status report. See the Status Reporting article for details.

Documents

During the installation of BrightWork 365 a SharePoint site and accompanying document library were created for the BrightWork 365 environment. A folder for each Program exists in this library.



You can create new Microsoft Office documents or upload existing documents into this library through the **Documents** tab of a Program record.



Caution

- By default, files deleted from the Documents tab will be permanently deleted from the SharePoint site associated with BrightWork 365 and cannot be restored from a recycle bin. Contact your Microsoft Support representative to discuss activating the associated SharePoint Recycle bin to be able to restore deleted documents.
- SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

Actions

See the Actions article for detailed information.

Issues

Click on the Issues link to view and create Portfolio related Issues.

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Risks

Click on the Risks link to view and create Portfolio related Risks.

The list of available users to choose from in the **Risk Monitor** column is limited to those users given the **BrightWork Team Member** security role.

Costs

See the Costs article for detailed information.

Communications

See the Communications article for detailed information.

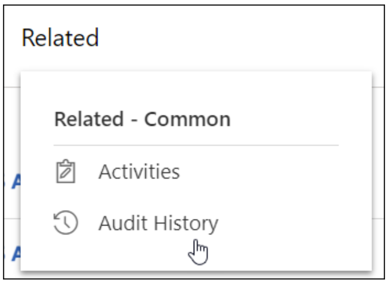
Program Settings

The Program Settings tab provides the ability to change the portfolio associated with the program, and to update the Microsoft Teams list to facilitate the creation of a Microsoft Teams Team for the program.

Only users with the BrightWork PMO Manager security role can view the Program Settings tab.

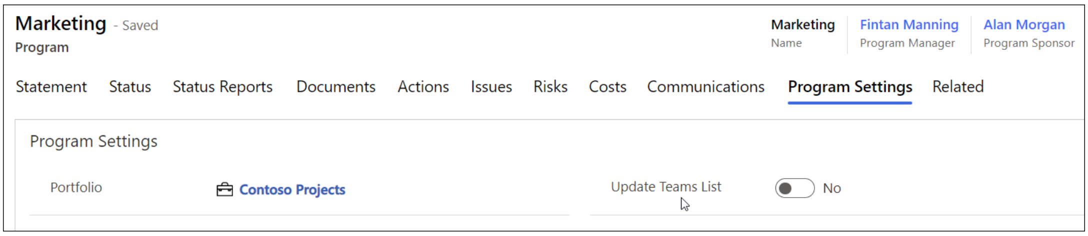
Related

Click on Related > Audit History to view the audit change history.

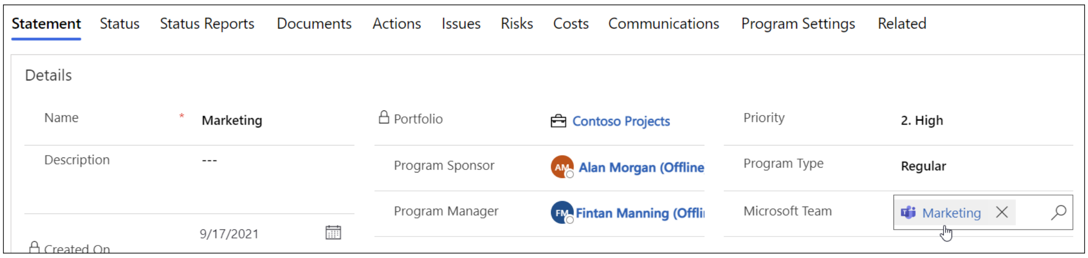


Program Settings & Microsoft Teams

You can update the Microsoft Teams list in the Program Settings screen:



and then choose the Microsoft Team in the Program's Statement screen:

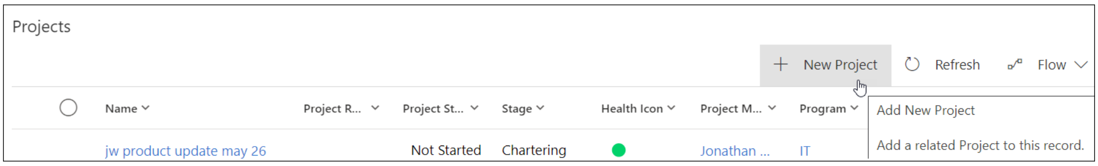


Note In order for the Teams list to update properly and include the program Team, the Team must have been created previously, and the Owner of the solution flow **Get list of Microsoft Teams** must have been added as a Member of the Team. See Microsoft Teams Admin Guide for more information.

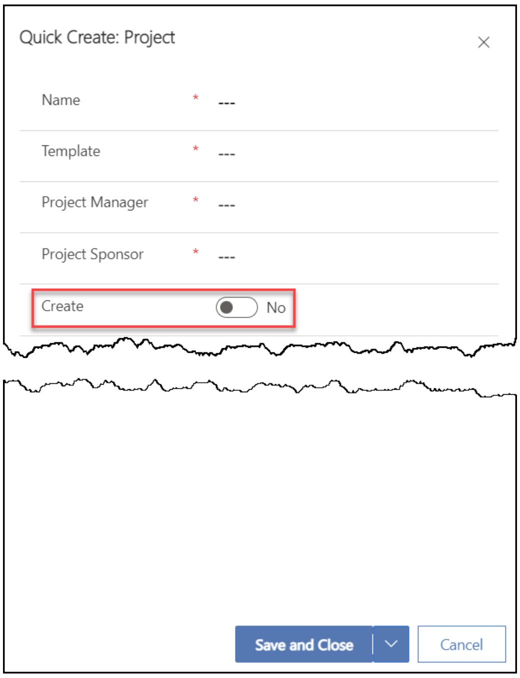
Quick Create - New Project

Managers can quickly create a new Project from a Program record using Quick Create.

1. In the Program's Projects section in the Statement tab, click **+ New Project**.



2. Fill in the short form, switch **Create** to **Yes**, and click **Save and Close**.



About Power Apps Dashboards

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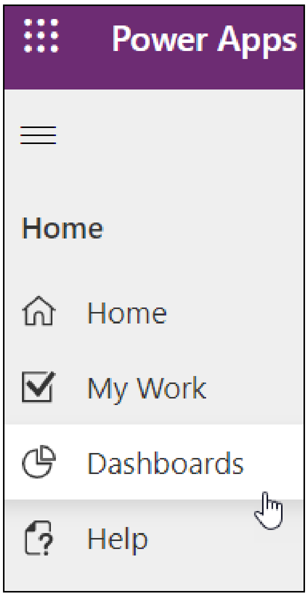
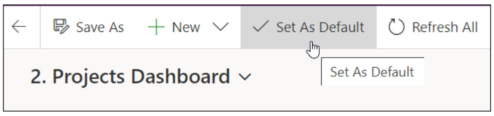
The Dashboards Section

The **Dashboards** section contains multiple BrightWork 365 Power Apps charts, each with many views of their own for further drilling down into project details.

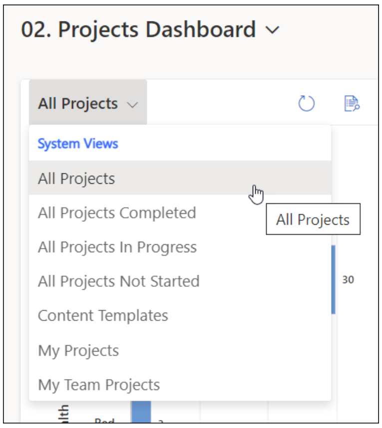


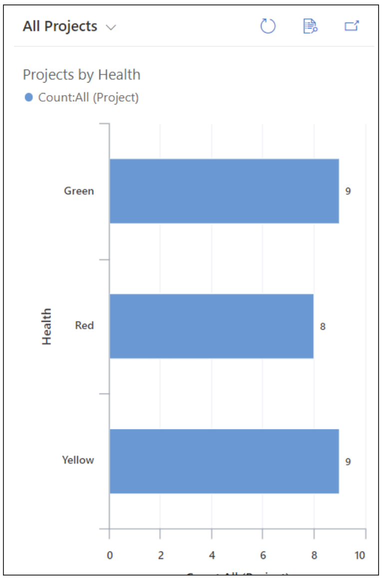
The first series of chart category to display will be whichever was set as the default. This default can be changed by clicking on **Set as Default**.



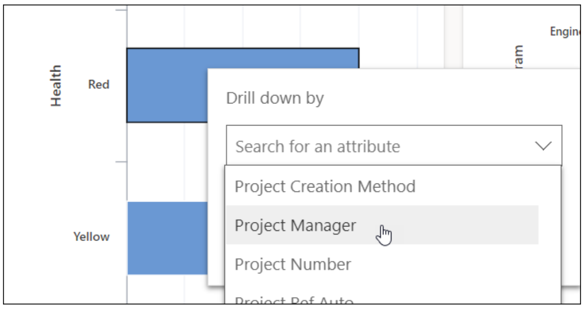
Using the Power Apps Dashboards

1. Choose the desired chart series (e.g., **Projects Dashboard**), and select the focus within a chart pane by selecting any of the available views (e.g., **All Projects**).





2. (Optional) Click into a chart bar and drill down using any of the relevant attributes.



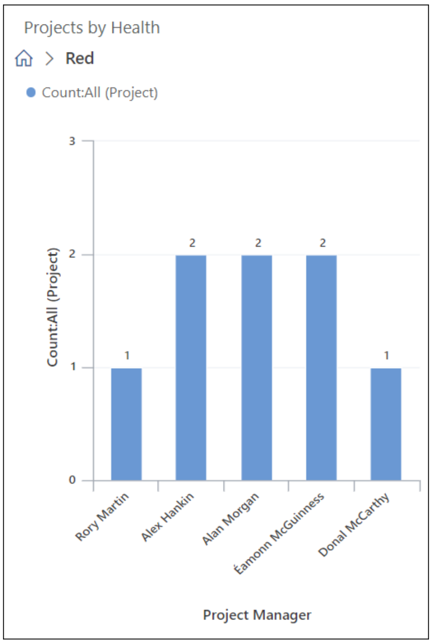
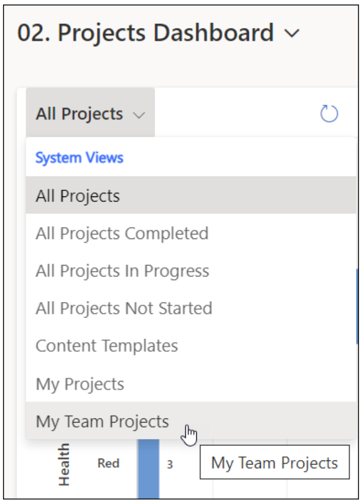


Chart Views

Among the many chart views are the following views:

- My Projects: Lists any project created by the logged in user, or any project in which the logged in user is either the Group Manager, Project Manager or Project Sponsor.
- My Team Projects: Lists any project on which the logged in user is a member of the Project Team.



Troubleshooting

- Percent values do not appear when drilling down within a Power Apps Chart: There is no current workaround for this as it is MS Power Platform behavior.

Portfolio & Program Status Reporting

Status Tab

The **Status** tab displays current metrics and KPIs.

The **Schedule** date values will automatically populate based on work item dates, and the values for the current overall Status, Health, Cost, and other metrics and KPIs are manually set by the manager.

Status Reports Tab

In the Status Reports tab a snapshot record of the current status information can be saved, and the history of previously created status reports can be viewed.

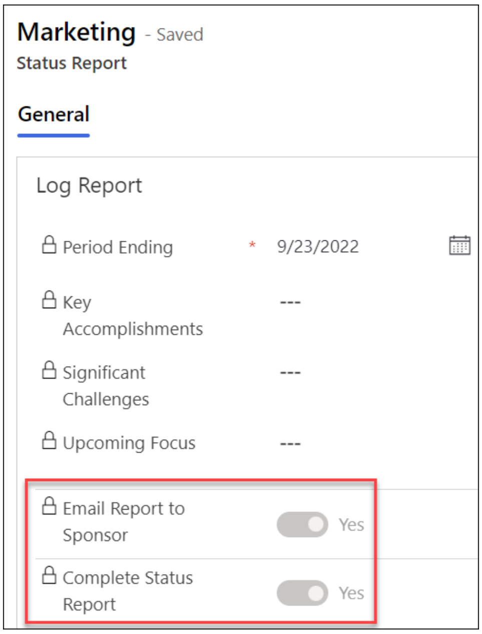
Saved status reports will be added to the list of any previously created status reports. The status report data is stored within your Microsoft 365 Dataverse.

To create a new status report snapshot:

1. In the Status Reports tab click the ellipses and **+ New Status Report**.
2. Fill in all relevant columns.
3. To save the status report:
    1. To save a draft, click **Save** or **Save and Close** in the ribbon.
    2. To save a final version of the status report, set **Complete Status Report** to **Yes**.

> **Note** After saving a draft status report, values that were initially automatically copied in from the Status tab (i.e., the "Status" value) will not be updated with any new values from the Status tab upon subsequent edits of the draft status report.

When you first set **Email Report to Sponsor** to **Yes**, and then set **Complete Status Report** to **Yes** (in that order), an HTML report will be emailed to the Sponsor, the Portfolio or Program Manager, and the person that set the report to the completed status. The email will be sent from the account that was used to install BrightWork 365.



Note Status related icons may fail to load in older versions of the Outlook desktop client.

Portfolio & Program Actions

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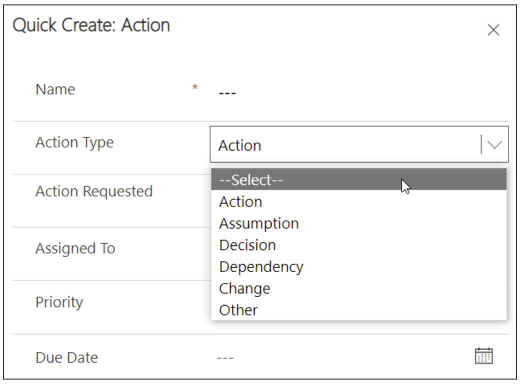
Actions

The Actions tab provides users with the ability to create, edit and view details in relation to an Action, a Resolution, an Approval, and to Notes, to help keep projects on track.

To access Actions, click on the **Actions** tab within a program, a portfolio, or a project created from one of the templates that contains this tab. Click **+ New Action** to create a new Action.

Clicking **+ New Action** brings up a Quick Create form with the most relevant fields. The form's **Action Type** field allows you to choose from several available types of actions.



Action Items

The Action tab within an individual Action item provides several sections to capture additional details about an Action.

Action

Fields include:

- Name: Provide a name for the action.
- Action Type: Choose either Action, Assumption, Decision, Dependency, Change, or Other.
- Action Requested: Enter the action requested.
- Assigned To: The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.
- Priority: Choose the priority level.
- Due Date: Choose the date the requested action is due.

Resolution

Fields include:

- Action Status: Choose from among the available Status choices.
- Progress Indicator: Choose from among the available schedule related choices.
- Action Taken: Describe any actions taken.
- Date Actioned: Choose the date the action was taken.

Approval

Fields include:

- Approver: Enter the name of the person responsible for approving the action. The list of available users to choose from in the **Approver** column is limited to those users given the **BrightWork Team Member** security role.
- Approval Date: Enter the date the approval was given.
- Resolution Rating: Choose a star rating for the resolution.
- Notes: A place to capture notes about the action.

Documents Tab

View, create, or upload documents associated with the action item. Documents will be saved in the project's SharePoint Online folder.

Related Tab

Click the **Related** tab to access the Audit History of the action item. The Audit History provides action item data change details including the change date, user who made the change, the changed field, and the old and new values.

Portfolio & Program Costs and Budgets

Tip The BrightWork 365 **Costs** tab in Portfolios and Programs provides an easy method for rolling up Project budgets and costs.

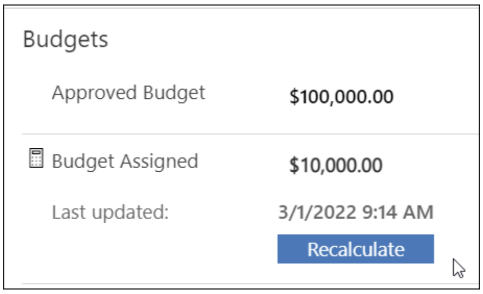
Portfolio & Program Level Cost Tracking

To enter the Costs section, click on the **Costs** tab of a portfolio or program. The screen is comprised of high-level budget and cost tracking fields separated into two screen sections.

Program Budgets

Fields include:

- Approved Budget: Enter the overall approved budget for the project. This is the first step for setting up cost management for the project.
- Budget Assigned: Calculates the sum of the total budget assigned to all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the **Recalculate** button.



- Budget Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Current Forecast. Automatically calculated.

Program Costs

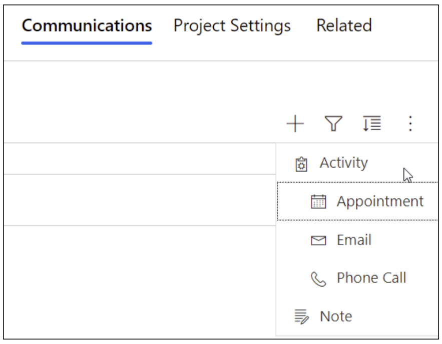
Fields include:

- Current Forecast: Calculates the total spend forecast of all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Actual to Date: Calculates the total money spent to date for all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Cost to Complete: Current Forecast - Actual to Date. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.

Portfolio & Program Communications

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Communications tab provides a comprehensive method for capturing various communication related activities at the project, program, or portfolio level. To access Communications, click on the **Communications** tab. The initial screen will display a history of previously entered Communications items. Click **"+"** to create a new Communications item of type Appointment, Email, Phone Call, or Note.



You can also access communications options from within the **Timeline** section of a **Project Stage** details screen.

Appointment

When creating a new Appointment the Quick Create form will display with relevant fields. If the creator's email and calendar are configured properly, an invite will be sent to the Attendees, and the appointment will be added to the creator's calendar and displayed as 'Free'.

The Appointment **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Appointments can be set as a Microsoft Teams meeting. If your organization is not yet

configured to work with Teams, see our Microsoft Teams Admin Guide.

Email

The new email screen presents the typical email fields such as To, CC, Subject, and email body. If the email creator's email is configured properly, an email will be sent to the addressees and a copy of the email will be saved in the Communications item record.

Phone Call

The Phone Call function provides a way to capture details about a call that was initiated outside the system. The details will be saved as part of the Communication record.

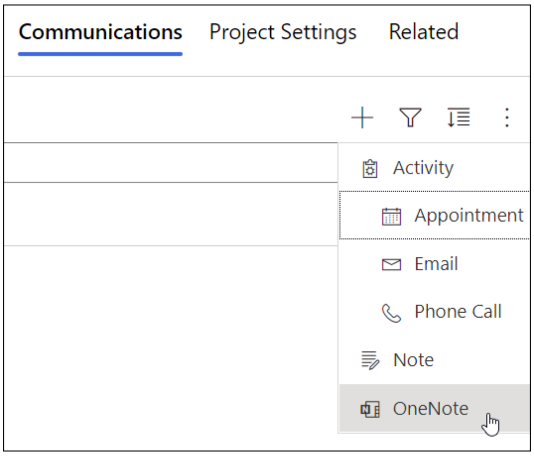
The Phone Call **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Note

You can create a note with a title, note body (with formatting), and attachments and save the note as part of the Communications record.

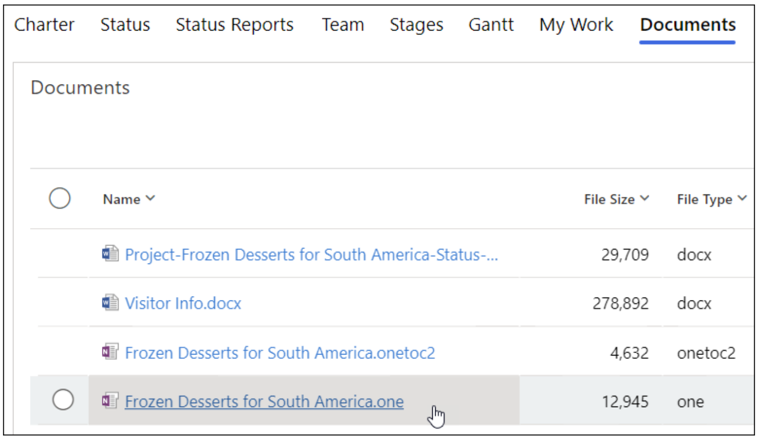
OneNote

In addition to the standard note mentioned above, you also have the option to create Microsoft OneNote notes that are saved as part of an associated OneNote notebook. To access the OneNote notebook after it's created, you can either click on the OneNote link displayed when you click the + sign in the Communications module:



Or,

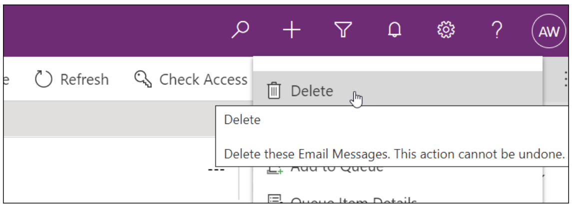
click on the **.one** file within the Documents tab:



Communications Tab - User Actions

You can take various actions on open Communications items directly in the main Communications screen.

If you need to delete a closed Communications item, e.g., delete an email after it was sent, you will need to do this from the toolbar within the item record instead of from the main Communications screen.



Note Users can only modify or delete their own Communications activities, not those of other users.

Dynamics 365 App for Outlook

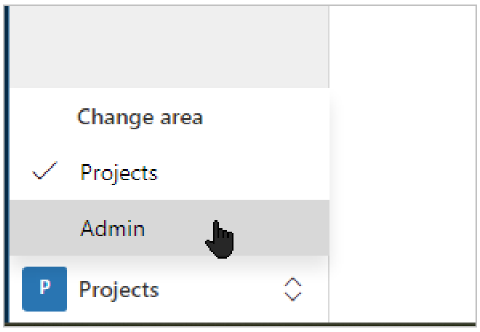
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf 📎), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web, or mobile. See Use Dynamics 365 App for Outlook for additional information.

Troubleshooting

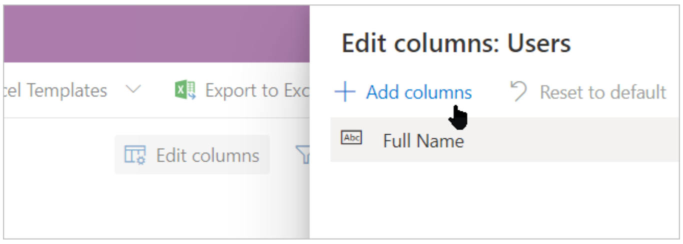
Communication activities not working for some users

A Power Platform Admin can check within the BrightWork 365 app if the affected user accounts are enabled for communication related activities:

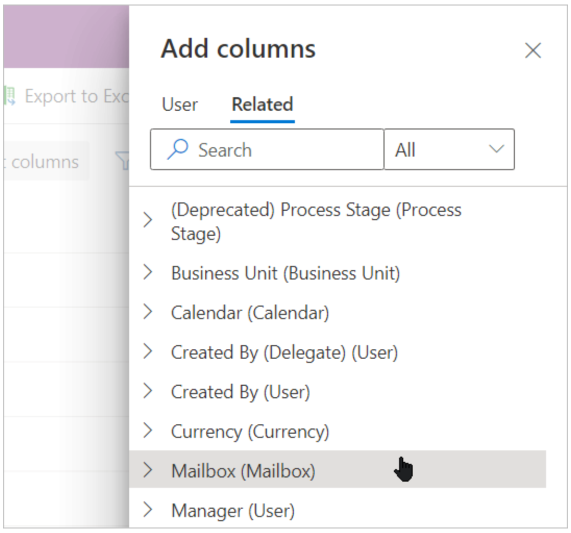
1. Click Projects in the bottom left of the page and click Admin.



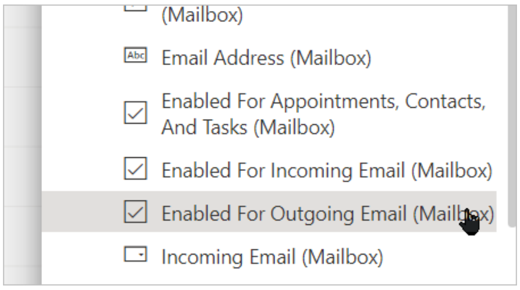
2. Click Users to load the BrightWork Users report.
3. Click Edit columns and then click Add columns.



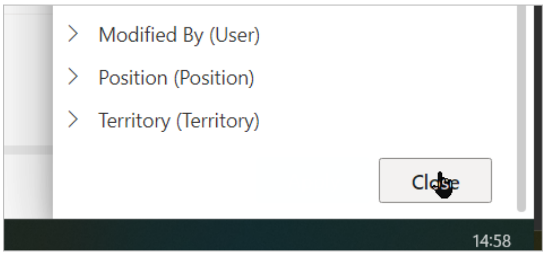
4. Click Related and Select Mailbox.



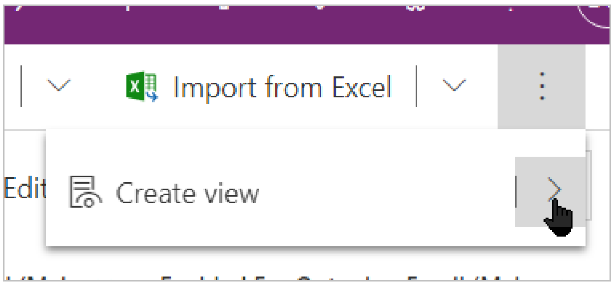
5. Add the three Enabled for... columns.



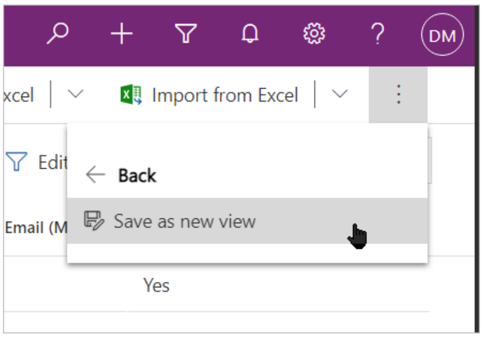
6. Scroll down to the bottom and click close.



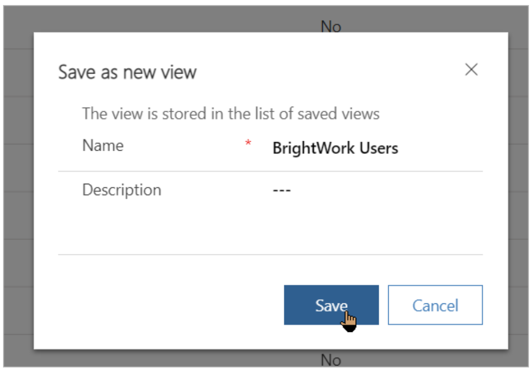
7. Click Apply.
8. Expand the three dots in the top right and click the arrow beside Create view.



9. Click Save as new view.

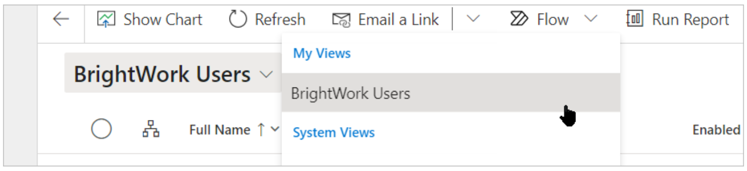


10. Rename the view if desired (optional), and click Save.



11. The new view is available to check if the user accounts are enabled for communication related

activities.



If further configuration is required, see the **Setup Dynamics Email** section of the BrightWork 365 Install Guide.pdf.

Work Allocation Reports

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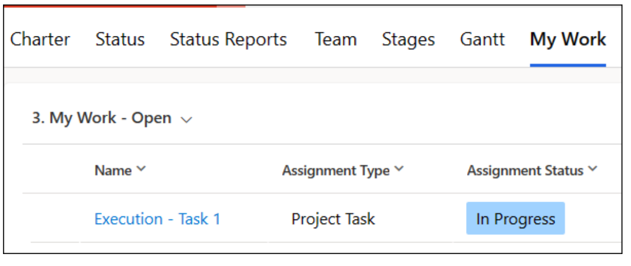
BrightWork 365 provides a number of rollup work-related reports for the various types of work that can be assigned to project team members.

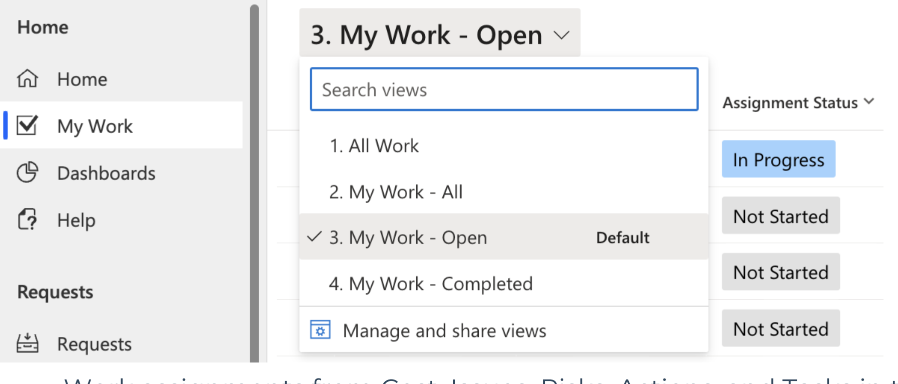
My Work

The My Work report rolls up all work items assigned to the logged in user either in an individual project or across all projects, depending on where the **My Work** link is clicked.

To view all work assigned to you as the logged in user for one specific project, click into the **My Work** tab within the project.



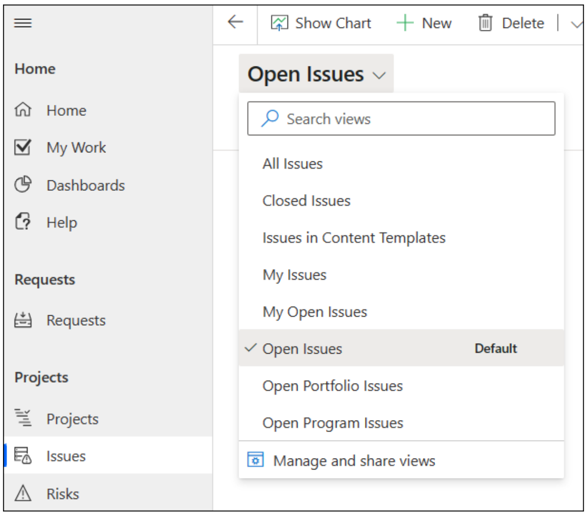
To view all work assigned to you as the logged in user across all projects, click into the **My Work** link on the Site Map. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



- Work assignments from Cost, Issues, Risks, Actions, and Tasks in the My Work report can be opened by clicking on the assignment name.
- Percent Complete is editable in the form for Tasks, Stages, Deliverables and Milestones. The percent complete slider can be adjusted in the form, but no updates will be made until the changes are saved via the toolbar option i.e., Save / Save & Close.

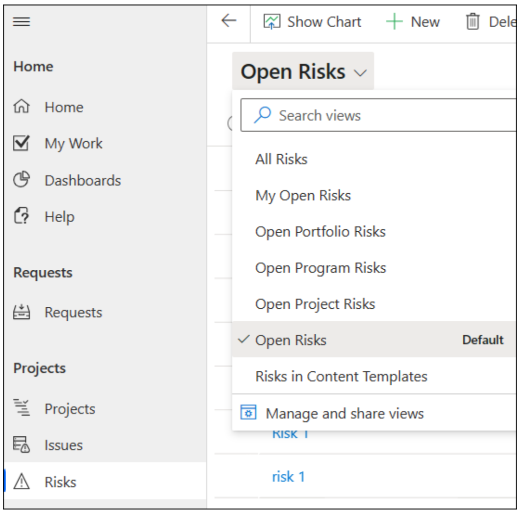
Issues

The Issues report rolls up all issues recorded throughout all projects. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



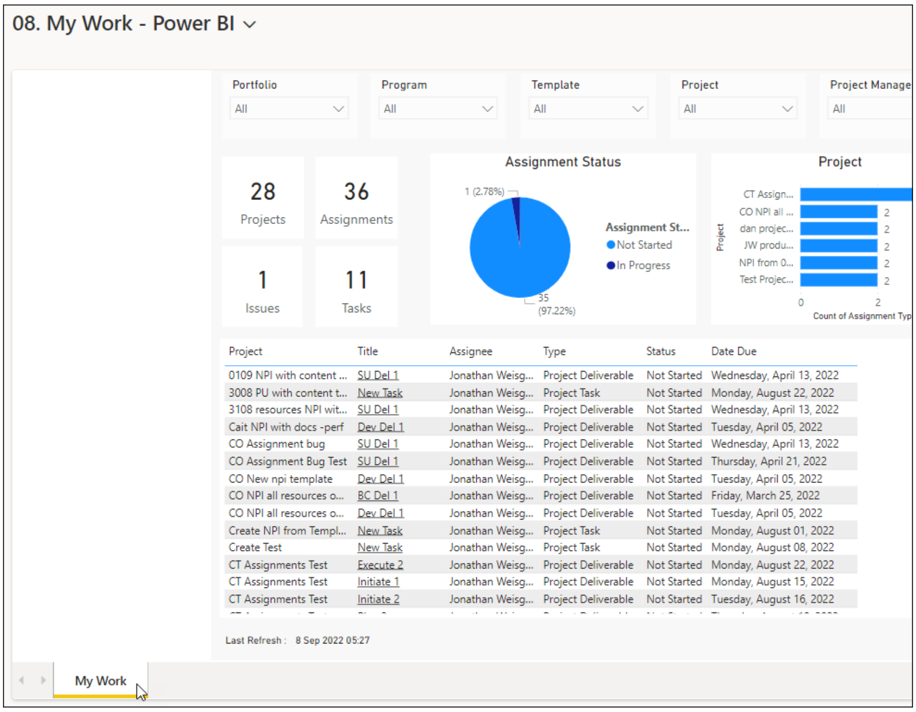
Risks

The Risks report rolls up all risks recorded throughout all projects. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



Work Allocation Reports - Power BI

With the pairing of BrightWork 365 and Microsoft Power BI, there are many resource related report options available for your team to review and analyze. Two main areas for resource reports are the **Work** and **My Work** reports. As with other Power BI reports, the work reports are interactive and details can be zoomed into by clicking into the various chart regions.



Note As referenced in the Install Guide, in order for the My Work Power BI reports to function properly for a user they must be added to the Power BI Workspace with Viewer access (Admin access will display work for all users, not just for themselves), and to the user security group for the report dataset.

About Power BI Dashboards

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

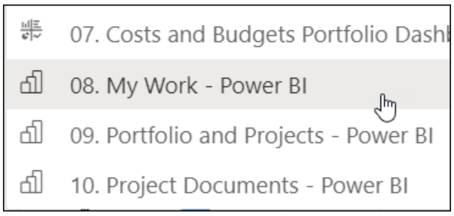
Intro to BrightWork 365 Power BI Dashboards

Note

- In order to use BrightWork 365 Power BI Dashboards, users must have a Microsoft Power BI Pro license or E5/G5 plan, and at least **Viewer** permission for the relevant Power BI Workspace.
- Specific examples of BrightWork 365 Power BI Dashboards can be found throughout this Knowledge Base in relevant articles including Portfolio & Program Status Reporting, Resource Utilization, Project Documents Dashboard and Work Allocation Reports.

BrightWork 365 and the Microsoft Power BI business analytics tool provide exceptional data visualization functionality.

To view Power BI dashboards, click into the Home section of **Main Nav > Dashboards**, and use the Dashboard drop-down to choose the desired Power BI Dashboard. Power BI Dashboards are differentiated from Power Apps Charts in the drop-down by having the words **Power BI** in their titles.

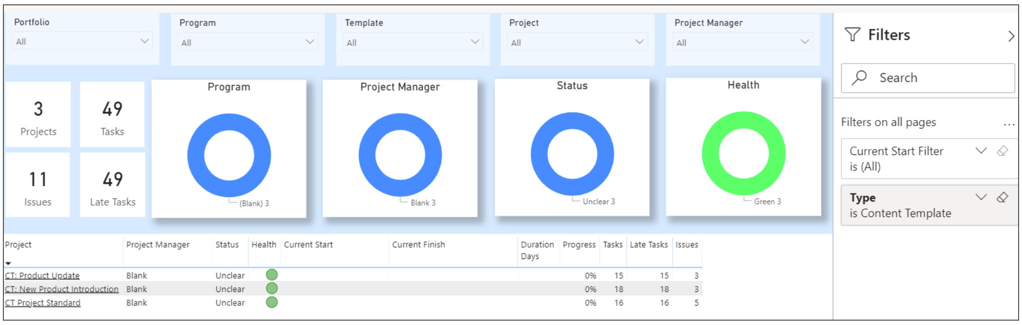


Additional Power BI reports can be added as desired through customization (contact your Customer Success Partner for more information).

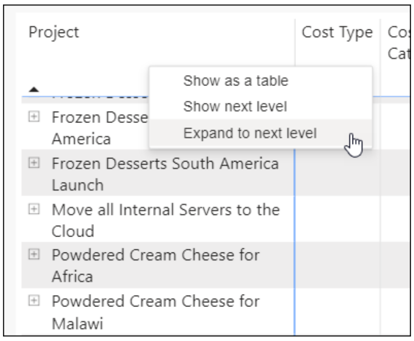
Navigating Power BI Dashboards

Tip You can improve Power BI readability by collapsing the Filters pane on the right side of the screen and the left nav.

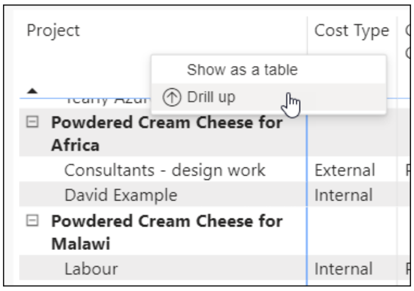
The Power BI dashboards include detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart objects or the checkboxes within an object, or with the **Filters** configuration options on the side of the screen.



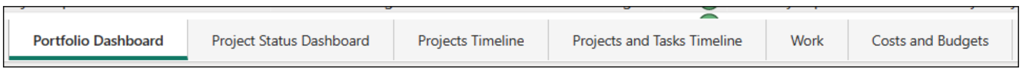
To expand all report list groupings, right-click on the grouped column (e.g.,**Project**) and click **Expand to next level**.



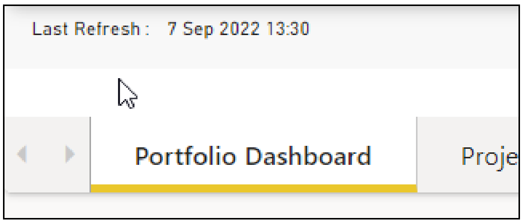
To collapse all report list groupings, right-click on the grouped column (e.g., **Project**) and click **Drill up**.



Along the bottom of Power BI Dashboard screens are tabs for additional report focus options - below is an example from the **Portfolio and Projecta - Power BI** Dashboard:

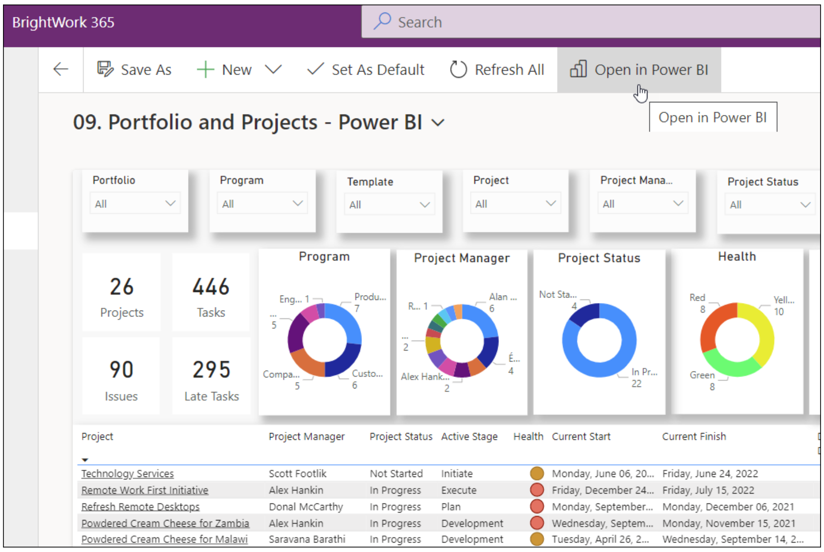


You can view the **Last Refresh** time of reports at the bottom of report pages. BrightWork does not force refreshes after data changes, the refreshes will occur on the schedule your administrator configures in your organization's Power BI admin settings.

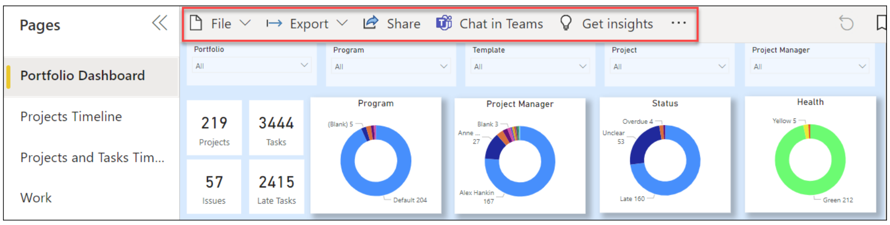


Open in Power BI Service

Microsoft **Open in Power BI Service** offers additional options to interact with BrightWork 365 reports. Users can conveniently access the service by clicking **Open in Power BI** on a BrightWork 365 Power BI dashboard page.



After navigating to the Power BI page, users are presented with menu options along the top of the web page including File (Print, Embed), Export (PDF, PowerPoint), Share (Copy link, Mail, Teams), and Chat in Teams.



For more information see Customize Power BI Dashboards and these Microsoft resources:

- https://docs.microsoft.com/en-us/power-bi/
- https://docs.microsoft.com/en-us/learn/powerplatform/power-bi?WT.mc_id=powerbi_landingpage-docs-link

Resource Utilization - Power BI Reports

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

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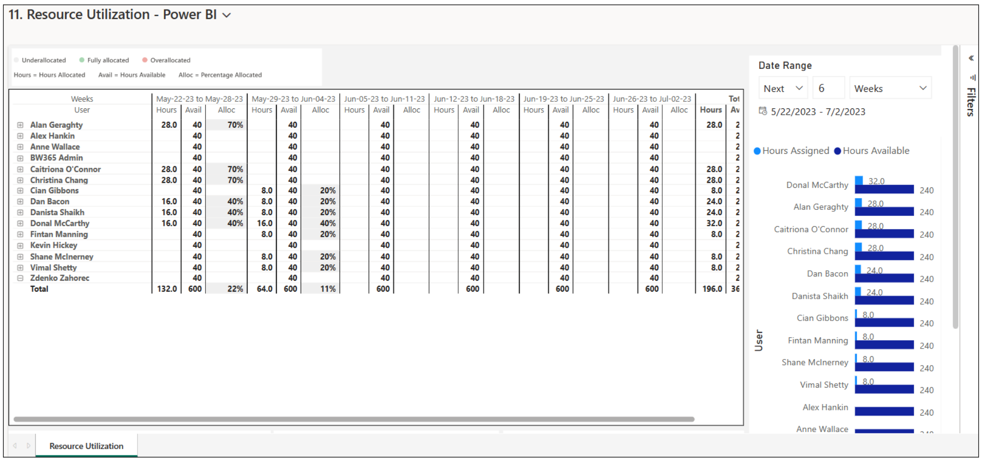
Introduction

In addition to Work Allocation reports, BrightWork 365 also offers a **Resource Utilization Power BI Dashboard**, allowing users to view all the project task assignments across projects, and assess levels of resource utilization. The dashboard allows viewers to quickly determine whether a resource is under or over allocated with project tasks.



Dashboard Components

Legend

The legend provides a definition of the color-coding present throughout the Main Window, making it easier for users to understand the data they're viewing.

Main Window

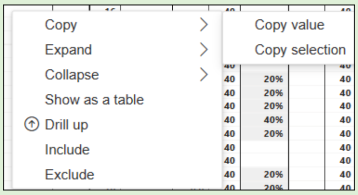
The main report window provides details about the chosen timeframe currently being analyzed including:

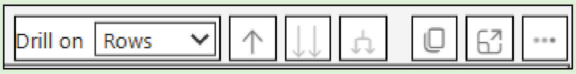
- All users with tasks assigned to them

- All users with tasks assigned to them.
- The projects related to users that have been assigned tasks.
- All related tasks that have been assigned to users.
- The number of hours assigned to users (see below for how this is calculated).

The Main Window also allows users to interact with the data, letting them drill down into more granular details about the assigned tasks.

> **Tip** Use the various Power BI right-click and focus options which provide the ability to Expand all/Collapse all, Drill up/Drill down (for example to switch from a Week view to a Month view), etc.





Date Range

Through the use of drop-down menus, users can change the **Date Range** displayed in the main window. This section also allows you to click on an individual resource to focus solely on their work utilization.

Project Utilization Summary

View a summary of Hours and Start and Finish Dates for projects with work that fits within the chosen Date Range. Click on the name of a project to open the project in a new browser tab.

Hours Assigned out of Available

This section of the report displays for the selected user for the chosen Date Range, the total hours assigned out of the total hours available, the % Allocation, and the % Availability.

When viewing the Resource Utilization Power BI reports, the Task Unit % for a resource that was entered in the Gantt or Assignment will be applied to the reports, which account for the variation of % utilization. For example, a Monday to Friday task (equal to 40 hours of work), with a Task Unit % of 50 for a resource, will show up as 4 hours per day for 5 days duration for the resource.

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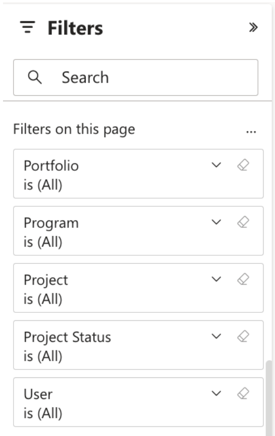
Filters

Filter the displayed data by available criteria.

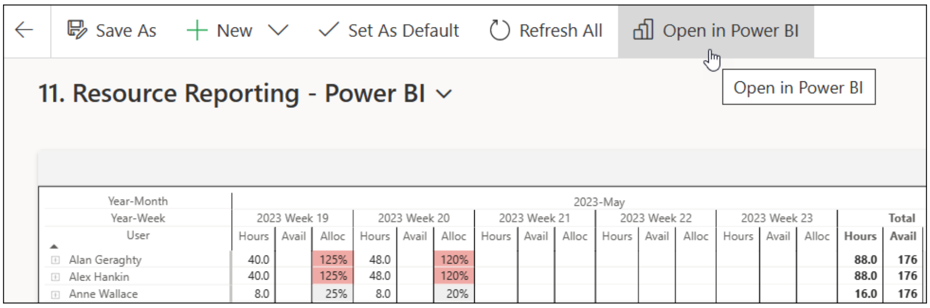


Resource Utilization Adjustment Process

When adjusting resourcing the Project Manager can launch the resource report in the Power BI service, and download the related PBIX file to open the new resource report in **Power BI Desktop**. They can then make assignment adjustments in the BrightWork 365 app and view the effects of these changes in realtime using Power BI Desktop, which allows unlimited refreshes of the report data unlike other methods of using Power BI which have limited daily refreshes. This cycle of **Adjust in the app > View in Power BI Desktop > Adjust in the app**, can be repeated as often as necessary to balance resource workloads.

Below are details for using the Resource Utilization Adjustment Process.

Open in Power BI



The **Open in Power BI** link will open the report in the Power BI Service, displaying the report in a separate webpage.

Download the Report PBIX File

Tip Power BI Desktop is a free download from Microsoft.

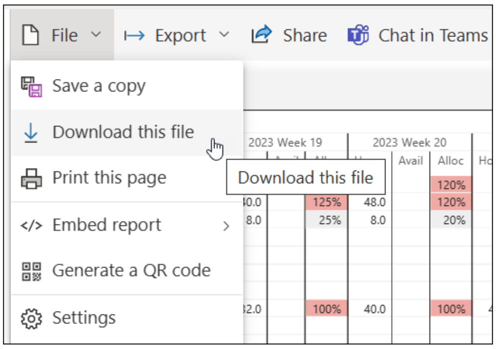
Note

- Users require **Contributor** permission in the relevant Power BI workspace to download the PBIX file.
- When users with **Contributor** permission access the **Power BI My Work Dashboard**, instead of only seeing their own work, they will see all users' work.

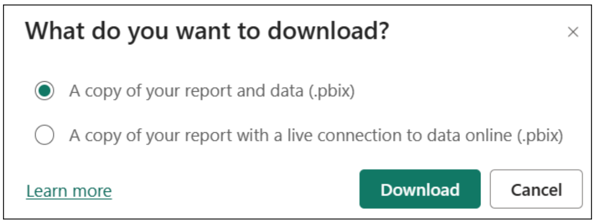
Caution When using Power BI Desktop for resource utilization purposes be sure not to publish the report as this will affect all users of the report.

One of the added functions provided by the Power BI Service is the ability to download the PBIX file that is associated with the report, which can then be opened in Power BI Desktop. To download the file from the Power BI Service:

1. Click **File > Download this file**.



2. Choose to download a copy of your report and data.



Open the PBIX File in Power BI Desktop

1. When file download initiated above is complete, open the PBIX file in Power BI Desktop.
2. View the data in Power BI Desktop and choose to refresh the data as necessary using the Refresh option.

> **Tip** If values are missing for columns **Hour** and **Alloc** in Power BI Desktop when all rows are collapsed, expand any row and the missing values will be displayed.

Utilization Calculation Rules

Resource Utilization - Task

- Resource utilization for task assignments is noted in Hours and is derived from the formula **# of Days * 8**.

Resource Availability - Hours

- Each assignee's availability is set to 40 hours per week by the BrightWork 365 solution.

Resource Availability - Calendar

- The solution uses one simple Monday to Friday Calendar.

Utilization Threshold Colors

For the various week time range intervals, the following colors code will appear in each cell for hours allocated:

If value **< 1** hours then **White** will appear in the relevant cell.

If value **>= 1** hours and **< 40** hours then **Grey** will appear in the relevant cell.

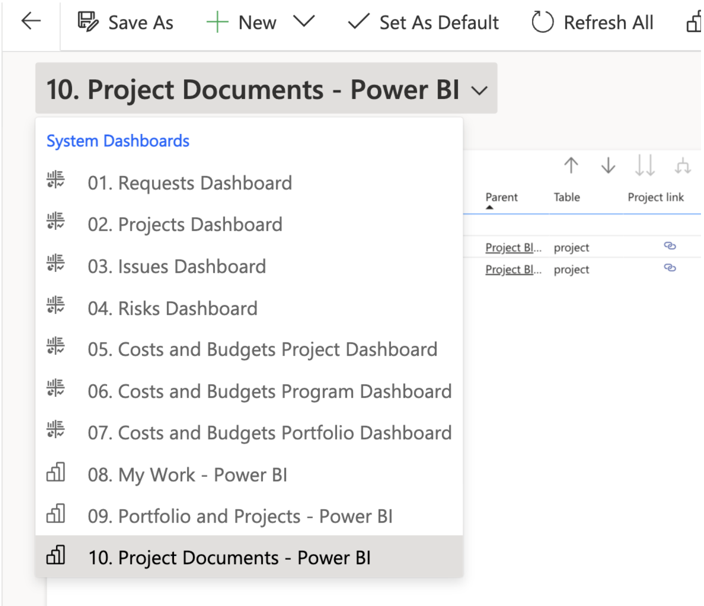
If value **= 40** hours then **Green** will appear in the relevant cell.

If value **> 40** hours then **Red** will appear in the relevant cell.

> **Tip** Two or more tasks assigned to a resource on the same day will always display the

user as over allocated; the system assumes one day of work for each assigned task even if there are other assignees. For example, if Dan is assigned two tasks on the same day, he will show as 200% allocated for that day.

Project Documents Dashboard - Power BI

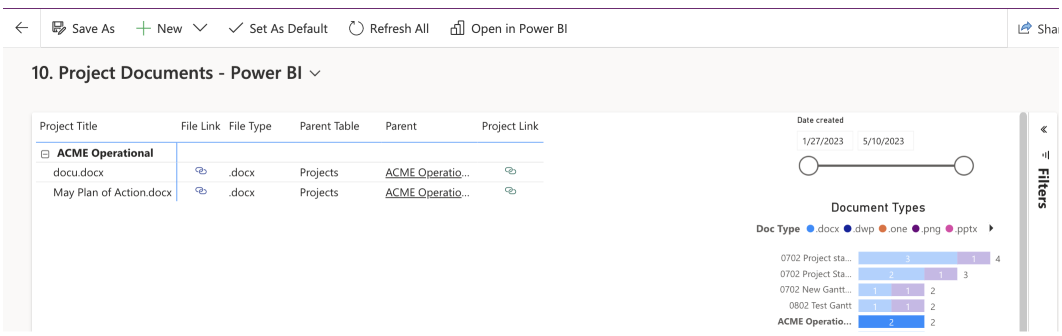


The **Project Documents** Power BI Dashboard displays documents from across your projects and includes links for easy access. The report includes documents from:

- Project Requests
- Project Tasks
- Project Issues
- Project Risks
- Project Actions
- Project Costs

The Date Slider allows the report viewer to narrow down the document selection making it easier to locate the desired document.

The **Parent Table** for documents located in a project's **Documents** tab will be listed as **Projects**.



What is BrightWork 365?

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

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.

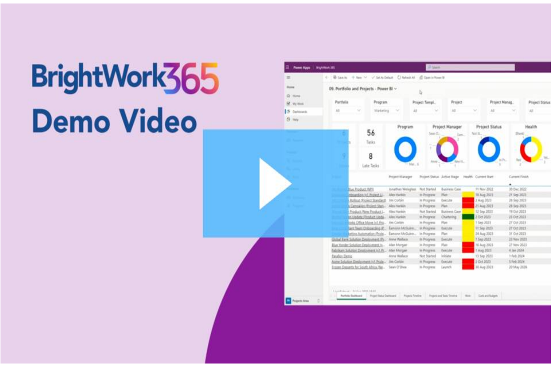
Use BrightWork 365 Across Varying Levels of Management

BrightWork365 | Template Spectrum

TO MANAGE	LEVEL OF MANAGEMENT: LIGHT	STANDARD	STRUCTURED
New Project Requests	No Approval	2-Stage Approval	Multi-Stage Approval
Work	My Work	My Work + Actions	My Work + Actions + Resource Utilization Reports
Projects	Project Light	Project Standard	Project Structured
		Product Update	New Product Introduction
Programs and Portfolios	Program and Portfolio Management	Program and Portfolio Management + Risks & Issues	Program and Portfolio Management + Risks & Issues + Costs & Budget
Collaboration	Microsoft Teams for Communication		
	SharePoint Online for Document Management		
Automation and Integration	SIMPLE — Power Automate for Workflows — COMPLEX		
	SIMPLE — Power BI for Reporting — COMPLEX		
	SIMPLE — Power Apps for Custom Forms — COMPLEX		

BrightWork 365 Orientation Demos

Short Demo



Extended Demo

Technologies Used

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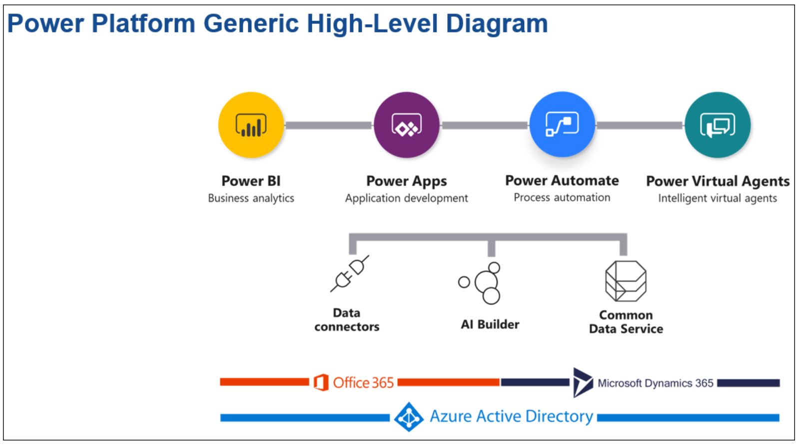
BrightWork 365

- BrightWork 365 ties together several powerful solutions including those in your organization's instance of Microsoft 365, allowing you to fully leverage your investment in this powerful platform.
- With over 25 years of experience and innovation with productivity solutions, BrightWork solutions let you hit the ground running with project management process templates with best practices built right in.
- Simplify task management with resource allocation and work reports.
- Manage deadlines with interactive Gantt charts and simple to use, yet powerful scheduling.

Microsoft 365

- Centralize project processes and information in one hub, working across Microsoft Teams, Microsoft Apps (Word, Excel, and OneNote), Power BI, Power Automate and SharePoint Online.
- Microsoft's security and compliance capabilities can be relied upon to protect data and users.

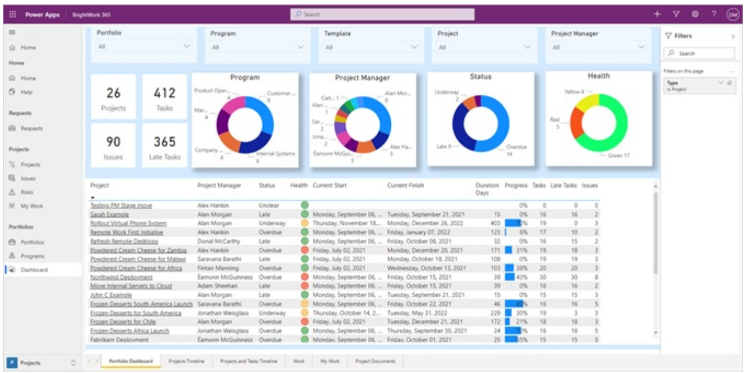
Microsoft Power Platform



- BrightWork 365 is a Power App managed solution installed in a Microsoft Power Platform environment. The app is sandboxed into the environment and only users given access to the environment can use the app.
- BrightWork 365 uses the Power Platform Dataverse for data storage. A basic environment = 1 GB of database storage. The first Power Apps Premium/Power Apps per user license enables 10 GB, and small increments are provided for each additional license purchased from Microsoft.
- Microsoft Power Apps lets your organization deploy a model-driven app to manage the full project lifecycle from initial project request to project completion.
- Built in workflow capabilities let you automate processes for efficiency and accuracy, freeing you up to focus on managing your initiatives.

Microsoft Power BI

Microsoft Power BI allows users to get rich insight into BrightWork 365 portfolio data including timeline, resource allocation, and tasks, all displayed within interactive reports.



Microsoft Power Automate

BrightWork 365 also interacts with parts of Microsoft 365 through Microsoft Power Automate. BrightWork 365 uses several out-of-the-box Power Automate connectors including:

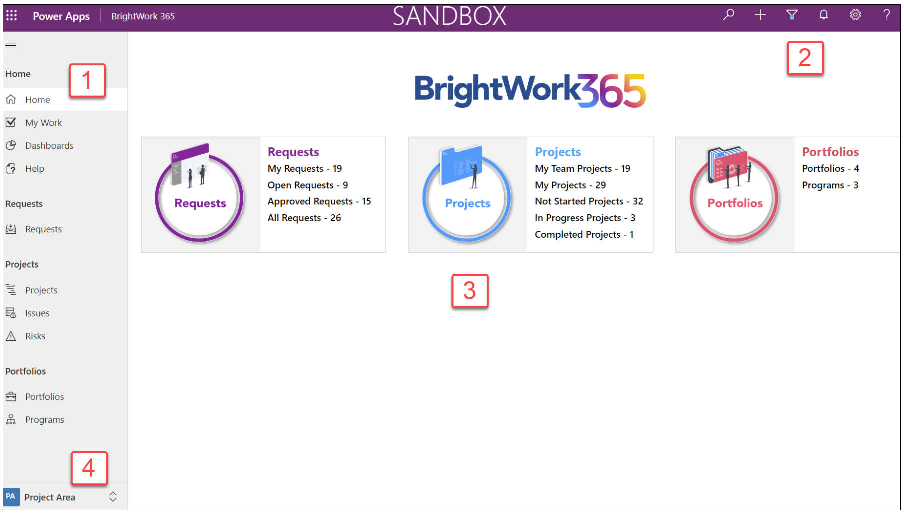
- Office 365 Outlook - Connectors: Used to send notification emails in approvals.
- BrightWork 365 uses HTTP with Microsoft Entra ID Connectors (formerly known as HTTP with Azure AD Connectors) to:
  - Get the list of MS Teams that the install user has access to and update the MS Teams table in the app.
  - Create a channel for the project in the Team associated with the program that the project sits in.
- BrightWork 365 uses the following connectors specifically in the environment within which BrightWork 365 is installed:
  - Microsoft Dataverse - Connectors: Used to Create, Read, Update and Delete rows in the Dataverse tables in BrightWork 365.
  - Approvals - Connectors: Communicates with the native approvals app that is used for approving requests for project creation and other approvals.

> **Tip** For the most optimal user experience, see Microsoft's Power Apps System Requirements article.

Navigating BrightWork 365

This article describes the basic navigation elements of the BrightWork 365 interface. You can find additional interface explanations in other sections of this Knowledge Base.

BrightWork 365 Home Screen



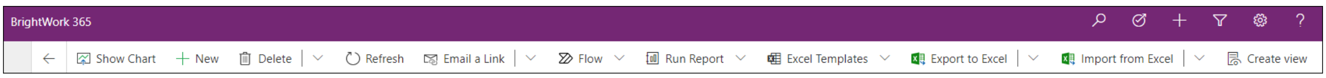
1) Site Map: The Site Map area is used to navigate to the different areas and sub-areas within BrightWork 365. They're lined up in the typical process flow of the project management lifecycle, from initial request, to managing the execution of a project, to reporting across projects.

2) Global Options: Use the Global Options elements to run actions across your entire BrightWork 365 solution.

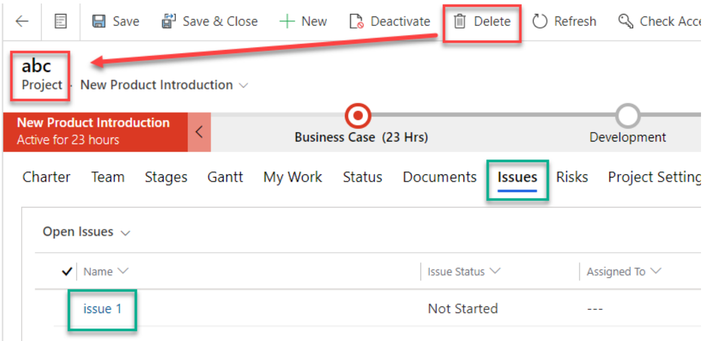
3) Home Page Summary Metrics: View important metric data and click into these home page tiles to enter the respective app sections.

4) Area Switcher: Use this section to toggle between the Projects Area, Templates Area, and Admin Area. Access to the Templates Area and Admin Area is trimmed via BrightWork security roles.

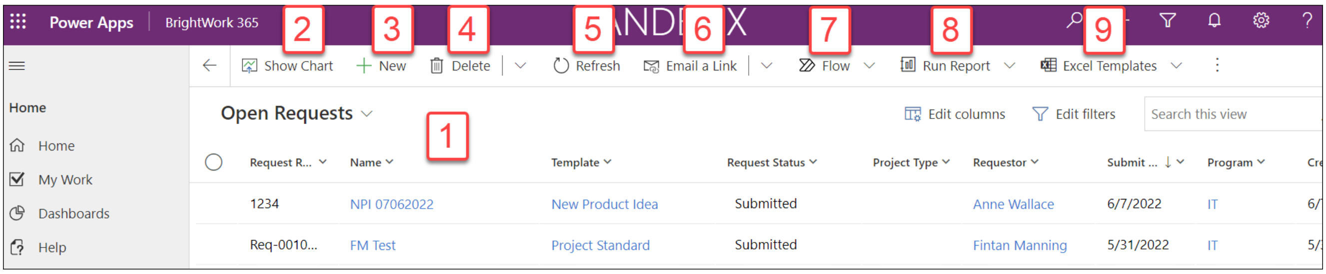
Ribbon



The Ribbon is activated when you click into a heading within one of the areas in the Main Nav. Here you'll find options that relate to the entity that is noted directly below it - for example, the **Delete** option will delete the entire abc project as shown below, not the issue that is displayed in the lower active pane.



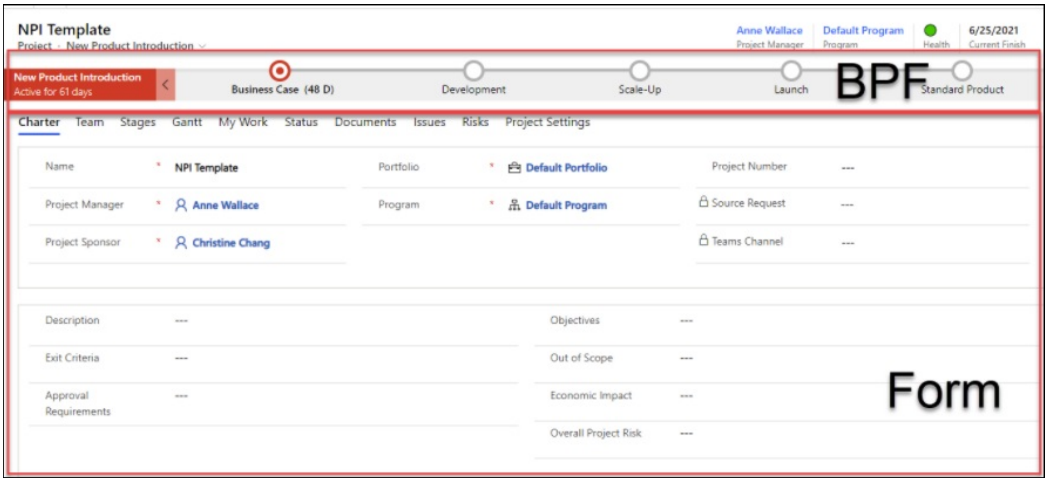
Most of the process areas share the same Ribbon options displayed across the top. An explanation of each of the major Ribbon elements follows below.



1. Main Grid: Displays metadata about the element currently in focus using the available Views.
2. Show Chart: View charts on a page that contains a list of rows.
3. New: Create a new record for the element currently in focus.
4. Delete: Deletes the entity displayed directly below the Header.
5. Refresh: Refreshes the grid data with the newest values.
6. Email a Link: Emails a link to the selected record in the grid.
7. Flow: Display, Create, or Run a flow for the current element.
8. Run Report: Choose to run an available report to help you monitor progress and status.
9. Excel Templates: Excel Templates allow you to create and share your own custom analyses with colleagues.

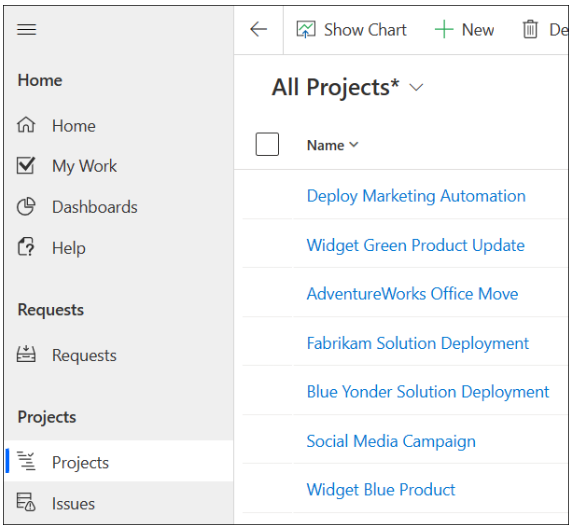
Business Process Flow

The Business Process Flow (BPF) is the process map at the top of a form. Different templates can have different BPFs depending on their use case.



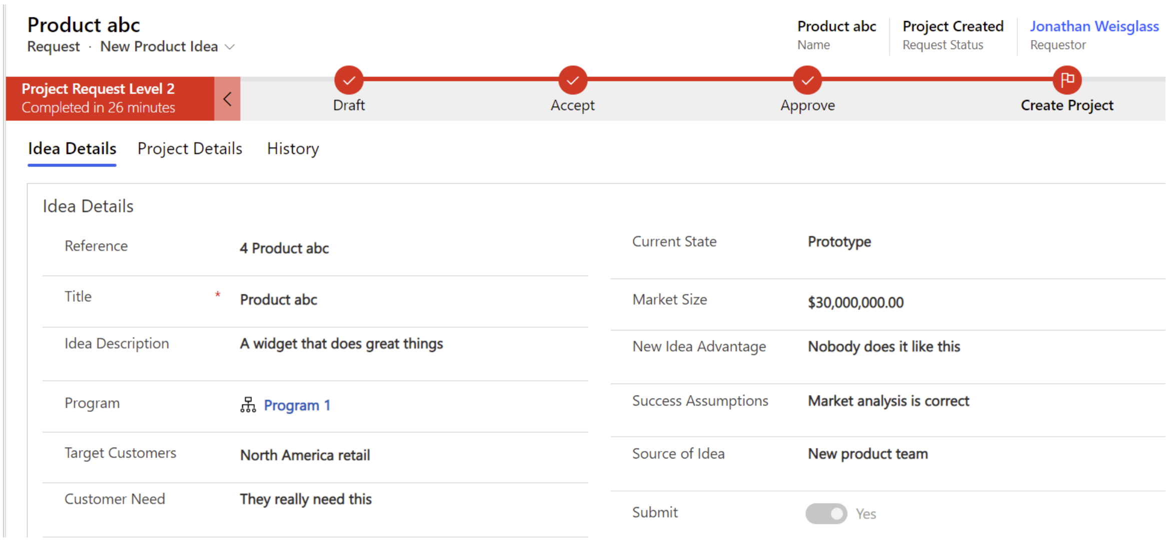
Table

A table defines information that you want to track in the form of records, which typically include properties such as different types of work and work record details. BrightWork 365 tables can be accessed via Site Map links such as **Requests** and **Projects**.

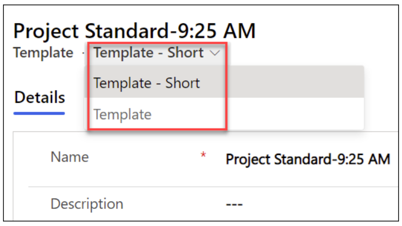


Form

Form elements and fields will differ between the various process areas, each with its own differences that make them relevant to the process it serves. Details about forms will be covered separately in other articles. An example of a **Request** form can be found below.



Form elements will also differ based on the user's Security Role, including access for certain users to both a short and a long version of forms.

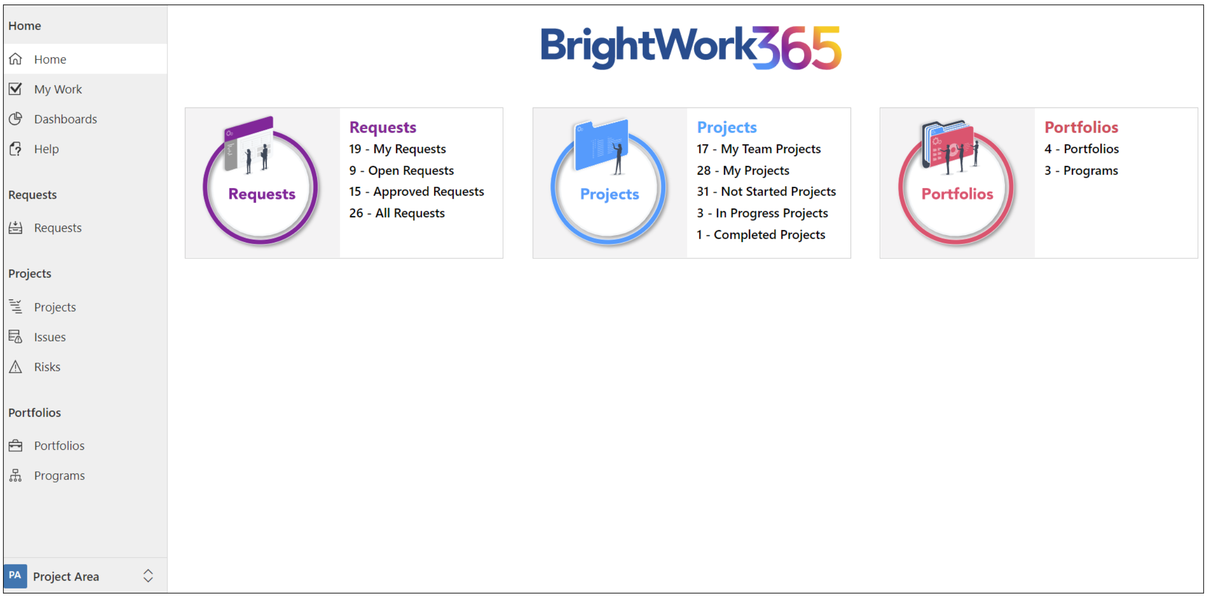


Tip

- Check the top of the screen to see if there are unsaved changes, which can prevent the system from updating various sections of the application. You may also need to refresh the screen in order to view the newest workflow progress.

- When working in people picker columns, e.g., columns that do not have a search icon such as the Approvers column in a project's Approvers tab, you will need to type at least 3 letters of the person's name before results will be returned.

Projects Area Components

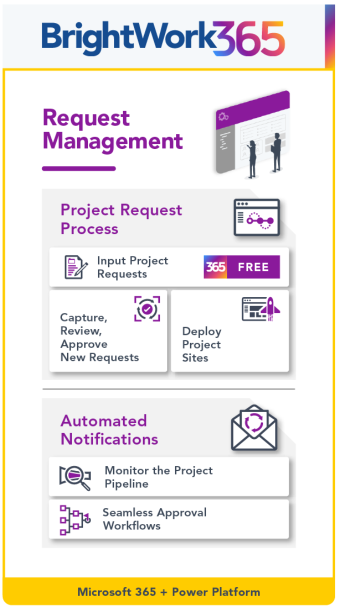


The main end user sections of BrightWork 365 are Home, Requests, Projects, and Portfolios

Home

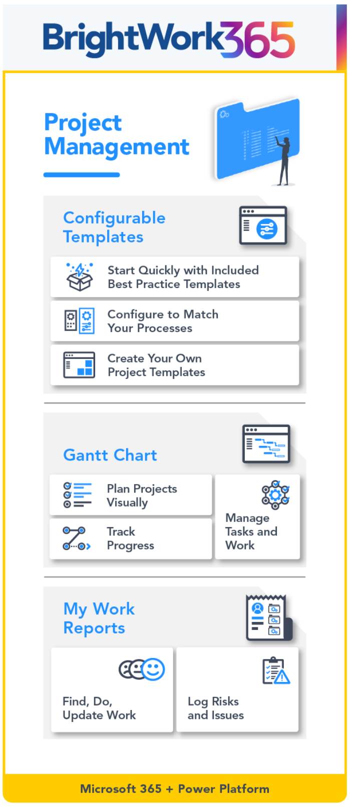
- See all of your work from across all projects in the My Work section of Reports.
- Power Apps Dashboards allow you to view and analyze critical portfolio data with selectors and drill-down options.
- Power BI Reports provide even more powerful and interactive reports with exceptional data visualization functionality.

Requests



- Capture, review and approve new project requests from anyone in your organization.
- Keep the approval process moving with automated notifications.
- Deploy new project sites based on request information, minimizing duplicate data entry.

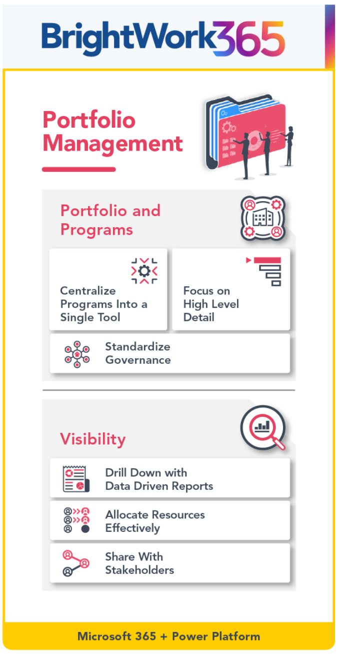
Projects



- A project is a child of an associated Program and Portfolio, and data from projects rolls up to these

parent levels.
- Start every project the right way and in a consistent manner with flexible proven templates and familiar Microsoft 365 apps.
- Plan your project with a few clicks and manage the schedule with an interactive Gantt chart.
- Instantly check the performance of your project with key reports on tasks, risks, issues and overall status.

Portfolios



- Portfolios are the highest level of the BrightWork 365 structure and are the overarching umbrella for their associated programs and projects.
- Get instant visibility across portfolios and programs in one tool and edit and update information quickly and easily.
- Get rich insights with Power Apps and Power BI reports for the schedule, tasks and resource allocation.
- Drill down into portfolios, programs and related projects for more details.

Starter Project Templates

> **Note**
>
> - For BrightWork 365 versions older than v1.7 see Prior Release Articles.
> - Templates that are associated with a Content Template will be prepopulated with project data.
> - User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.

BrightWork 365 comes with three starter project templates to help you get started managing projects quickly. The included starter project templates are named **Project Standard**, **New Product Introduction**, and **Product Update**. Each template comes with its own different Business Process Flow and stages, and certain templates come with several additional fields. Below are details about the major out of the box elements of these templates.

Project Tabs

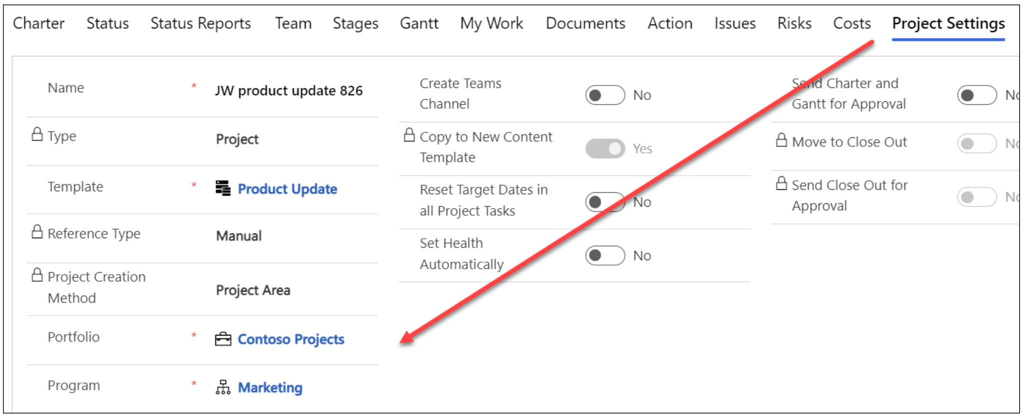
Charter

The Charter tab contains high level metadata about the project, including the project title and stakeholder information.

The following columns limit their user lookup values to the corresponding mapped BrightWork security role:

- Project Sponsor column to BrightWork Team Member security role
- Project Manager column to BrightWork Project Manager security role

The **Charter** tab also contains the mandatory columns **Program** and **Portfolio**. The values for these columns can later be changed in the **Project Settings** tab by a user with elevated privileges (see the **Project Settings** section below). All associated child items will be automatically adjusted to reflect these value changes.



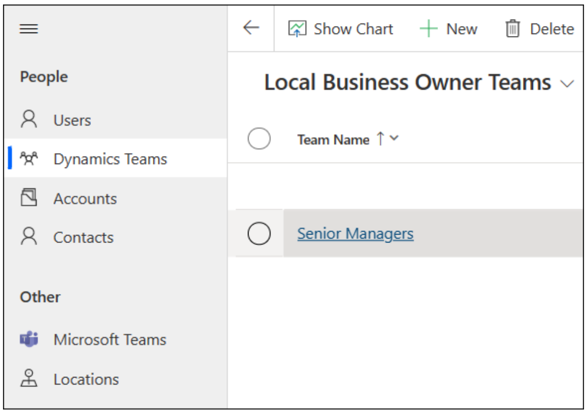
The following can be specified in Project Templates and will populate corresponding columns in the Charter and Project Settings tabs of new Projects:

- Content Template
- Portfolio
- Program
- Project Manager
- Project Sponsor
- Project Type

Charter Fields Specific to the Product Update Template

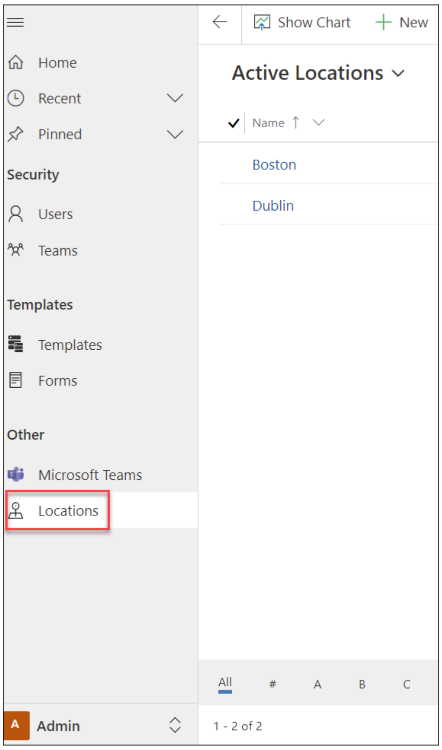
Group Manager

The list of users returned in the **Group Manager** drop-down field that is in the **Charter** tab of Product Update projects is limited to the users added to the **Senior Managers** Dynamics Team found in **Admin Area | Dynamics Teams**.



Location

The **Location** drop-down menu choices that are found in the Charter tab of the Product Update template are configured in **Admin Area | Locations**.



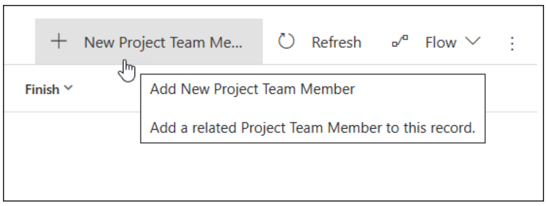
Status & Status Reports

The Status tab allows the project manager to set current project metrics and KPIs, and the Status Reports tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See Status Reporting for details.

Team

Automatically populates with the names of work item assignees, and the earliest start dates and latest finish dates across all the work assigned to them.

To manually add a team member that has not yet been automatically added from being assigned a work item, click **+ New Project Team Member**.



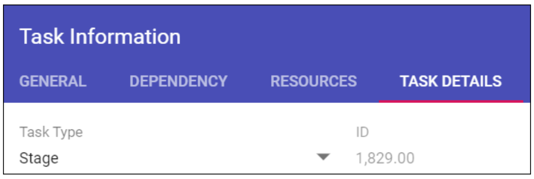
Note

- To manually delete a Project Team Member from the **Team** tab in a project, you will first need to remove the user from all work assignments in the project.

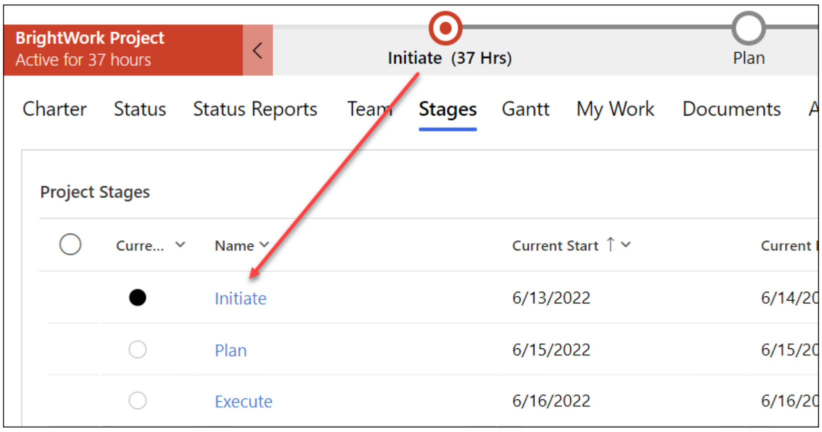
- Dates may not update in the Teams tab until an update of some kind is made in the Gantt tab, which will trigger the date update.

Stages

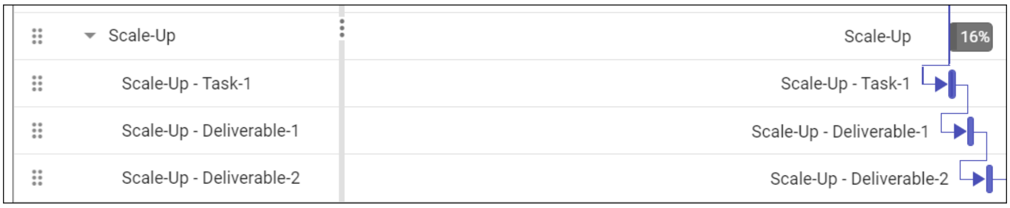
- Stages are automatically listed in the Stages tab after being created in the Gantt tab (a Gantt task can be set to be a Stage type task in Task Details). Manually adding stages from within the Stages section is not supported.



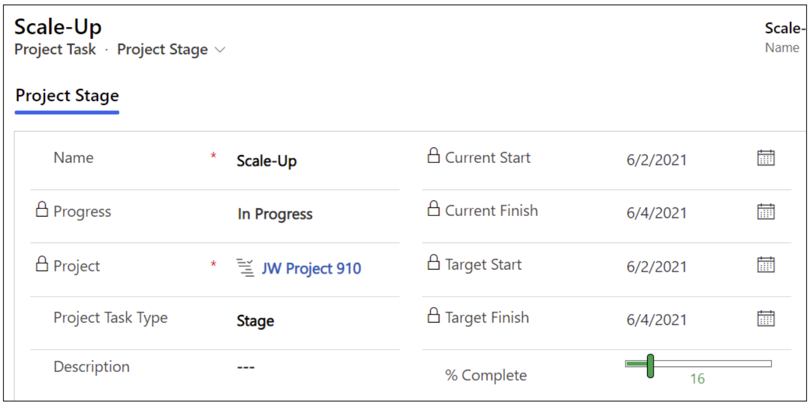
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the top of the project.



- The **Current Stage** detail values are tied to the progression of tasks within that Stage in the Gantt.



- Click on a stage link to view additional details about the stage including description and status information.



See the **Approvals** tab section below for information about how projects move from one stage to the next.

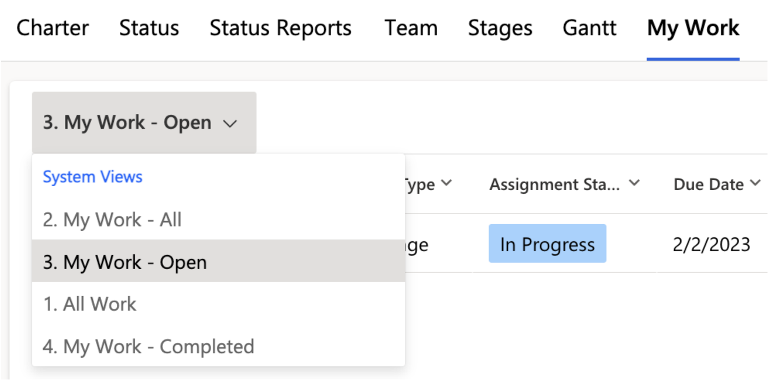
Gantt

List of project tasks with a corresponding bar chart that represents the project schedule with task start and end dates. Visually depicts dependency relationships between the tasks as well as task status. See the Task Management article for more information.

My Work

A list of all assignments assigned to the logged in user.

To view all work assigned to you as the logged in user for the project, click into the **My Work** tab. You can enter a specific piece of work by clicking on the Name of the assignment.



Documents

Create new Microsoft Office documents and upload existing documents and store these files in your organization's SharePoint document library that is associated with BrightWork 365.

> **Note** SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

Actions

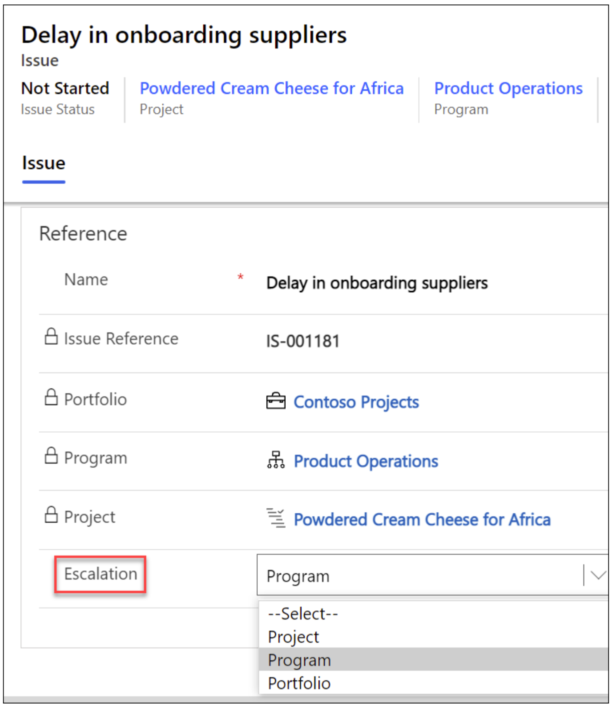
Log project actions, decisions, and changes. See the Actions article for details.

Issues

In the **Issues** section you can create a new issue by clicking **+ New Issue** (do not use the Add Existing Issue option).

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.

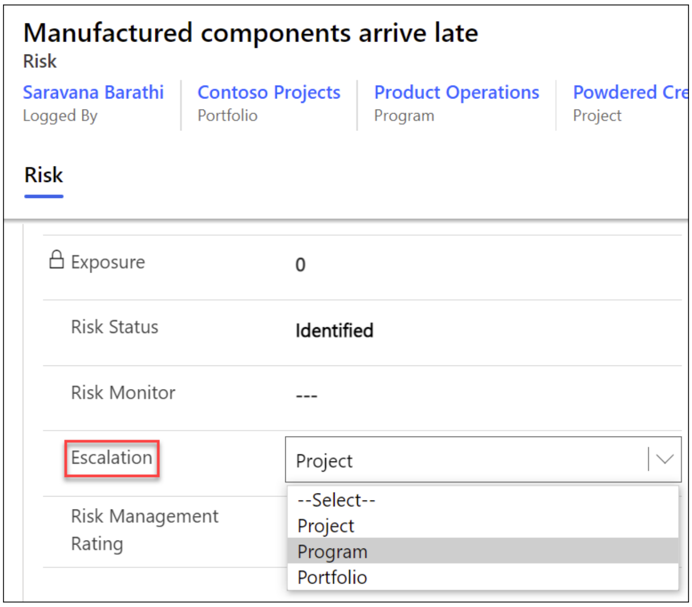


Risks

In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Risks can be added to the project's associated program or portfolio by clicking into the risk and choosing the relevant escalation location.



Costs

The Costs tab provides a comprehensive method for capturing and tracking project budgets and actual costs at the project and individual item levels. See the Costs article for details.

Communications

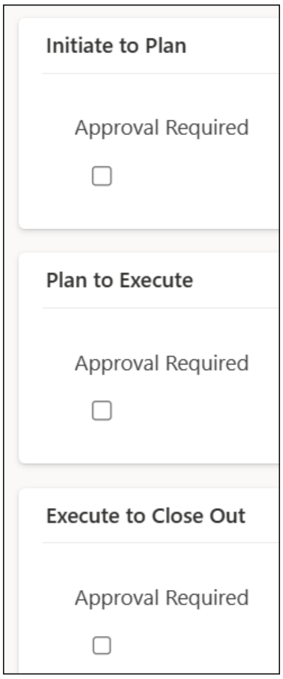
Initiate and save project related Emails and Appointments directly in the BrightWork 365 app and save these items as well as Phone Call details and Notes, within associated projects. See the Communications article for details.

Approvals

The Approvals tab is only visible to users given the **BrightWork Approvals Coordinator** security role.

Approvals Coordinator is a lookup and security role - the nominated user must be chosen in the Approvals Coordinator field and also be given the BrightWork Approvals Coordinator security role. The Approvals Coordinator will be notified of approval process progress.

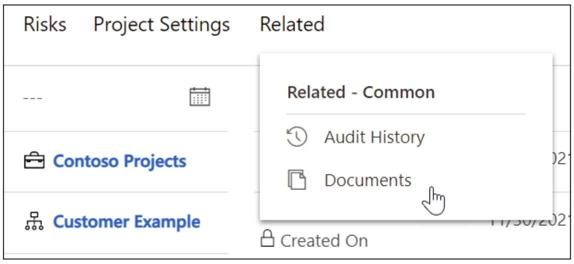
Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the **Approvals** tab. The default settings are controlled by the configuration set in **Templates Area | Project Templates** by a user given the BrightWork Template Editor security role.



See the Project Stage Approval Process article for related information.

Related

You can view documents related to entities within a project such as Issues or Risks, and project audit history, by clicking on the **Related** tab.



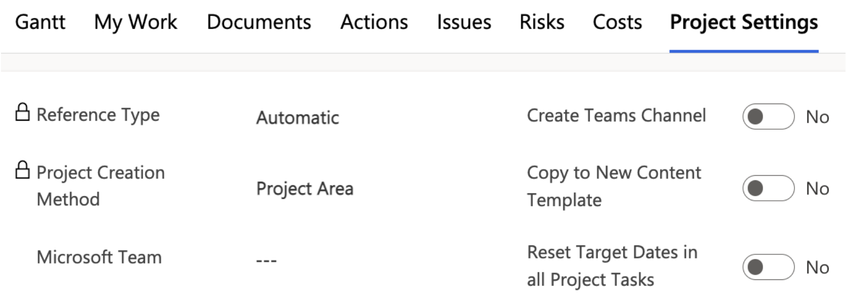
Project Settings Tab

Only users with the **BrightWork Project Manager**, **BrightWork PMO Manager** or **BrightWork Program Manager** security role can access the **Project Settings** tab.

The **Project Settings** tab provides additional project information and gives the manager the ability to change the portfolio or program associated with the project, reset the target dates in all project tasks (baseline the schedule), and other administrative tasks.

Microsoft Teams

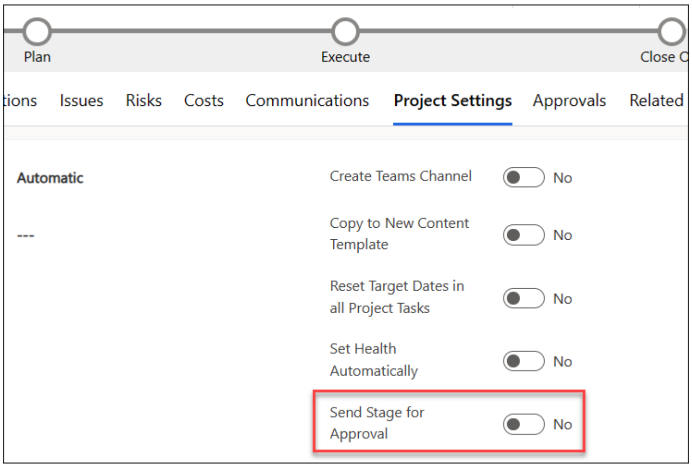
Project Settings also allows the project manager options with regards to **Microsoft Teams**, e.g., they can create a Microsoft Teams Channel for the defaulted associated Microsoft Team (which is based on the project's parent program Microsoft Team setting), or they can connect to a different Microsoft Team if a Channel has not yet been created for the project.



> **Note** If the project is later moved to a different program, the project's Microsoft Team Channel will not move to the new program's Microsoft Team.

Send Stage for Approval

If approval is required for a stage, the approval process will need to be started manually by the Project Manager by clicking the **Send Stage for Approval** button in the **Project Settings** tab. When a stage is sent for approval some sections of the project will be made read-only and a related message will display on the Charter tab. The Business Process Flow will not be disabled, but users will be prevented from moving a stage forward or backward.



See Project Stage Approval Process for related information.

Approval History

The Approval History section of the **Project Settings** tab includes a history of the approval process for each stage of the Business Process Flow.

Approval History

Name	Stage	Outcome	Date ↑	Comment
Alex Hankin	Initiate to Plan	Reject	1/24/2023 4:24 PM	
Alex Hankin	Initiate to Plan	Approve	1/24/2023 4:25 PM	
Christina Chang	Plan to Execute	Approve	1/24/2023 4:26 PM	approved by christina
Caitriona O'Connor	Execute to Close Out	Approve	1/24/2023 4:27 PM	

What is a BrightWork Customer Success Partner?

A BrightWork Customer Success Partner is not just a team member; they are your dedicated partner in achieving project management success. With their extensive knowledge of project management processes, best practices, and templates that harness the power of Microsoft 365, they bring a wealth of expertise to your side.

Their role goes beyond mere assistance and guidance. They actively collaborate with you, ensuring that you hit the ground running with the BrightWork 365 solution. Together, you will define and execute the next phase of your project management journey, working hand in hand to achieve your goals.

Throughout your project management success journey, your Customer Success Partner will be there every step of the way. They will accompany your groups, providing support, insights, and strategies to ensure your success. With their partnership, you can confidently navigate the challenges and triumphs of your project management endeavors.

Pricing and FAQs

Training Introduction

Introduction

This training guide can be used as an introductory roadmap for how to use BrightWork 365 to manage projects and portfolios on the Microsoft Power Platform. This content is intended to give a first-time user a tour of what it is like to use BrightWork 365 as a BrightWork Champion, Project Requester, Project Manager, Team Member and Senior Executive, following the usual lifecycle of a project. Detailed training for these key user types served by BrightWork 365 is available in the 'Role-Based Guides' in this Knowledge Base section, and training on project template setup and adjustments can be found in the Customization section of the Knowledge Base.

Extensive training can also be obtained through our various BrightWork 365 service offerings. See the Deployment section of this Knowledge Base for additional information.

BrightWork 365 Basics

Prior to moving on to the subsequent training guides we recommend completing a review of our Basic Orientation articles. This content will provide you with the fundamental knowledge to help ease your way into the subsequent training guides.

Sample Training Syllabus

> **Note**
>
> - For BrightWork 365 versions older than v1.7 see Prior Release Training Guides.

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.

We recommend working through the roles in the order presented, starting with the BrightWork Champion role to setup the necessary app elements for further use by the other roles.

1-BrightWork Champion

Approximately 2 hours

BrightWork Champion Introduction

- What is a BrightWork Champion?
- What is a BrightWork Customer Success Partner?
- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- BrightWork User Management
- BrightWork Security Roles Details
- Frequently Asked Questions

Portfolios & Programs

- Use Case Discussion
- Create a Portfolio
- Create a Program
- Exercise

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Starter Project Templates

- Starter Project Template Details
- Project Stage Approval Process
- Task Management
- Documents
- Status Reporting
- Exercise

Work Reports (My Work, Tasks, Issues, Risks)

- Use Case Discussion
- Work Allocation Reports
- Resource Utilization
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Customization

- Customization Overview
- Request Template & Project Template Configuration
- Form Configurator
- Content Templates
- Power BI Customization

Open Forum Q&A

2-Project Manager

Approximately 2 hours

Project Manager Introduction

- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- Frequently Asked Questions

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Starter Project Templates

- Starter Project Template Details
- Project Stage Approval Process
- Task Management
- Documents
- Status Reporting
- Exercise

Work Reports (My Work, Tasks, Issues, Risks)

- Use Case Discussion
- Work Allocation Reports
- Resource Utilization
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

3-Team Member

Approximately 1 hour

Team Member Training Topics

- What is BrightWork 365?
- Navigating BrightWork 365
- Projects Area Components
- Find Assigned Work and Update Work Progress
- Document Management
- Microsoft Teams
- Configure a Personal View
- Exercise

Open Forum Q&A

4-Senior Executive

Approximately 1 hour

Senior Executive Introduction

- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- Frequently Asked Questions

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

BrightWork Champion

Note For BrightWork 365 versions older than v1.6 see Prior Release Training Guides.

Who Is This Guide For?

This guide is geared to the customer organization's BrightWork Champion, the person responsible for the initial in-app setup of BrightWork 365, including the Program and Portfolio structure, prior to starting the management of projects within the app. The Champion gains a thorough understanding of BrightWork 365 top to bottom, helps define their organization's requirements, and acts as an invaluable subject matter resource for their peers.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- BrightWork User Management | BrightWork Security Roles Details

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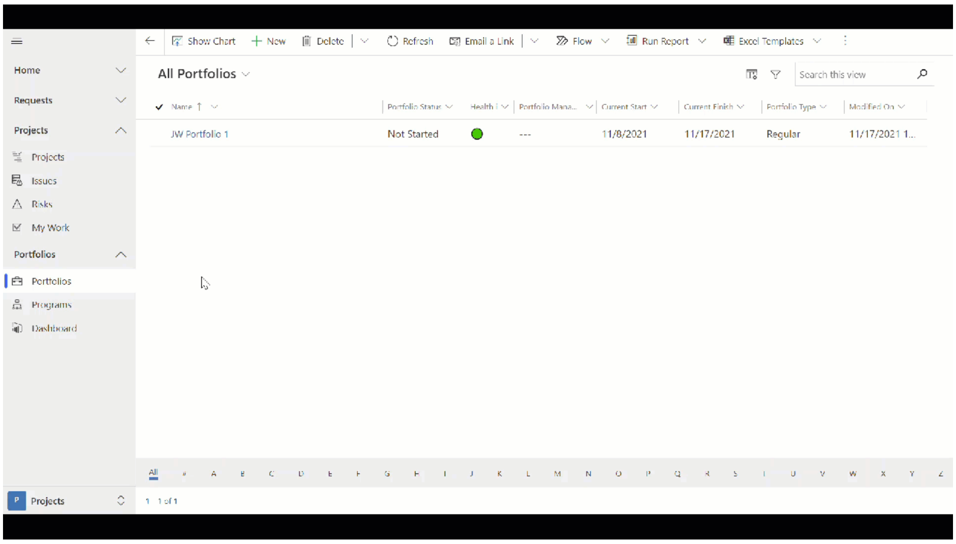
Create the Portfolio and Program Structure

In order to submit project requests and manage projects in BrightWork 365, you'll first need to create at least one parent Portfolio and one child Program associated with the Portfolio. Once this initial structure is in place you can move on to setting up your first project.

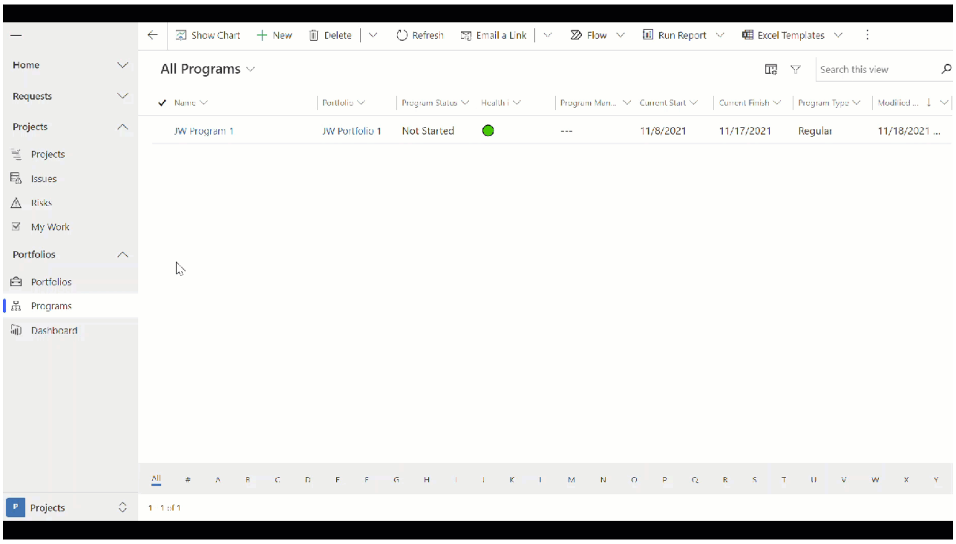
Create a Portfolio

Click the **Portfolios** link, click **+ New** and fill out the form fields.



Create a Program

Click the **Programs** link, click **+ New** and fill out the form fields.



Deeper Dive - Portfolios & Programs

- Portfolios
- Programs

What's Next?

We suggest you next move on to subsequent role-based guides, beginning with the Project Manager guide.

Project Requester

Who Is This Guide For?

This guide is aimed primarily at members of the organization who will be using BrightWork 365 to submit requests for projects that will be created through the Request process.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

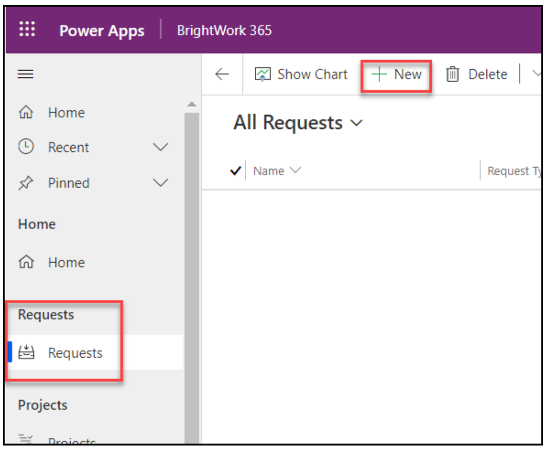
Submit a New Project Request

> **Tip** For more information beyond what is in this Getting Started section, see the Requests knowledge base category and videos.

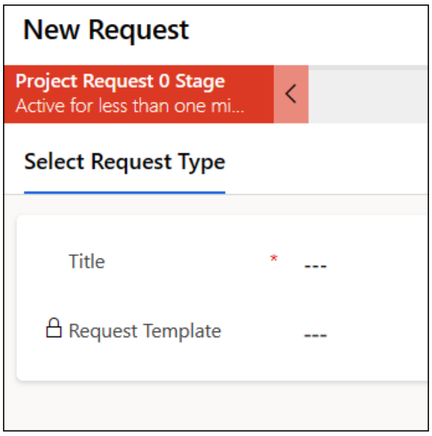
The BrightWork 365 project management process typically begins in the Requests Area. Here you can choose from different project templates for an efficient and consistent way to create new projects.

To submit a new project request:

1. On the main nav click **Requests** and then click **+ New**.



2. Provide a **Title** for the request and select a **Request Template** to serve as the foundation from which to base the new project.

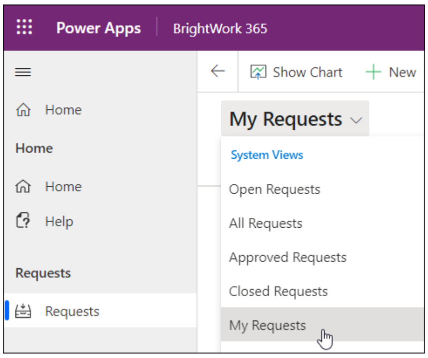


3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request**.

Note: Users who only have the **BrightWork Request Submitter** security role will only see the **Requests** link on the main nav and not the other sections of the full app such as **Projects** and **Portfolios**.

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests on the nav and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down view list.



Project Manager

Note For BrightWork 365 versions older than v1.6 see Prior Release Training Guides.

Who Is This Guide For?

This guide is primarily aimed at Project Managers who will be using BrightWork 365 to manage projects. However, this guide will also be useful for any member of the organization who will be using BrightWork 365 extensively.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

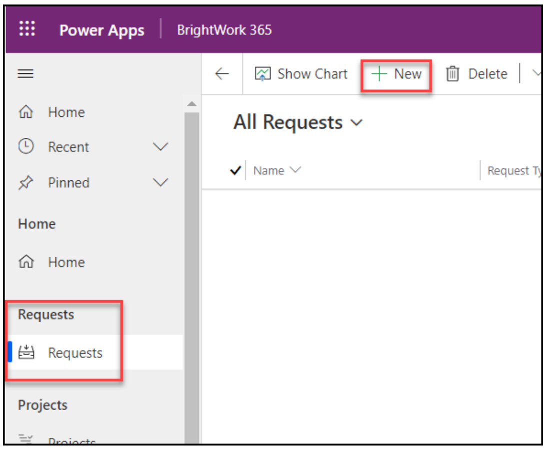
Submit a New Project Request

Tip For more information beyond what is in this Getting Started section, see the **Requests** category and videos.

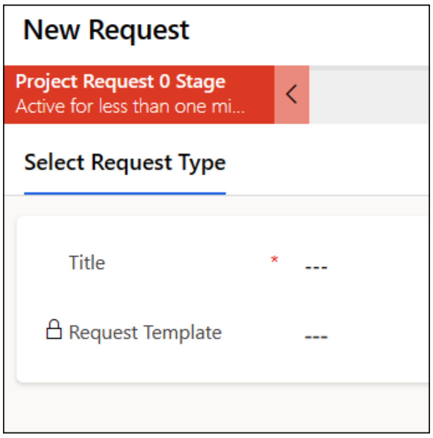
The BrightWork 365 project management process typically begins in **Requests**. Here you can choose from different project templates for an efficient and consistent way to create new projects.

To submit a new project request:

1. On the main nav click **Requests** and then click **+ New**.



2. Provide a **Title** for the request and select a **Request Template** to serve as the foundation from which to base the new project.

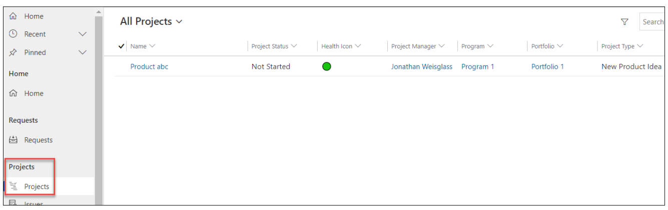


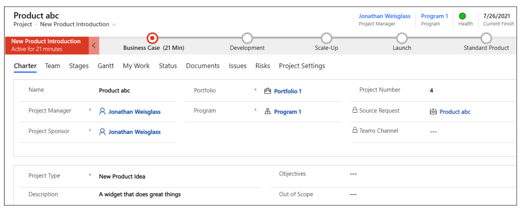
3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request** to start the project request approval process.

Manage a Project

Tip For more information beyond what is in this Getting Started section, see the **Projects** knowledge base category and videos.

After your new project is created click into **Projects** on the main nav to see a list report of all projects. Click on your project link and its various tabs to display project information and to make any necessary updates as the project flows through its lifecycle.



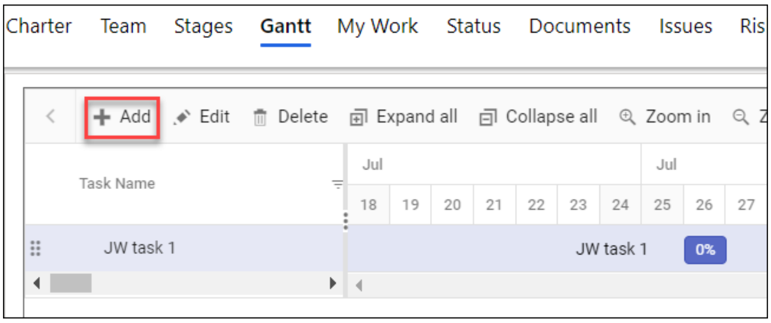


Charter

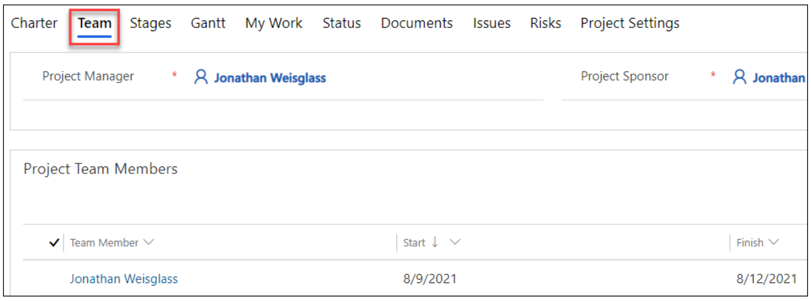
After your project is created you will find Charter columns available for you to add high level details about the project, beyond what was included in the project request form.

Gantt

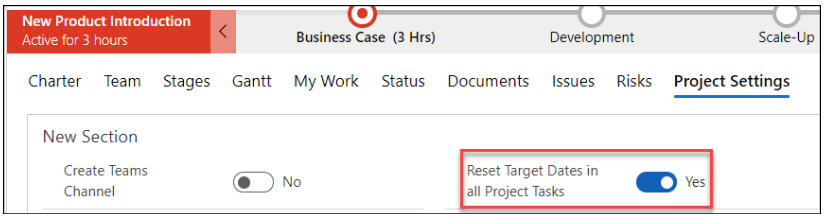
Click into the Gantt tab and update any tasks that were included as part of the template that the project was based on and add new tasks you and the team decide should be included in the project.



As you assign tasks to colleagues the Team section of the project will automatically populate associated assignee and task date information.

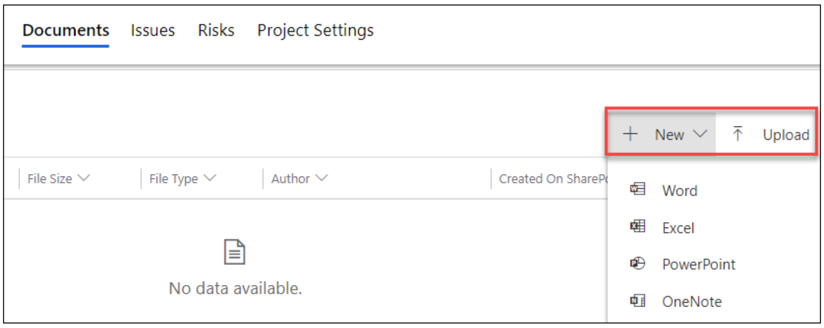


After the project team agrees on the task structure and dates, you can lock-in the schedule by baselining it - in the **Project Settings** tab choose **Yes** for **Reset Target Dates in all Project Tasks**.



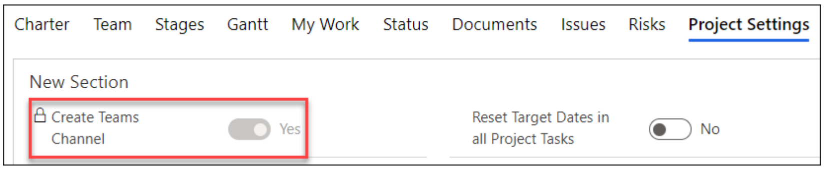
Documents

In the Documents section you have the option to create a new Microsoft Office document or upload external documents to the project's associated SharePoint library as deliverables get drafted.



Create a Microsoft Teams Channel

It's a best practice to create a Microsoft Team for every program (see below), and to create a Team Channel in Project Settings for every project in the program.



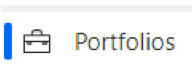
See the Microsoft Teams article for more details about configuring Microsoft Teams integration.

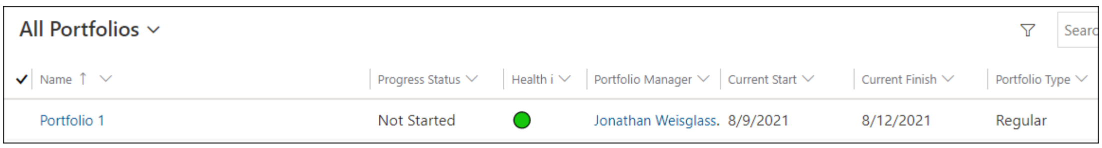
View Reports

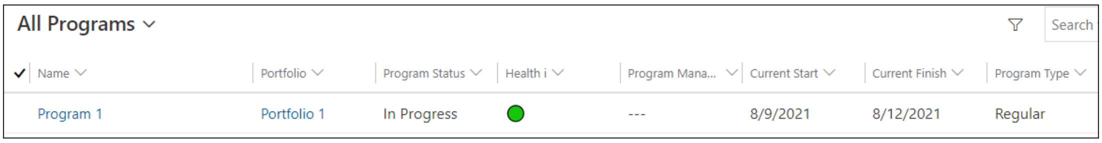
Tip For more information beyond what is in this Getting Started section, see the **Portfolios** knowledge base category and videos.

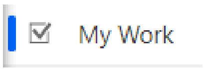
Portfolio Reports

In the **Portfolios** section of BrightWork 365 you can check on the health and status of Portfolios, Programs, and all assigned work.





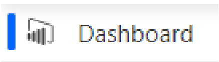


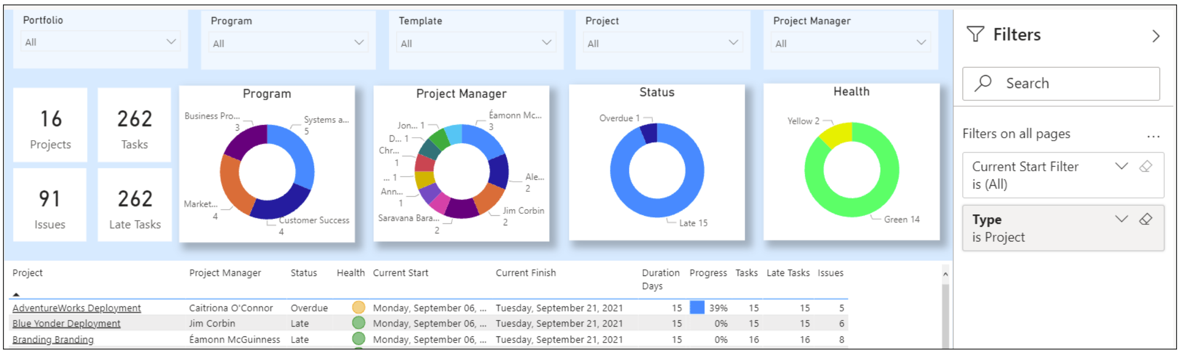


Power BI Reports

> **Note** In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

Power BI dashboard reports allow for interactive analysis of critical project and portfolio data.





See the Power BI Reports article for more details.

What's Next?

If you'd like to dive into the granular details of Power Apps for business users, check out the related article.

Team Member

Who Is This Guide For?

This guide is aimed primarily at team members; however, any member of the organization who will be using BrightWork 365 and is new to the Power Platform will also benefit from this guide.

Prerequisites

We suggest you first review the BrightWork 365 Basic Orientation content to familiarize yourself with the fundamentals of the solution.

To obtain maximum benefit from this training material it's advised that a project manager assign some work items to you in a project you have access to. Confirm with your project manager that this has been completed before continuing with this training.

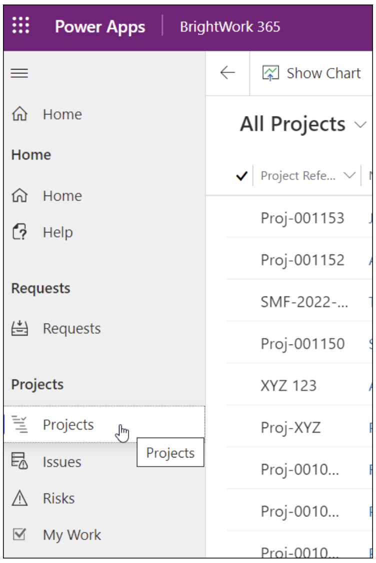
Introduction

BrightWork 365 is a Microsoft Power Platform solution for managing work and projects of varying sizes and types. BrightWork 365 includes a set of best practice project management templates, fields and dashboards that mimic the reality of the varying degrees of work and project management found in most organizations today.

This Team Member training guide will help you learn how to use BrightWork 365 to effectively manage your work. The training guide will teach you BrightWork 365 basics, how to find your work and how to manage work and documents.

Find Your Training Project

To find the project site with your assigned work, you can either click on a direct link provided by your project manager or navigate to the project in the Projects Area of BrightWork 365.



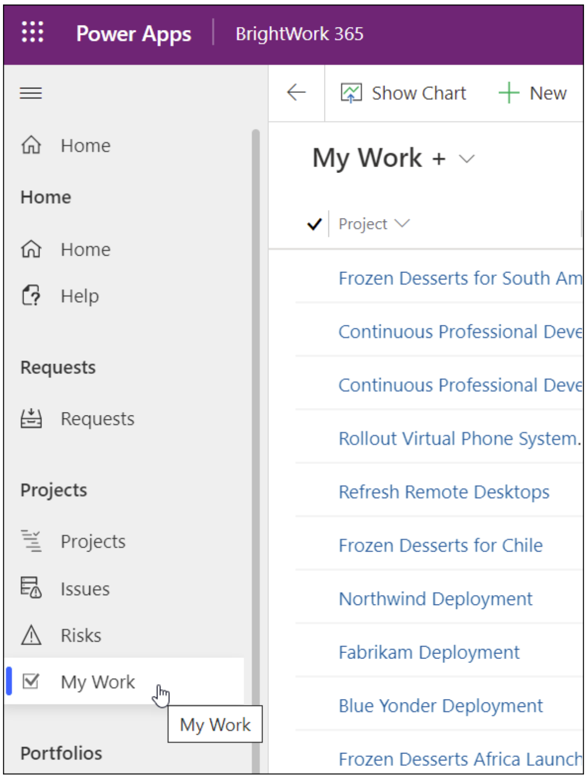
Find Assigned Work

There are various ways you can find work assigned to you in BrightWork 365. If you are used to a project management environment where work is assigned and managed via email, you will know that keeping track of this work can be inefficient. BrightWork makes this process easy and efficient by providing several ways to find your assigned work.

My Work Power Apps Views

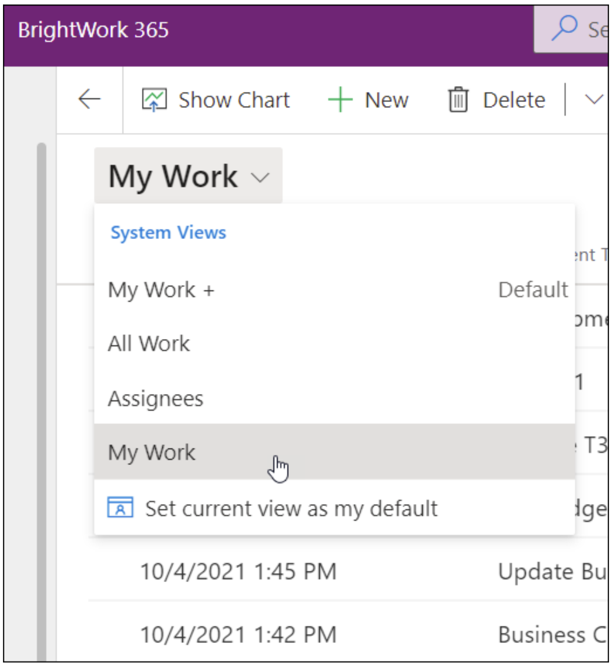
The My Work views, available from a link on the Projects Area navigation, are reports that display and link to all the work items owned by, or assigned to, the logged in user (i.e., you). For added convenience the view can display work items from multiple types of work in a single view.

To access this view, click the **My Work** link in the navigation section of the Projects Area.



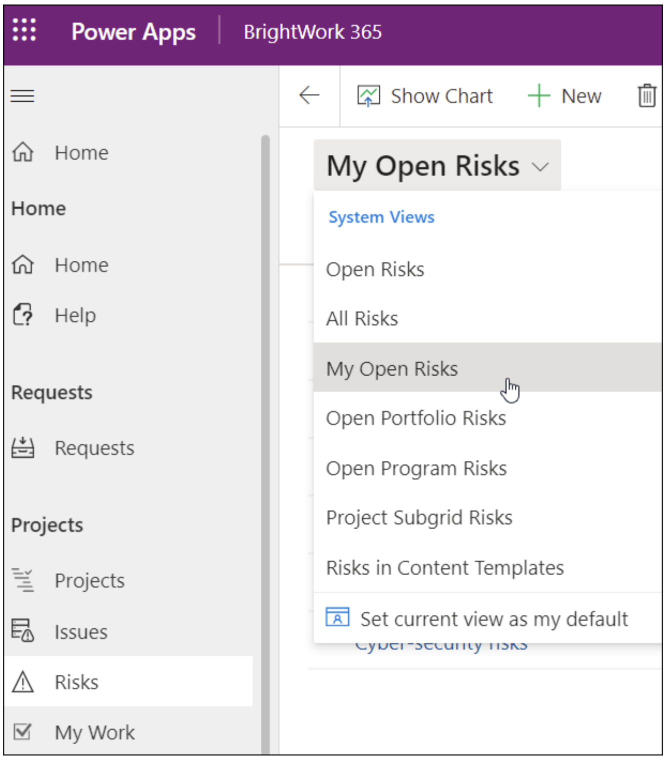
The initial view **My Work +** provides a link to the associated project site in addition to work related information.

The alternate view **My Work** provides only work-related information. To access this view as well as other available views, click on the view drop-down.



If you'd like to narrow down your search to only issues or risks assigned to you, click on the

desired option in the navigation and switch the view to one of the "My" views.

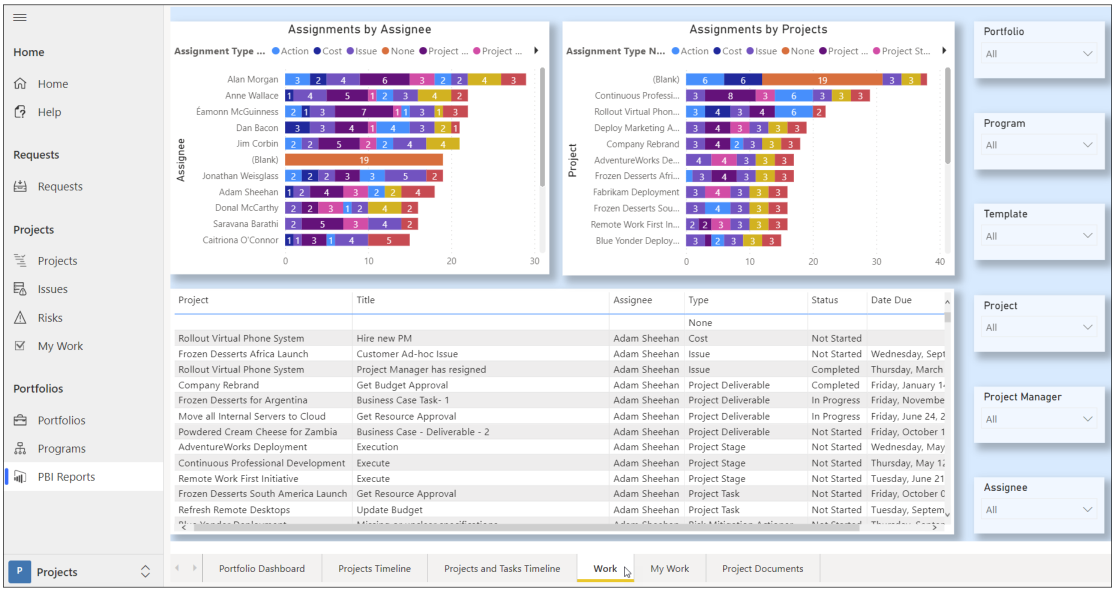


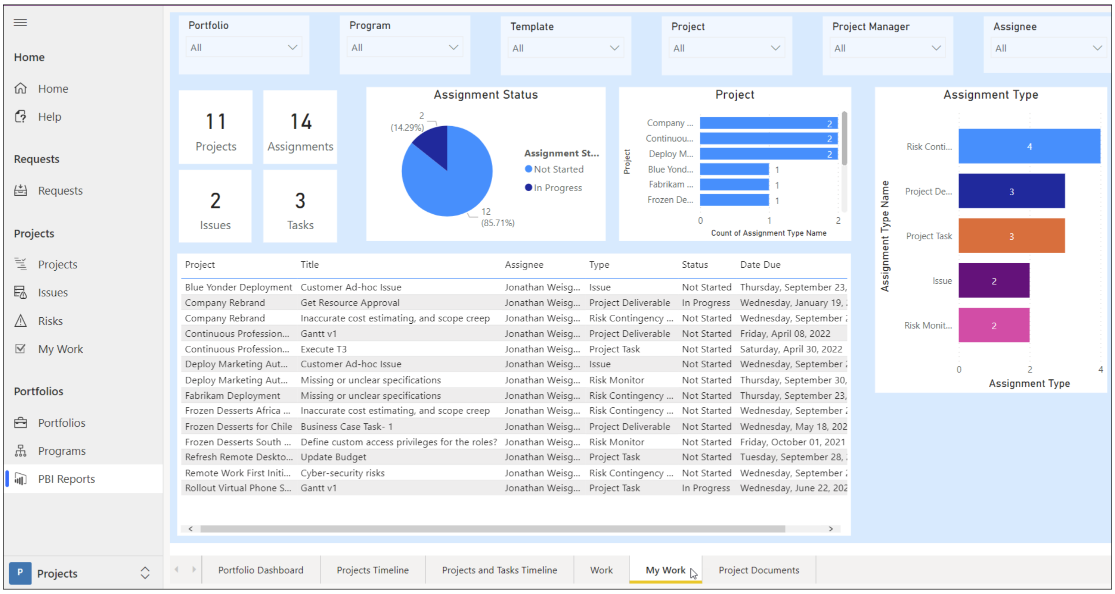
You can also choose to create your own personal view of work assigned to you to make these reports even more personally relevant.

Power BI Work Reports

> **Note** In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

With the coupling of BrightWork 365 and Microsoft Power BI, there are many resourcing report options available for your team to review and analyze. A main area for resourcing reports is in **PBI Reports > Work** and **PBI Reports > My Work**. As with other Power BI reports, the work reports are interactive, and details can be zoomed into by clicking into the various chart regions. Additional Microsoft licensing requirements apply.





Manage Work and Documents

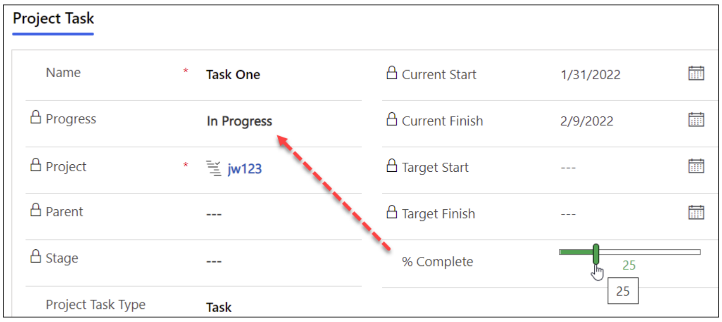
This section explains how to update the details of your work items, log a project issue, and work with documents.

Form Based Update

You can use the Gantt form to make updates to work items assigned to you.

1. Click into a **My Work** view as described above.
2. Double-click on the name of a work item assigned to you to open up the related form for the item.
3. In the form, change the **% Complete** value and click **Save**; the **Progress** value will automatically

change accordingly.

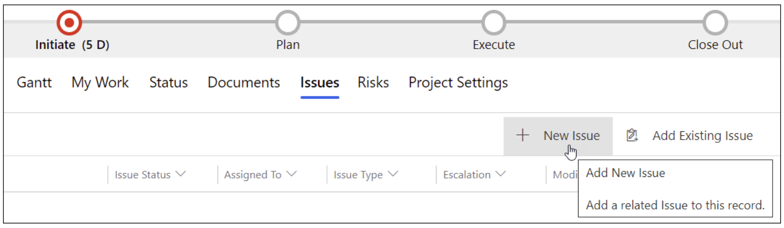


4. Click **Save & Close** to complete the operation.

Log an Issue via Form Entry

As a team member you may need to log an issue about something you feel threatens the success of the project, e.g., the schedule, quality or cost of the project.

1. Click into the **Issues** tab within a project record.
2. Click **+ New Issue**.



3. Fill in the Issue form and click **Save and Close**.

Document Management

BrightWork 365 provides the ability to create and upload documents to be shared with other project team members. Users with Microsoft Office can edit files as if they were on a local or network drive. See the Document Management article for detailed information.

Senior Executive

Who Is This Guide For?

This guide is aimed primarily at Senior Executives and Program Managers who need to maintain oversight of work and projects across an entire project portfolio in the organization. In this training guide you'll learn about reporting features available with BrightWork 365.

Prerequisites

If you are new to BrightWork 365 and the Microsoft Power Platform, we recommend you first complete the Basic Orientation and Team Member training guides.

If you will be more directly involved in managing projects, we recommend that you complete the Project Manager training guide prior to using this guide.

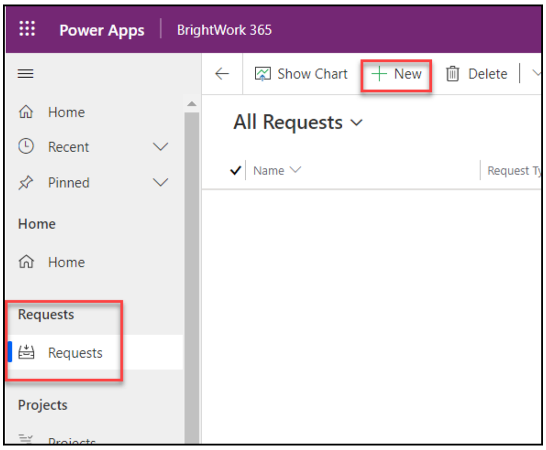
Submit a New Project Request

> **Tip** For more information beyond what is in this Getting Started section, see the **Requests** knowledge base category and videos.

The BrightWork 365 project management process typically begins in the Requests Area. Here you can choose from different project templates for an efficient and consistent way to create new projects.

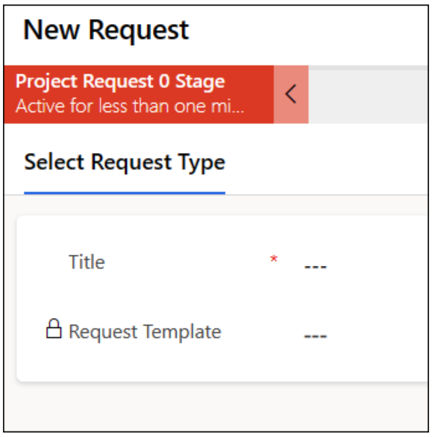
To submit a new project request:

1. On the main nav click **Requests** and then click **+ New**.



2. Provide a **Title** for the request and select a **Request Template** to serve as the foundation from

which to base the new project.

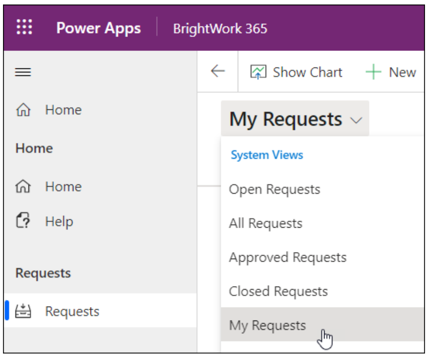


3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request**.

Note: Users who only have the **BrightWork Request Submitter** security role will only see the **Requests** link on the main nav and not the other sections of the full app such as **Projects** and **Portfolios**.

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests on the nav and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down view list.



Manage Project Requests

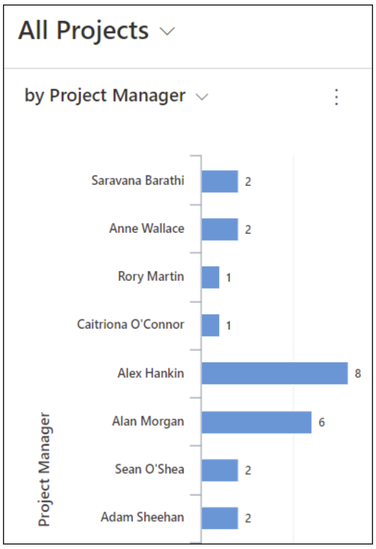
As part of your role in program and project management you may be asked to participate in the project request approval process. BrightWork 365 has a robust solution for managing the entire lifecycle of project requests including an approval mechanism. For detailed project request submission and approval details see the Requests section of this knowledge base.

Report Types

In this section you will learn about the different report types available in BrightWork 365. There are a number of cross-table and cross-project report types that can be used for a range of scenarios.

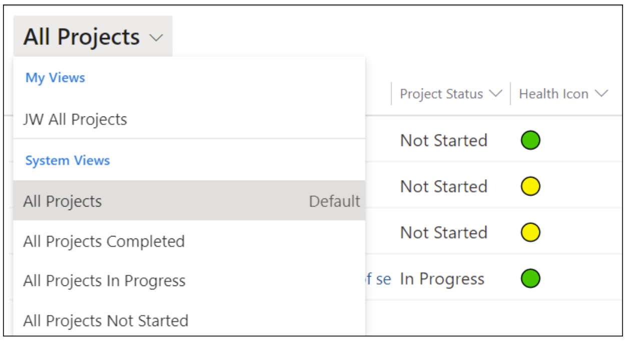
Chart Reports

Chart reports can be configured to display data from across project records in visual reports such as Pie, Bar, and 3D.



Area Report Views

Through the use of System views and Personal "My" views in the Requests, Projects, and Portfolios areas, you can easily obtain crucial project and portfolio information from a single screen. These reports have multiple variations allowing you to zoom in on just the specific data you need.



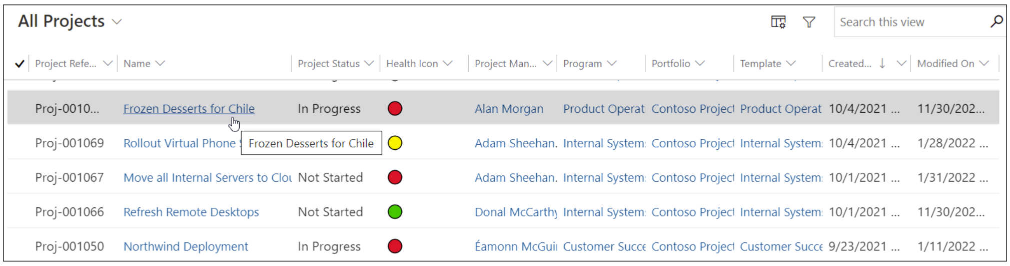
Power BI Dashboards

If your organization is licensed for Microsoft Power BI, there are a number of additional dashboard reports available in BrightWork 365.

Project Management Reports

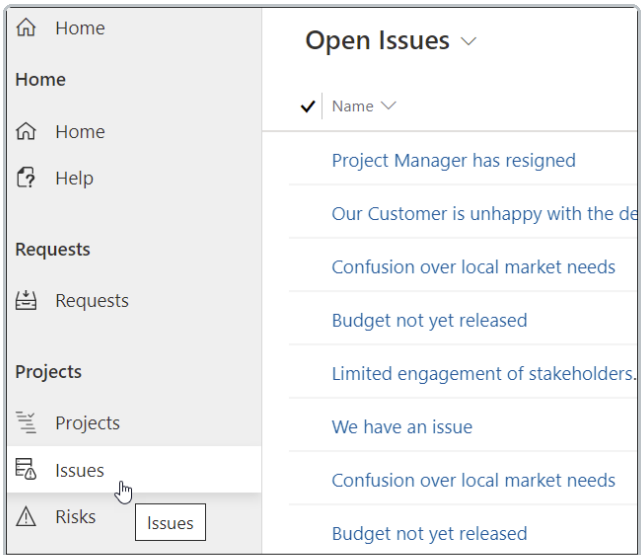
Project

BrightWork 365 Project reports, which can be accessed from the **Projects** link on the nav bar, display high-level information about individual projects. These reports are best for focusing on high-level details, but they also offer an easy way to drill down into very specific project information by clicking on various hyperlinks in each row.

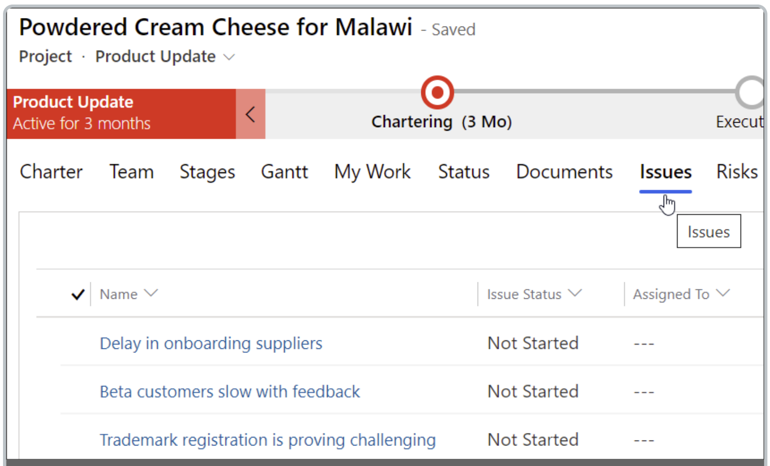


Issues

The Issues reports display all the issue items created within project records, with the option to switch between different views.



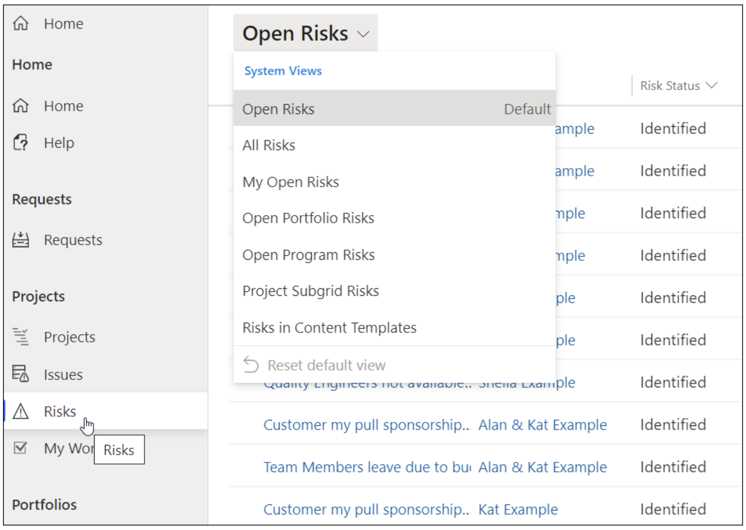
Issues Report View in the Projects Area



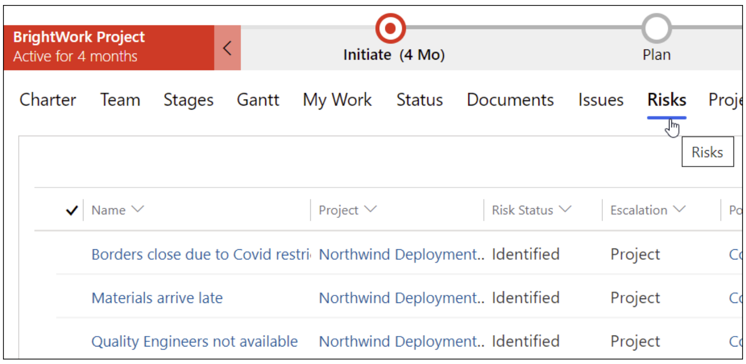
Issues Tab in the Project Record

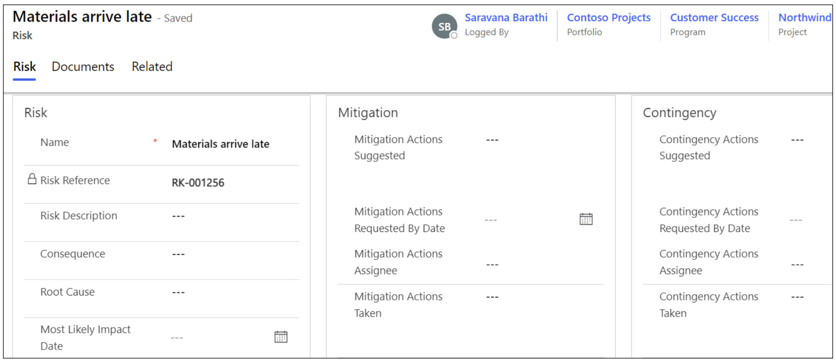
Risks

Project Area Risk reports allow you to quickly see items across projects that have been identified as potential future issues, with Status, Impact, Exposure, and other relevant risk details. There are also various report views available for viewing the risks.



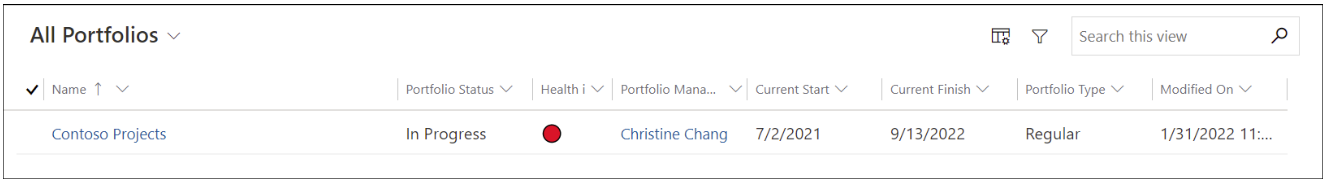
Risks can be easily logged from within project records.



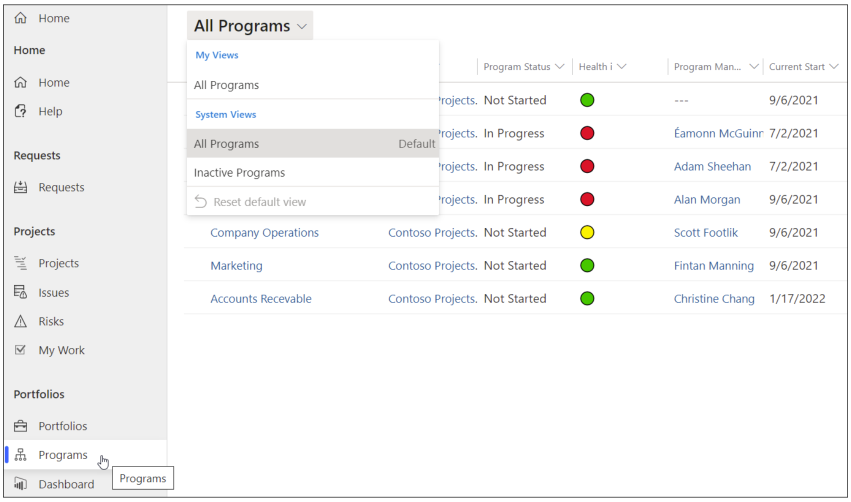


Portfolio Reports

Portfolio reports allow you to see the highest level information about the portfolios that have been created within BrightWork 365.



Program reports display high-level information about the programs that fall under the portfolio(s). There are various views available to focus on programs with different criteria, and new personal views can be created as well.



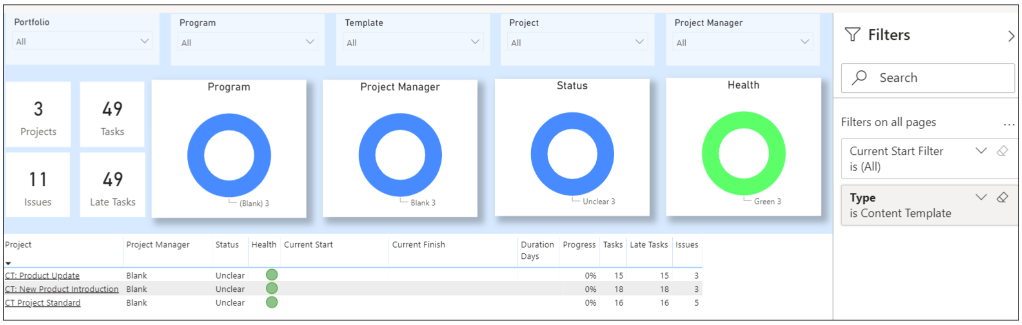
BrightWork 365 Dashboard with Power BI

> **Note** In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

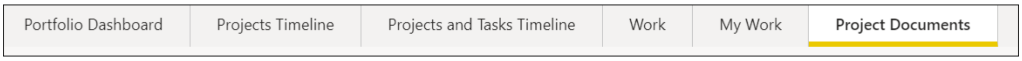
Together BrightWork 365 and the Microsoft Power BI business analytics tool provide exceptional data visualization functionality.

To view the Dashboard and use out of the box reports, click into**Portfolios | Dashboard**. Additional Power BI reports can be added as desired.

The Dashboard includes detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart objects, or with the **Filters** configuration options on the side of the screen.



At the bottom of the Dashboard screen there are tabs for additional report focus options.



System Administrator

Who is this Guide for?

This guide is intended primarily for administrators who will be working on BrightWork 365 installations, upgrades and the overall maintenance of the technologies encompassing the solution; these technologies include BrightWork 365, Microsoft 365, and the Microsoft Power Platform.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

Installation & User Management

Learn how to install and upgrade BrightWork 365

- Product Licenses and Installation
- Upgrade BrightWork 365

User Management & Access

- In order for users to be able to access BrightWork 365, the BrightWork User Management setup steps for the Microsoft Power Platform environment and the BrightWork 365 app will need to be completed.
- Learn about the various BrightWork Security Roles that can be applied to your organization's users.
- After granted access, users will log in to BrightWork 365 using the same credentials used to access the organization's Microsoft 365 environment.

Business User Extended Training

Microsoft Power Platform

The following links provide extensive training for the Microsoft Power Platform solution and is intended for business users, e.g., Project Managers, Marketing, Inside Sales, and Operations staff:

1. Microsoft Power Platform Fundamentals
2. Introduction to Microsoft Power Platform
3. Introduction to Dataverse
4. Introduction to Power Apps
5. Introduction to Power Automate
6. Introduction to Power BI
7. Consume data with Power BI

Training Introduction

Introduction

This training guide can be used as an introductory roadmap for how to use BrightWork 365 to manage projects and portfolios on the Microsoft Power Platform. This content is intended to give a first-time user a tour of what it is like to use BrightWork 365 as a BrightWork Champion, Project Requester, Project Manager, Team Member and Senior Executive, following the usual lifecycle of a project. Detailed training for these key user types served by BrightWork 365 is available in the 'Role-Based Guides' in this Knowledge Base section, and training on project template setup and adjustments can be found in the Customization section of the Knowledge Base.

Extensive training can also be obtained through our various BrightWork 365 service offerings. See the Deployment section of this Knowledge Base for additional information.

BrightWork 365 Basics

Prior to moving on to the subsequent training guides we recommend completing a review of our Basic Orientation articles. This content will provide you with the fundamental knowledge to help ease your way into the subsequent training guides.

Sample Training Syllabus

> **Note** For BrightWork 365 versions older than v1.6 see Prior Release Training Guides.

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.

We recommend working through the roles in the order presented, starting with the BrightWork Champion role to setup the necessary app elements for further use by the other roles.

1-BrightWork Champion

Approximately 2 hours

BrightWork 365 Overview

- What is a BrightWork Champion?
- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- BrightWork User Management | BrightWork Security Roles Details
- Frequently Asked Questions

Portfolios & Programs

- Use Case Discussion
- Create a Portfolio
- Create a Program
- Exercise

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Starter Project Templates

- Starter Template Details

- Project Stage Approval Process
- Task Management
- Document Management
- Status Reporting
- Exercise

Work Reports (My Work, Tasks, Issues, Risks)

- Use Case Discussion
- Work Allocation Reports
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Customization

- Customization Overview
- Request Template & Project Template Configuration
- Content Templates
- Power BI Customization

Open Forum Q&A

2-Project Manager

Approximately 2 hours

BrightWork 365 Overview

- What is a BrightWork Champion?
- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used

- Navigating BrightWork 365
- Frequently Asked Questions

Portfolios & Programs

- Use Case Discussion
- Create a Portfolio
- Create a Program
- Exercise

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Starter Project Templates

- Starter Template Details
- Project Stage Approval Process
- Task Management
- Document Management
- Status Reporting
- Exercise

Work Reports (My Work, Tasks, Issues, Risks)

- Use Case Discussion
- Work Allocation Reports
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

3-Team Member

Approximately 1 hour

Training Topics

- Navigating BrightWork 365
- Find Assigned Work and Update Work Progress
- Document Management
- Microsoft Teams
- Configure a Personal View
- Exercise

Open Forum Q&A

4-Senior Executive

Approximately 1 hour

BrightWork 365 Overview

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- Frequently Asked Questions

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

BrightWork Champion

Who Is This Guide For?

This guide is geared to the customer organization's BrightWork Champion, the person responsible for the initial in-app setup of BrightWork 365, including the Program and Portfolio structure, prior to starting the management of projects within the app. The Champion gains a thorough understanding of BrightWork 365 top to bottom, helps define their organization's requirements, and acts as an invaluable subject matter resource for their peers.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- BrightWork User Management | BrightWork Security Roles Details

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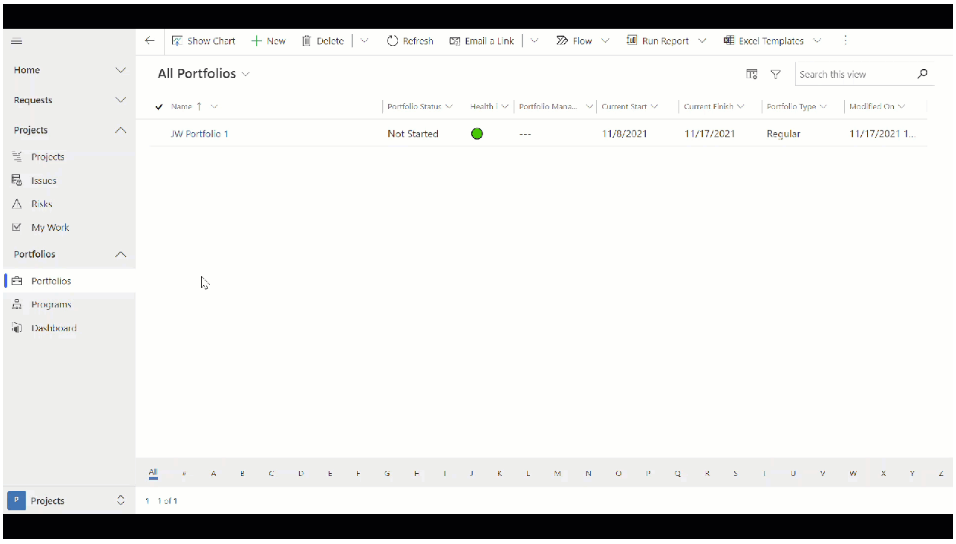
Create the Portfolio and Program Structure

In order to submit project requests and manage projects in BrightWork 365, you'll first need to create at least one parent Portfolio and one child Program associated with the Portfolio. Once this initial structure is in place you can move on to setting up your first project.

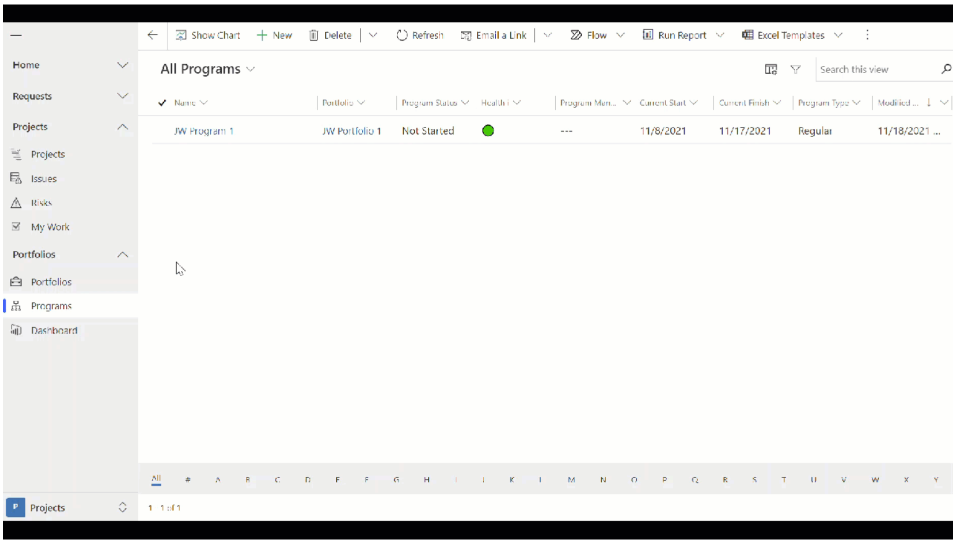
Create a Portfolio

Click the **Portfolios** link, click **+ New** and fill out the form fields.



Create a Program

Click the **Programs** link, click **+ New** and fill out the form fields.



Deeper Dive - Portfolios & Programs

- Portfolios
- Programs

What's Next?

We suggest you next move on to subsequent role-based guides, beginning with the Project Manager guide.

Project Requester

Who Is This Guide For?

This guide is aimed primarily at members of the organization who will be using BrightWork 365 to submit requests for projects that will be created through the Request process.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

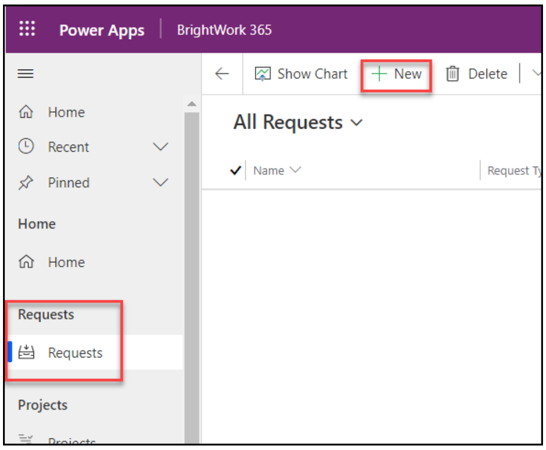
Submit a New Project Request

Tip For more information beyond what is in this Getting Started section, see the Requests category and videos.

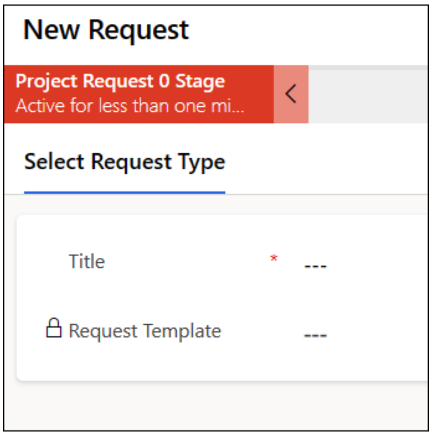
The BrightWork 365 project management process typically begins in the Requests Area. Here you can choose from different project templates for an efficient and consistent way to create new projects.

To submit a new project request:

1. On the main nav click **Requests** and then click **+ New**.



2. Provide a **Title** for the request and select a **Request Template** to serve as the foundation from which to base the new project.

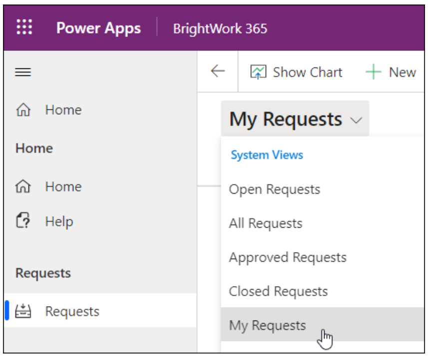


3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request**.

Note: Users who only have the **BrightWork Request Submitter** security role will only see the **Requests** link on the main nav and not the other sections of the full app such as **Projects** and **Portfolios**.

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests on the nav and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down view list.



Project Manager

Note For BrightWork 365 versions older than v1.6 see Prior Release Training Guides.

Who Is This Guide For?

This guide is primarily aimed at Project Managers who will be using BrightWork 365 to manage projects. However, this guide will also be useful for any member of the organization who will be using BrightWork 365 extensively.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

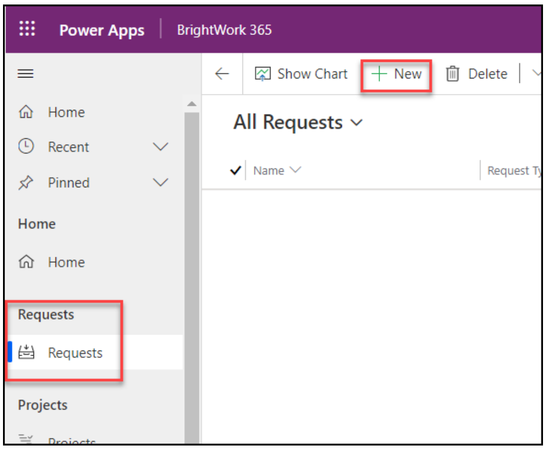
Submit a New Project Request

Tip For more information beyond what is in this Getting Started section, see the **Requests** category and videos.

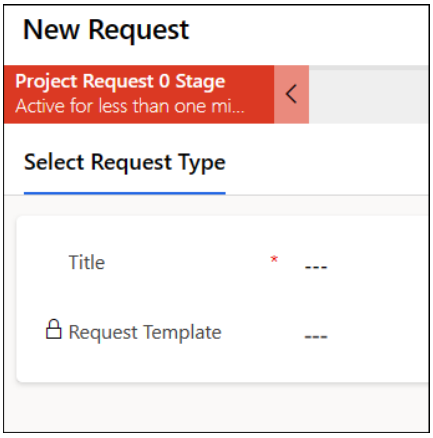
The BrightWork 365 project management process typically begins in **Requests**. Here you can choose from different project templates for an efficient and consistent way to create new projects.

To submit a new project request:

1. On the main nav click **Requests** and then click **+ New**.



2. Provide a **Title** for the request and select a **Request Template** to serve as the foundation from which to base the new project.

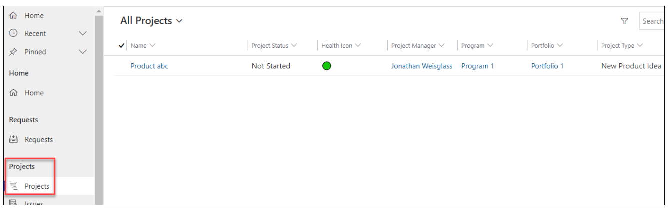


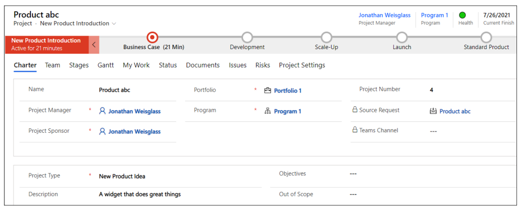
3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request** to start the project request approval process.

Manage a Project

> **Tip** For more information beyond what is in this Getting Started section, see the **Projects** category and videos.

After your new project is created click into **Projects** on the main nav to see a list report of all projects. Click on your project link and its various tabs to display project information and to make any necessary updates as the project flows through its lifecycle.



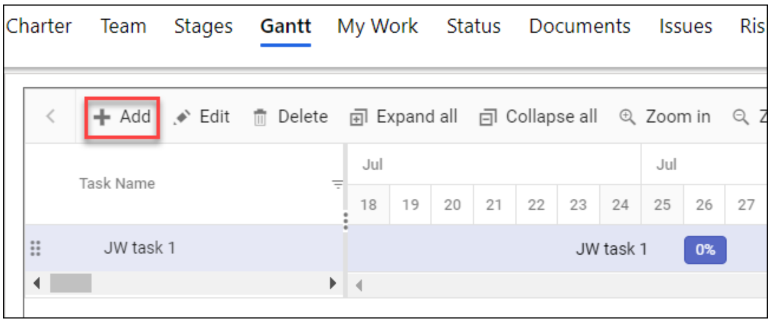


Charter

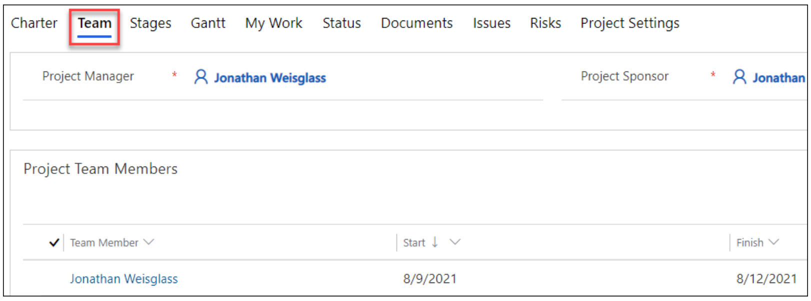
After your project is created you will find Charter columns available for you to add high level details about the project, beyond what was included in the project request form.

Gantt

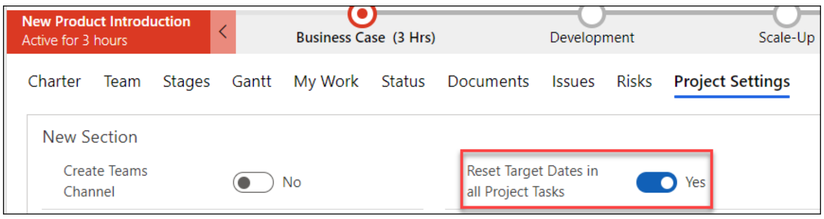
Click into the Gantt tab and update any tasks that were included as part of the template that the project was based on and add new tasks you and the team decide should be included in the project.



As you assign tasks to colleagues the Team section of the project will automatically populate associated assignee and task date information.

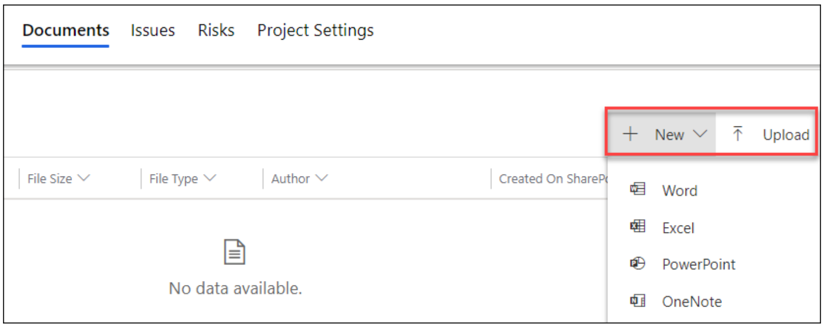


After the project team agrees on the task structure and dates, you can lock-in the schedule by baselining it - in the **Project Settings** tab choose **Yes** for **Reset Target Dates in all Project Tasks**.



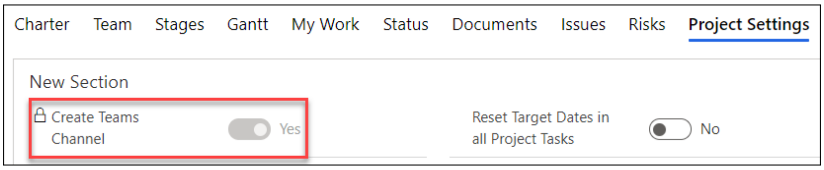
Documents

In the Documents section you have the option to create a new Microsoft Office document or upload external documents to the project's associated SharePoint library as deliverables get drafted.



Create a Microsoft Teams Channel

It's a best practice to create a Microsoft Team for every program (see below), and to create a Team Channel in Project Settings for every project in the program.



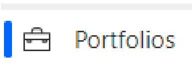
See the Microsoft Teams article for more details about configuring Microsoft Teams integration.

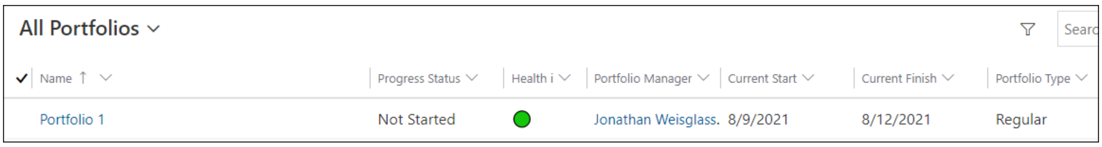
View Reports

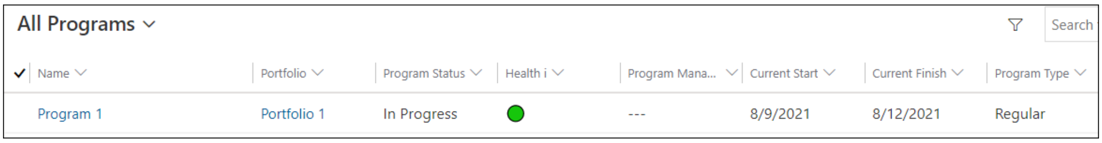
Tip For more information beyond what is in this Getting Started section, see the **Portfolios** knowledge base category and videos.

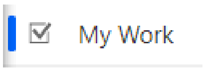
Portfolio Reports

In the **Portfolios** section of BrightWork 365 you can check on the health and status of Portfolios, Programs, and all assigned work.





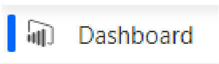


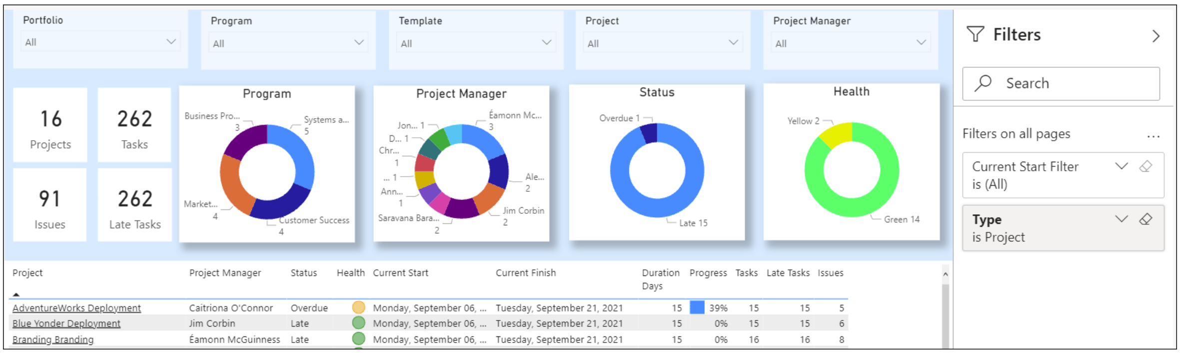


Power BI Reports

Note In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

Power BI dashboard reports allow for interactive analysis of critical project and portfolio data.





See the Power BI Reports article for more details.

Team Member

Who Is This Guide For?

This guide is aimed primarily at team members; however, any member of the organization who will be using BrightWork 365 and is new to the Power Platform will also benefit from this guide.

Prerequisites

We suggest you first review the BrightWork 365 Basic Orientation content to familiarize yourself with the fundamentals of the solution.

To obtain maximum benefit from this training material it's advised that a project manager assign some work items to you in a project you have access to. Confirm with your project manager that this has been completed before continuing with this training.

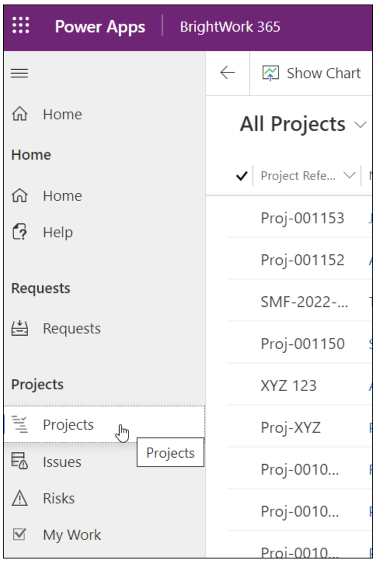
Introduction

BrightWork 365 is a Microsoft Power Platform solution for managing work and projects of varying sizes and types. BrightWork 365 includes a set of best practice project management templates, fields and dashboards that mimic the reality of the varying degrees of work and project management found in most organizations today.

This Team Member training guide will help you learn how to use BrightWork 365 to effectively manage your work. The training guide will teach you BrightWork 365 basics, how to find your work and how to manage work and documents.

Find Your Training Project

To find the project site with your assigned work, you can either click on a direct link provided by your project manager or navigate to the project in the Projects Area of BrightWork 365.



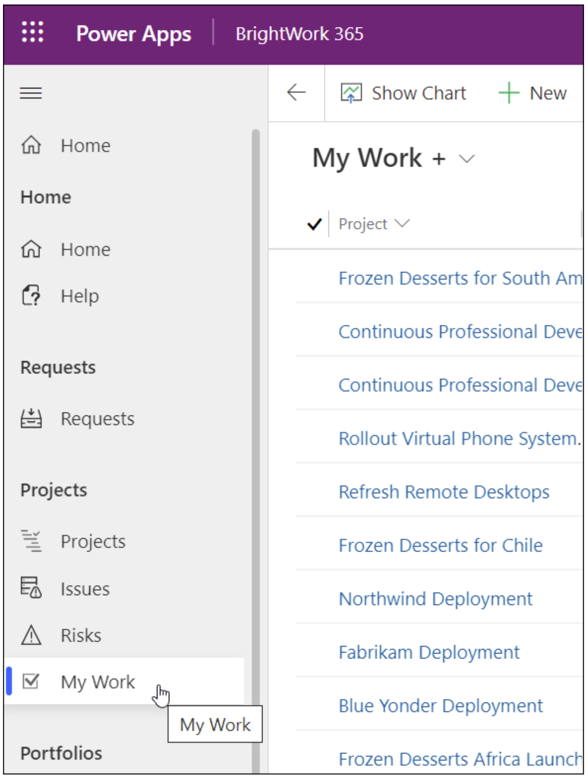
Find Assigned Work

There are various ways you can find work assigned to you in BrightWork 365. If you are used to a project management environment where work is assigned and managed via email, you will know that keeping track of this work can be inefficient. BrightWork makes this process easy and efficient by providing several ways to find your assigned work.

My Work Power Apps Views

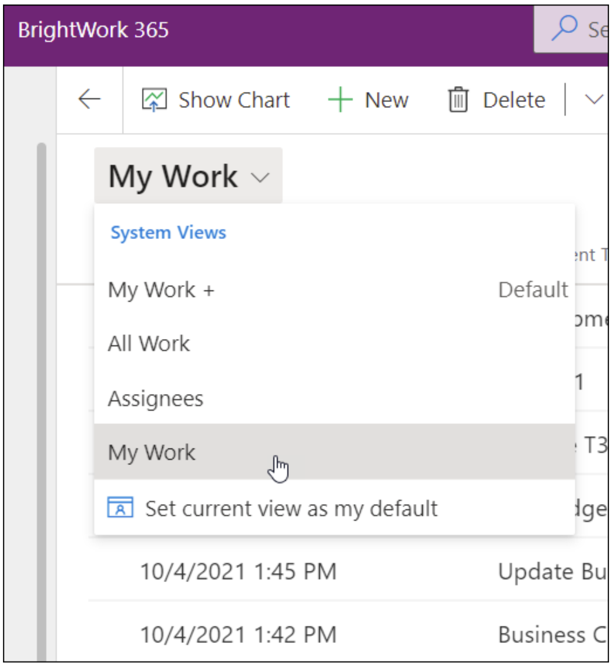
The My Work views, available from a link on the Projects Area navigation, are reports that display and link to all the work items owned by, or assigned to, the logged in user (i.e., you). For added convenience the view can display work items from multiple types of work in a single view.

To access this view, click the **My Work** link in the navigation section of the Projects Area.



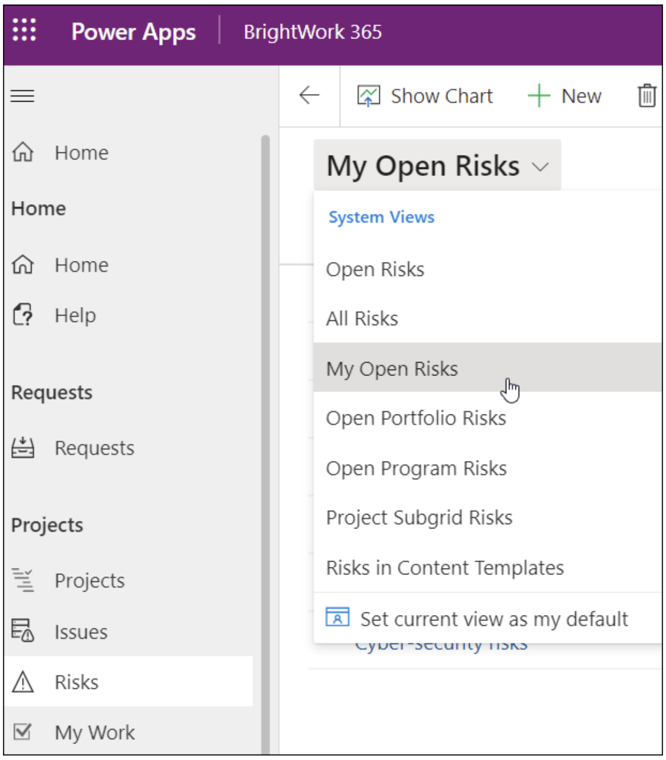
The initial view **My Work +** provides a link to the associated project site in addition to work related information.

The alternate view **My Work** provides only work-related information. To access this view as well as other available views, click on the view drop-down.



If you'd like to narrow down your search to only issues or risks assigned to you, click on the

desired option in the navigation and switch the view to one of the "My" views.

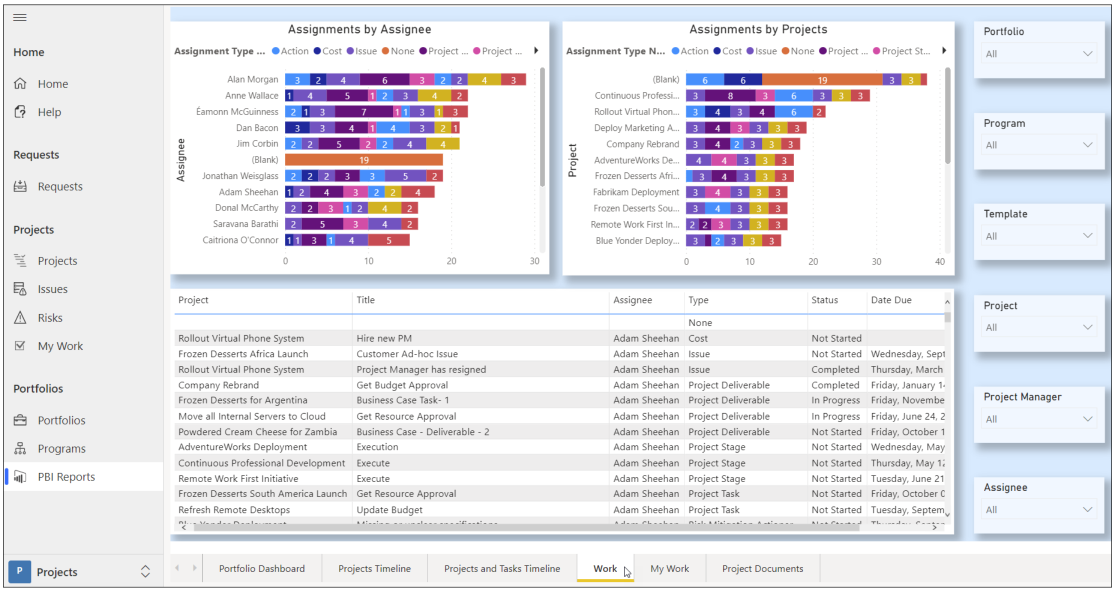


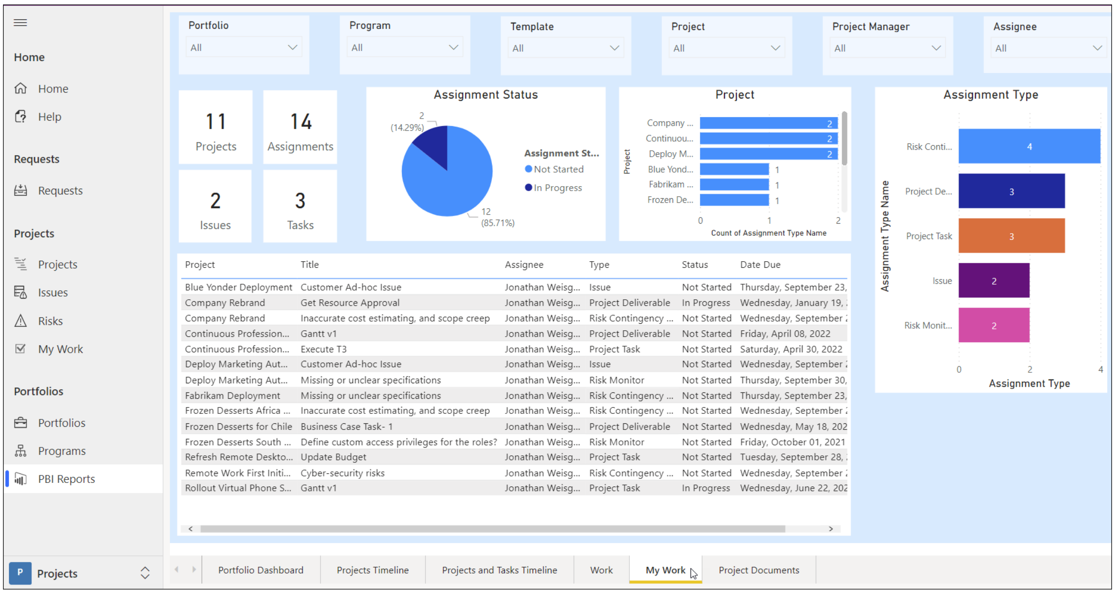
You can also choose to create your own personal view of work assigned to you to make these reports even more personally relevant.

Power BI Work Reports

> **Note** In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

With the coupling of BrightWork 365 and Microsoft Power BI, there are many resourcing report options available for your team to review and analyze. A main area for resourcing reports is in **PBI Reports > Work** and **PBI Reports > My Work**. As with other Power BI reports, the work reports are interactive, and details can be zoomed into by clicking into the various chart regions. Additional Microsoft licensing requirements apply.





Manage Work and Documents

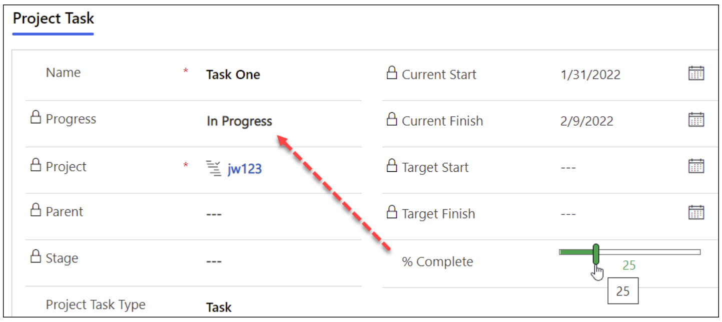
This section explains how to update the details of your work items, log a project issue, and work with documents.

Form Based Update

You can use the Gantt form to make updates to work items assigned to you.

1. Click into a **My Work** view as described above.
2. Double-click on the name of a work item assigned to you to open up the related form for the item.
3. In the form, change the **% Complete** value and click **Save**; the **Progress** value will automatically

change accordingly.

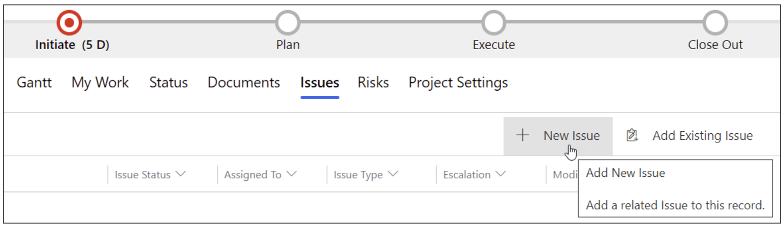


4. Click **Save & Close** to complete the operation.

Log an Issue via Form Entry

As a team member you may need to log an issue about something you feel threatens the success of the project, e.g., the schedule, quality or cost of the project.

1. Click into the **Issues** tab within a project record.
2. Click **+ New Issue**.



3. Fill in the Issue form and click **Save and Close**.

Document Management

BrightWork 365 provides the ability to create and upload documents to be shared with other project team members. Users with Microsoft Office can edit files as if they were on a local or network drive. See the Document Management article for detailed information.

Senior Executive

Who Is This Guide For?

This guide is aimed primarily at Senior Executives and Program Managers who need to maintain oversight of work and projects across an entire project portfolio in the organization. In this training guide you'll learn about reporting features available with BrightWork 365.

Prerequisites

If you are new to BrightWork 365 and the Microsoft Power Platform, we recommend you first complete the Basic Orientation and Team Member training guides.

If you will be more directly involved in managing projects, we recommend that you complete the Project Manager training guide prior to using this guide.

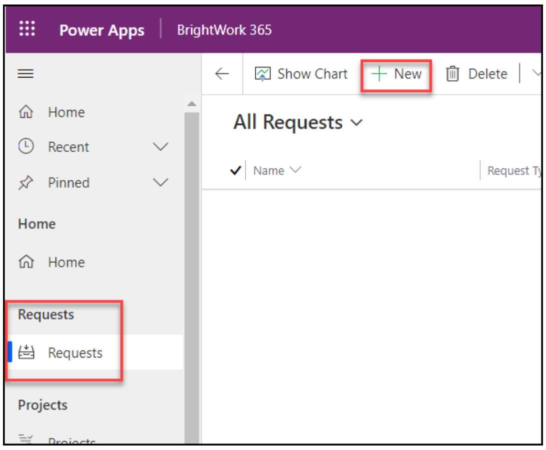
Submit a New Project Request

> **Tip** For more information beyond what is in this Getting Started section, see the **Requests** category and videos.

The BrightWork 365 project management process typically begins in the Requests Area. Here you can choose from different project templates for an efficient and consistent way to create new projects.

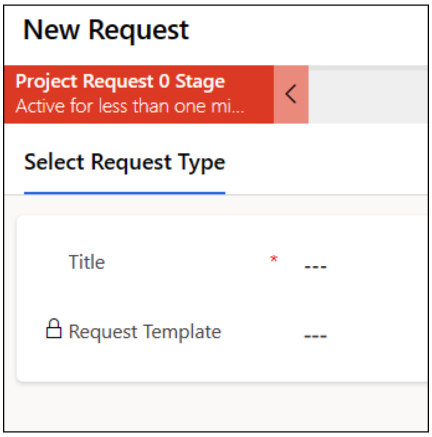
To submit a new project request:

1. On the main nav click **Requests** and then click **+ New**.



2. Provide a **Title** for the request and select a **Request Template** to serve as the foundation from

which to base the new project.

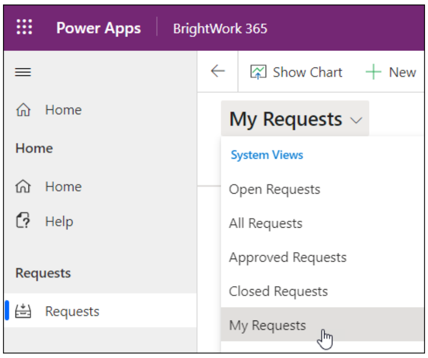


3. Fill in any blank fields in the **Request Details** and **Project Details** tabs.
4. Click **Submit Request**.

Note: Users who only have the **BrightWork Request Submitter** security role will only see the **Requests** link on the main nav and not the other sections of the full app such as **Projects** and **Portfolios**.

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests on the nav and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down view list.



Manage Project Requests

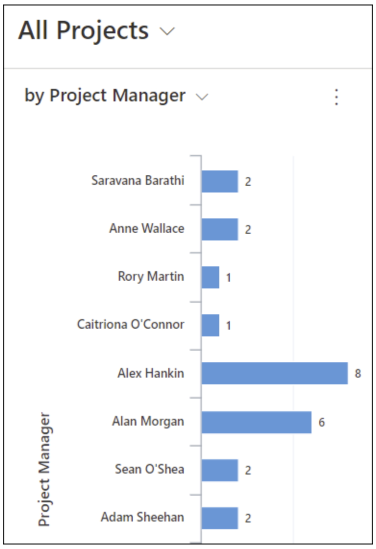
As part of your role in program and project management you may be asked to participate in the project request approval process. BrightWork 365 has a robust solution for managing the entire lifecycle of project requests including an approval mechanism. For detailed project request submission and approval details see the Requests section of this knowledge base.

Report Types

In this section you will learn about the different report types available in BrightWork 365. There are a number of cross-table and cross-project report types that can be used for a range of scenarios.

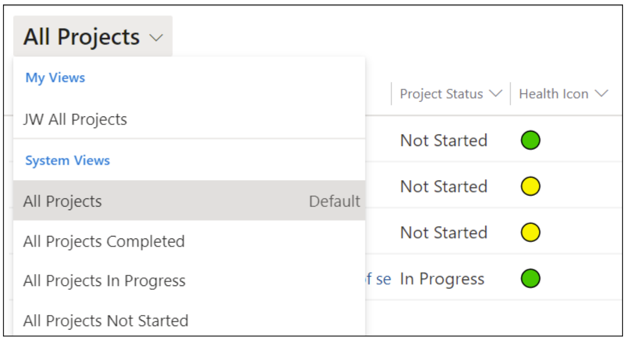
Chart Reports

Chart reports can be configured to display data from across project records in visual reports such as Pie, Bar, and 3D.



Area Report Views

Through the use of System views and Personal "My" views in the Requests, Projects, and Portfolios areas, you can easily obtain crucial project and portfolio information from a single screen. These reports have multiple variations allowing you to zoom in on just the specific data you need.



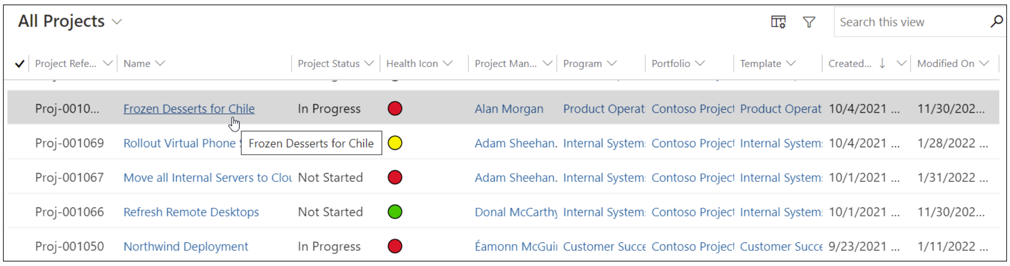
Power BI Dashboards

If your organization is licensed for Microsoft Power BI, there are a number of additional dashboard reports available in BrightWork 365.

Project Management Reports

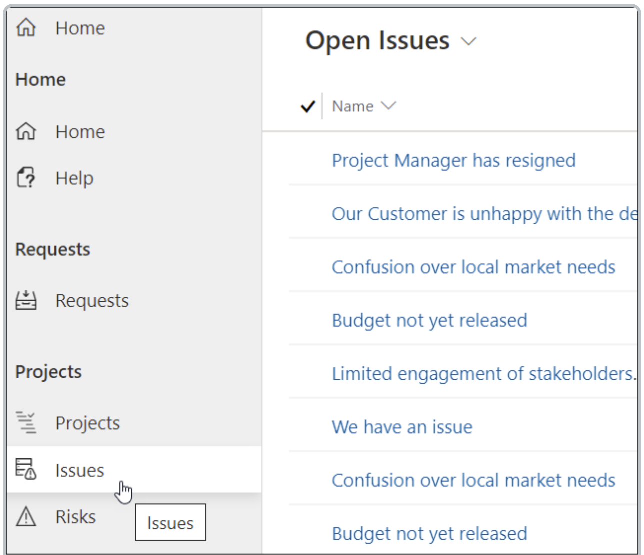
Project

BrightWork 365 Project reports, which can be accessed from the **Projects** link on the nav bar, display high-level information about individual projects. These reports are best for focusing on high-level details, but they also offer an easy way to drill down into very specific project information by clicking on various hyperlinks in each row.

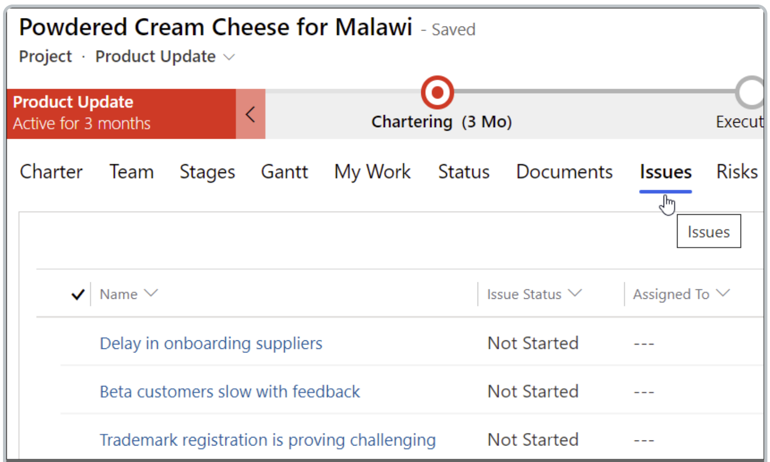


Issues

The Issues reports display all the issue items created within project records, with the option to switch between different views.



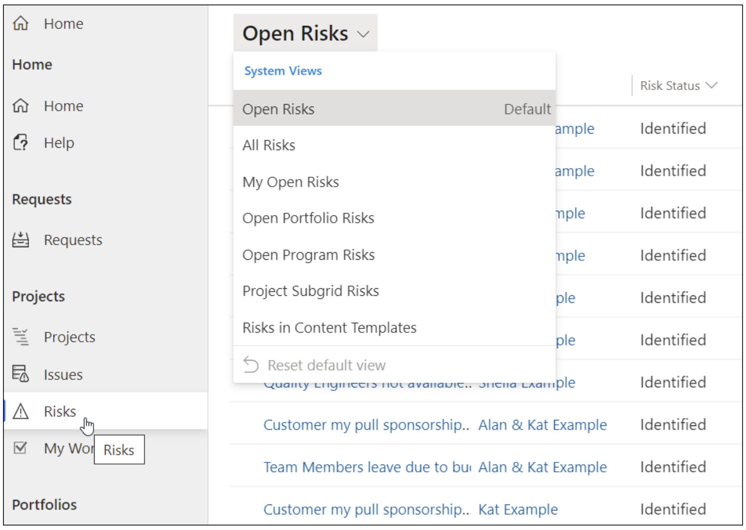
Issues Report View in the Projects Area



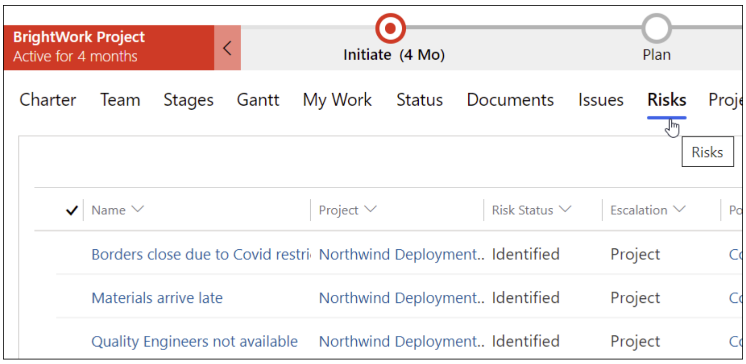
Issues Tab in the Project Record

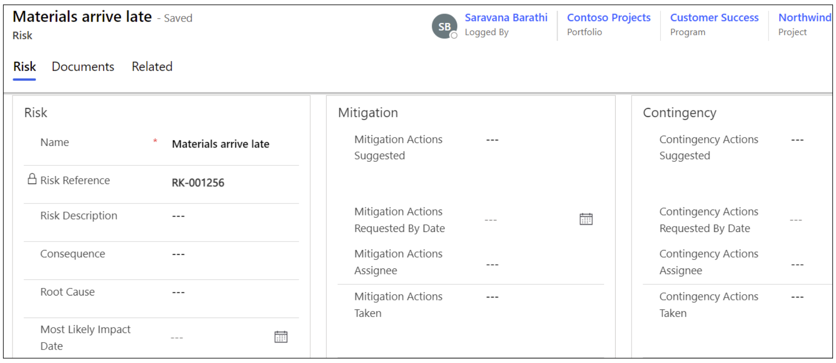
Risks

Project Area Risk reports allow you to quickly see items across projects that have been identified as potential future issues, with Status, Impact, Exposure, and other relevant risk details. There are also various report views available for viewing the risks.



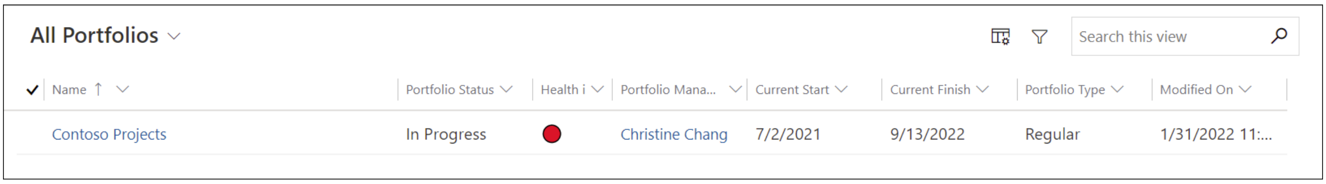
Risks can be easily logged from within project records.



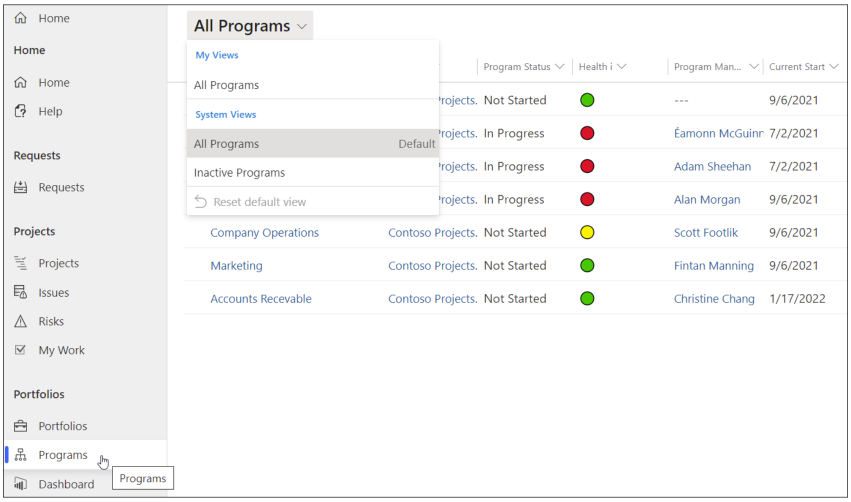


Portfolio Reports

Portfolio reports allow you to see the highest level information about the portfolios that have been created within BrightWork 365.



Program reports display high-level information about the programs that fall under the portfolio(s). There are various views available to focus on programs with different criteria, and new personal views can be created as well.



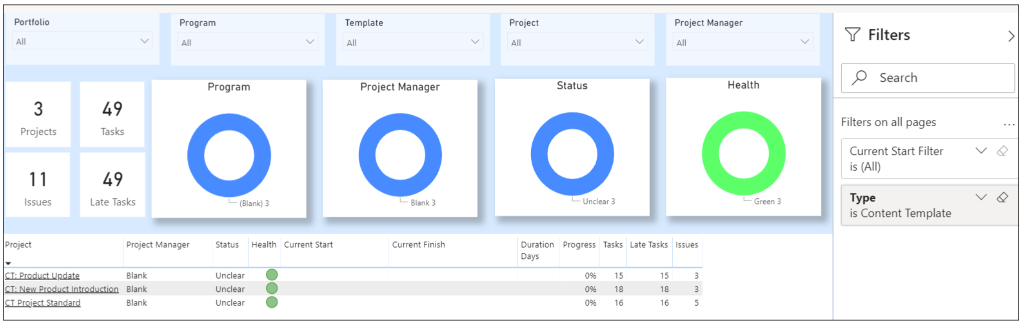
BrightWork 365 Dashboard with Power BI

Note In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

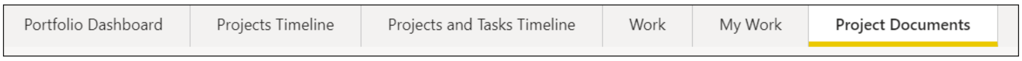
Together BrightWork 365 and the Microsoft Power BI business analytics tool provide exceptional data visualization functionality.

To view the Dashboard and use out of the box reports, click into**Portfolios | Dashboard**. Additional Power BI reports can be added as desired.

The Dashboard includes detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart objects, or with the **Filters** configuration options on the side of the screen.



At the bottom of the Dashboard screen there are tabs for additional report focus options.



System Administrator

Who is this Guide for?

This guide is intended primarily for administrators who will be working on BrightWork 365 installations, upgrades and the overall maintenance of the technologies encompassing the solution; these technologies include BrightWork 365, Microsoft 365, and the Microsoft Power Platform.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

Installation & User Management

Learn how to install and upgrade BrightWork 365

- Product Licenses and Installation
- Upgrade BrightWork 365

User Management & Access

- In order for users to be able to access BrightWork 365, the BrightWork User Management setup steps for the Microsoft Power Platform environment and the BrightWork 365 app will need to be completed.
- Learn about the various BrightWork Security Roles that can be applied to your organization's users.
- After granted access, users will log in to BrightWork 365 using the same credentials used to access the organization's Microsoft 365 environment.

Business User Extended Training

Microsoft Power Platform

The following links provide extensive training for the Microsoft Power Platform solution and is intended for business users, e.g., Project Managers, Marketing, Inside Sales, and Operations staff:

1. Microsoft Power Platform Fundamentals
2. Introduction to Microsoft Power Platform
3. Introduction to Dataverse
4. Introduction to Power Apps
5. Introduction to Power Automate
6. Introduction to Power BI
7. Consume data with Power BI

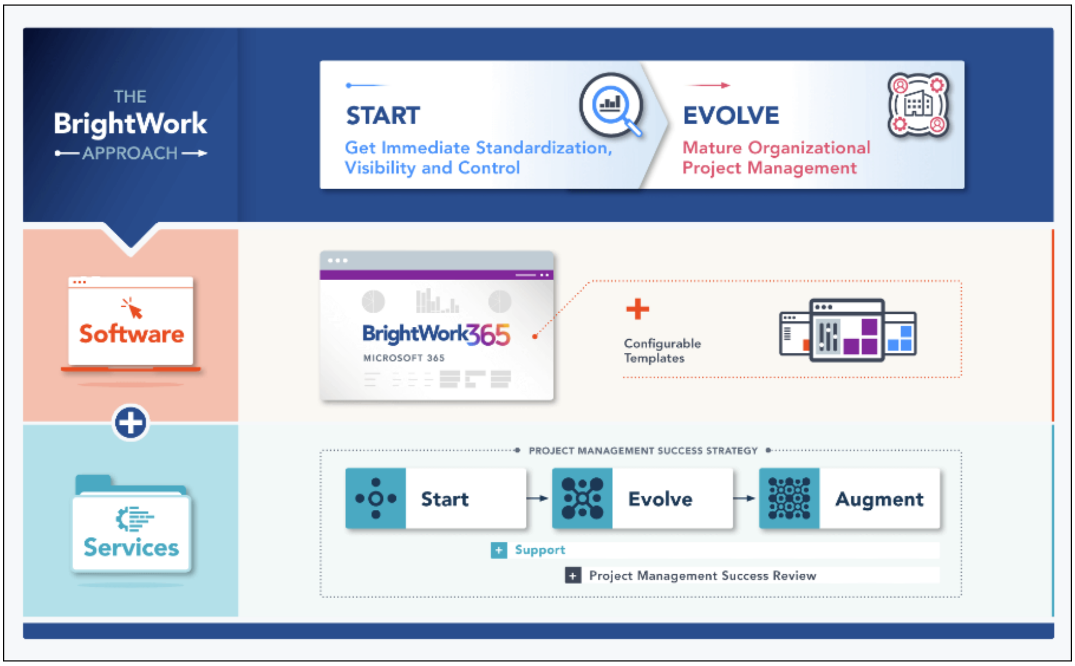
What is a BrightWork Customer Success Partner?

A BrightWork Customer Success Partner is not just a team member; they are your dedicated partner in achieving project management success. With their extensive knowledge of project management processes, best practices, and templates that harness the power of Microsoft 365, they bring a wealth of expertise to your side.

Their role goes beyond mere assistance and guidance. They actively collaborate with you, ensuring that you hit the ground running with the BrightWork 365 solution. Together, you will define and execute the next phase of your project management journey, working hand in hand to achieve your goals.

Throughout your project management success journey, your Customer Success Partner will be there every step of the way. They will accompany your groups, providing support, insights, and strategies to ensure your success. With their partnership, you can confidently navigate the challenges and triumphs of your project management endeavors.

BrightWork 365 Solution Services



In addition to the Support service and Project Management Success Review (see agenda below) that are part of the BrightWork 365 subscription, the following **solution services** are designed to help you get immediate value from BrightWork 365.

Start Service

Accelerate your initial project management deployment with the BrightWork 365 Start Service to get immediate standardization and visibility across all your projects, so you can achieve control over your entire project portfolio.

Your dedicated BrightWork 365 Customer Success Partner will collaborate with your team to Design, Deliver, and Deploy your Project Portfolio Management solution on the Microsoft 365 platform and deliver the first version of your Project Portfolio Management Success Strategy.

Evolve Service

The BrightWork Evolve Service leverages the Microsoft 365 platform to help your Project Portfolio Management evolve by gradually adding and maturing your project management workflows, processes, and practices, leading to more timely, predictable, and successful project outcomes.

BrightWork 365 Product Training Course

Get trained to manage a Project and Program environment using BrightWork 365.

BrightWork 365 Solution Upgrade

Ensure your team continues to leverage new features in every new release of BrightWork 365. Upgrading your BrightWork 365 solution to the latest version allows you to leverage these new features and improvements.

Project Management Coaching

Learn Project Management best practices following our 4-step GROW model.

Personal and Collaborative Leadership Training

Develop the leadership skills and insights needed for efficient project and team management.

Augment Service

The BrightWork 365 Augment Service is a project management advisory service with one or more Customer Success Partners dedicated to you full-time, to help you leverage your Microsoft 365 environment to establish a project management model that can be shared with other groups within your organization. This will empower your organization with a clear project management success strategy and practices to achieve a high level of project management adoption and project management success sooner.

Project Management Success Review

The Project Management Success Review is a collaborative meeting to address your immediate BrightWork 365 or project management process needs, and review and update your Project Portfolio Management Success Strategy devised to deliver on your long-term project management goals.

Agenda (1 hour duration)

1. Immediate Needs
    - We start by addressing your immediate needs. This is your time to ask any top-of-mind questions, bring any current issues to the table, or simply ask for a quick how-to.
    - We make sure you are confident using and navigating through your BrightWork 365 Project Portfolio Management tool.

2. Current State
    - At this stage, a walkthrough of the recent activities helps us to understand how you are currently managing your projects and activities.
    - We review your Desired Outcomes and Value received
    - We review the Current Deployment plan and Project Team assignments to ensure they are accurate and up to date.
    - We also review your BrightWork Support status on recently completed and open support requests.
3. Desired State
    - Here, we discuss your desired state for your project management processes. This is to help you plan and document your project management vision, goals, and priorities for your teams/organization.
    - Together, we decide and document on a project management evolution strategy and work out the steps to put it in motion.
    - We review the BrightWork 365 Project Management Assistance services available to you.
4. BrightWork 365 Product Roadmap
    - We talk about what's coming in the next release of BrightWork 365...
    - We will discuss your Upgrade path and how we can assist you in getting on the latest release.

3D Deployment Process Overview

The Start Service uses the BrightWork implementation process called 3D (Design, Deliver, Deploy). 3D is a clear, transparent, and practical change management process focused on the project management needs of your group.

We work with you every step of the way to help you identify and implement your requirements on BrightWork 365.

During Start, your Customer Success Partner will with the project management champion from your group as our main contact. We'll also work with additional senior managers, project managers, and team members as needed.

The 3D Methodology

1. Design - using collaborative project management best practices
2. Deliver - starting with configurable templates
3. Deploy - with on demand and as needed training

Design - Using Best Practices

Requirements

Your designated and experienced BrightWork Customer Success Partner will work with your senior project management sponsors to capture your organization's project management vision, both short and long term. In this step, your BrightWork 365 Customer Success Partner will catalog the desired outcomes and expected value and with you will rank them in order of importance.

Evolve Plan

Together we prioritize your requirements to determine which ones to include in Start (Iteration 1) and what should go in the Backlog (for future implementation), or what we like to call your Evolve Plan. In this Evolve Plan, we will specify any risks or issues which may affect this iteration and together we will make any accommodations necessary.

Design

In addition to the included out of the box templates, the BrightWork 365 Start service provides for the collaborative design of additional templates to manage Project Requests, Projects, Programs and Portfolios.

Deliver - With Configurable Templates

Configure

Your BrightWork 365 Customer Success Partner will work with you to configure the templates and build out a sample of projects for your team, so you can learn on the job.

Review Templates

Your BrightWork 365 Customer Success Partner will work with you to assist key stakeholders to review and verify the template design before continuing. This ensures the amount of project management process to be implemented is right for your current needs.

Adjust

Your BrightWork 365 Customer Success Partner will prioritize feedback with you from your key stakeholders to determine which items are be adjusted immediately, and which can be added to the Backlog for the subsequent Evolve plan stages.

Deploy - With Training

Train

Your BrightWork 365 Customer Success Partner will work with you to design a role-based training plan that suits your project management processes so your group can start using the solution as soon as possible.

Rollout

At this stage you go live and start using BrightWork 365! Your Customer Success Partner will conduct feedback sessions with you and your teams after some initial usage to determine if some items need to be adjusted immediately and to agree with you what should go in the Backlog (for the Evolve plan).

Support

You and your BrightWork Customer Success Partner will check and formally declare all in-scope 'Start' deliverables achieved and will update the Project Management Strategy that guides project management success. Your BrightWork Customer Success Partner will follow up on deployment status and address any adjustments that arise.

How Long Does Deployment Typically Take?

Our Start deployment service includes 40 hours of effort spread over 3 to 9 weeks. Factors that influence duration are:

- Project Management in use today versus what will be implemented.
- Infrastructure readiness.
- Speed of process/management level decisions.
- Resource availability and skill levels.
- External and organizational constraints.

Note that it's typically preferable to take on less rather than more in the first iteration.

3D Deployment Process Deep Dive

Introduction

Introductory Call Agenda

1. Introductions
2. Review the meeting agenda and objectives
3. Review Desired Outcomes and Value Expected
4. Introduction to the Project Management Success Strategy
5. Review the BrightWork 3D Deployment Process
6. Make high-level deployment decisions:
    - Length of deployment
    - Configuration approach
    - Training planning
    - Team roles
7. Introduce the Project Management Process Assessment Questionnaire
8. Discuss next steps

Develop Your Project Management Success Strategy

A Project Management Success Strategy is a comprehensive plan and approach designed to enable you to effectively deploy your project and portfolio management processes. It establishes a framework that allows for the seamless implementation of BrightWork 365 and these processes. The Project Management Success Strategy enables you to start quickly. As you gain experience, the Project Management Success Strategy facilitates the continuous improvement and evolution of project and portfolio management processes. It empowers you to adapt to changing dynamics and drive innovation, ultimately leading to improved project outcomes and organizational success.

BrightWork 3D Deployment Process

The BrightWork deployment process makes it easy for you and your group to get to … "Project Management Success," using 3D, a clear transparent change management process.

1

Design...
Using Best Practices

- Project Management Success Strategy
- Gather Requirements
- Prioritize Requirements
- Select Templates

2

Deliver...
With Configurable Templates

- Configure Templates
- Review Templates
- Adjust Templates

3

Deploy...
With Training

- Roll Out Plan
- Go Live
- Deployment Support
- Project Management Success Review

How Long Does Deployment Typically Take?

Our Start service includes 40 hours of effort spread over 3 to 9 weeks. The factors that influence duration are:

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- Speed of process/management level decisions.
- Resource availability and skill levels.
- External and organizational constraints.

Note: It’s typically preferable to take on less rather than more in the first iteration.

Configuration, Customization or Both?

As BrightWork 365 is built on the Microsoft 365 Power Platform, a highly configurable and customizable platform, customers have the option to choose configuration, customization, or both to deliver on project management requirements. For additional information see Customization.

Training Planning

1. During the Design stage we advise reviewing the BrightWork 365 Getting Started series of articles.
2. In the Deploy stage we will work with you to plan BrightWork 365 role-based training for Project Managers, Team Members and Senior Executives. We will start with our recommended Training Syllabus as the foundation for training.
3. If you or your colleagues would like additional training updates, sign up for our Customer Success Mailing List.

Assign Deployment Project Team Roles

Project Manager (Customer): Drives the overall deployment project for the customer and is from the customer organization. This is the all-important manager and cheerleader role.

BrightWork Customer Success Partner (BrightWork): Provide services including advice, product training, design and configuration support and consulting.

BrightWork Trainer (BrightWork): Provides training of the configured templates to end users during the Deploy stage.

System Administrator (Customer): Responsible for the BrightWork 365 installation and deeper Power Platform technical support on-site.

BrightWork Designers (Customer, BrightWork): Responsible for mapping the local project management process to BrightWork 365 templates.

Senior Stakeholders (Customer): Departmental or functional managers whose support is necessary for a successful deployment. May run the first set of projects.

Executive Sponsors (Customer): Funds, approves and directs the BrightWork 365 implementation in the customer organization.

What's next?

1. Complete the Project Management Process Assessment Questionnaire provided by your Customer Success Partner.
2. Continue on to the Design stage and schedule the Requirements session with your Customer Success Partner.

Design

Requirements

Complete Handover

- During a scheduled handover call you and your assigned BrightWork 365 Solutions Specialist will have a first conversation for introductions and to better understand Requirements and the Expected Solution.

Understand Vision and Value

Understand and develop the project management longer term vision

- Work with the senior project management sponsor to capture this vision.
- Review actual customer case studies and examples from other BrightWork 365 customers (with permission) to illustrate what is possible .
- Demo and very lightly train to assist this visioning and requirements discovery process.

Work with your sponsor, capture the Desired Outcome(s) / Value expected and rank in order of importance

- Examples of Desired Outcome include: Saving Time, Saving Money, Working more efficiently, Cost reduction, Number of projects being run through the system, Visibility, Collaboration, Ease of management, Automation, Management of resources.

Document Value, etc. in the Project Management Success Strategy document which will eventually contain:

- Expected Value Analysis
- Evolve Plan
- Current Deployment Plan and Status
- Project Team Member List
- Future Project Management Success Review

Document Requirements

- You and BrightWork will work together to capture immediate specific needs using BrightWork requirements gathering documents which will be used by the solution build team.

Project Management Steps

- Create a BrightWork 365 project to manage the deployment (data to be added later).

Evolve Plan

Build Evolve Plan

The Evolve Plan looks at the Vision, Value and the Requirements and decides what is for Iteration 1 delivery and puts the rest on a backlog (unprioritized).

Document the Evolve Plan in the Project Management Success Strategy document.

Protect the Evolve Plan

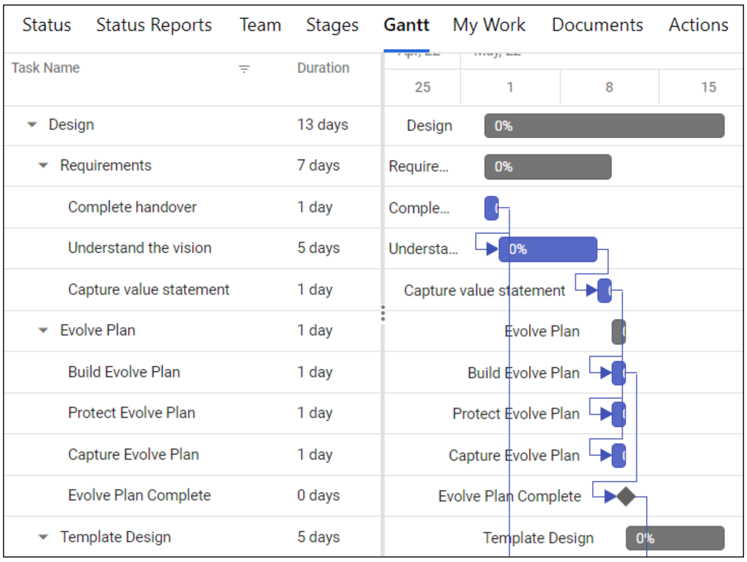
- Talk through Issues and Risks which could affect this iteration of the Evolve Plan and make adjustments to the plan as necessary.
- Check this iteration of the Evolve Plan against the maturity and appetite of the target group and make adjustments to the plan as necessary.
- Document any Evolve Plan issues and risks in the Project Management Success Strategy document.

Approve the Evolve Plan

- Have the Evolve Plan signed off by the most senior Executive.
- Save the Project Management Success Strategy document in a place where it can be accessed, controlled and managed.

Project Management Steps

- Develop a task plan / schedule for the current iteration of the Evolve Plan including the**Go-Live date**.
  Sample portion of BrightWork 365 Gantt:



Tip It's imperative for subject matter expert team members to confirm the completeness of the task list, the task durations and the completion dates, so as to not jeopardize the deployment's agreed **Go-Live date**.

Design

Select Templates

- Decide which templates will be used in the first Iteration.
- Decide the infrastructure to be used for the design/configuration work.

Decide Template Configurations

- An organization with a lower project management maturity level should strongly consider staying closer to out of the box templates.

Decide Roles and Security

- Decide what roles are needed and what rights will be associated with each role (e.g. Project Manager, Team Member, Request Approver, Request Submitter, Senior Sponsor, etc.).

Document the Design Decisions in the Design Documents

Project Management Steps

- Track and re-plan the project as necessary.

What's next?

Continue on to the Deliver stage.

Deliver

Configure

Setup the Configuration Environments

If not already done as part of the BrightWork 365 installation process, three environments will need to be created in the customer's Microsoft 365 tenant: Dev, UAT, and Production.

In order for the BrightWork Customer Success team to collaborate with customers for solution configuration/customization during the Deliver stage, a guest user account for a named BrightWork person will need to be added to the Dev and UAT environments and given relevant security roles and a Power Apps per User license (preferred), or Power Apps per App license.

For more information see Add a BrightWork Customer Success Guest User and Share a canvas app with guest users.

Train for Configuration

- Customers are offered BrightWork 365 Role based and Configuration training.

Configure Templates

- This "Deliver" phase is intended to help you be empowered and trained - it is a combination of consulting and also delivery of on the job training.

Implement Roles and Security

- Implement the roles needed with the associated rights with each role (e.g. Project Manager, Team Member, Request Approver, Request Submitter, Senior Sponsor, etc.) so these can be tested.

Project Management Steps

- Track and re-plan the project as necessary.
- Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.

Customization Note

Certain customer requests will necessitate work beyond configuration, and therefore customization of the solution will be required. BrightWork will deliver any customizations via an additional managed solution that is specific to the customer (i.e., the 'customer solution'). The customer solution will be developed by BrightWork in the customer's Power Platform environment and made available to the customer for installation on top of their BrightWork 365 managed solution. BrightWork will periodically demo the ongoing work to the customer for collaborative review.

Verify

Identify Stakeholders

- Seek a representative set of users, e.g. Executive Sponsor and a Project Manager and a Team Member.

Verify Design

- Verify the template design with these key stakeholders in order to review and validate the design work before continuing.
- Be mindful to check that the amount of project management process to be implemented is feasible for the customer's environment.

Prioritize Feedback

- With the key stakeholders, determine items to be adjusted immediately and those that will be added to the Backlog.

Project Management Steps

- Track and re-plan the project as necessary.
- Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.

Adjust

Adjust Templates

Configure-Verify-Adjust

- Sometimes (but not always) we may need to cycle through Configure-Verify-Adjust until Project Management Success is likely.

Final Verification

Project Management Steps

- Track and re-plan the project as necessary.
- Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.

What's next?

Continue on to the Deploy stage.

Deploy

Train

Create a Rollout Plan including Training

Determine the initial set of projects to manage

When designing the training, consider and discuss together:

- Training based on the key roles, e.g. Team Member and Project Manager.
- Training focused on configuring BrightWork 365.
- Extra training as needed to the internal support team (who might be in a project management office or in an IT support team).
- Collaborative Project Management training - can be configured to suit the customer's environment.

Prepare Training

- Prepare or Configure user guidance / training materials for each of the key roles (Team Member, Project Manager, Senior Manager).
- Grant user access with appropriate permissions for the current set of users.

Deliver Training

- Offer individual 1:1 follow-up training after the group sessions.

Project Management Steps

- Track and re-plan the project as necessary.
- Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.

Rollout

Go Live

- After finishing the BrightWork 365 installation, verify success by completing all Post Installation Checklist items.

Feedback

- Conduct a feedback session with the team after some initial usage.

Adjust

- Determine items to be adjusted immediately and those to be added to the Backlog.

Project Management Steps

- Track and re-plan the project as necessary.
- Communicate to stakeholders any task date changes that may affect the scheduled **Go-Live date**.

Support

Handover to Support

- You and BrightWork will confirm all in-scope deliverables have been achieved.
- Review the Support vs Services distinction.
- Handover to the Support Desk.

Update Project Management Strategy

- Update your Project Management Success Strategy document.

Setup ongoing post-deployment status and working sessions, e.g.

- Quarterly Sponsor Start-Evolve review meetings.
- Your next Project Management Success Review.

Post Deployment Check

- Formally close this iteration of the project.
- Continue to follow up on Deployment Status and address any adjustments that arise.

Project Management Steps

- Close out the Project and conduct a Post-Mortem.

Customer Success Training Syllabus

> **Note**
>
> - For BrightWork 365 versions older than v1.7 see Prior Release Training Guides.

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.

We recommend working through the roles in the order presented, starting with the BrightWork Champion role to setup the necessary app elements for further use by the other roles.

1-BrightWork Champion

Approximately 2 hours

BrightWork Champion Introduction

- What is a BrightWork Champion?
- What is a BrightWork Customer Success Partner?
- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- BrightWork User Management
- BrightWork Security Roles Details
- Frequently Asked Questions

Portfolios & Programs

- Use Case Discussion
- Create a Portfolio
- Create a Program
- Exercise

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Starter Project Templates

- Starter Project Template Details
- Project Stage Approval Process
- Task Management
- Documents
- Status Reporting
- Exercise

Work Reports (My Work, Tasks, Issues, Risks)

- Use Case Discussion
- Work Allocation Reports
- Resource Utilization
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Customization

- Customization Overview
- Request Template & Project Template Configuration
- Form Configurator
- Content Templates
- Power BI Customization

Open Forum Q&A

2-Project Manager

Approximately 2 hours

Project Manager Introduction

- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- Frequently Asked Questions

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Starter Project Templates

- Starter Project Template Details
- Project Stage Approval Process
- Task Management
- Documents
- Status Reporting
- Exercise

Work Reports (My Work, Tasks, Issues, Risks)

- Use Case Discussion
- Work Allocation Reports
- Resource Utilization
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

3-Team Member

Approximately 1 hour

Team Member Training Topics

- What is BrightWork 365?
- Navigating BrightWork 365
- Projects Area Components
- Find Assigned Work and Update Work Progress
- Document Management
- Microsoft Teams
- Configure a Personal View
- Exercise

Open Forum Q&A

4-Senior Executive

Approximately 1 hour

Senior Executive Introduction

- What is BrightWork 365?
- Technologies Used
- Navigating BrightWork 365
- Projects Area Components
- Frequently Asked Questions

Requests

- Use Case Discussion
- Project Request Approval Process
- Create a Project Without a Request
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

Deployment Best Practices

Do's

Thorough Planning

- **Do:** Invest time in comprehensive planning before the deployment. Understand the specific needs and requirements of your organization.
- **Do:** Consider user roles, project structures, and data governance to ensure the deployment aligns with organizational goals.

User Training and Adoption

- **Do:** Provide extensive training for end-users, administrators, and other stakeholders. This includes training on using BrightWork 365, Power Platform components, and any customizations.
- **Do:** Foster a culture of user adoption. Communicate the benefits of the new solution and provide ongoing support to address user concerns.

Integration with Power Platform

- **Do:** Leverage the capabilities of the Power Platform for enhanced functionality. Integrate Power Apps, Power Automate (formerly Flow), and Power BI where applicable to streamline processes and provide valuable insights.
- **Do:** Ensure proper data flow and connectivity between BrightWork 365 and other Power Platform components.

Administration

- **Do:** Name Power Platform environments and URLs correctly, i.e., BrightWork DEV, and customer-bw365-dev.crm.dynamics.

Don'ts

Overly Complex Configurations

- **Don't:** Overcomplicate the system with unnecessary customizations. Keep configurations aligned with business needs and avoid unnecessary complexity that could lead to maintenance challenges. This includes overly complex workflows or external system integrations.
- **Don't:** Implement features or customizations without a clear understanding of their impact on performance and user experience.

Neglecting Security and Compliance

- **Don't:** Neglect security considerations. Ensure that proper permissions and access controls are in place to protect sensitive information.
- **Don't:** Ignore compliance requirements. Understand and adhere to regulatory standards that

may apply to your industry.

Skipping Testing

- **Don't:** Skip thorough testing before rolling out the deployment. Test various scenarios to identify and address any potential issues or bugs.
- **Don't:** Deploy changes directly to a production environment without proper testing in a staging or development environment.

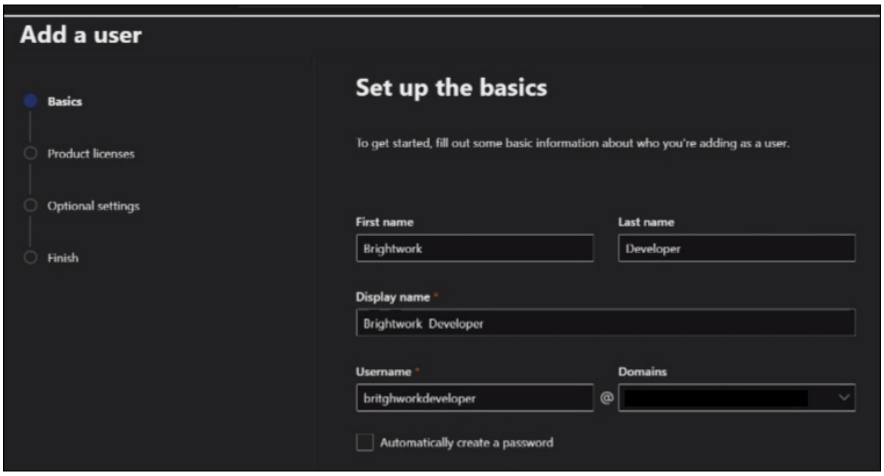
Requirements Assumptions

- **Don't:** Assume a requirement is too complex for the initial start without first discussing it with your CSP as it may not be as complex as you think, or BrightWork may have done something similar in the past that would mitigate the complexity. At least you have had the conversation with your CSP and mutually agreed to park it for the Evolve.

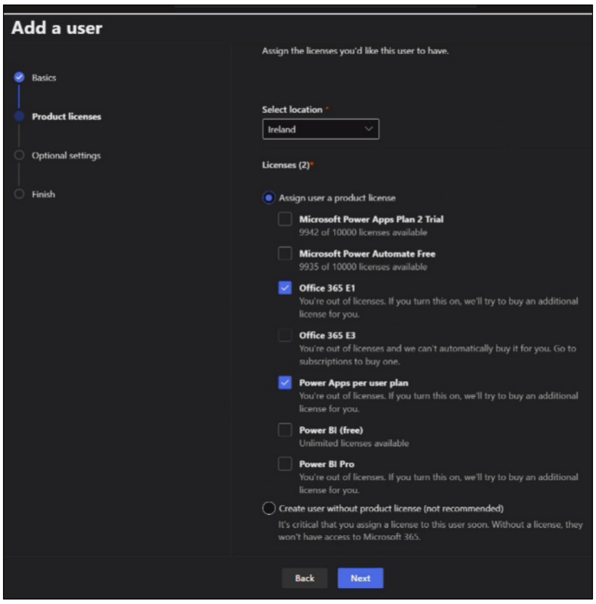
Add a BrightWork Customer Success Local User

In order to collaboratively work on customizations together with BrightWork, you will need to add a BrightWork Customer Success local user to your Microsoft 365 tenant and Power Platform development environment:

1. Navigate to the Microsoft 365 Admin Center at https://admin.microsoft.com.
2. Expand **Users** and click **Active users**.
3. Click **Add a user** and fill out the form.

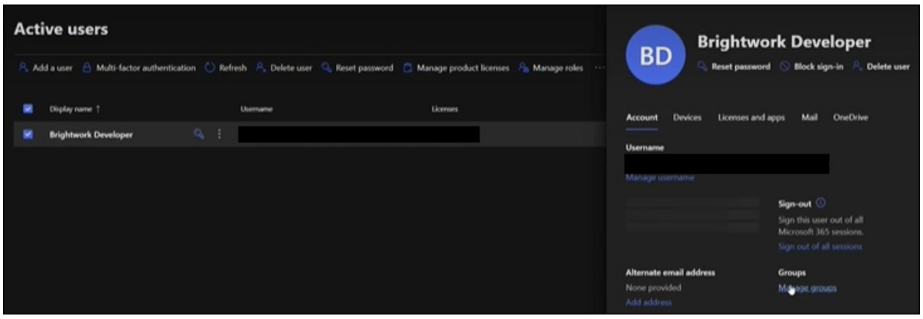


4. Click **Next** and assign Microsoft product licenses: Office 365 E1 or above and a Power Apps Premium/Power Apps per user plan. A Power Apps Premium/Power Apps per user plan is preferred but, if necessary, you can instead assign Power Apps per app plan for the development environment (done in the Power Platform admin center, https://admin.powerplatform.microsoft.com).



5. Click **Next** and skip the Optional settings.
6. Click **Next** and **Finish adding**.

7. In **Active users** select the new local user and click **Groups > Manage groups**.



8. Click **Assign memberships** and add the user to the security group that is controlling access to the development environment.
9. Navigate to https://admin.powerplatform.microsoft.com, and in the development environment assign the local user the security roles **Basic User** and **System Administrator** (additional BrightWork specific security roles will be assigned at a later time).
10. Share the account details with your Customer Success Partner.

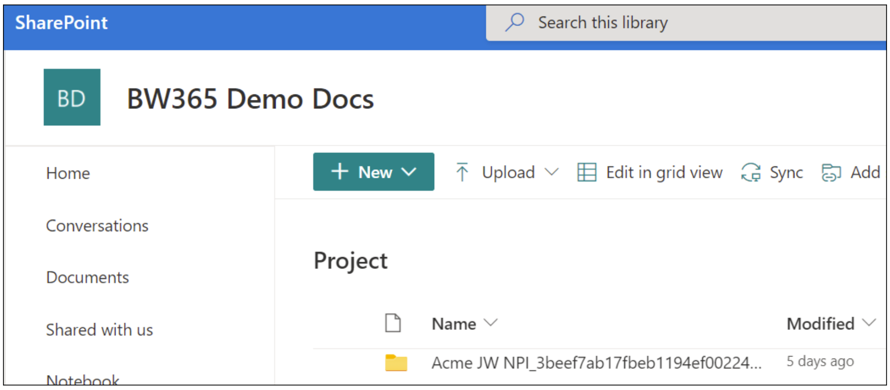
Document Management

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

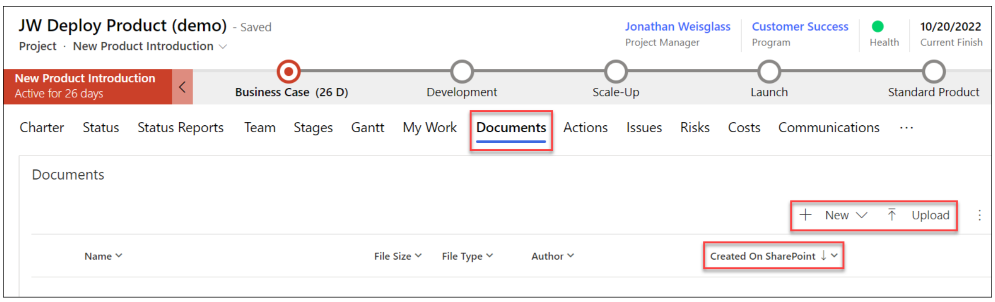
Overview

Documents in BrightWork 365 are stored in your SharePoint Online site. During the installation of BrightWork 365 the SharePoint site and accompanying document library were created for the environment. A folder in this document library will get created for every new project. With appropriate permissions you can view all the folders directly in the environment's SharePoint Online site.



Documents Tab

The Documents tab is where you can create new Microsoft Office documents and upload existing documents. These files are stored in your organization's SharePoint document library that is associated with BrightWork 365.



Caution

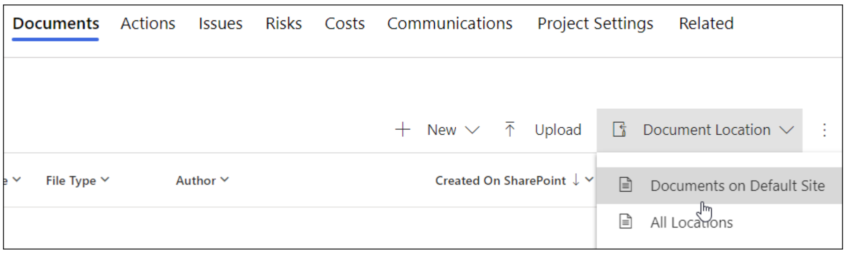
- By default, files deleted from the Documents tab will be permanently deleted from the

- By default, files deleted from the Documents tab will be permanently deleted from the SharePoint site associated with BrightWork 365 and cannot be restored from a recycle bin. Contact your Microsoft Support representative to discuss activating the associated SharePoint Recycle bin to be able to restore deleted documents.
- SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

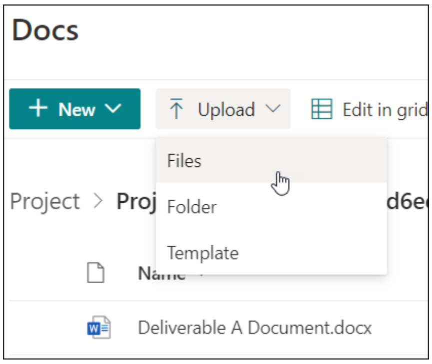
Large Documents

Documents larger than 50 MB will need to be uploaded directly to the associated SharePoint Online site instead of the Documents section of the record. To upload these documents:

1. Go to the record's Documents tab and use the drop-down in **Document Location** to click on **Documents on Default Site**. You will be taken to the associated SharePoint Online location.

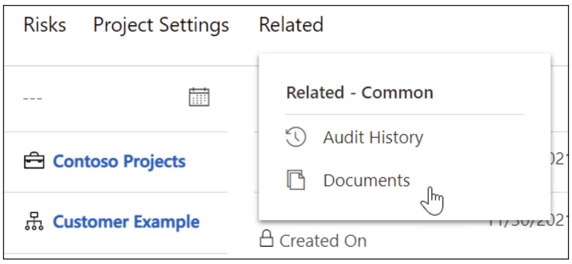


2. Choose Upload to upload the file. The file will upload even if it is larger than 50 MB.



Related Documents

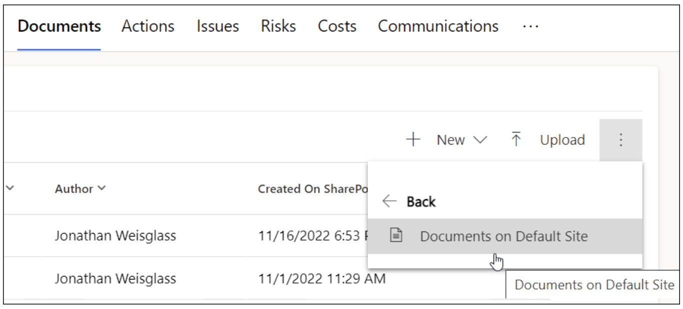
You can also view a record's documents by clicking **Related | Documents** in the menu bar.



Desktop Sync

An additional method to interact with a BrightWork 365 SharePoint Online document library is via desktop sync:

1. Confirm Microsoft OneDrive is installed on your computer.
2. In the Documents tab click the ellipses, click **Open Location**, and then click **Documents on Default Site.**

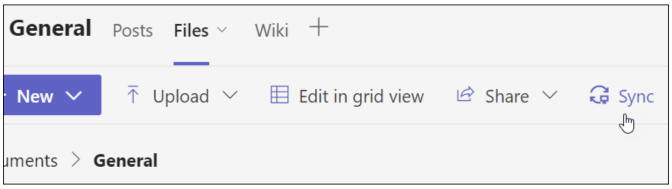


3. On the SharePoint Online page that opens click **Sync** to begin the desktop sync via Microsoft OneDrive.

Microsoft Teams Sync

An additional method to interact with a BrightWork 365 SharePoint Online document library is by syncing with a project's channel within a Microsoft Team:

1. Confirm Microsoft OneDrive is installed on your computer.
2. In the relevant project channel click on the **Files** tab and then click **Sync**.



Views & Charts

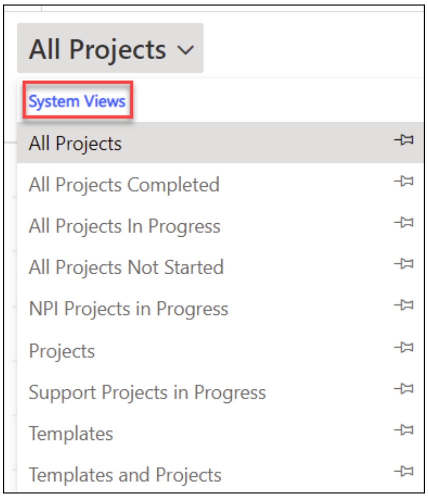
> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

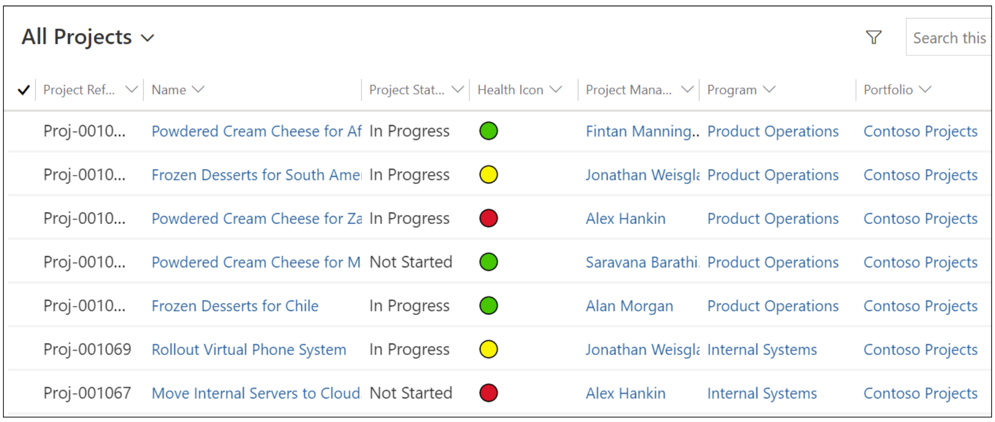
> **Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

> **Caution** Deleting a row of data from any View cannot be undone.

System Views

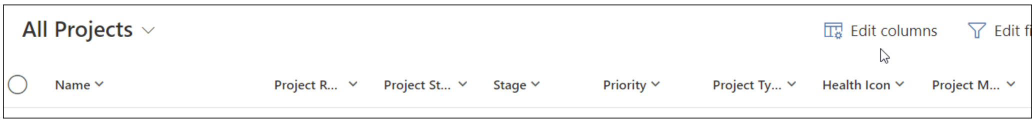
The various BrightWork 365 site map sections such as Requests, Projects, and Portfolios, each come with their own set of out of the box **system views,** in addition to any custom personal or system views you configured on your own. Different views will present a different number of rows of project information depending on view filters, and/or a different set of columns across the top.



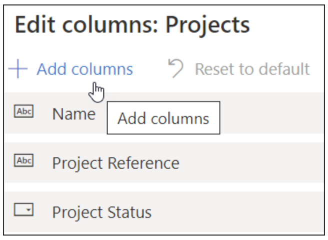


Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

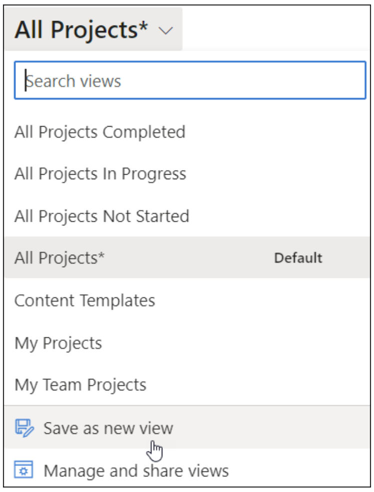
1. Within a view in the section of interest (e.g., Requests, Projects, Portfolios), click **Edit columns**.



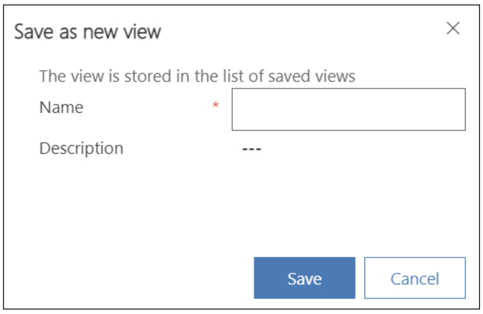
2. Edit the columns:
   1. Reorder or remove columns using the ellipses that appears when you hover over an existing column name and click **Apply**.
      Or,
   2. To add new columns to the view: **Click Add columns**, select the column to add, click **Close**, reorder the column as necessary, and click **Apply**.



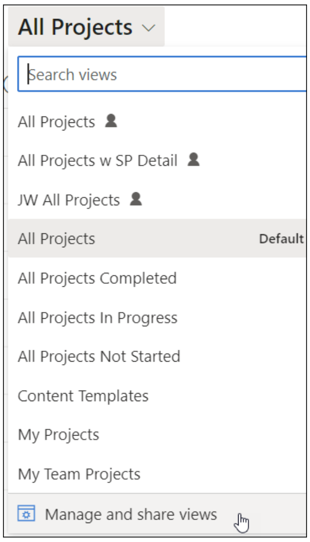
3. If the view is only meant to be temporary, the process is complete. If you would like to permanently save the view as a personal view:
   1. In the view selector drop-down click **Save as new view**.



   2. Fill in the fields and click **Save** to save the view as a personal view.



3. To share a personal view:
    1. In the view drop-down click **Manage and share views**.



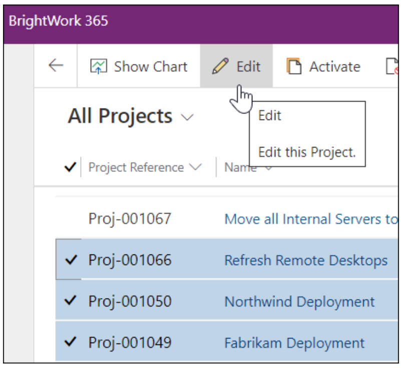
    2. Click on the ellipses next to the view you want to share and click **Share**.
    3. Search for and select the user or team you would like to share the personal view with.
    4. Assign permissions and click **Share**.

Views and Bulk Updates

It is possible to make bulk updates to certain fields in multiple records from a view screen using a couple of different options.
Note: Do not make edits to calculated columns such as the date column **Current Finish**.

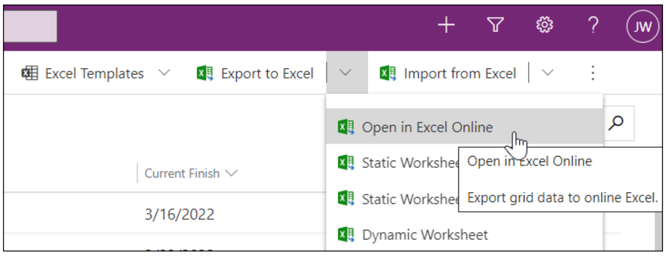
Option 1: Use the Edit Option

Select multiple rows in a view and click Edit in the menu bar.



Option 2: Open in Microsoft Excel Online

Click Open in Excel Online from the Excel menu.

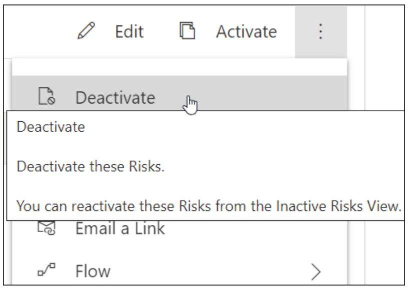


Item Activation Status

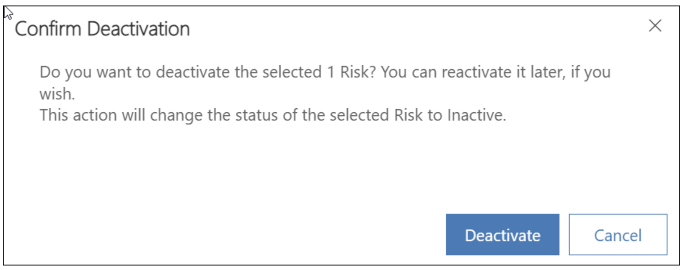
Items can be deactivated and activated throughout BrightWork 365. Deactivated records will be locked. Users with edit permission can activate a deactivated record.

To deactivate an item:

1. Select the item row and click Deactivate in the menu.

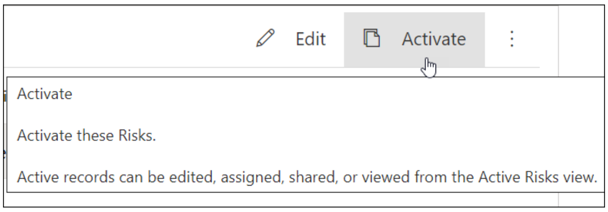


2. Confirm the deactivation.



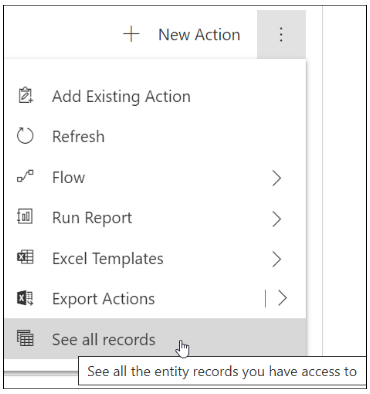
To activate an item:

1. Select the deactivated item row and click Activate in the menu.

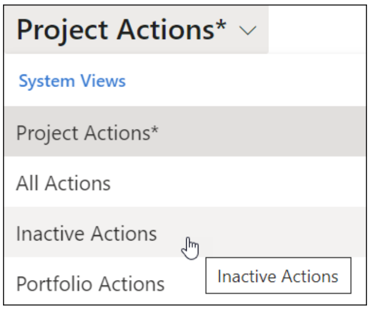


Deactivated items may be removed from certain views. To find these items in order to activate them once again:

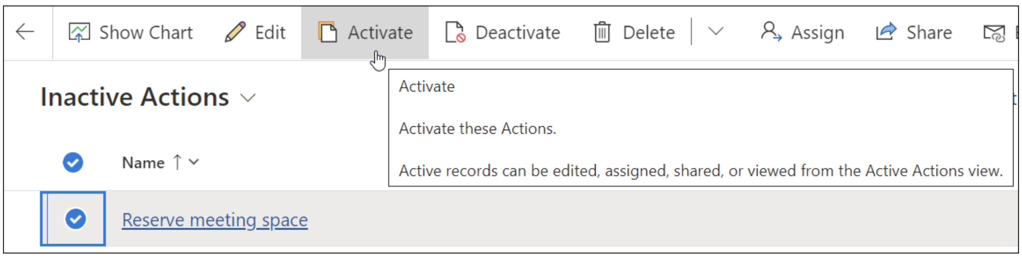
1. In the current view click **See all records** in the menu.



2. Change the resultant screen's view to the Inactive view.



3. Select the item's row and click Activate.

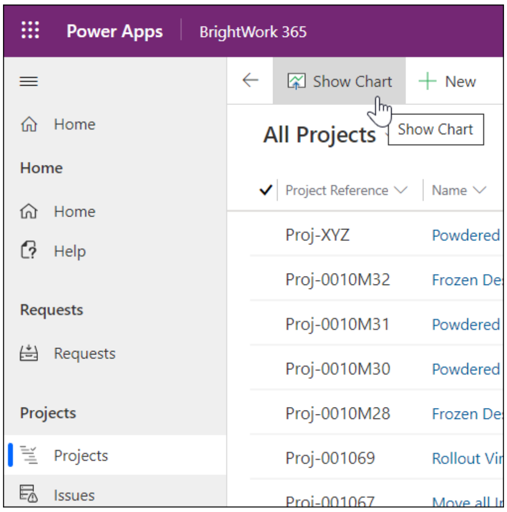


4. Confirm the activation.

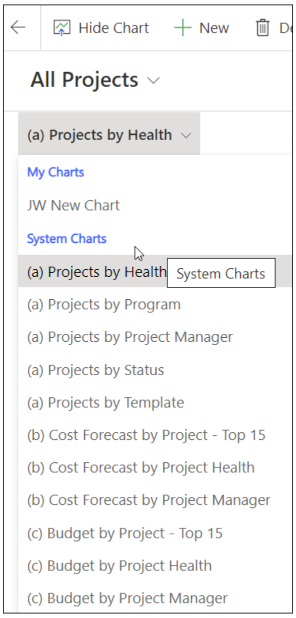
5. Return to the original view.

System Charts

The BrightWork 365 solution comes with a set of system charts accessible from the different Areas. To access the available charts click into a section on the Site Map and then click **Show Chart**.



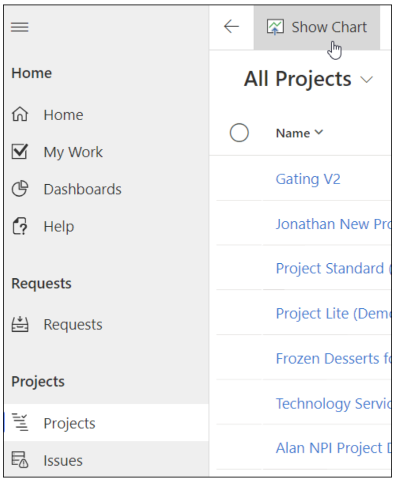
Click on the drop-down arrow to view the available System Chart options.



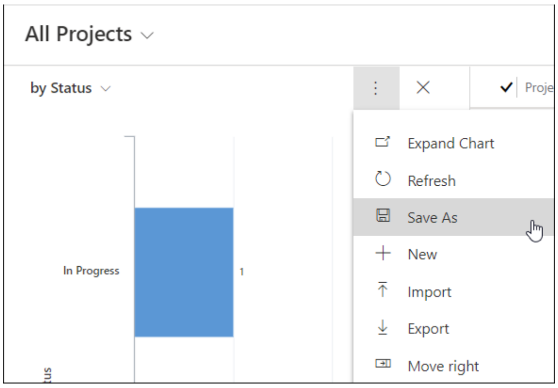
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Configure a Personal Chart

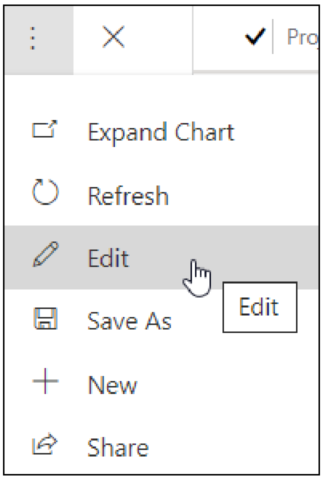
1. Click **Show Chart** at the top of a view's page.

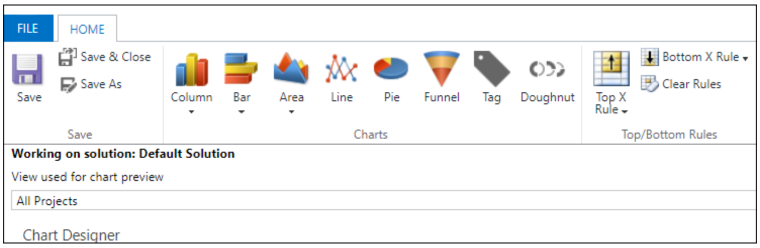


2. Click the ellipses next to an existing system chart you would like to use as the basis for your personal chart, choose **Save As** in the menu, fill in the fields, and click **Save**.



3. If you would like to make changes to your new personal chart, choose **Edit** in the menu and make necessary changes in the Chart Designer.

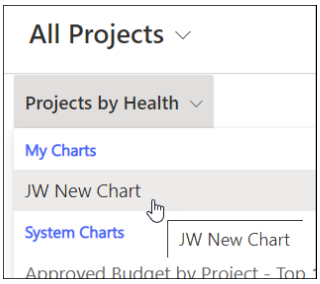




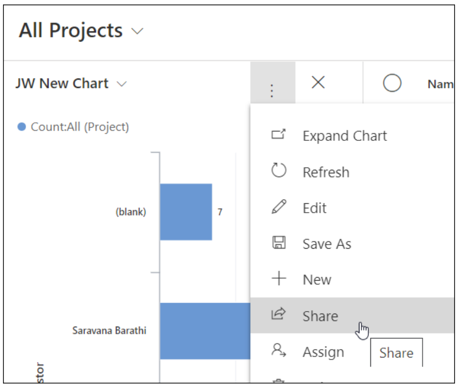
4. Save your changes.

Share a Personal Chart

1. Select the personal chart in the chart drop-down.



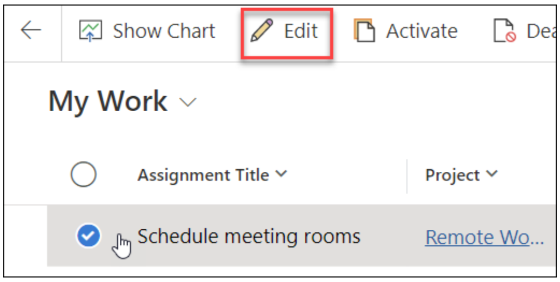
2. Click the ellipses next to the personal chart and click **Share**.



3. Add the user or team you would like to share the personal chart with.
4. Assign permissions and click **Share**.

Edit Items in a List View

1. Click to the left of the first position column to highlight the row.
2. Click **Edit** at the top of the page.



Microsoft Teams

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

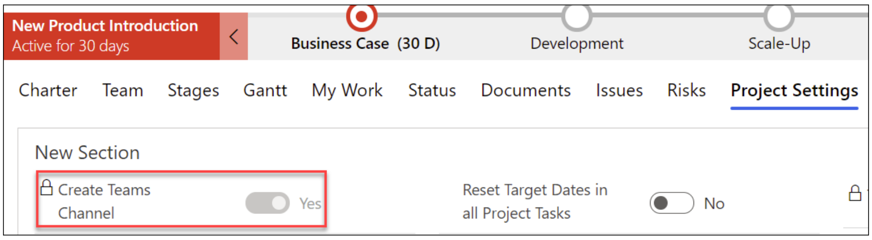
> **Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

With Microsoft Teams integration, BrightWork 365 provides powerful options for staying connected and keeping your projects organized. Each BrightWork 365 Program can have its own Microsoft Team, and each Project can have its own Microsoft Team Channel.

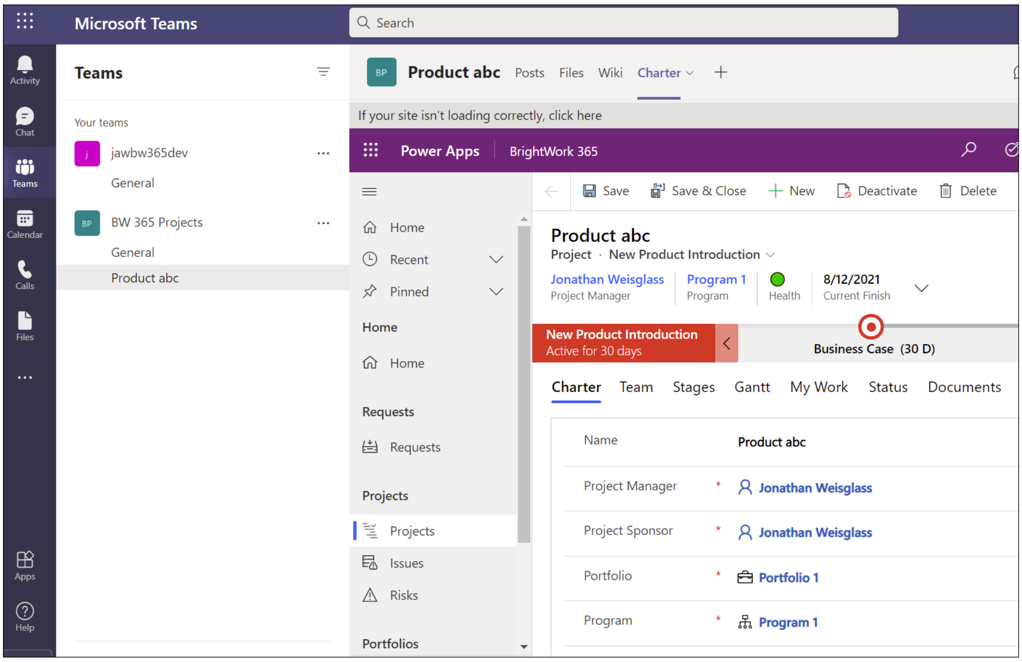
> **Note** In order for a Microsoft Teams channel to be created for a project, a Team must have been created previously for its associated program, and the program must have been configured to use the Team.

Create a Microsoft Teams Channel for a Project

1. In the project click on the **Project Settings** tab and switch the **Create Teams Channel** slider to **Yes**.



2. When the process has completed you will find the new project channel in Microsoft Teams in the Team associated with the project's program.



Tip See the Document Management article for information about using the channel File tab.

Approvals in Microsoft Teams

In addition to reviewing and acting on approval requests found in the automatically generated approval request emails, you can also do so within Microsoft Teams by installing Approvals in Microsoft Teams. See this article for more information: https://learn.microsoft.com/en-us/power-automate/teams/native-approvals-in-teams.

Microsoft Excel

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

View Excel Data in BrightWork 365

When Microsoft Excel is added to Power Apps, Excel becomes a data source. You can view the Excel table data within Power Apps. For more information see this View Excel Data article.

Open BrightWork 365 Table Data in Excel

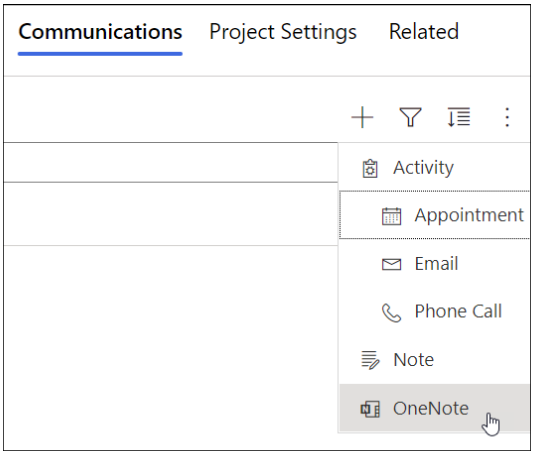
By opening table data in Microsoft Excel, you can quickly and easily view and edit data by using the Microsoft Power Apps Excel Add-in. For more information see this Microsoft Excel Table Data article.

Microsoft OneNote

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

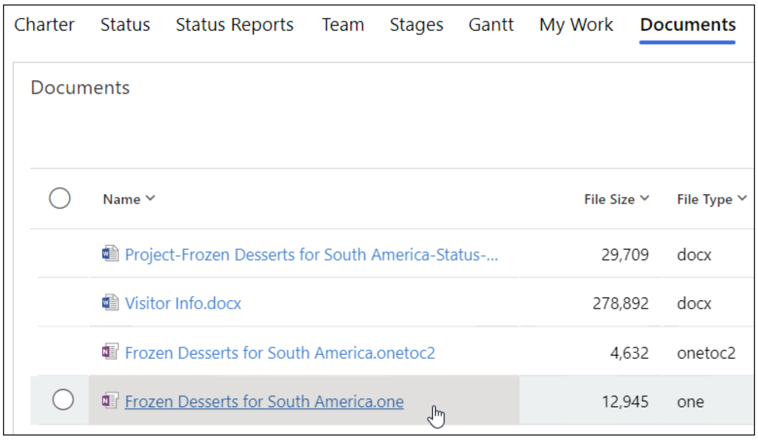
In addition to the standard note that can be added to a project in the Communications tab, you also have the option to create Microsoft OneNote notes that are saved as part of a OneNote notebook associated with a project.

To access the OneNote notebook after it's created, you can either click on the OneNote link displayed when you click the + sign in the Communications module:



Or,

click on the **.one** file within the **Documents** tab:



Search

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Power Apps Search

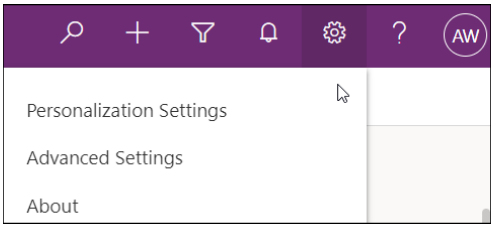
The Power Apps Search function finds records in a table that contain a string in one of their columns.

For more information see the Microsoft Search help article.

Configure User Security Roles

Configure Personal Options

To configure personal options such as time zone, and the formats for number, currency, time and date, click the settings wheel in the top right area of the BrightWork 365 app and choose **Personalization Settings**.



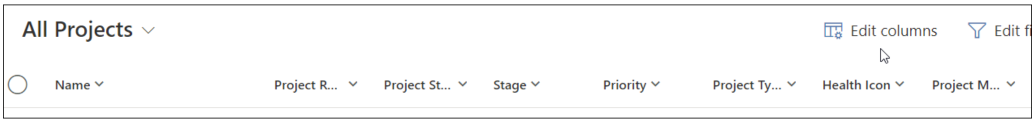
The personal time zone setting should be changed to avoid timing related issues including incorrect **Created** and **Modified** dates. To change the personal time zone setting:

1. Click into **Personalization Settings** as noted above.
2. Change the time zone and click **OK**.

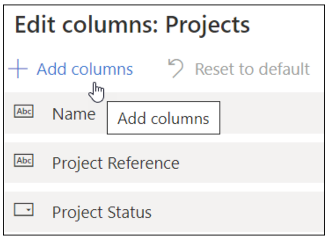
Configure a Personal View

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

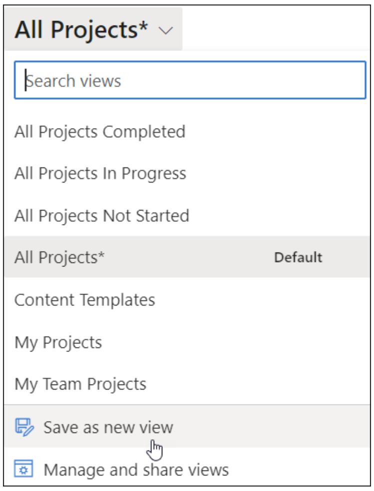
1. Within a view in the section of interest (e.g., Requests, Projects, Portfolios), click **Edit columns**.



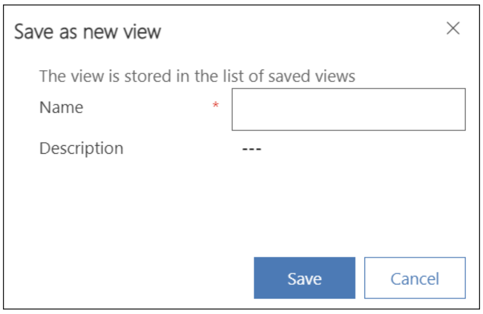
2. Edit the columns:
   1. Reorder or remove columns using the ellipses that appears when you hover over an existing column name and click **Apply**.
      Or,
   2. To add new columns to the view: **Click Add columns**, select the column to add, click **Close**, reorder the column as necessary, and click **Apply**.



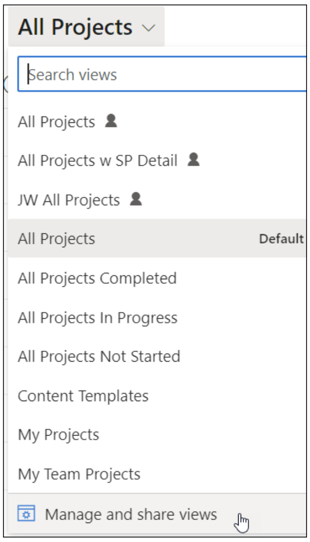
3. If the view is only meant to be temporary, the process is complete. If you would like to permanently save the view as a personal view:
   1. In the view selector drop-down click **Save as new view**.



   2. Fill in the fields and click **Save** to save the view as a personal view.



3. To share a personal view:
   1. In the view drop-down click **Manage and share views**.



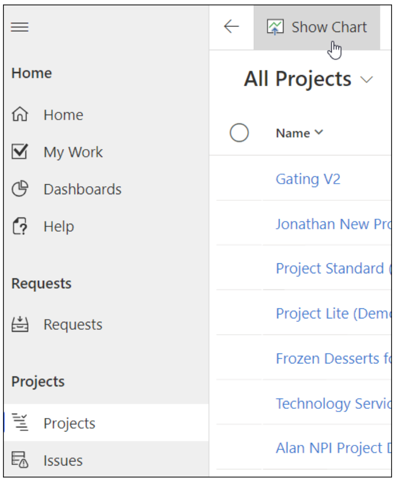
   2. Click on the ellipses next to the view you want to share and click **Share**.
   3. Search for and select the user or team you would like to share the personal view with.
   4. Assign permissions and click **Share**.

Configure Personal Charts

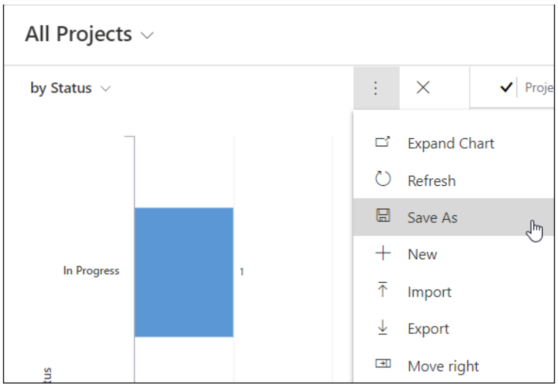
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Configure a Personal Chart

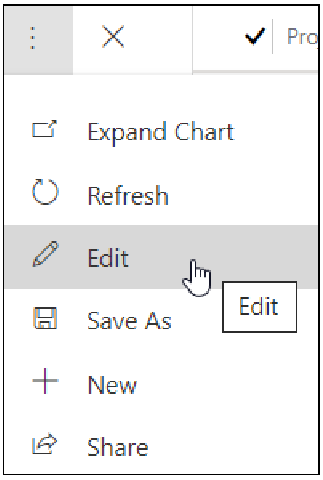
1. Click **Show Chart** at the top of a view's page.

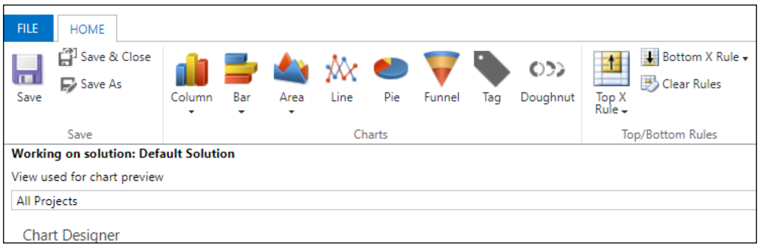


2. Click the ellipses next to an existing system chart you would like to use as the basis for your personal chart, choose **Save As** in the menu, fill in the fields, and click **Save**.



3. If you would like to make changes to your new personal chart, choose **Edit** in the menu and make necessary changes in the Chart Designer.

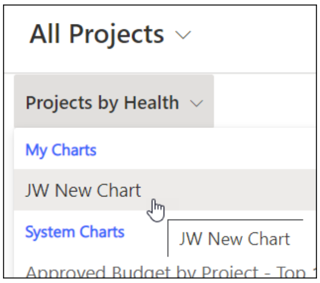




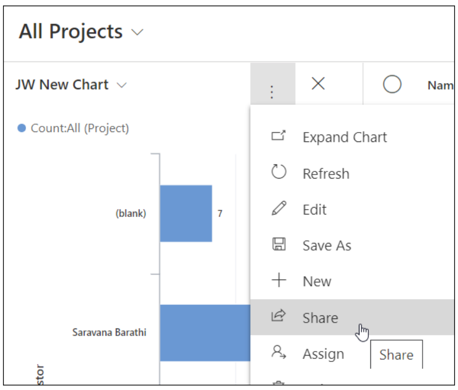
4. Save your changes.

Share a Personal Chart

1. Select the personal chart in the chart drop-down.



2. Click the ellipses next to the personal chart and click **Share**.



3. Add the user or team you would like to share the personal chart with.
4. Assign permissions and click **Share**.

Configure Form, Request & Project Templates

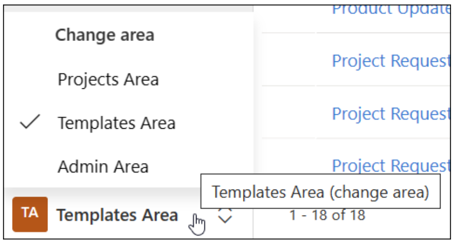
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

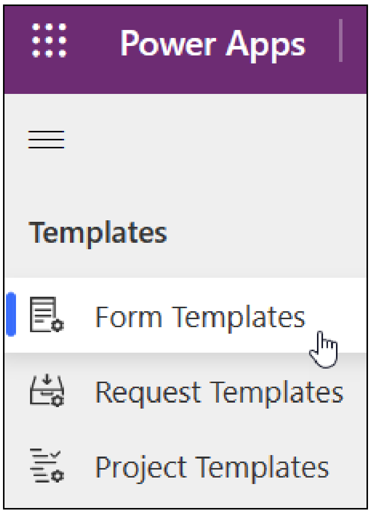
Note

- Users will need the BrightWork Template Editor security role to access the Templates Area and to configure templates.

BrightWork 365 Form Templates

Form Templates can be accessed by clicking into **Templates Area > Form Templates.**





Name

The name of the Form Template.

Table

The table in which the Form is located.

Templates Version

Version 1: Templates created in BrightWork 365 versions earlier than v1.6.

Version 2: Templates created in BrightWork 365 v1.6 and later.

Form GUID

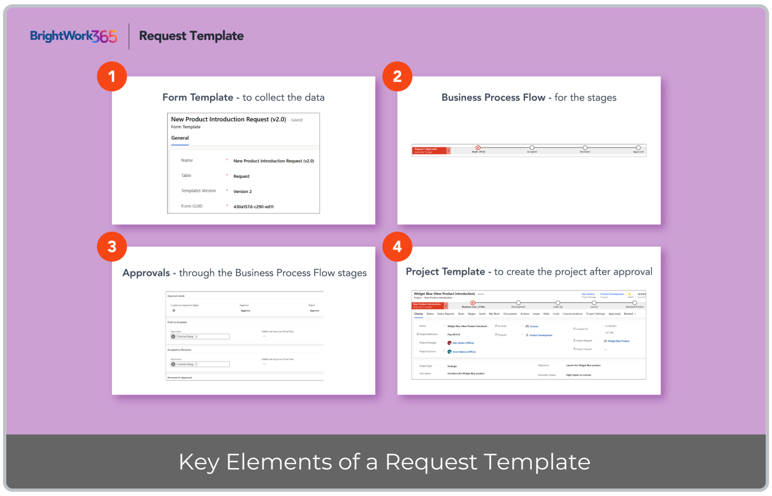
The GUID of the form, used mainly for customization reference purposes.

Changes made to the Form GUID will be immediately reflected in places the Form Template has been used.

Audit History Tab

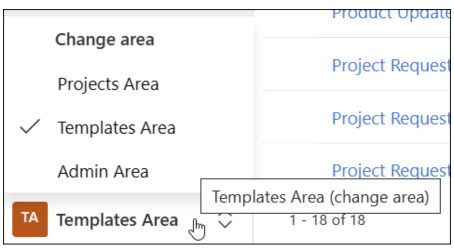
Tracks changes made to the Form Template, including who made the change, when the changes were made, old values and new values.

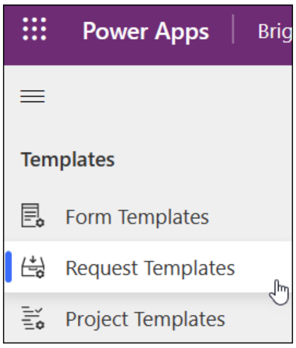
BrightWork 365 Request Templates



Your browser does not support HTML5 video.

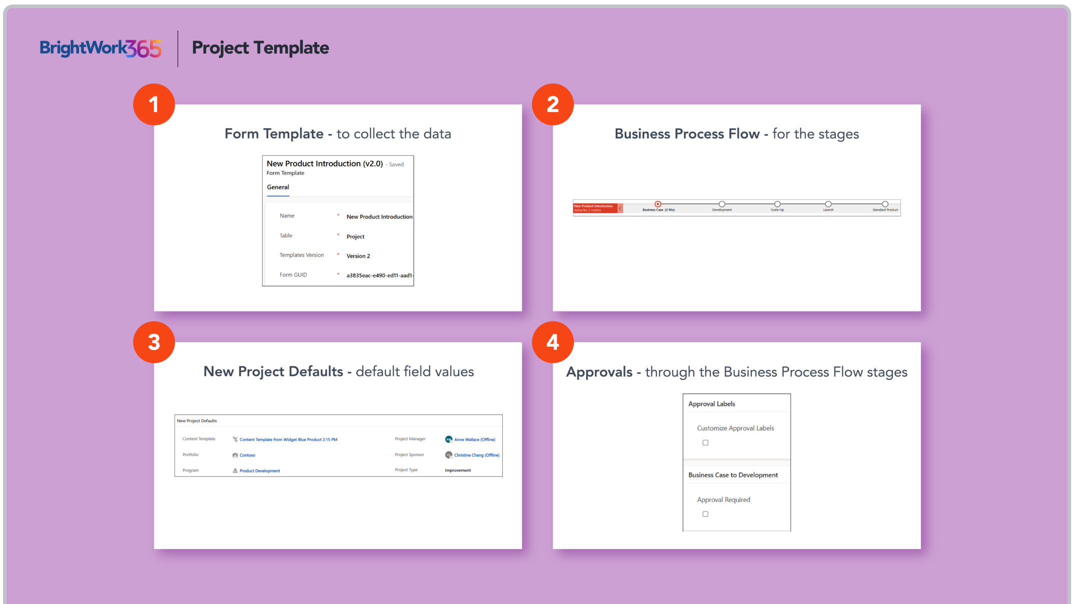
Request Templates can be accessed by clicking into **Templates Area > Request Templates.**





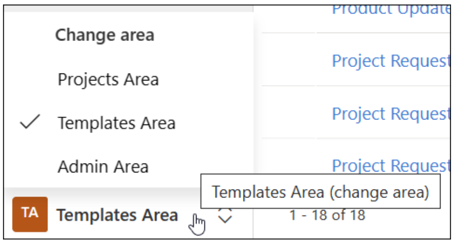
> **Caution**
> - The following configuration changes made to a Request Template will be immediately reflected in Requests that were previously created from the Template: Form Template, Business Process Flow (all requests that use it will be reset to the start), Reference Type, Approval Labels.
> - Ensure there are values in the **Approvals Coordinator** field in both Request and Project templates, and in all of the **New Project Defaults** fields in Project Templates, otherwise script errors will be produced when new requests or projects are created.

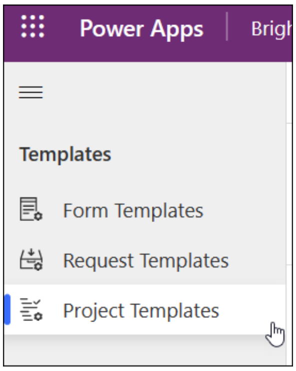
BrightWork 365 Project Templates



Key Elements of a Project Template

Project Templates can be accessed by clicking into **Templates Area > Project Templates.**





Caution

- If a Project Template is deleted, projects that were previously created from the Template will lose their project forms giving the false impression that project data has been deleted. There is a process available to recreate the Template and return the project forms with the data to the affected projects. Contact BrightWork Support or your Customer Success Partner for details.
- The following configuration changes made to a Project Template will be immediately reflected in Projects that were previously created from the Template: Form Template, Business Process Flow (all projects that use it will be reset to the start), Reference Type, Approval Labels.

Common Elements for Request Templates & Project Templates

Details Tab

Name

The name given to the Request or Project by the submitter

Description

The description of the template.

Requests or Projects

A count of Requests or Projects linked to the template. This enables users to gain valuable insights into the potential implications of their actions within the Templates Area.

Approvals Coordinator

The Approvals Coordinator helps to keep the approval process moving along. The Approvals Coordinator field is a lookup field and security role. This user must be given the BrightWork Approvals Coordinator security role in addition to being selected as the Approvals Coordinator in the Template.

The Approvals Coordinator does not make approval decisions, the first and subsequent approvals are done by the Approvers. The Approvals Coordinator does not move the process from one stage to the next via the Business Process Flow; this must be done via approvals completed by the nominated Approvers.

The Approvals Coordinator will be notified of the approval process progress through notifications.

Form Template

This is the Request or Project form that will load. Newer Request templates will only use Version 2 Form Templates.

Business Process Flow

The Business Process Flow that will load on the Request or Project form.

Project Template

The Project Template that will be used to create the project.

Available in Requests

If set to Yes, the Template will be available in Requests.

Reference Type

Choose Automatic or Manual reference numbering.

Create Copy

Create a copy of the Request Template or Project Template. Upon copy completion the user will be brought directly into the template copy.

Approval Labels

Approval labels can be configured at the individual template level, or globally through a business rule configuration.

Approval Timeout Behavior

The **Approval Timeout Behavior** setting for long running approvals alerts by email the Approvals Coordinator (a user chosen in the **Approvals Coordinator** field and also given the **BrightWork Approvals Coordinator** security role), and **Approvers #1**, that the 28-day approval time period limit was reached so that they may take necessary actions.

Within the **Details** Section of the relevant **Project Template**, the following **Approval Timeout Behavior** options are available:

- **Cancel and Notify**
- **Cancel, Restart and Notify**

Per Stage Options

Business Process Flow Stages are used to control the quantity of Stages and the Stage names in the approval sections. Additional stages beyond what is included out of the box can be added through Business Process Flow customization for up to a total of 10 stages.

Approvers

Any user with the BrightWork Team Member security role can be chosen as an Approver.

Additional Approval Email Text

Appears in the approval email sent to approvers.

Audit History Tab

Tracks changes made to the Templates, including who made the change, when the changes were made, old values and new values.

Elements of Request Templates Only

Details Tab

Auto-create Project

If Auto-create Project is set to **Yes**, an approved project will be created automatically at the conclusion of the approval process. If set to No, the Create Project button is displayed, and the Approvals Coordinator gets an email requesting that they set the Create Project button to Yes.

Per Stage Options

Approval Start

If Approval Start is Automatic, approval starts when the previous approval gets approved.

If Approval Start is Manual, the Approvals Coordinator gets notified that they have an approval to start when the previous approval gets approved, and the Start Approval button on the Approvals tab gets enabled.

Requests Tab

- View Requests that are associated with the Request Template to easily view which Requests would be impacted by changes made to the associated form. The Requests Tab includes many essential columns such as Request Status, Requestor, Submit Date, and Project.

Elements of Project Templates Only

Your browser does not support HTML5 video.

Details Tab

Available in Projects

If Available in Projects is set to **Yes**, the Project Template will be available in Projects.

Approval Required

If approval is not required for the stage, the project can be moved to the stage by a user with the BrightWork Project Manager or BrightWork Stage Mover security role. If approval is required for the stage, the project cannot be moved to the stage manually.

If approval is required for a stage, the Project Manager can click the **Send Stage for Approval** button in the **Project Settings** tab to start the approval process. When a stage is sent for approval, the project is made read-only and a related message will display on the Charter tab. The Business Process Flow will not be disabled, but users will be prevented from moving a stage forward or backward.

New Project Defaults

The following can be specified and will populate corresponding columns in the forms of new Requests and Projects:

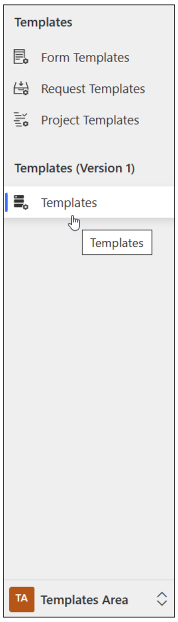
- Content Template
- Portfolio
- Program
- Project Manager
- Project Sponsor
- Project Type

Projects Tab

- View projects that are associated with the Project Template to easily view which projects would be impacted by changes made to the associated form. The Projects Tab includes many essential columns such as Project Status, Program, and Portfolio.

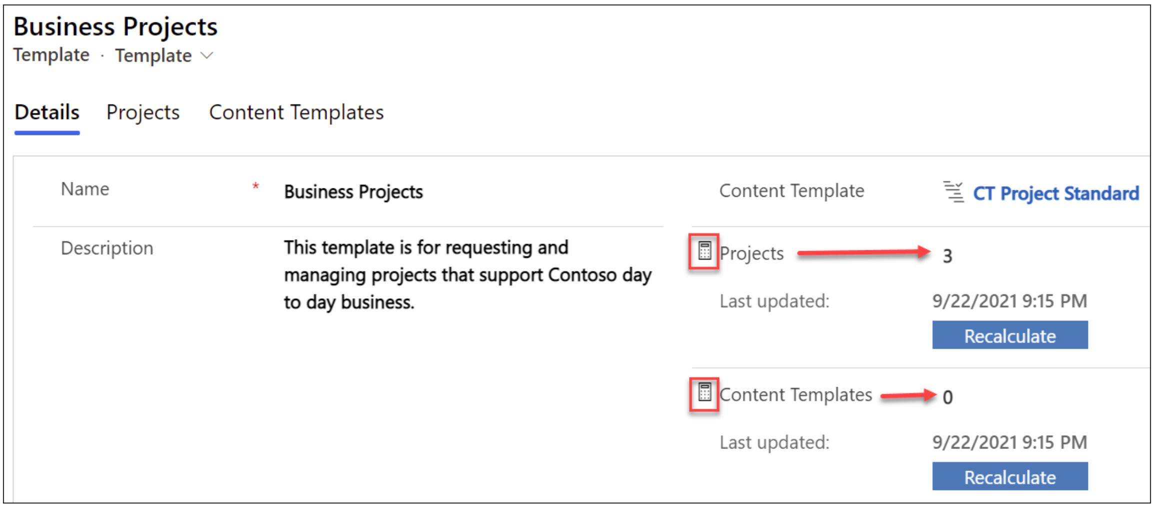
Templates (Version 1) - Templates from BrightWork 365 v1.5 and Earlier

Templates (Version 1) can be accessed by clicking into **Templates Area | Templates (Version 1) | Templates.**

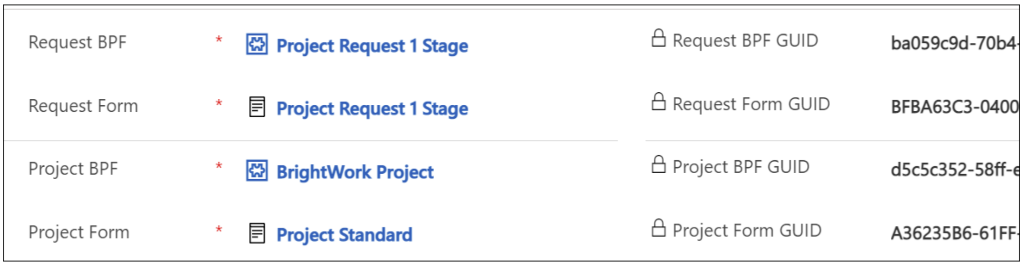


Details Tab

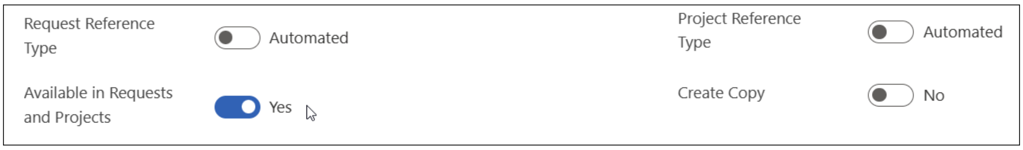
The Details screen displays template overview information. If the template is associated with a Content Template, the Content Template will be noted. You can also view the number of Projects and Content Templates that use the selected template by clicking the calculate icon and then the **Recalculate** button.



Further down the **Details** screen you can view the forms that are currently associated with the template, and by extension future projects that will be created from the template, as well as any projects that were previously created from the template.



The **Details** screen also allows you to choose if the template will be available to choose from in Requests, and in Projects for users who have the requisite permission to create projects without first submitting a request.



The **Details** screen also allows configuration of the **Request Reference Type** and **Project Reference Type**:

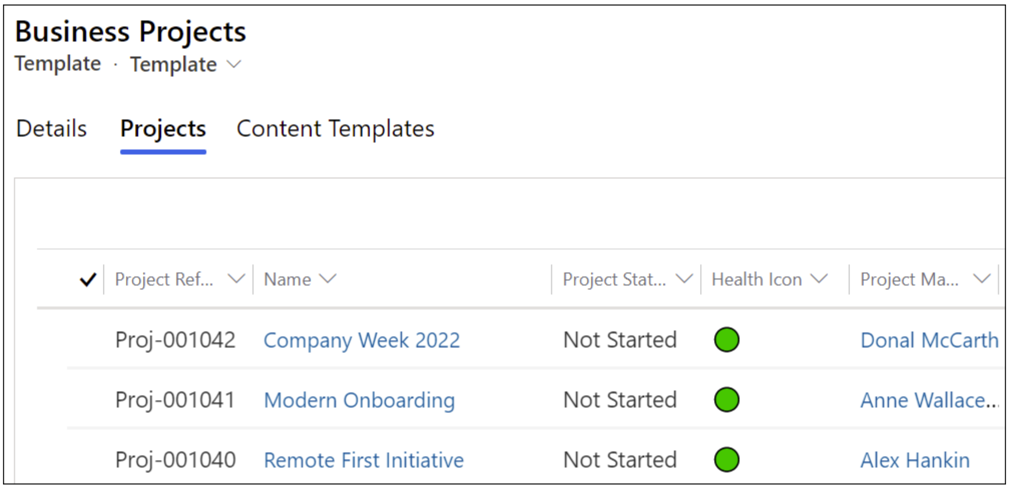
- If the **Reference Type** is set to **Manual**, the hidden Request Number and Project Number columns will appear on the forms. The text entered into this column takes the place of the standard autonumber column. When a project is created from a request, the Request Number is passed to the project's **Project Reference** column.
- If the **Reference Type** is set to **Automated**, the standard autonumber column is displayed. The autonumber reference column takes the form of Req-001121 or Proj-001121.
- **Note:** The autonumber reference is always applied and incremented in a request or a project, regardless of the option selected in the Template. New Content Templates will also increment the

number.

- If the **Reference Type** changes in the template, a flow will run to update the **Reference Type** in the Requests and Projects that were created from the template.
- If the template value changes in a request or a project, a workflow will run to update the **Reference Type** accordingly.

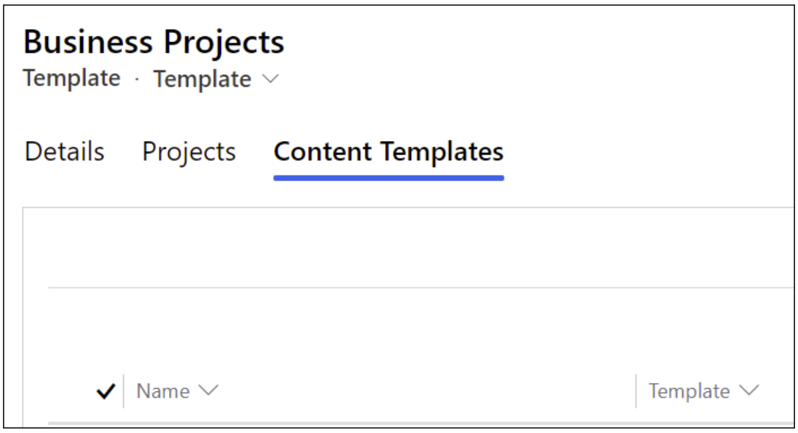
Projects

The **Projects** tab provides information about the projects that were created from the selected template.



Content Templates

The **Content Templates** tab displays any content templates that use the selected template. See the Content Template article for more information.

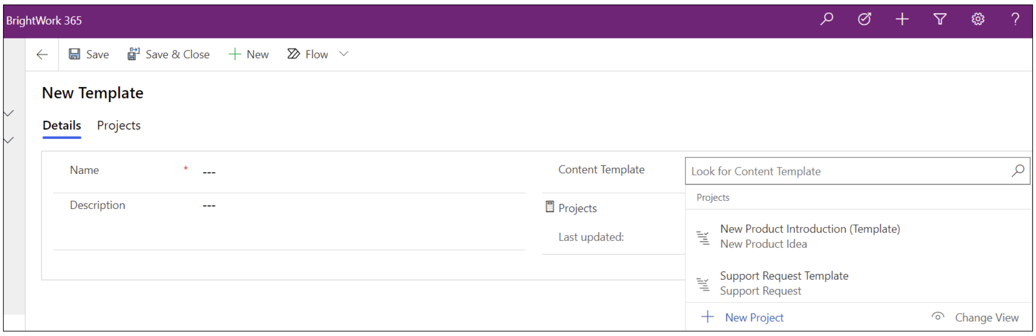


Create a Template from Scratch

> **Note** Only users with the BrightWork PMO Manager or BrightWork Template Editor

security role can create templates.

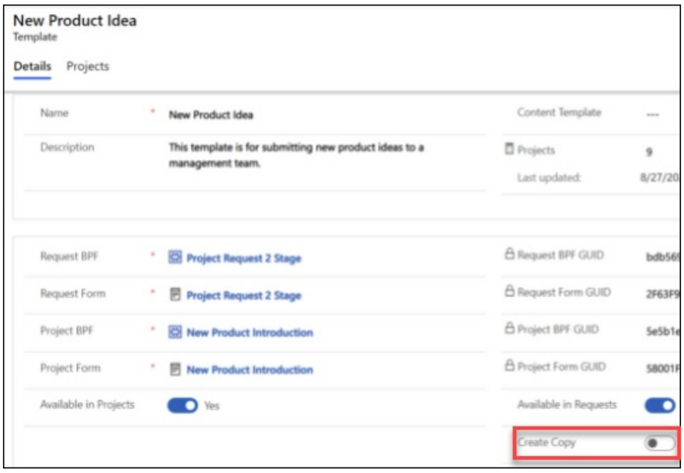
1. Use the Area switcher at the bottom left of the Nav to switch into the **Templates Area**, and then click into either **Request Templates** or **Project Templates**.
2. Click **+ New** and fill out the New Template form.
   The **Content Template** lookup field in the New Project Template form provides the option to associate an existing **Content Template** to the new project template. If this option is chosen, any projects created from the template will include the content from the referenced content template. See the Content Template article for more information.



3. **Save & Close** the form to finalize the new template.

Create a Template from a Copy of Another Template

1. Use the Area switcher at the bottom of the screen to switch into the **Templates Area**.
2. Click into an existing template and click the Create Copy button.



3. The Create Copy button triggers the Copy Template flow. This creates an exact copy of the template with the time of creation added to the template name to keep the template name unique.

Troubleshooting

Unable to Delete a Template

- Microsoft at times will present an error when you initiate the deletion of a template. The fix is to wait for the Microsoft weekend database clean up jobs to run in Microsoft Dynamics.

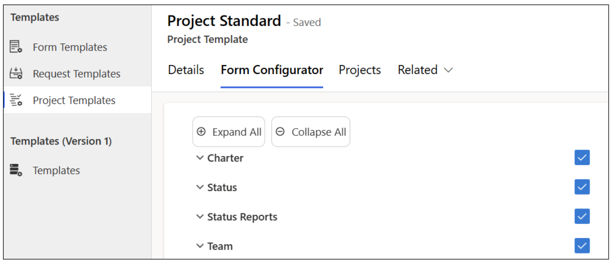
Form Configurator

Note
- This article applies to BrightWork 365 release September 2023 (v1.8).
- Also see article Form Configurator Best Practices.

Your browser does not support HTML5 video.

Introduction

The Form Configurator tool provides Template Editors with the ability to hide or show Project Template Form Tabs, Sections, and Columns with point and click ease. The Form Configurator allows users to adjust the amount of process in projects, and to better focus on the most relevant project elements. You can think of it as a map of the form that is behind the template.

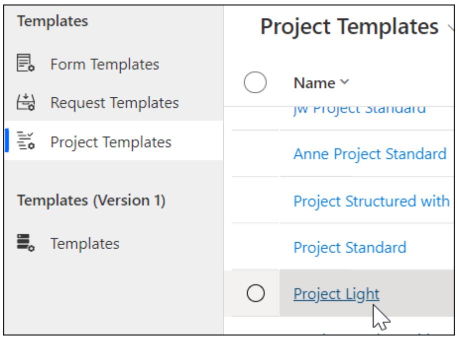


Note
- Users without the BrightWork PMO Manager or BrightWork Template Editor security role can read Form Configurator settings but cannot edit them.
- Form Configurator is not for use with Version 1 Templates.

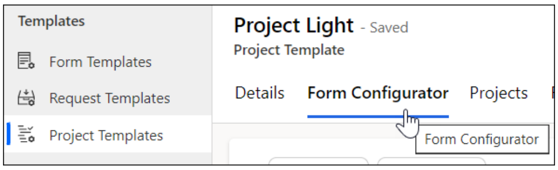
Caution Form Configurator changes will be reflected immediately in all projects created from the template.

Steps

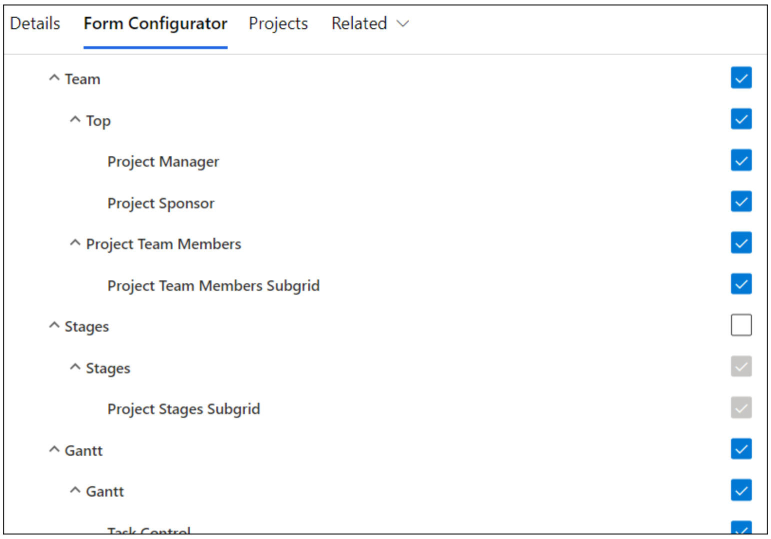
1. Click into **Templates Area > Project Templates**.
2. Click on the name of the Project Template you would like to configure.



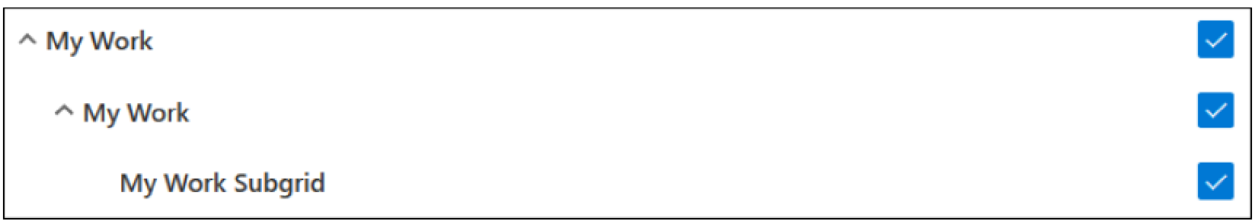
3. Click the **Form Configurator** tab.



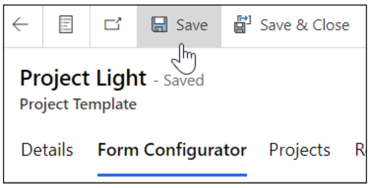
4. Check the box of any element you would like exposed and uncheck any element you would like hidden from projects that use the associated project template.



The first level (i.e., My Work) is the Tab element, the second level (i.e., My Work) is the Section element, and the third level (i.e., My Work Subgrid) is the Control element itself.



5. Click **Save** at the top of the page.



Note

- Although the Form Configurator allows for the **Charter** and **Status** tabs to be hidden, we advise against this.
- The Approvals and Project Settings tabs cannot be configured via the Form Configurator as these are permission restricted tabs that should not be altered in this manner.
- Form Configurator does not apply any changes to Content Templates.
- When columns are hidden the associated data is preserved.

Note

- If a component is hidden on the Form Editor, it will not be displayed on the Form Configurator, nor any projects associated with the form. This means that the Form Configurator can only be used to hide visible form components. This also means that components hidden via the Form Configurator will flash briefly when the form loads.
- If an element is unchecked (hidden) in the Form Configurator, but not hidden in the underlying form itself, subsequently publishing the form in the Power Platform form editor will not unhide that element in the Form Configurator.

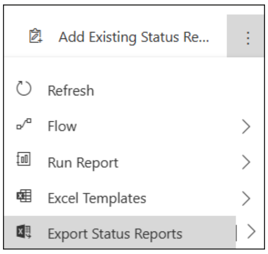
Tip If upon first use the Form Configurator does not hide the elements set to be hidden, perform a **Ctrl-F5** full browser refresh; if this does not fully resolve this, then clear the browser's cache.

Status Form Related Notes & Exceptions

Details regarding hiding Status related form elements via the Form Configurator:

- The **Status Report** form layout for columns (not sections) will match the project's **Status** tab layout as modified by the Form Configurator, so that if you remove/hide some columns (i.e., **Cost**, **Cost Comment**, etc.) these do not show in the **Status Report**, and the corresponding columns in the Status Report subgrid will have a blank value. The **Status Report Email** will also not include the items hidden from the **Status** tab in the project. Exceptions are noted below.
- If an individual status icon column (i.e., **Health**, **Cost**, etc.) is set to be hidden after it was already assigned a value (i.e., **Red**, **Yellow**, **Green**), the status icon will be hidden in the **Status Report** and the **Status Report Email**, but the status icon will not be hidden in the **Status Report** Subgrid. Customers who want to hide these status icons will need to clear the values in Excel Online (**Export Status Reports** > **Export Status Reports in Excel Online**); you can clear the status icon values for many projects at a time by performing the export on a custom view in the Projects

table that includes the relevant status icon columns.



- If the **Indicators** section of the **Status** tab is set to be hidden after a status icon in the section was already assigned a value (i.e., **Red**, **Yellow**, **Green**), the **Indicators** section will be hidden in the **Status Report** tab, but the status icons that are part of the **Indicators** section (i.e., **Health**, **Cost**, etc.) will not be hidden in the **Status Report Email**.

Form Configurator Best Practices

> **Note** This article applies to BrightWork 365 release September 2023 (v1.8).

Introduction

The Form Configurator tool provides users with the BrightWork PMO Manager or BrightWork Template Editor security role the ability to hide or show Project Template Form Tabs, Sections, and Columns with point and click ease. The Form Configurator allows users to adjust the amount of process in projects to better focus on the most relevant project elements.

With the Form Configurator, project forms can be delivered using the same underlying BrightWork 365 out-of-the-box form, and with a different Project Template instance per form.

> **Note** To use the Form Configurator, you will need either the BrightWork PMO Manager or BrightWork Template Editor security role.

Power Platform Form Editor Best Practices

This section covers all actions carried out in the Form Editor in the Power Platform Make Area. It is assumed that users accessing the Form Editor are familiar with the general principles of Power Platform Solution Customization.

General

With the inclusion of the Form Configurator in the form editing process, using Save As to work from a copy of the original form no longer needs to be used with out-of-the-box BrightWork 365 project forms; this is one of the main advantages of the Form Configurator in that it allows you to use BrightWork 365 out-of-the-box project forms to generate your own forms (see "BrightWork 365 Project Forms" below). You will get any updates to these forms in the future and avoid upgrade complications such as needing to recreate your custom forms using the latest standard forms or backfill the new features into your existing custom forms.

> **Note** If a component is hidden on the Form Editor, it will not be displayed on the Form Configurator. This means that the Form Configurator can only be used to hide visible form components. This also means that components hidden via the Form Configurator will flash briefly when the form loads.

An important detail to understand about forms is that they support merge changes. This means that you can make some changes to a form, and that form will still take updates in a BrightWork 365 solution update. However, if you make changes to a column in a section, it will add a solution layer to the section and this will prevent that section from getting any updates in an upgrade.

See How managed solutions are merged | Microsoft for more information.

Brightwork 365 Project Forms

BrightWork 365 includes three out-of-the-box project forms:

- BrightWork 365 Project (used in the Project Light, Project Standard and Project Structured Project Templates).
- New Product Introduction
- Product Update

You will typically use the "BrightWork 365 Project" form as the main form for delivering your generic Project Management Templates. The New Product Introduction Template and the Product Update Template are examples of using BrightWork 365 for more specific business processes.

Component Naming Conventions

A component is any element that you can add to a form in the Form Editor. It includes tabs, sections, columns and so on.

Components typically have a Label (the display title) and a Name (the underlying schema name).

Labels

Labels can be hidden on most components (apart from tabs) and do not have to be unique. Section labels that are hidden should give the user some indication of where the section is on the form, i.e., Top, Bottom etc.

Names

Component names are how form elements are addressed via code. Component names must be unique and should follow the convention below:

- Tabs: Use a combination of the tab name and the word tab, i.e., tab_charter, tab_statusreports – note the absence of a space between status and reports – this is a Power Platform convention.
- Sections: Include the tab name and the word section, i.e., tab_charter_section_top, tab_statusreports_section_statusreports.

- Columns: Column names are automatically assigned on column creation and can only be updated when adding the column (this should only need to be done if you are adding a column with a name that already exists).

Tabs

If you are certain that you do not want to use a particular tab at all, hide the tab in the Form Editor instead of the Form Configurator – this will prevent the unwanted tab from flashing as the form is loading.

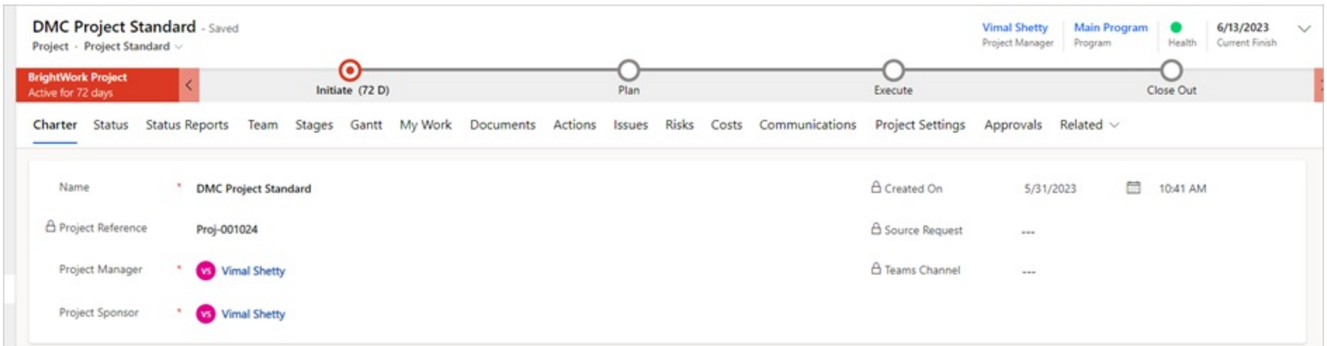
If you would like to add an element to the Project Settings tab, add it to a separate section on the tab. Do not make any changes to the out-of-box sections on this tab, or on the Approvals tab.

Sections

As a basic rule, do not make any changes to columns in out-of-the-box sections. Add your own new sections for custom columns, and if you would like to make section changes (e.g., hide some columns and rearrange the layout).

If you would like to make changes to the top and bottom sections on the Charter tab, we recommend you hide them, and recreate them as your own sections. Hiding one of our sections does not prevent the section from getting updates during an upgrade.

Custom sections should be laid out with the multiple end-scenario designs in mind. For example, avoid a scenario like the below where the columns in the middle of a 3-column section are hidden.



Subgrids and Other Components

Subgrids and other components, such as the Timeline, should be added to a section of their own.

Columns

Columns in our out-of-the-box sections should not be touched, as this will cause the section containing the column to take a solution layer.

If you would like to change the display name of a BrightWork column, you should first change the display name in the column itself in the solution editor, create a new section, and then add the column there.

While changing the display name of the underlying column will not change it on the form, if it already exists on the form, it will change it in views. Therefore for best practice, if the column already exists in one of your sections, change the underlying name of the column, remove it from the custom section and then add it back. Do not change the label of a column in one of the out-of-the-box sections.

Custom columns are added as before but should be added to your own custom sections.

Best Practice FAQs

Q: How should a custom column get added?

A: All new custom columns should be added to new sections.

Q: How should a new column be added to the top section of the Charter?

A: Replicate the top section and add the column to the new section. Hide the out-of-the-box top section with the Form Configurator.

Q: How should an existing column be hidden?

A: Use the Form Configurator to hide the column.

Q: How should the labels/names of a couple of the existing columns be changed?

A: Replicate the relevant section and change the label there. Hide the out-of-the-box section on the Form Editor.

Q: How should the layout of the columns in an existing section be changed?

A: Replicate the relevant section and make the changes there. Hide the out-of-the-box section on the Form Editor.

Q: How should a column be moved to a different tab?

A: Hide the column in its current location using the Form Configurator. Add the column to a new section in the different tab.

Q: How should different templates for marketing / finance / operations - with different custom columns and different Business Process Flows for each be created?

A: Create a Project Template for each instance.

Q: What are the implications of saving a copy of the BrightWork 365 Project form?

A: The form will be orphaned and will not get updates made to the original form in subsequent releases.

Q: What are the implications of changing an existing column on a form using the make app?

A: The section the column is in will have an unmanaged layer and will not get updates made to the section in the original form in subsequent releases.

Q: What are the implications of changing an existing section on a form using the make app?

A: The section will have an unmanaged layer and will not get updates made to the section in the original form in subsequent releases.

Change Project Template

Currently it is not possible to change the Project Template on a live project. If you need to do this, follow these steps:

1. Create a personal view with just a small number of columns (no calculated ones).
2. In your personal view include the Project Template and Project Templates columns.
3. Open the view in Excel Online and paste the text name of the desired Project Template into both columns.
4. When you reopen the project, click Ctrl-F5 to refresh it.

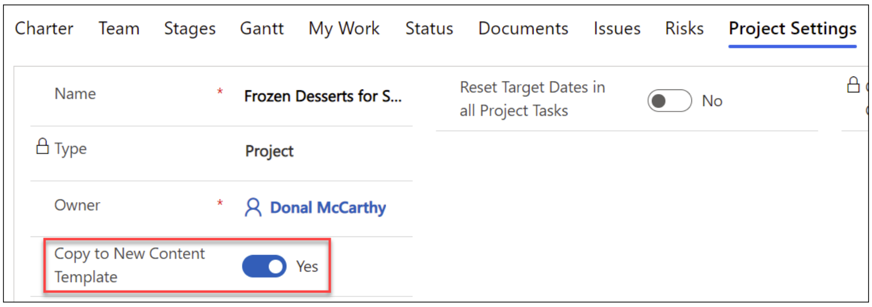
Create a Content Template

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

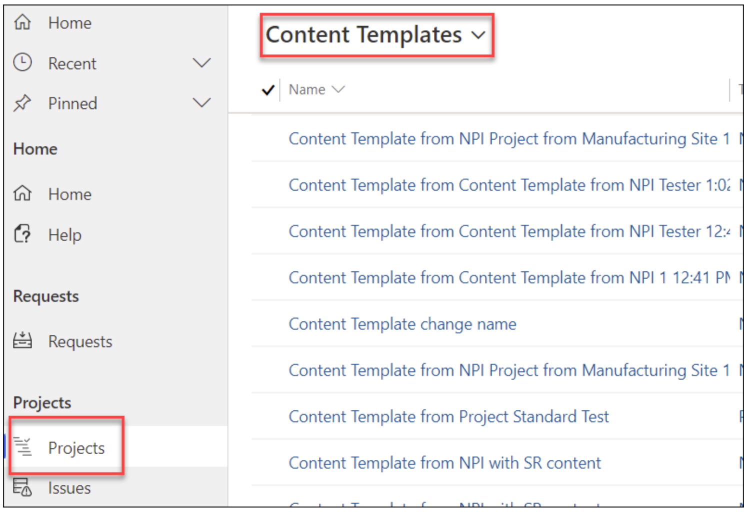
Create a Content Template from an Existing Project

Users have the option to create a special type of template from an existing project that will include the content from that project - these templates are called **Content Templates**. The content copied over to the template will include content from the tabs Stages, Deliverables, Tasks, Issues, Risks, and Project Settings. This is a great way to give your project colleagues a head start creating projects using best practice templates from other similar projects.

1. In the project's **Project Settings** section, set the **Copy to New Content Template** slider to **Yes**, and click **Save**.



You will find the new template in the **Content Templates view** in the **Projects Area** once the associated workflow has run. When the content template is ready to be used, the user that initiated the creation process will receive an email.



2. The content template itself will not be used to create new projects - new projects will need to be created from a Project Template that is associated with the Content Template. To create the new project template that can then be used to create new projects, continue with the instructions for

creating templates in the template configuration article.

Note

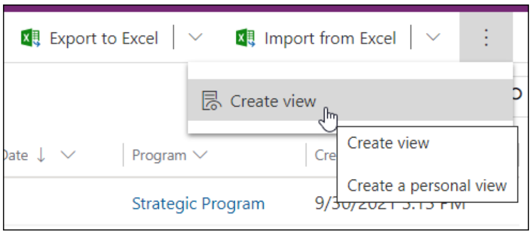
- Work assignments for Gantt Tasks, Issues, Risks, etc., are not copied over as part of the content template creation process. However, Gantt Task assignments can be manually added to content templates after they have been created.
- Gantt Chart task dependency offsets are not saved to content templates.
- Although Content Templates will include any custom Form Tabs, Sections, and Columns, data from these custom elements will not be passed on to any newly created projects that are associated with the Content Template.

Caution If you delete a content template from the Projects section of the Projects Area, the content template will also be removed from any templates that are referencing it.

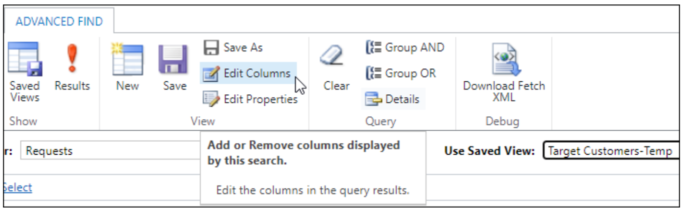
Bulk Copy Data Between Columns

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

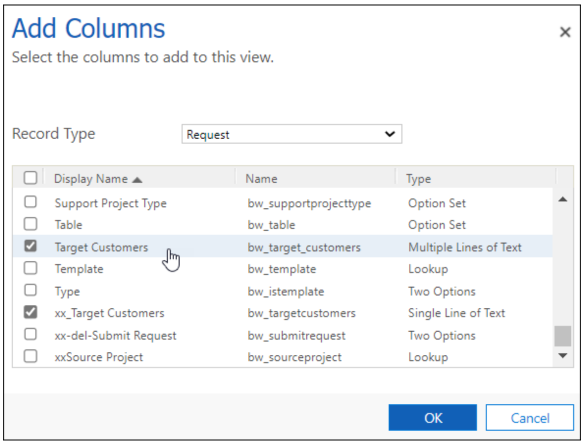
1. In the area of interest (e.g., Requests, Projects) choose to Create a personal view.



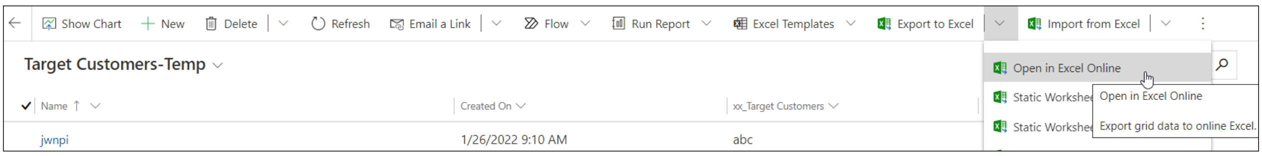
2. In the personal view configuration screen click Edit Columns.



3. Choose the relevant Record Type and add the two columns required for the data transfer.



4. Click OK and save and close the view.
5. Switch to your new personal view.
6. Click Open in Excel Online.



7. In Excel copy the data from one column to the other as you would typically do in a spreadsheet.
8. Save the Excel file, click Track Progress, wait for the Excel Online import process to complete and close the import screen.
9. Return to your custom view, refresh the screen and confirm that the column data has been

successfully copied into the other column.

Edit Choices in a Managed Solution

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note

- This article is for BrightWork 365 Release February 2023 (v1.6) and newer.
- The System Customizer or System Administrator security role is required in the relevant environment to edit choices.
- If you currently have a custom solution, and a flow or piece of code uses values in a choice field (as opposed to the choices just being used for display or categorization) in that solution, then the recommendation for that specific choice field is to customize it using a custom solution rather than the alternative method described here.

Caution Only the following fields (as well as any custom choices you may have added) should be edited with the method described in this article - these are the only choices you should edit with this method: Account Type, Action Type, Cost Category, Cost Type, Item Type (Issue Type), Project Type, Support Project Type.

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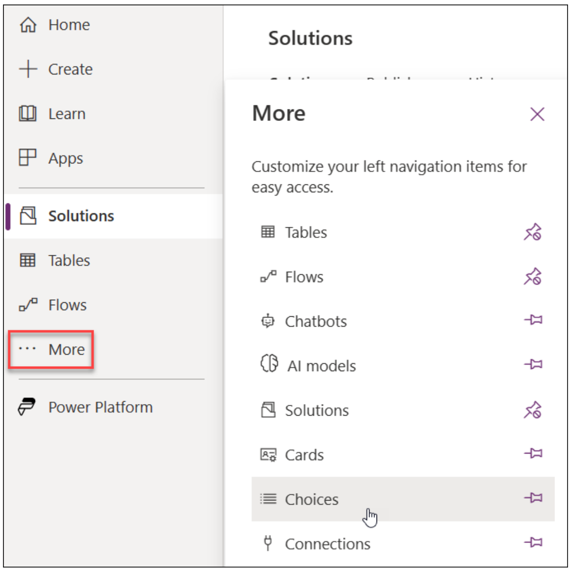
Introduction

When appropriate (see the notes above), editing choices in a managed solution at the environment level is an easier and less time-consuming process than doing so through the unmanaged solution customization process. This simpler process is possible for the global choices listed above. Specifically, customers can:

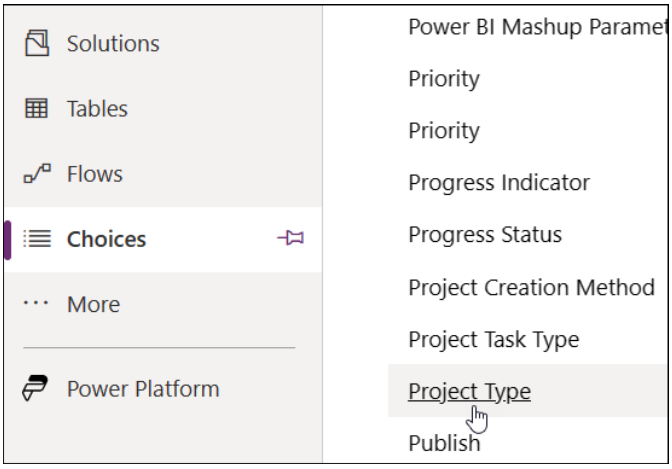
- Add choice values
- Edit existing choice values (this propagates to all records with the previous value)
- Delete choice values (this will cause issues if there are any business rules or code referencing the choice)
- Change choice colors
- Reorder choices
- It is not recommended to change choice numbers

Editing Choices

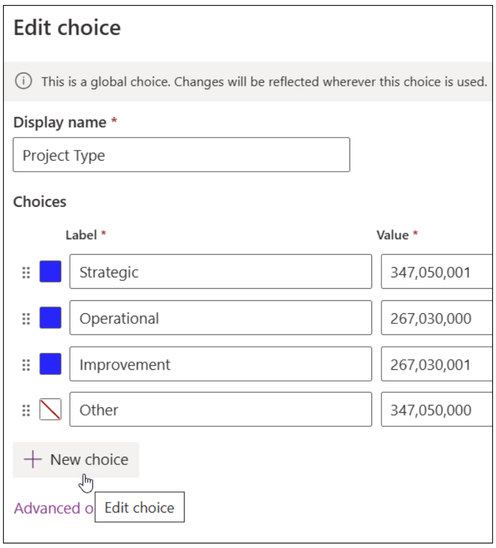
1. Login to https://make.powerapps.com and select the BrightWork 365 environment from the environment switcher in the top-right.
2. Click **More > Choices** on the nav.



3. Click one of the eligible choices listed in the Caution note above.



4. Make your desired changes. For example, you can add a new choice value or edit the label of an existing value and arrange the vertical order of the fields as necessary; do not make any changes to the entries in the **Value** field.



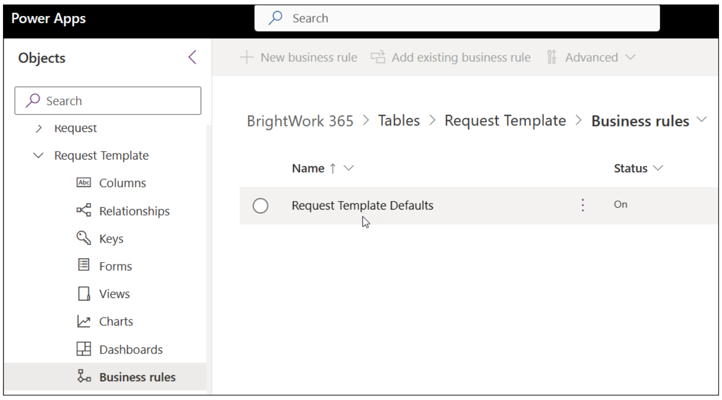
5. Click **Save**.

Configure Default Template Approval Labels

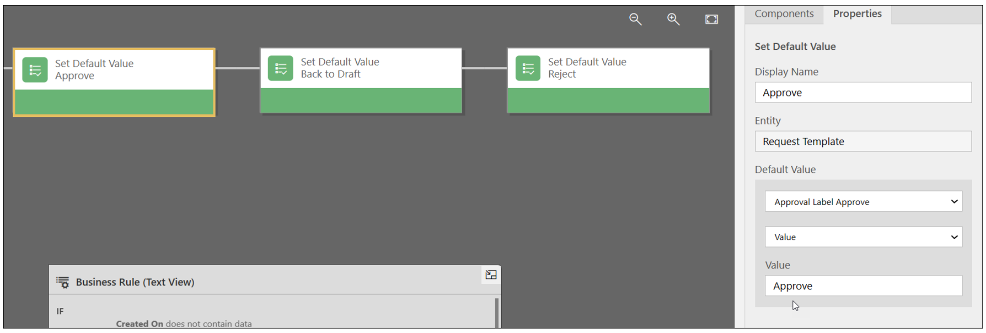
> **Note**
>
> - This article is for BrightWork 365 Release February 2023 (v1.6) and newer.
> - These configuration changes can be done in the BrightWork 365 managed solution.
> - The BrightWork Template Editor security role is required to make these configuration changes.

Request Templates Default Approval Labels

1. Login to the solutions page for the BrightWork 365 environment.
2. Click **Solutions** and enter the BrightWork 365 solution.
3. Expand **Tables** and the **Request Template** table, click **Business rules**, and open the **Request Template Defaults** business rule.



4. Deactivate the rule.
5. Click the **Set Default Value Approve**, **Set Default Value Back to Draft**, or the **Set Default Value Reject** action to change the default value of any of those actions.

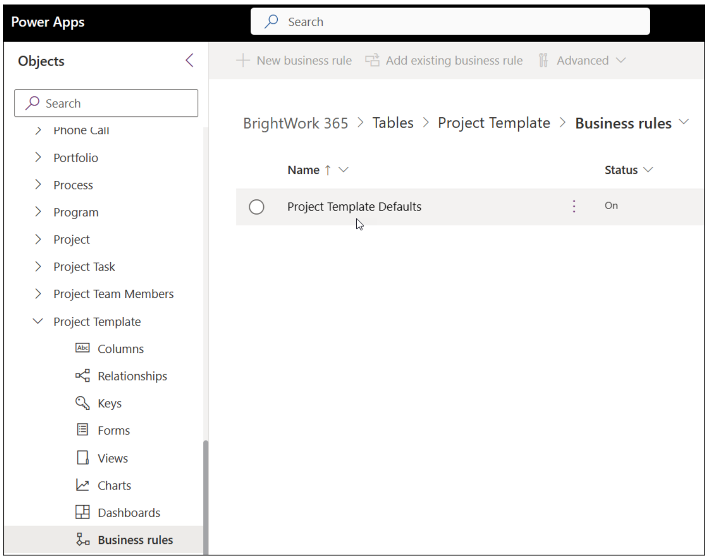


6. Click **Apply**.
7. Save and activate the rule.
8. Close the rule.

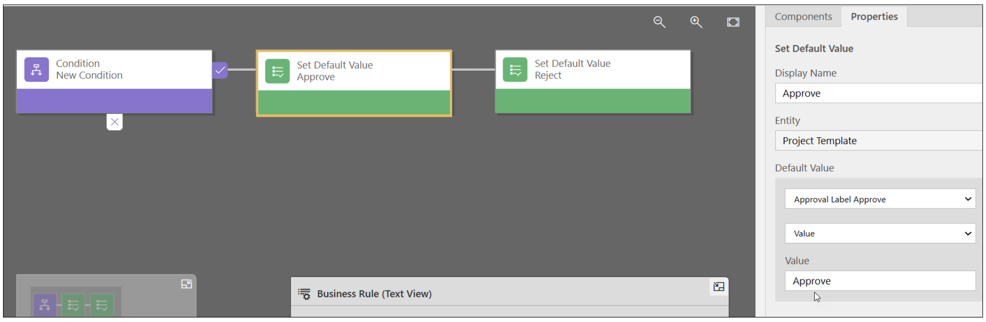
Project Templates Default Approval Labels

1. Login to the solutions page for the BrightWork 365 environment.
2. Click **Solutions** and enter the BrightWork 365 solution.

3. Expand **Tables** and the **Project Template** table, click **Business rules**, and open the **Project Template Defaults** business rule.



4. Deactivate the rule.
5. Click the **Set Default Value Approve** or **Set Default Value Reject** action to change the default value of any of those actions.



6. Click **Apply**.
7. Save and activate the rule.
8. Close the rule.

Read First: Customization Notes

Note

- This article is for BrightWork 365 Release February 2023 (v1.6) and newer.
- Beginning with release September 2023 (v1.8) BrightWork 365 also includes the Form Configurator for a relatively easy method for hiding and showing Project Template Form Tabs, Sections, and Columns.

Introduction to Solution Customization

Solution customization primarily refers to any change to a solution object that can be moved within a custom solution to another Power Platform environment. These changes are typically done in the Make area of Power Apps.

While there are many customization options available within a Microsoft 365 Power Platform environment, there are guidelines that are recommended when working with a managed solution such as BrightWork 365, mainly to prevent issues when upgrading. Our guidelines will help you understand the recommended approach to take if you decide to make changes to objects in the out of the box solution. You also have the option to reach out to your assigned Customer Success Partner or support365@brightwork.com with upgrade concerns you might have.

Caution

- We strongly recommend working alongside a BrightWork Customer Success Partner to customize objects within BrightWork 365. See the Deployment section for more information.
- BrightWork consulting assistance for remediating issues caused by customer made customizations will be billable.

Managed and Unmanaged Solutions

The Microsoft Power Platform uses solutions to implement an application lifecycle management process. There are two types of solutions: unmanaged and managed.

Unmanaged solutions are primarily used in development environments when changes are still being made to an application. With unmanaged solutions you can:

- Add and remove components.
- Export the solution.

Managed solutions such as BrightWork 365 are fully developed and are intended to be distributed, installed and used for production purposes. The following are attributes of managed solutions:

- Components cannot be added or removed.
- Managed solutions cannot be exported.

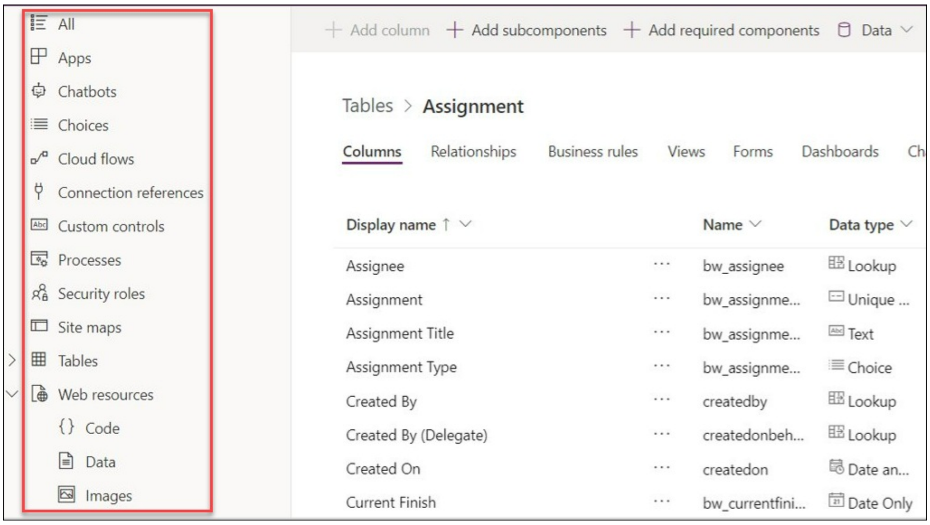
Although you can make certain *configuration* changes in a managed solution as noted in the Configuration Knowledge Base category, component *customization* must be done in an unmanaged solution.

> **Caution** Customizations should only be made in an unmanaged solution, not in a managed solution. For additional information contact your Customer Success Partner.

For more information from Microsoft see Solution Concepts.

BrightWork 365 Solution Objects

The solution editor screen displays a list of available solution objects.



Recommended Process for Object Customization

> **Note**
> - You will need to be at least a Power Platform System Administrator to be able to perform object customization.
> - Content data is not copied into environments when importing solutions.

> **Caution**
> - We advise that you follow Microsoft's recommendation to have separate Dev and Test Power

Platform environments, in addition to your Production environment. See Microsoft article Create Environment.

- If your solution has a customized object (e.g., form) and a BrightWork 365 upgrade contains changes to the original out of the box version of that object, the new changes will need to be manually applied to your custom object.
- It is important to be aware of the implications of hiding or deleting key fields and the effects this can have on other areas of the app, for example the effects of hiding the Issue Status column on various views, charts and Power BI. Contact your Customer Success Partner for more information.
- We recommend not making any changes to the "Default" solution in your BrightWork 365 environment as this will likely cause technical issues.

First Time Setup Process for Object Customization

1. Install the same version of BrightWork 365 that is installed in your Power Platform Production environment as a managed solution in your **Dev and Test environments**.
2. In the **Dev environment**, create a clean unmanaged second solution. See Microsoft article Create Solution. This unmanaged solution is necessary because objects should not be modified in a managed solution. It is also not recommended to create an unmanaged solution in a Production environment. See Microsoft article Understand How Managed Solutions are Merged.

Ongoing Process for Object Customization

In your Dev environment, in the clean unmanaged solution previously created:

1. Add new objects (i.e., a Form) and any specific existing BrightWork 365 objects requiring modification - do not choose **All Components** when adding components and add only those specific elements needed for your customization in order to keep the unmanaged solution as clean as possible.
2. Modify the added components as necessary - see the various Customization Knowledge Base articles.
3. Export your modified solution as a managed solution. See https://learn.microsoft.com/en-us/power-apps/maker/data-platform/export-solutions.

Import into your Test environment:

1. Back up the current BrightWork 365 solution.
2. Import the managed solution that contains your modifications using the same account that was used to install BrightWork 365; this new imported managed solution will be layered with the original installed BrightWork 365 managed solution.
   Note: Only users with a Power Apps Premium/Power Apps per user license should perform a solution import.
3. Import any new custom Forms and Templates. See section "Import Forms and Templates" in the BrightWork 365 Install Guide.pdf 📎
4. Test the functionality of the BrightWork 365 app with the modified objects before proceeding to your Production environment.

Import into your Production environment:

1. Back up the current BrightWork 365 solution.
2. Import the managed solution that contains your modifications using the same account that was used to install BrightWork 365. This new imported managed solution will be layered with the original installed BrightWork 365 managed solution.
   Note: Only users with a Power Apps Premium/Power Apps per user license should perform a solution import.
3. Import any new custom forms and templates. See section "Import Forms and Templates" in the BrightWork 365 Install Guide.pdf 📎

Add a New Form Tab

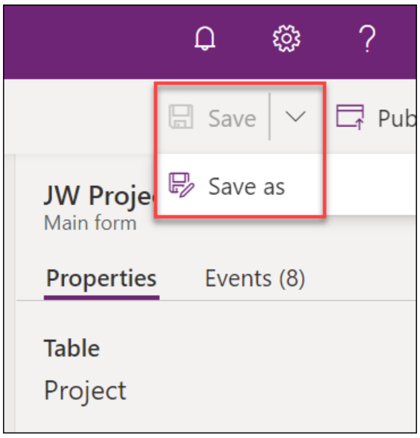
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Caution

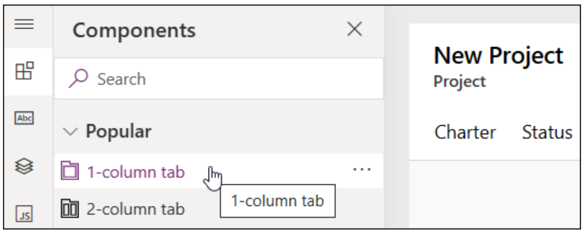
- Be sure to first read the Customization Notes article. If you are using BrightWork 365 release September 2023 (v1.8) or newer, also first read Form Configurator.
- If your solution has a custom form and a BrightWork 365 upgrade contains changes to the original out of the box version of that form, the new upgrade changes will need to be manually applied to your custom form.
- These instructions are assuming a first-time customization of a form. If you are now editing a previously customized form, alter these instructions as necessary.

Add a New Form Tab

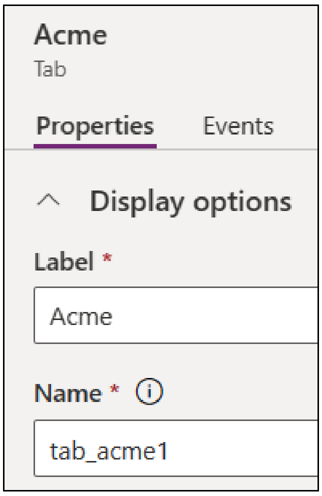
1. Navigate to the **unmanaged solution in your dev environment** that you use for customizations.
2. In the Power Apps solution editor add the existing table that contains the form to be modified, e.g., Project.
3. Add the relevant original out of the box form that will be used as the basis for your new form.
4. Load the original form.
5. Using **Save as**, save the original form as a new form that will be used for modification; do not edit the original form.



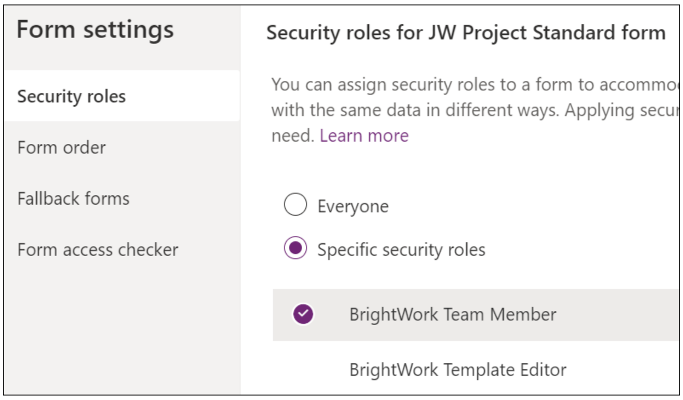
6. Copy the GUID of your modified form. The form GUID can be obtained from the URL of the Power Platform edit page of the form. See this example of the form GUID (the highlighted portion only): https://make.preview.powerapps.com/e/123456abcd/entity/bw_request/form/edit/65432gfiul-00987f1?source=powerappsportal.
7. Click **Component**.
8. Click on the existing tab that you would like to be to the left of your new tab.
9. On the **Components** list select the tab style you'd like to add to your form.



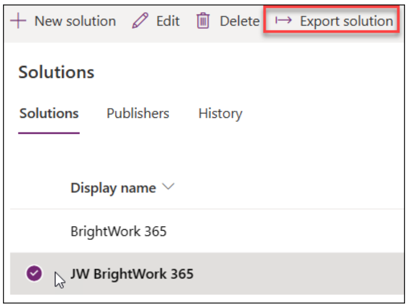
10. Click on the new tab you just created and edit the tab's **Label** value and **Name** value.



11. Modify the new tab's content as needed, e.g., add fields, add sections, etc.
12. In **Form settings** at the top of the editor, change the **Security roles** of the form to include at least the roles of **BrightWork Team Member**, **System Administrator**, and **System Customizer**. Click **Save and publish**.

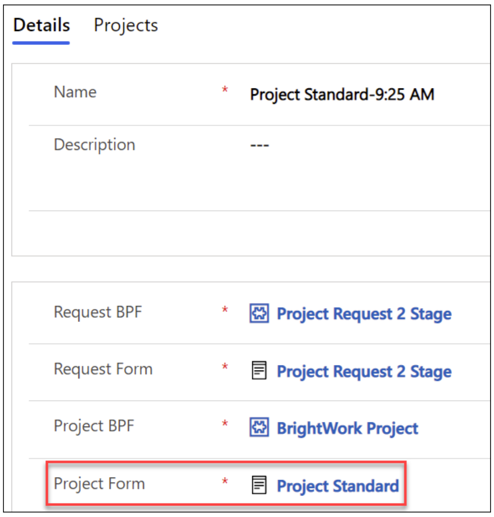


13. **Save** the form, **Publish** the form, and exit to the solution screen.
14. Remove the original form that was previously copied to your custom unmanaged solution (the unmanaged solution should be as clean as possible) and exit to the environment screen.
15. Export your customized unmanaged solution; be sure to **Publish** the form as part of the export process.



16. Import the managed solution into the relevant environment as described in the Customization Notes article.
Note: We generally recommend skipping the check for issues during export since you will be presented with many non-problematic issues that can be ignored.
17. In the BrightWork 365 app, use the Area switcher at the bottom left of the screen to switch to the **Templates area** (for BrightWork versions earlier than v1.6, switch to **Admin area > Forms**). In the **Form Templates** list add a new row by clicking **+ New** at the top of the page and add all required fields including the previously copied Form GUID.

The newly created form can then be chosen in a template's **Details** tab. The associated Form GUID will automatically populate after a short wait.



Add a New Form Section

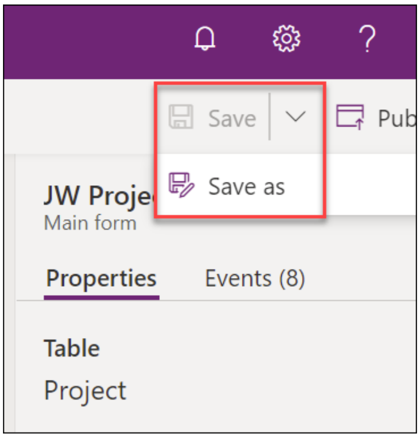
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Caution

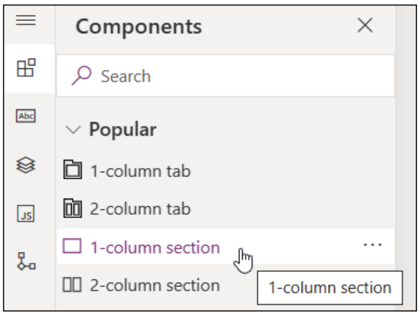
- Be sure to first read the Customization Notes article. If you are using BrightWork 365 release September 2023 (v1.8) or newer, also first read Form Configurator.
- If your solution has a custom form and a BrightWork 365 upgrade contains changes to the original out of the box version of that form, the new upgrade changes will need to be manually applied to your custom form.
- We recommend adding a new form section of your own to a form rather than editing an out of the box form section.
- These instructions are assuming a first-time customization of a form. If you are now editing a previously customized form, alter these instructions as necessary.

Add a New Form Section

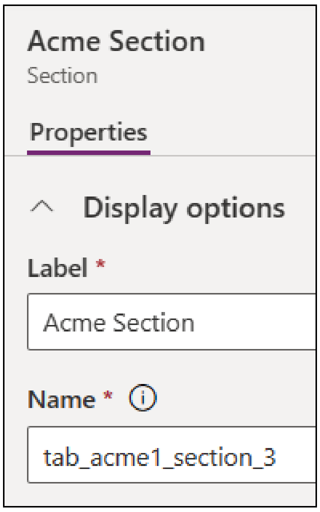
1. Navigate to the **unmanaged solution in your dev environment** that you use for customizations.
2. In the Power Apps solution editor add the existing table that contains the form to be modified, e.g., Project.
3. Add the relevant original out of the box form that will be used as the basis for your new form.
4. Load the original form.
5. Using **Save as**, save the original form as a new form that will be used for modification; do not edit the original form.



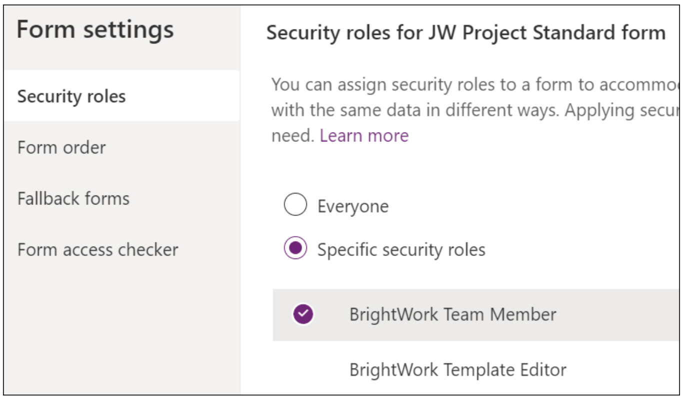
6. Copy the GUID of your modified form. The form GUID can be obtained from the URL of the Power Platform edit page of the form. See this example of the form GUID (the highlighted portion only): https://make.preview.powerapps.com/e/123456abcd/entity/bw_request/form/edit/65432gfiul-00987f1?source=powerappsportal.
7. Click **Component**.
8. Click on the existing tab that you would like the new section to be added to.
9. On the Components list select the section style you'd like to add to your form.



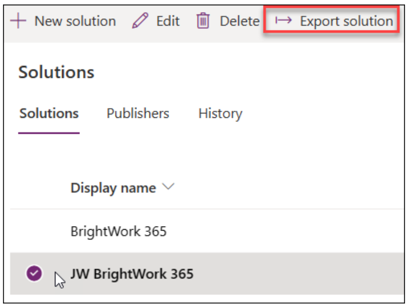
10. Click on the new section and edit the section's **Label** value and **Name** value.



11. Modify the new section's content as needed (add fields, etc.).
12. In **Form settings** at the top of the editor, change the **Security roles** of the form to include at least the roles of **BrightWork Team Member**, **System Administrator**, and **System Customizer**. Click **Save and publish**.

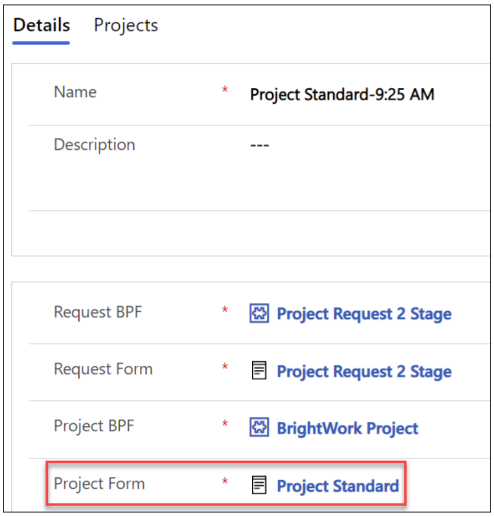


13. **Save** the form, **Publish** the form, and exit to the solution screen.
14. Remove the original form that was previously copied to your custom unmanaged solution (the unmanaged solution should be as clean as possible) and exit to the environment screen.
15. Export your customized unmanaged solution; be sure to **Publish** the form as part of the export process.



16. Import the managed solution into the relevant environment as described in the Customization Notes article.
 Note: We generally recommend skipping the check for issues during export since you will be presented with many non-problematic issues that can be ignored.
17. In the BrightWork 365 app, use the Area switcher at the bottom left of the screen to switch to the **Templates area** (for BrightWork versions earlier than v1.6, switch to **Admin area > Forms**). In the **Form Templates** list add a new row by clicking **+ New** at the top of the page, and add all required fields including the previously copied Form GUID.

The newly created form can then be chosen in a template's **Details** tab. The associated Form GUID will automatically populate after a short wait.



Customize Tables

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Caution Be sure to first read the Customization Notes article.

Tables

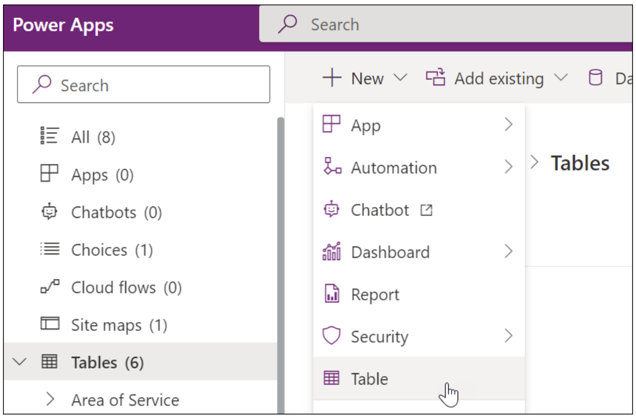
Tables are where BrightWork 365 data is stored. Tables have a list of 'sub-components':

- Columns: It is safe to edit column titles. Calculated and rollup columns should not be edited. There is a large selection of different types of columns available for use in tables.
- Relationships: Do not make any edits to Relationships.
- Business Rules: See the Business Rules article for more details.
- Forms: See the Forms article for details.
- Dashboards: None supplied out of the box.
- Keys: Do not make any edits to Keys.

Caution If you delete a table, you delete both the table definition and all data that the table contains. Tables and the data within them cannot be recovered if deleted.

Create a New Table

1. In the **unmanaged solution in your dev environment** that you use for customizations:
    1. In the Power Apps solution editor click **+ New | Table**.



2. Add any required new columns to your new table.
3. Save and Publish.

For more information see this Microsoft Tables article.

Customize Site Maps

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Caution Be sure to first read the Customization Notes article.

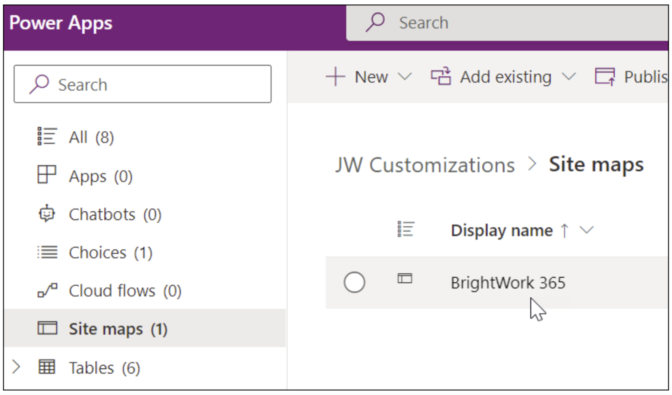
Site Maps

The purpose of a Site Map is to define the navigation for a Power Platform app such as BrightWork 365. Site Maps are created using a tile-based Site Map Designer.

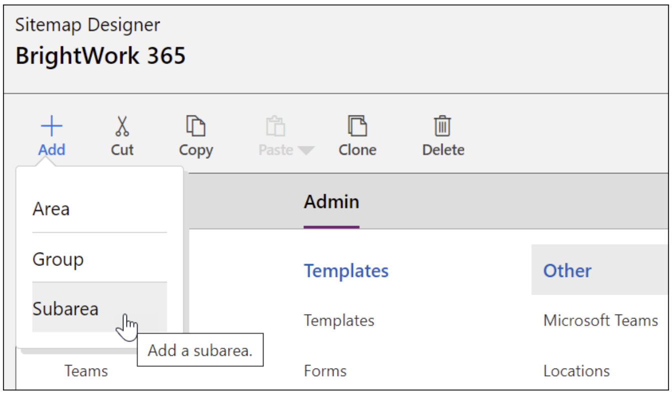
Unlike many solution customizations which will not merge with product upgrades to the same components, Site Map customizations will successfully merge with Site Map updates made in BrightWork 365 upgrades.

To modify the BrightWork 365 Site Map:

1. In Power Apps, load and edit the **BrightWork 365** site map located in your unmanaged custom solution.

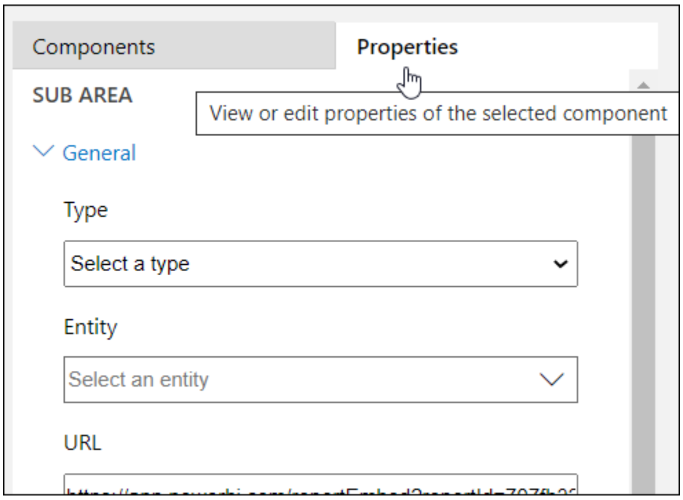


2. Choose a Site Map section such as **Admin | Other** and click **+ Add | Subarea**.



3. In the **Properties** configuration section for the new Subarea, set the **Entity** value to one of your

tables, or choose any of the other options relevant to your customization scenario.



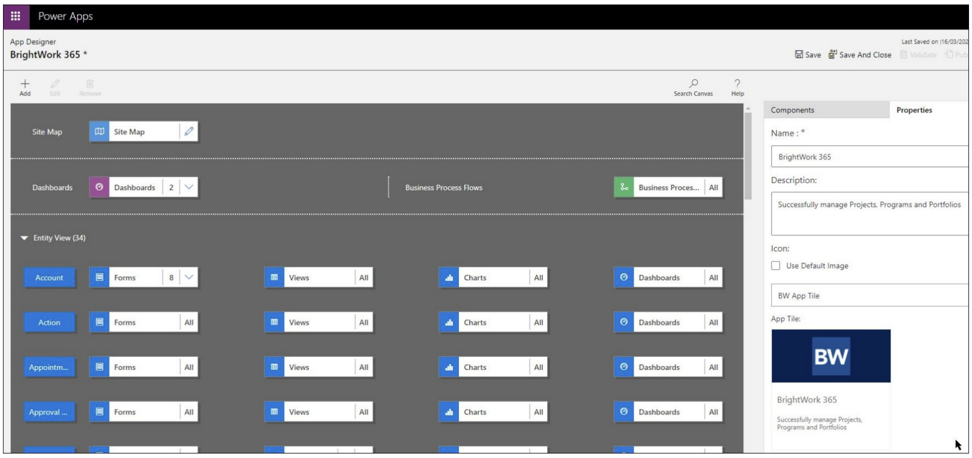
4. Save, Publish, and Close the site map.

For more information see this Microsoft Site Map article.

Add a Custom Logo

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

1. Enter the App Designer for the solution.
2. In the **Properties** tab add the custom logo as a web resource and select it as the **App Tile**.



Customize Power BI Dashboards

Introduction

Note

- This article is for BrightWork 365 Release February 2023 (v1.6) and newer.
- Customization of Power BI reports requires a Microsoft Power BI Pro license or an E5/G5 plan (which includes Power BI), and installation of the Microsoft Power BI Desktop application.

Caution If customizations are made to the out of the box Power BI report, when BrightWork releases upgrades that include an updated Power BI report, you will need to either keep your own customized report, or use the report included in the upgrade and then apply your own customizations to it. We recommend creating a separate Power BI report for customizations (with an optional custom link, e.g., in the app's Site Map) rather than editing the out of the box Power BI report. You can save a copy of the out of the box Power BI report and work in that copy. Contact your Customer Success Partner for additional information related to your specific implementation.

To access BrightWork 365 Power BI reports, click into the **Reports** area on the Main Nav.

See our Product Installation article for initial Power BI set up instructions.

For additional Power BI information see these Microsoft resources:

- https://docs.microsoft.com/en-us/power-bi/
- https://docs.microsoft.com/en-us/learn/powerplatform/power-bi?WT.mc_id=powerbi_landingpage-docs-link

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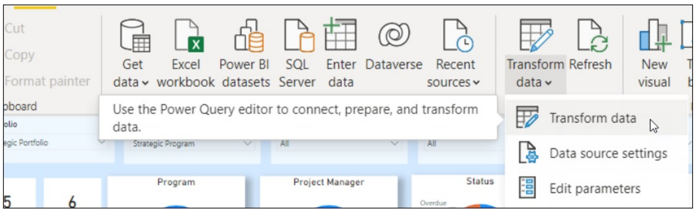
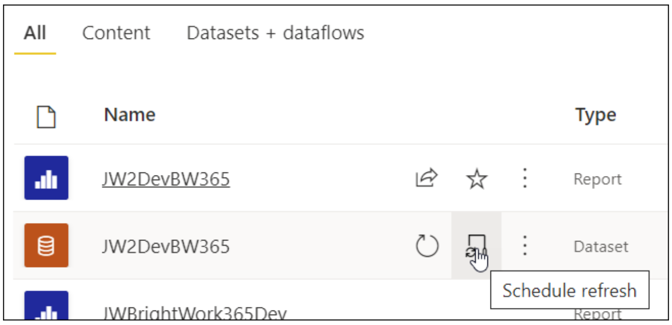
Add a Column to a Custom Power BI Report

1. In the Power BI Desktop application load your Power BI PBIX file, and ensure the latest data is refreshed.
2. Choose **Transform Data** in the ribbon to launch the Power Query Editor.

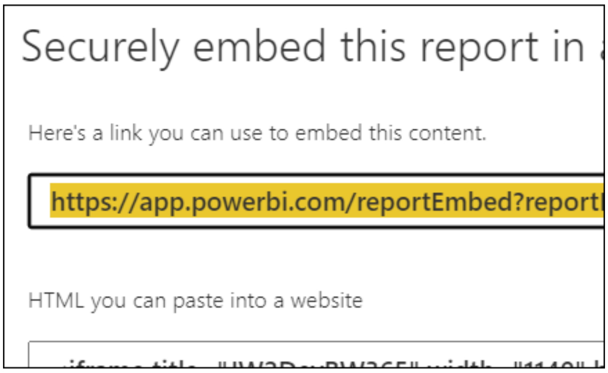


3. Select the table name in the **Queries** section.
4. In Applied Steps, click on **Removed Other Columns** and click its Settings gear.
5. Select the desired column and click **OK**.
6. If necessary to rename the column, in **Applied Steps** click **Renamed Columns**, double-click on

the column in the table header, rename it, and choose to insert a step when asked.
7. Choose **Close & Apply** in the ribbon to close the Power Query Editor and return to Power BI Desktop.
8. In Power BI Desktop, click into the area of the report page where you want to add the column.
9. Click on the table name in the **Fields** section.
10. Select the new column under the table name in the **Fields** section to add it to the **Visualizations** section.
11. In the **Visualizations** section drag the column vertically to place it into the desired location.
12. Save the report.
13. Publish the report to the relevant Power BI destination.
14. Launch Power BI Online (app.powerbi.com) and navigate to the relevant workspace.
15. If necessary, configure the relevant Dataset's **Schedule refresh** settings.



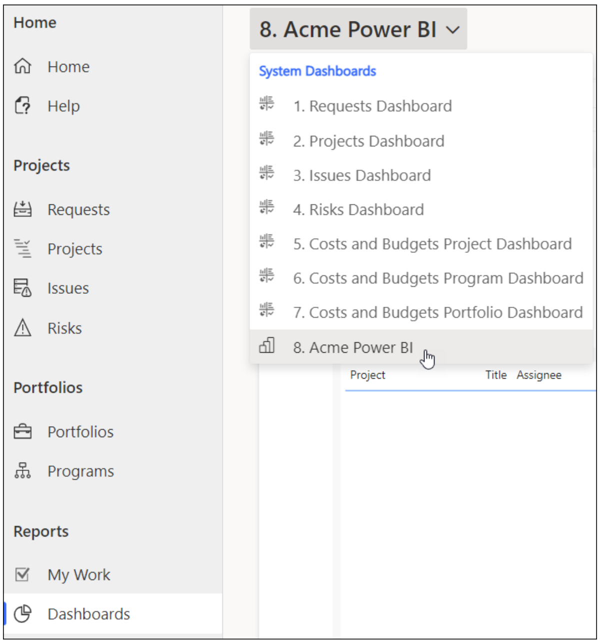
16. Click on your custom report to launch it.
17. Choose **File > Embed report > Website or portal** .
18. Copy the "embed" link and share with whomever you provided report access to.



Add a Custom Power BI Dashboard Link in the App

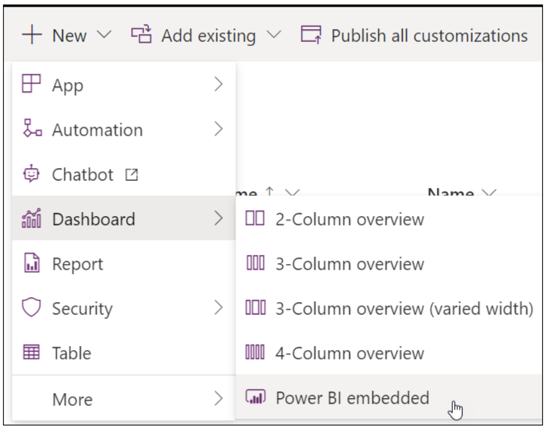
> **Note** See important general customization information in our article Read First: Customization Notes.

In addition to opening custom Power BI reports in a browser tab, you can choose to add a new link to the Dashboards section of the app.

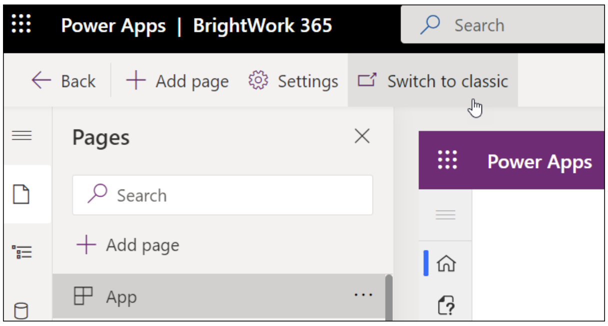


To add a new custom Power BI Report Dashboard link:

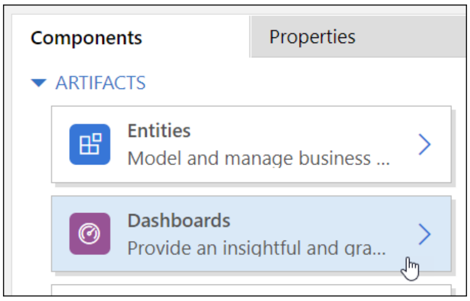
1. Open your unmanaged solution in make.powerapps.com.
2. Click **+ New > Dashboard > Power BI embedded** .



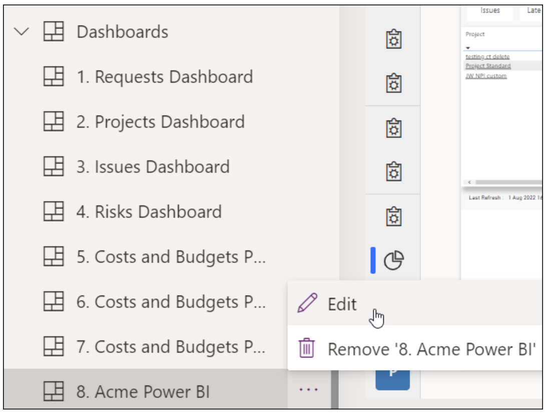
3. Enter a **Display** name.
4. Choose Type **Power BI report**, select the relevant Power BI Workspace and your custom Power BI report.
5. Click **Save**.
6. Publish the customization.
7. Return to the main customization screen of the unmanaged solution.
8. Click **Add existing > App > Model-driven app** , and add the out of the box BrightWork 365 app.
9. Click into the app that is of type Model-Driven App, and click **Switch to classic**.



10. In the **Artifacts** section click on **Dashboards**.



11. Scroll down the Classic Dashboards list to the **Power BI Embedded Dashboards** section and select your custom dashboard.
12. Save and Publish.
13. Back on the main (non-Classic) design screen scroll down to the **Dashboards** section, click the ellipses for your new custom Dashboard and choose **Edit**.



14. Change the name of the dashboard to include a prefix number that will place it in the proper vertical order in the app's Dashboard drop-down list, e.g., "8. Acme Power BI" or "08. Acme Power BI".
15. Save and Close the edit screen.
16. Publish the customization.

Customize Other Elements

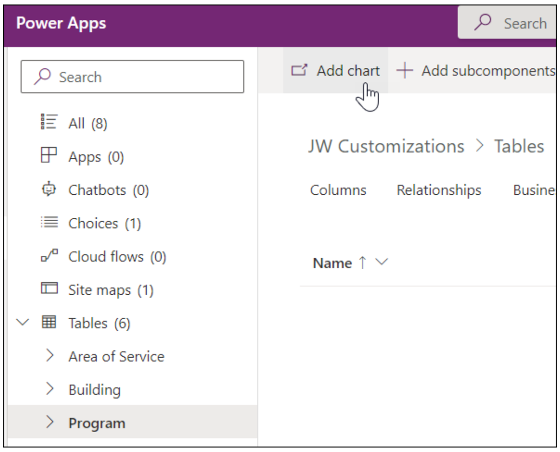
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Caution Be sure to first read the Customization Notes article.

System Charts

Charts let you see table data in a visual manner.

To create a system chart, rather than modifying any existing system charts, instead modify a copy of the original chart by loading it from the relevant table in Power Apps and using the **Save as** method or add a new chart.



For more information see this Microsoft Charts article. Note that Personal Charts can also be configured.

System Views

Views define how rows for a specific table are displayed. A view defines the following:

- The columns (attributes) to display
- The width of the columns
- How the rows are sorted by default
- Which filters are applied to determine which rows appear in the list by default

To create system views, modify a copy of the original system view, or create a new view, do not modify the original view.

For more information see this Microsoft Views article.

Business Rules

Business Rules apply logic and validations in an interface that lets you do the following:

- Set column values
- Clear column values
- Set column requirement levels
- Show or hide columns
- Enable or disable columns
- Validate data and show error messages
- Create business recommendations based on business intelligence.

Currently BrightWork includes only one business rule: ‘Request Default Values’. The customization process for this rule is an exception to the customization recommendations noted above; editing this rule directly in the managed BrightWork 365 solution is a necessary part of the installation process.

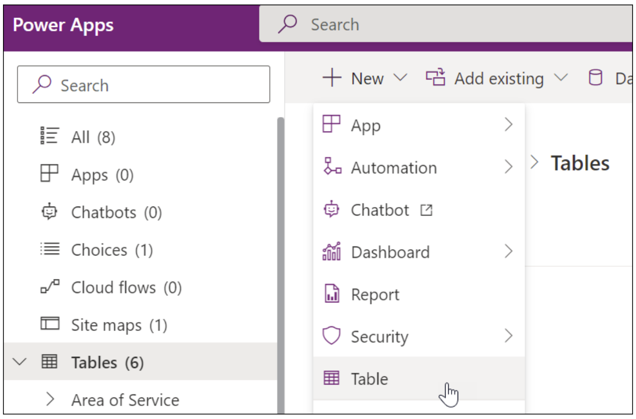
For more information see this Microsoft Business Rules article.

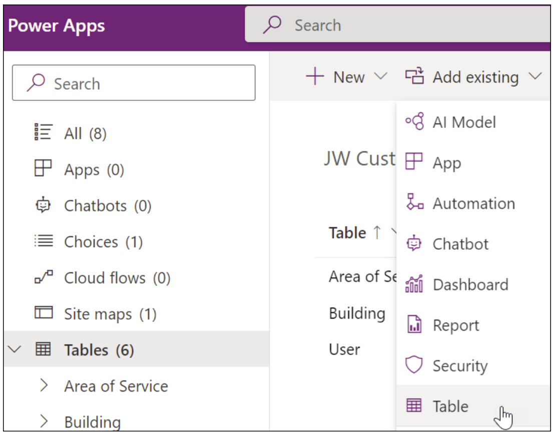
Add a Choice Column Using a Table Lookup

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

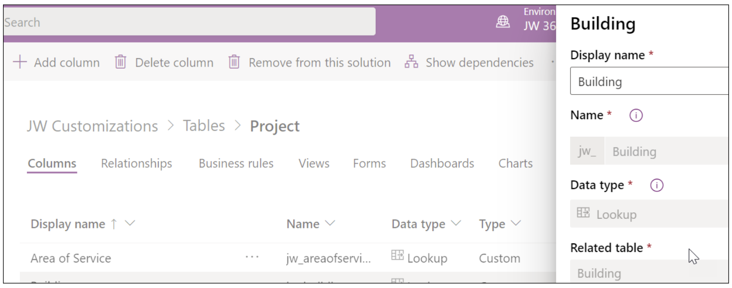
Caution Be sure to first read the Customization Notes article.

A common scenario is the need to create a new choice column in a form. There are several different methods to achieve this, but the method described here ties together much of the content noted in other customization articles and is relatively easy to maintain. The scenario noted below uses the example of adding a new **Building** choice column to a Project form; you can substitute in your own specific requirements as necessary.

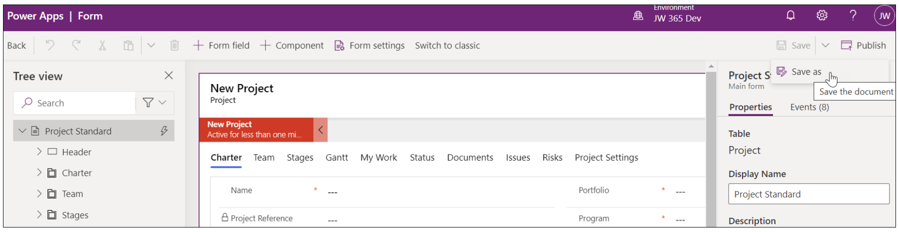
1. In the **unmanaged solution in your dev environment** that you use for customizations:
    1. Create a new table named **Building**.
    

    2. Add the existing out of the box **Project** table to the solution, if it's not already present.
    

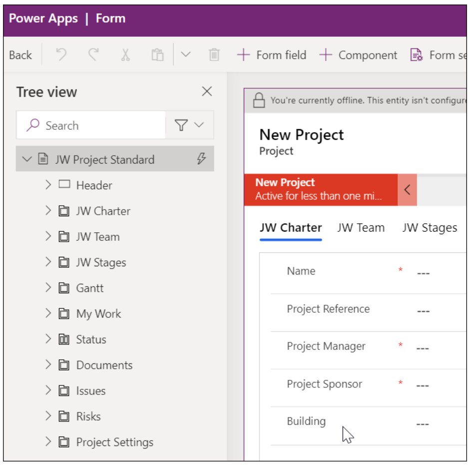
    3. In the **Project** table add new Lookup column **Building** and configure it to do a lookup to the **Building** table. Save the modified table.



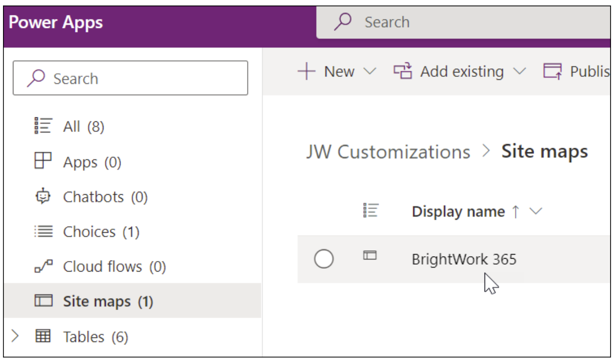
4. If in the Project table's Forms component you do not yet have a custom Project form of your own, make a copy of an out of the box project form by loading it and using **Save as,** and then name the new form as desired. If this is a new form, be sure to follow all the new form instructions found in the Customize Forms article.



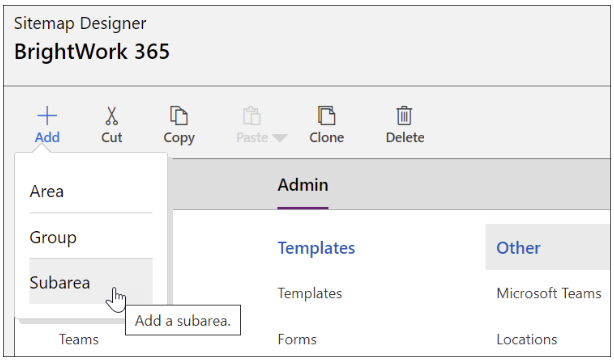
5. In your custom Project form add the **Building** table lookup column by choosing the **+ Form field** option in the menu, and place it in the desired location. Save, publish and close the modified form. See also Customize Forms.



6. To make it easy for users in the future to update the list of choices available in the **Building** column, you can create a navigation link to the **Building** table by modifying the app Site Map:
    1. Load the **BrightWork 365** Site Map.

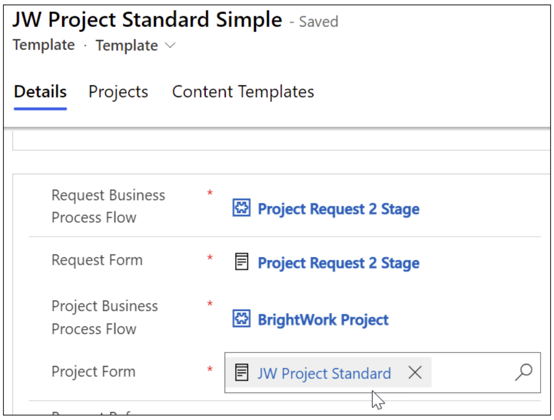


    2. Choose the section **Admin | Other** and click **+ Add | Subarea**.

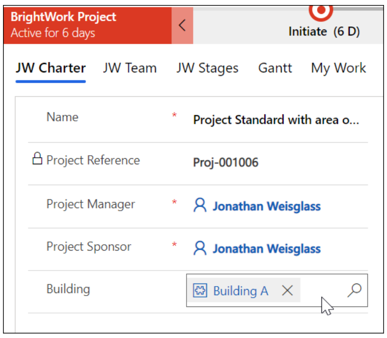


3. In the **Properties** configuration section for the new Subarea, set the **Entity** value to **Buildings**.
4. Publish, save and close the site map.

7. Load the BrightWork 365 app in your development environment and switch to the **Admin** area.
8. Click **Buildings** in the left navigation pane and add desired building choices using **+ New**.
9. Load a project that was created from a template that isconfigured to use your custom Project form.



10. In the chosen project click into the **Building** column, choose a Building choice and save the changes.

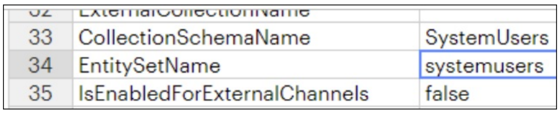


11. After your testing has completed successfully you can proceed to port the changes over to your production environment as outlined in the Customization Notes article.

Using Power Automate to Set the Value of a Lookup Column

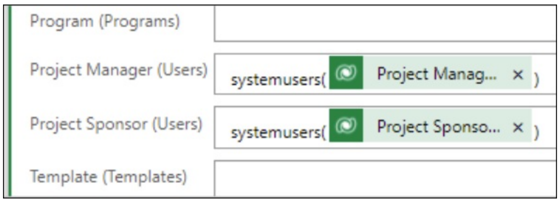
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

When using Power Automate to set the value of a Lookup column in an unmanaged solution, you must wrap the value in a lookup table plural value (classic name for this is Entity Set Name). To get this value, open the table in the Metadata Browser extension.



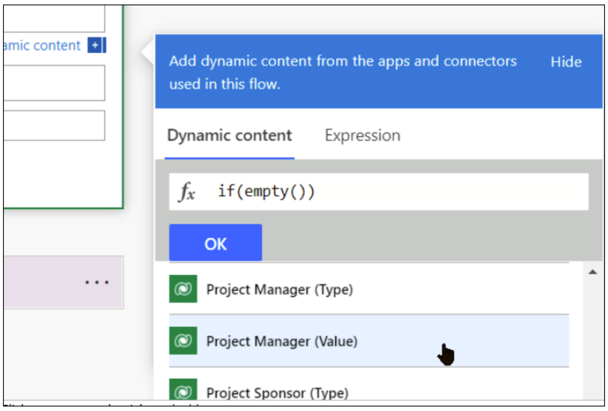
33	CollectionSchemaName	SystemUsers
34	EntitySetName	systemusers
35	IsEnabledForExternalChannels	false

If the relevant column is a user lookup, the syntax to use would be as follows:



If there is a chance that the source lookup you are copying from is blank, you will have to use an expression to allow for this; otherwise the flow will fail when it tries to set a blank lookup. The syntax in this scenario would be entered as follows (do not type the double quotation marks unless noted otherwise):

1. Click into the lookup field and select the Expression tab.
2. Type "if(" - this will automatically add the closing bracket.
3. Type "empty(" - this will automatically add the closing bracket.
4. Select the column you want to copy from the **Dynamic content** tab.



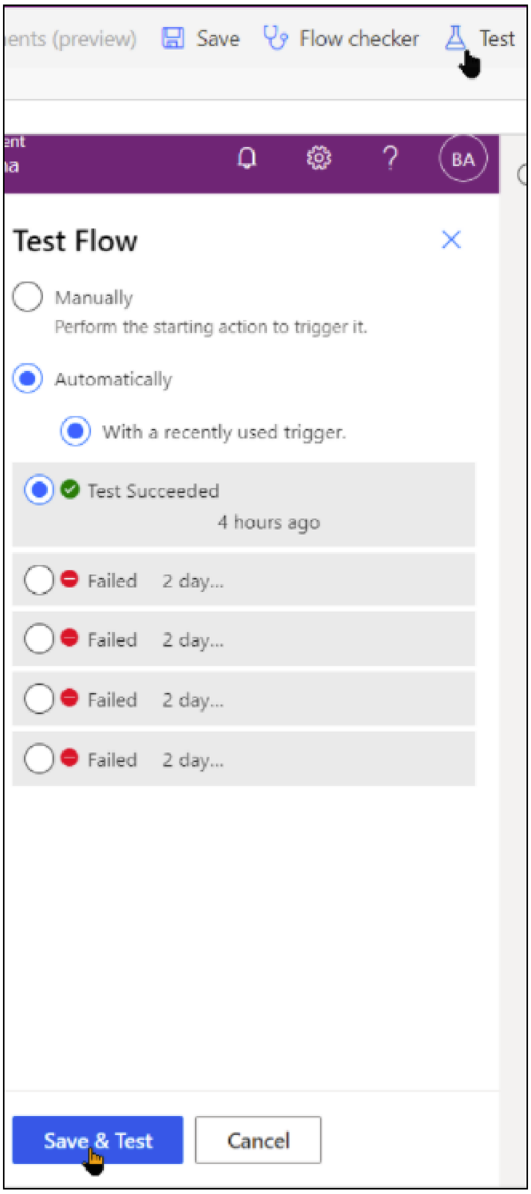
5. Click one space to the right and add ",".
6. Enter a single quotation mark. This will automatically add the closing ' - this means that '' is the value if the source lookup is empty.
7. Click one to the right again and add ",".

8. Type "Concat(" and click one space to the right.
9. Enter a single quotation mark and "systemusers(" or whatever the table set name is.
10. Click to the right after the closing ' and add ",".
11. Select the source column value from the **Dynamic content** tab.
12. Add a ",".
13. Enter a single quotation mark and ")".

The Expression should look something like the below:

```
if(empty(outputs('Get_Source_Project')?['body/_bw_projectmanager_value']),'',concat('systemusers(',outputs('Get_Source_Project')?['body/_bw_projectmanager_value'],')'))
```

If the flow does not present any error messages, you must still test the flow as Power Automate will allow you to enter a faulty expression. You can run a test from inside the flow.

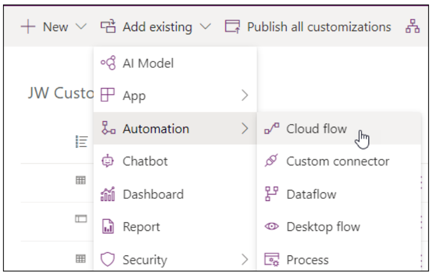


Copy Data from Custom Request Columns to Custom Project Columns

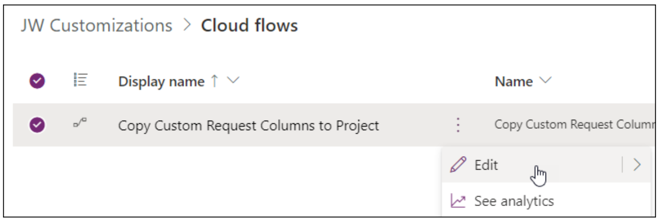
> **Note**
>
> - This article is for BrightWork 365 Release February 2023 (v1.6) and newer.
> - If working with Lookup columns and Power Automate Flows, see this article for important technical notes.

Enabling the copying of data from a custom Request column to a custom Project column requires some customization work as noted in the steps below.

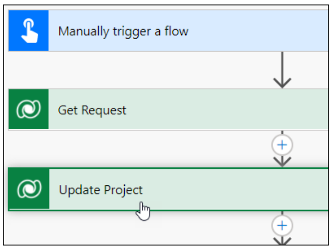
1. Load the unmanaged solution you use to add customizations.
2. If not done previously, add your new custom column to the Request and Project tables.
3. If not done previously, add your new custom column to your custom Request and Project forms.
4. In the unmanaged solution choose **Add existing > Automation > Cloud flow** .



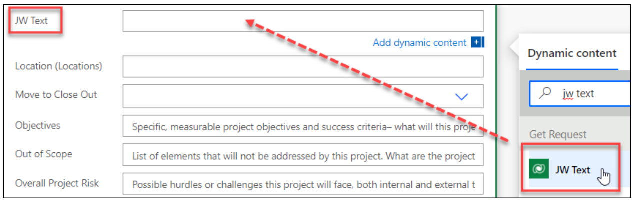
5. Choose the flow **Copy Custom Request Columns to Project** and click **Edit**.



6. Choose the flow step **Update Project** and expand it.



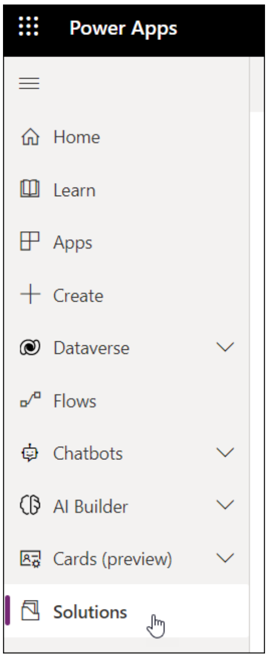
7. Find your new custom column. Click into the empty field next to the column name, choose to search **Dynamic content** for the same column, and choose it to have the value added to the field.



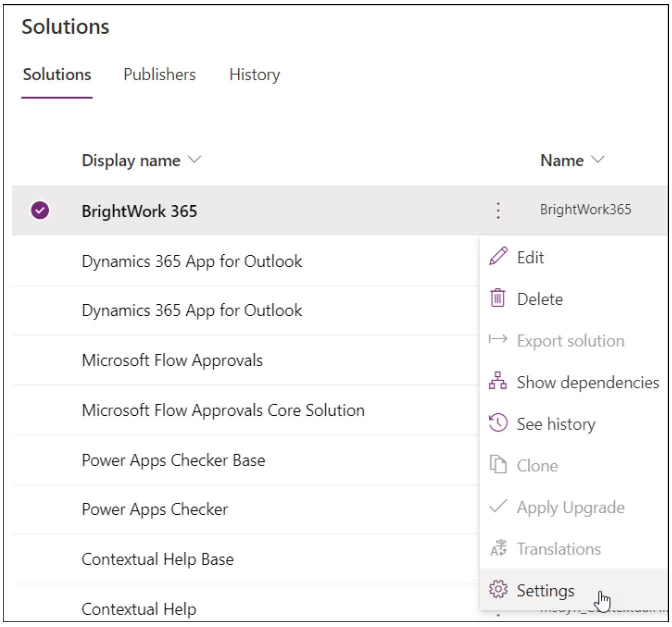
8. Save and close the flow.

Find Your BrightWork 365 Version Number

1. Go to make.powerapps.com and select the environment that contains the BrightWork 365 solution.
2. Click on **Solutions** in the Site Map.



3. Click the 3 dot menu for the **BrightWork 365** solution and click **Settings**.



4. The version number will be displayed in the **Solution settings** panel.


Solution settings
Display name *
BrightWork 365
Name *
BrightWork365
Publisher *
BrightWork 365 (brightwork)
New publisher
Version *
1.5.0.7419

Pre-Install Power Platform Environment Instructions

Tip We strongly recommend working alongside the BrightWork Support team to initiate the pre-install process, as this will ensure proper procedures are followed; this service is included as part of the product purchase.

Create Three Power Platform Install Environments

Prior to the installation of BrightWork 365, create three Power Platform environments with Dataverse data stores: two Sandbox environments (see Sandbox environments - Power Platform | Microsoft Learn), and one Production environment; BrightWork will eventually be installed into each of these three environments:

- **Dev Sandbox:** This is where your BrightWork consultant will create your custom solution.
- **Test Sandbox:** This is where you will test the custom solution.
- **Production:** This is where your users will use BrightWork 365.

For environment creation instructions see Create and manage environments in the Power Platform admin center - Power Platform | Microsoft Learn. Required **Settings** details are as follows:

- For the Type of environment, select **Sandbox** for Dev and Test, and **Production** for Production.
- Choose to add a **Dataverse data store**.
- URL Setting: Use URLs that make it easy to distinguish between the **Dev**, **Test** and **Production** environments. We suggest the naming convention **bw365-{customer name}-{environment type}**, e.g., **bw365-acme-dev**.
- We recommend selecting a Security group to manage access to the environment. See Control Environment Access below.
- If you are using Microsoft Power Apps per app licenses, proceed to allocate capacity to the environments - see Capacity add-ons for Power Apps and Power Automate - Power Platform | Microsoft Learn. In the **Manage add-ons** screen, you allocate capacity to the environments in the **App passes** field.

Caution

- If you are using Microsoft Dynamics 365, the BrightWork 365 production installation should be done in the same environment as Microsoft Dynamics 365.
- BrightWork 365 should not be installed in the **Default Environment**, unless you are also using Microsoft Dynamics 365 and that is the environment where it is installed.
- Environments into which BrightWork 365 is installed must have the English language pack installed. This will only likely need to be done if the base language in your environment is not English.

Control Environment Access

We advise that you use dedicated Microsoft 365 security groups to control access to the environments (i.e., a security group per environment). If you do not do this, all users in your Active Directory will be listed in the environment. The easiest way to accomplish this is to create a Microsoft Team and use the associated group to control access to the environment. For more information see Control user access to environments: security groups and licenses - Power Platform | Microsoft Docs.

Product Licenses | BrightWork 365 Installation

Note Prior to installing or upgrading BrightWork 365 please contact BrightWork Support to schedule a technical consultation to ensure all prerequisites are in place for a successful installation.

Requirements for the Installation User

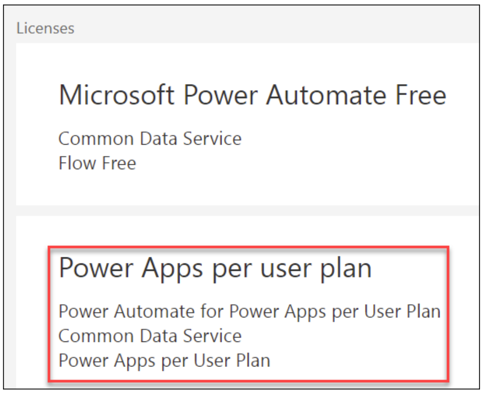
Caution

- The BrightWork 365 installation user must have a Power Apps Premium/Power Apps per user license. Do not proceed with the installation if the installation user does not have this license.
- Whenever the installation account's password is changed, the BrightWork 365 related connectors will need to be refreshed.
- Post installation, after the BrightWork security roles have been created, the installation user account must also be given the **Basic User** security role and all other **"BrightWork"** named security roles except for **BrightWork Request Submitter**.

We recommend that a service account be used to install BrightWork 365 and the install be performed by a member of the organization's Microsoft 365 admin team in consultation with a BrightWork Customer Success person. Upgrades must be done by the same account used for the original installation.

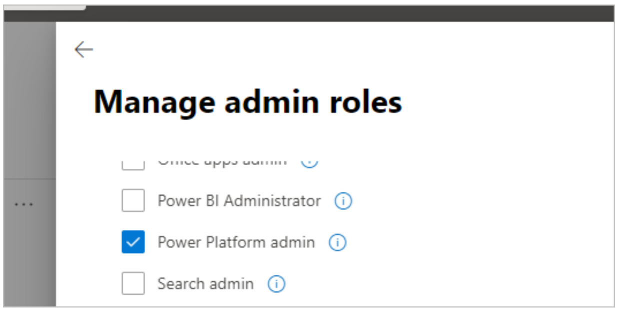
The Microsoft 365 account used to install BrightWork 365 must have the attributes listed below - licenses must not be removed from this user to ensure flows continue to function:

- **Power Apps Premium/Power Apps per user license**. See "How to Check Your Microsoft 365 License Status" below for additional information. **Note:** The Power Apps and Power Automate for Office 365 licenses that are included with Microsoft 365 Business Standard are not sufficient as they do not provide the premium connectors necessary for BrightWork 365.

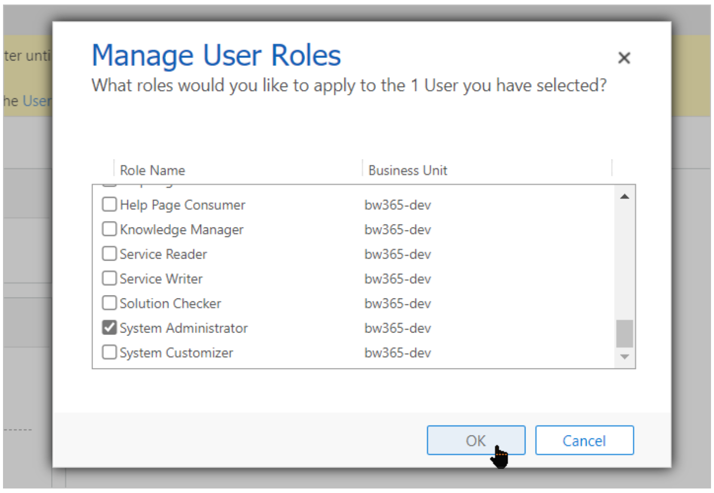


- **Power BI Pro or higher license (optional):** Thiis license is used to setup the Power BI dashboard to a common workspace.

- **Power Platform Admin role** in Microsoft 365.



- **Assigned the System Administrator role** in the destination environment.



- **Assigned the Power BI Administrator** role.
- **Assigned an Exchange mailbox** (e.g., a minimum of a Microsoft 365 E1 or equivalent license).
- If you intend to use email activities in projects, the install guide section **Setup Dynamics Email** will need to be completed by a user assigned the **Global Administrator** or **Exchange Administrator** role in Microsoft 365, and the **System Administrator** role in the Power Platform environment.

About the Need for the Power Platform Admin Role

BrightWork recommends that the BrightWork 365 application be installed by a user account with the Power Platform Admin role. This user account must permanently have a Power Apps Premium/Power Apps per user license. This is necessary because BrightWork 365 requires a licensed user to set up connection references using their organizational Microsoft 365 account. These connection references enable different parts of the Microsoft 365 ecosystem to 'talk' to each other (e.g. SharePoint, Outlook etc.). Removing the license means that BrightWork 365 will stop working as expected.

We further recommend that this user account be a service account, to ensure continuity of service should individuals leave the organization.

We typically expect that a member of the organization's Microsoft 365 administration team will perform the installation.

Providing this user with the Power Platform Admin role gives them access to all the Power Platform environments in the organization and to manage these environments. This is why we expect that the installation user will be a member of the Microsoft 365 Admin Team.

Although it may be possible to install BrightWork 365 with a lower 'per-environment' set of privileges, this is not a situation that BrightWork has tested.

End User BrightWork 365 License Requirements

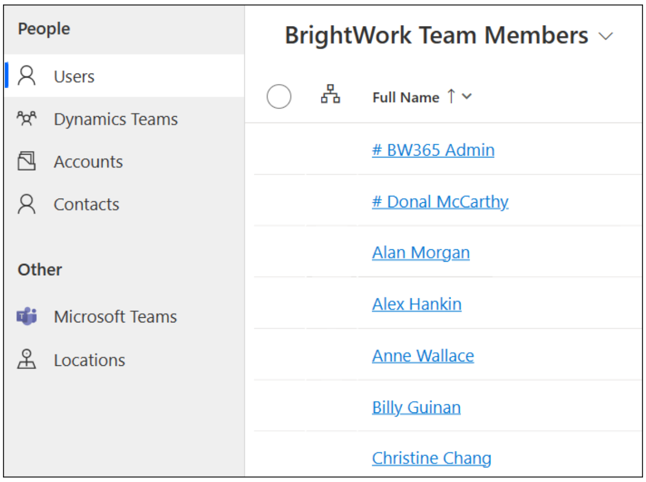
Paid BrightWork licenses are required and will automatically be assigned to all users that have the BrightWork Team Member security role assigned. A free BrightWork 365 license will automatically be provided to users that only have the **Basic User** and **BrightWork Request Submitter** security roles that only permit them to enter project requests into the system (with no additional interaction with the BrightWork 365 app). For additional **BrightWork 365 license requirement** details see our Pricing and Licensing website pages.

BrightWork 365 License Audit

The annual BrightWork 365 license audit is a count of all unique named users throughout the organization that have been given the **BrightWork Team Member** security role (which gives them access to the full BrightWork 365 app). For the smooth running of the account, customers need to ensure they are in compliance with the BrightWork 365 Software License and Service Agreement. BrightWork will contact you when it is time for your annual license audit.

To complete the license audit:

1. Navigate to **Admin Area > Users > BrightWork Team Members** .



2. Count the number of unique users in the view.

3. Use this link to submit your audit.

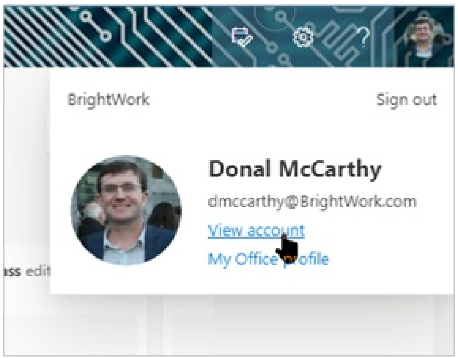
End User Microsoft License Requirements

In addition to any required BrightWork 365 licenses, users will also need one of the following licenses **from Microsoft** in order to use the BrightWork 365 solution: **Power Apps Premium/Power Apps per user, Power Apps per app**, or **Dynamics**.

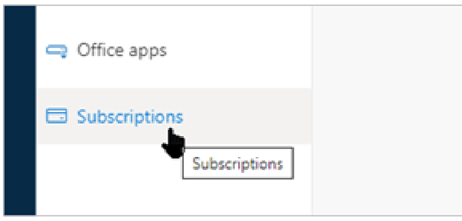
How to Check Your Microsoft 365 License Status

To check your Microsoft 365 licensing status.

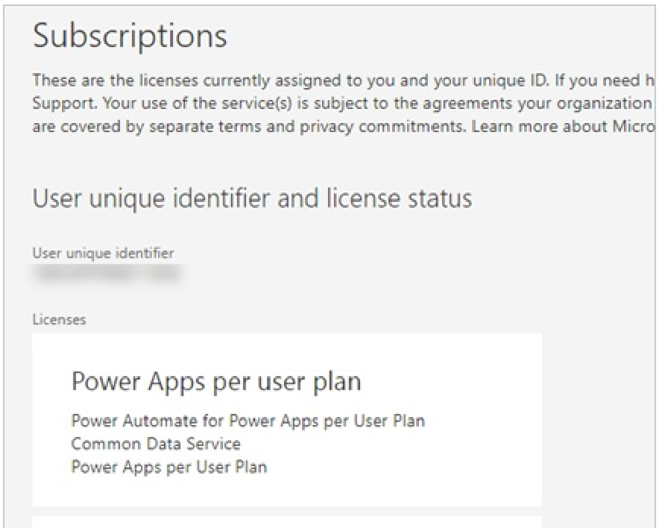
1. Log in to https://www.office.com.
2. Click **View account** on your profile menu.



3. Click **Subscriptions** on the nav.



4. For installation users: If the **Power Apps Premium/Power Apps per user plan** is not listed, do not proceed with the installation. Contact your organization's Microsoft 365 admin to add a **Power Apps Premium/Power Apps per user** license to your Microsoft 365 account.



Check a Specific User's Microsoft 365 Licensing Status

Go to the Users page for the Environment, select the user, and click Run Diagnostics.

Check Microsoft 365 Power Apps per app License Usage for an Environment

Go to https://admin.powerplatform.microsoft.com/resources/capacity#add-ons. Note the quantity of Power Apps per app licenses listed in the **App passes** column. Power Apps per app licenses get consumed and assigned once a user accesses an environment. These assignments last for a year. Any user that has accessed both the full BrightWork 365 app and the BrightWork 365 Request app will have consumed two licenses. For additional details see About Power Apps per App Plans.

Desktop System Requirements

For optimal usability we strongly recommend the following:

- Outlook for Microsoft 365 (not the standard desktop version of Outlook)
- Newest version of Internet browser (Microsoft Edge preferred)

For more information see https://learn.microsoft.com/en-us/power-apps/limits-and-config.

Login Issues While Using Browser Tracking Protection

If you are having issues logging into BrightWork 365 while using some form of browser tracking protection, i.e., Firefox Enhanced Tracking Protection, this can typically be remedied by disabling this setting for the BrightWork 365 site. See Enhanced Tracking Protection in Firefox for desktop | Firefox Help (mozilla.org) for steps to disable it for Firefox.

Installation Instructions

Note

- Also see Pre-Install Power Platform Environment Instructions.
- After reviewing the license and role related details in this article, see the embedded installation instructions below, or for mobile viewing download the BrightWork 365 Install Guide.pdf 📎.

BrightWork 365 Install Guide

Importing Custom Solutions Supplied by BrightWork

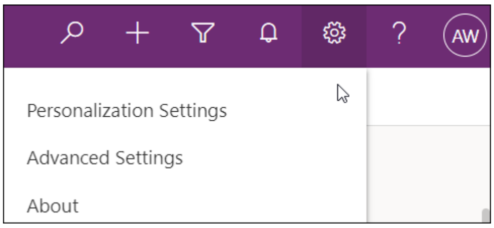
If you're organization worked with the BrightWork team to create a custom solution, then you will also need to read these additional import instructions.

Organization System Settings

Organization system settings, including **Regional Options** such as currency, number, time and date formats (not time zone), can be configured through Power Platform System Settings.

Personalization Settings

We recommend users check the settings of their personal options upon first use and update them as necessary. To configure personal options, click the settings wheel in the top right area of the app and choose Personalization Settings.



The personal time zone setting should be changed to avoid timing related issues including incorrect Created and Modified dates. To change the personal time zone setting:

1. Click into Personalization Settings as noted above.
2. Change the time zone and click OK.

Post Installation Steps

Verification Checklist

After completing the installation or upgrade steps as described in the guide, we recommend running through the post installation or post upgrade verification checklist.

User Management

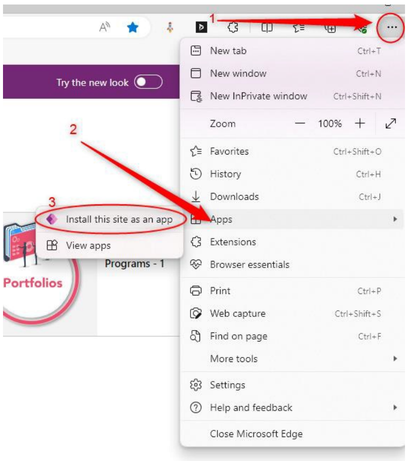
Confirm that users have been added to the Power Platform environment that contains the BrightWork 365 solution and have also been assigned relevant BrightWork 365 security roles; if this is not done, users will not be able to access BrightWork 365. See the BrightWork User Management and BrightWork Security Roles Details articles for more information.

Add the BrightWork 365 App as a Desktop App

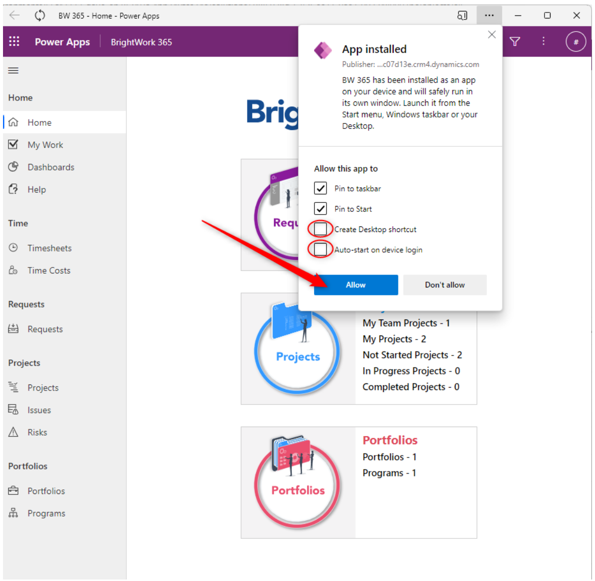
The BrightWork 365 app can be added as a desktop app via tools included with the Microsoft Edge and Google Chrome browsers.

Microsoft Edge

1. Open your BrightWork 365 application using Microsoft Edge and select the ellipsis on the top right of the browser.
2. Select **Apps.**
3. Select **Install this site as an app.**



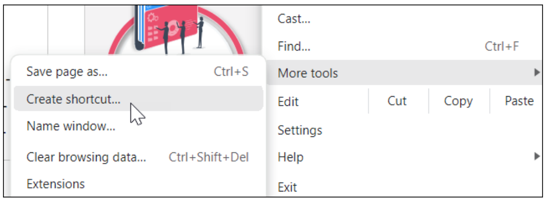
4. In the pop up that appears enter a name for the desktop app, i.e., BrightWork 365.
5. Select **Create Desktop shortcut**, and **Auto-start on device login** if needed.



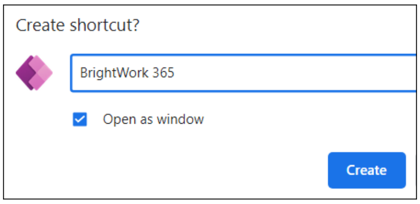
6. The BrightWork 365 app will now be available as a desktop app.

Google Chrome

1. Open your BrightWork 365 application using Google Chrome and select the ellipsis on the top right of the browser.
2. Click **More tools > Create shortcut**.



3. Enter a name for the shortcut, i.e., BrightWork 365, select **Open as window**, and click **Create**.



4. Choose to pin the app to your taskbar.
5. The BrightWork 365 app will now be available as a desktop app.

Post Installation Verification Checklist

It is a recommended best practice to run through a series of tests to verify that an installation has completed successfully in your environment. This article outlines some initial tests that can be performed to assist with this verification.

Prerequisites

It is a prerequisite that all the steps in the BrightWork 365 Product Installation Guide have completed successfully and without error.

Post Installation Checklist

All items on the checklist should pass. If any items fail, please check your Power Platform logs for issues and if necessary, contact BrightWork 365 Support.

Requests

1. Go to the **Requests** section on the main nav and create a new request.
2. Verify that all notification emails are received, and that a project was created successfully from the request.

Projects

Open the project created in the previous section and complete the following steps:

1. Verify project details were carried over from the request correctly. Add any additional required field values and save the changes.
2. Click on the Gantt tab and add at least one task for each of the available task types, e.g., Stage, Task, and Deliverable.
3. Set initial **Start** and **Finish** dates. Save the changes, wait a few seconds, and click **Refresh**.
4. View the **Status** tab in the project and verify the **Start** and **Finish** dates match the values in the Gantt.
5. Go to **Project Settings** and select **Reset Target Dates** to reset the Baseline. Wait approx. 10 Seconds. Click on The Gantt and select Refresh in the Gantt. Click **Baseline** and confirm it has been updated to match current Gantt dates.
6. Confirm the **Target Dates** updated in the **Status** tab match those in the Gantt.

Assign yourself as a resource on a task in the Gantt and complete the following steps.

1. Click on the **Team** tab and verify you have been added as a team member.
2. Click on the **My Work** tab and verify that your task is displayed in My Work with the correct Start and Finish dates.
3. Click on the **Status** tab. Make some changes in the Indicators section of the Status tab and save.
4. Click on the **Status Reports** tab and click **+ New Status Report**. Enter status details and select

Email Report to Sponsor and **Complete Status Report**, and then click **Save & Close**. The Status report should be presented in the next screen. Open the Status report and verify it matches what was updated. Verify the Project Sponsor receives an email with the same report details.

Power BI Dashboards (if applicable to your organization)

1. Confirm that at least one project with Gantt tasks and assignments has been created and saved.
2. Click **Dashboards** on the main nav.
3. From the Dashboard drop-down select **Portfolio and Projects - Power BI**.
4. Click into the various sections of the Power BI dashboard and confirm data is presented as expected.

Microsoft Teams (if applicable to your organization)

1. Create a new Team in the Microsoft Teams app.
2. In BrightWork 365 go to **Programs** on the main nav, click into the program associated with the project you created earlier.
3. Click **Program Settings**.
4. Click **Update Teams List**.
5. Wait a short time and click the **Statement** tab.
6. Start typing the name of your new Team, select the Team, and click **Save**.
7. Open the project you created earlier.
8. Configure the project for Microsoft Teams by clicking into the **Project Settings** tab and selecting **Create Teams Channel**.
9. After waiting for the associated flow to run, click the **Charter** tab of the project and verify the Team you created earlier is displayed in the **Microsoft Team** field.

Upgrading BrightWork 365

Release Notes & Upgrade Guide

See the Release Notes section of this Knowledge Base for content related to new features, enhancements, and bug fixes.

See the BrightWork365 Upgrade Guide.pdf 📎 for upgrade details.

Solution Flows and the Upgrade Installation User

- BrightWork 365 solution upgrades need to be installed by the Owner of solution Flows as set during the initial installation.

Upgrades and Custom Solutions

- If your solution has a custom form based on an out of the box form, and an upgrade contains a change to the out of the box form (e.g., a new field on a project tab) that you would like to utilize, this can be accomplished by manually applying the upgrade change to your custom form. Contact your Customer Success Partner for more information.
- Custom BrightWork Forms and v1.6 Upgrade Features: For high-level instructions for how to use new v1.6 features with custom forms, see Custom BrightWork Forms and App Upgrades.

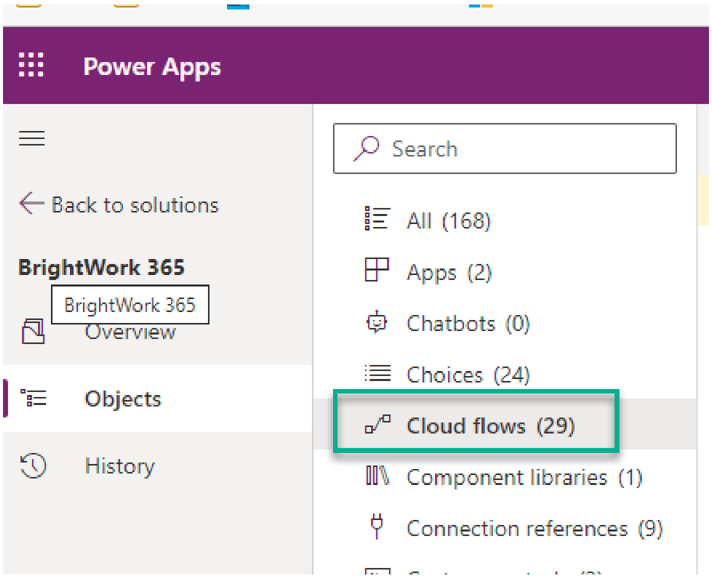
Post Upgrade Verification Checklist

It is a recommended best practice to run a set of tests to verify that an upgrade has completed successfully in your environment. This article outlines some initial tests that can be performed to assist with this verification. You can also choose to do additional verification as noted in the Post Installation Verification Checklist article.

All items on the checklist should pass. If any items fail, please check your Power Platform logs for issues and if necessary, contact BrightWork 365 Support.

Confirm All Flows are Turned On

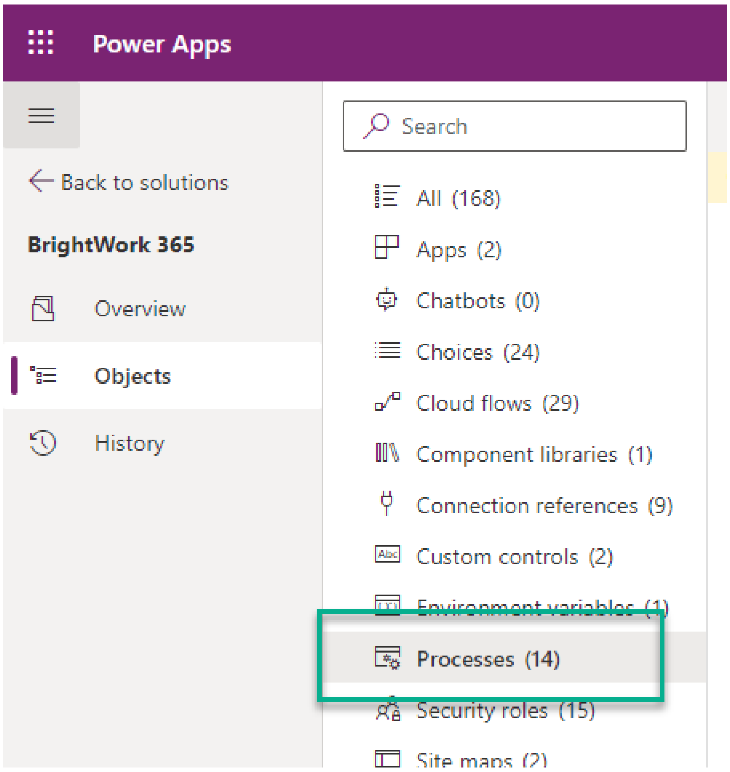
1. As an Admin user go to the Environment Solutions page.
2. Click on BrightWork 365.
3. Select Cloud Flows from the side panel



4. Verify status of all flows is On.
5. If any of these are Off, switch them On.

Confirm All Processes are Turned On

1. Click on Processes in the side panel.



2. Verify Status of all processes are switched On.

3. If any of these are Off, switch them On.

4. Test new functionality works as expected. These tests are specific to what is included in the upgrade.

Custom BrightWork Forms and App Upgrades

Introduction

If you have an older custom form that is based on an out of the box form that has since been upgraded with new features you would like to utilize, this can be accomplished by either:

- Applying your customizations to the new out of the box form, or
- By applying a new upgrade feature to your own custom form

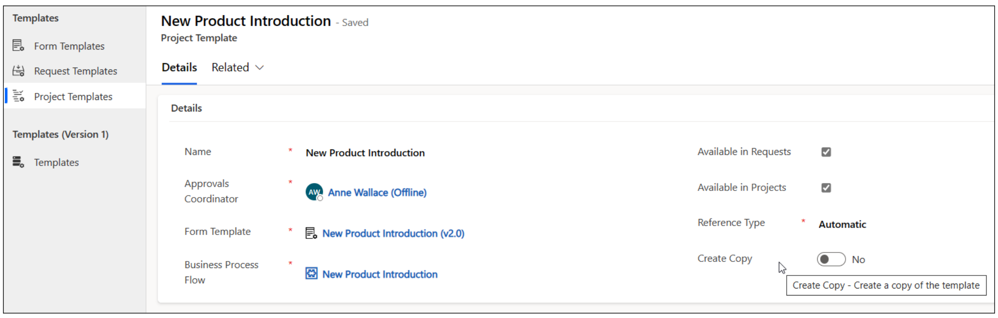
The best approach to choose will depend on your specific implementation, and this can be determined through discussions with your **Customer Success Partner**. The content below is related to the former approach, manually applying your customizations to a new out of the box form, e.g., applying customizations from a BrightWork v1.5 Request or Project form to a newer form that contains the new Approvals process for Requests and Projects.

Caution Be sure to first read the Customization Notes article before making any customization changes.

Note
- Below are high-level instructions; more detailed information can be found in the Customize Forms article.
- Contact your **Customer Success Partner** with questions or to discuss obtaining consulting assistance.

Applying Customizations from a BrightWork v1.5 Request or Project Form to a Newer Form

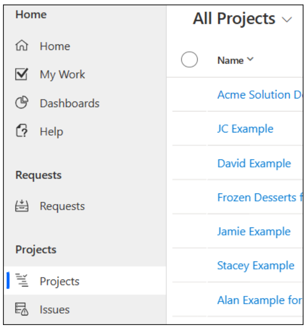
1. Customize a new Request Form or Project Form from a copy of the new BrightWork 365 form using the **Save as** method described in the Customize Forms article.
2. Create a new Request Form Template or Project Form Template that references your new custom form.
3. In the Templates Area, either create a copy of the new out of the box Request Template or Project Template, or create a new template.



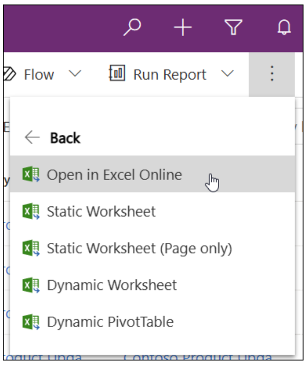
4. Edit the Request Template or Project Template you created to point to your custom form, and if applicable, to your custom Business Process Flow.

Switch Older v1.5 Projects to the New Project Template

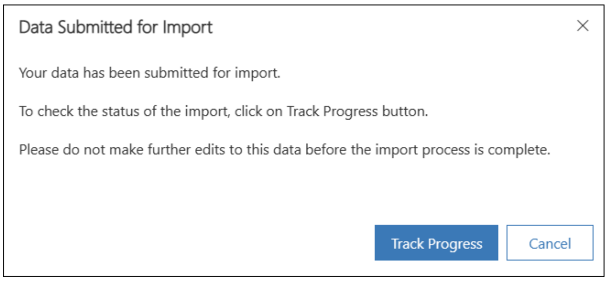
1. Click into the **Projects Area > Projects > All Projects** view.



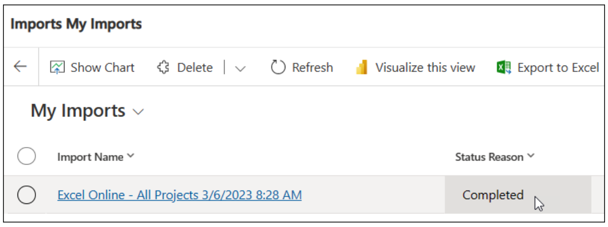
2. Create a new view that contains the columns **Template**, **Project Templates**, and **Project Template**. If you do not see the **Project Templates** column to select in the view, do not continue with this process and contact your Customer Success Partner for further assistance.
3. In the table header click **Export to Excel** > **Open in Excel Online**.



4. For the projects that should use the upgraded custom project form, remove the values from the **Template** and **Project Templates** columns, and in the **Project Template** column enter the name of your new project template that references your upgraded custom project form.
5. Click **Save**.
6. Click **Track Progress**.



7. The import tracking screen will change the **Status Reason** field to Completed when the import process is done.



8. Open the updated projects and test functionality.

Import a BrightWork Custom Solution

Import a Custom Solution Supplied by BrightWork

1. Navigate to the **Solutions** folder in the BrightWork 365 install environment using the link https://make.powerapps.com.
2. Click **Import**.

3. Select the solution ZIP file supplied by BrightWork and click **Next**.
4. Click **Import**. The import process will take approximately 20 minutes. Wait until the upgrade completes and the progress bar turns green. It is safe to ignore any timeout messages you may see during this process.
5. After the conclusion of the import process, if the security role **Team Member** exists, all BrightWork paid license users (not free license users) will need to be added to it. If other security roles exist, i.e., **Stage Mover**, you will need to determine which users should be added to these security roles, similar to how you would decide for other BrightWork security roles.

Import Custom Solution Forms Supplied by BrightWork

1. Open the BrightWork 365 app and click into the **Templates Area** at the bottom left of the app screen.
2. Click **Form Templates** on the navigation sidebar.
3. Click **Import from Excel > Import from CSV** and choose the **Forms Templates** CSV file supplied by BrightWork.
4. Click **Next**.
5. Click **Review Mapping**.
6. Click **Finish Import**.
7. In the **Submit Data** dialog, click **Confirm**.
8. Click **Track Progress**, click **OK**, and wait until the import has completed.
9. Click **Done**.

Import Custom Solution Request Templates Supplied by BrightWork

1. Open the BrightWork 365 app and click into the **Templates Area** at the bottom left of the app screen.
2. Click **Request Templates** on the navigation sidebar.
3. Click **Import from Excel > Import from CSV** and choose the **Request Templates** CSV file supplied by BrightWork.
4. Click **Next**.

5. Click **Review Mapping**.
6. Click **Finish Import**.
7. In the **Submit Data** dialog, click **Confirm**.
8. Click **Track Progress**, click **OK**, and wait until the import has completed.
9. Click **Done**.

Import Custom Solution Project Templates Supplied by BrightWork

1. Open the BrightWork 365 app and click into the **Templates Area** at the bottom left of the app screen.
2. Click **Project Templates** on the navigation sidebar.
3. Click **Import from Excel > Import from CSV** and choose the **Project Templates** CSV file supplied by BrightWork.
4. Click **Next**.
5. Click **Review Mapping**.
6. Click **Finish Import**.
7. In the **Submit Data** dialog, click **Confirm**.
8. Click **Track Progress**, click **OK**, and wait until the import has completed.
9. Click **Done**.

BrightWork User Management

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Definitions

- **Security:** Methods for protecting the system as a whole and the data housed within the system. Security is cumulative.
- **User Security:** Defines user access to Tables, Columns, Rows, etc., in the Power Platform Dataverse. Individual user access is controlled through an accumulated combination of their associated Security Roles, Business Unit, Dynamics Teams, etc. Users will get the least restrictive combination of all their security roles.
- **Security Role**: Defines permission to Tables and other miscellaneous privileges.

Add Users to the Power Platform Environment

Microsoft 365 admins will need to first give users access to the Power Platform environment that contains the BrightWork 365 solution; this can be done either individually or with the recommended method of adding users to a Microsoft 365 Security Group that is part of the environment. If no users at all are added to the environment then all Active Directory users will have environment access.

Security groups can be created either directly within the Microsoft 365 admin center, or through the creation of a private Microsoft Team which will in turn automatically create a security group with the same given name in Microsoft 365. Once the security group is created, users can be added to it either via the Microsoft 365 admin center or by adding them to the Microsoft Team.

Once a user is added to the environment, an environment System Administrator must assign security roles to the user so they may use the BrightWork 365 app in the intended manner - see the **Security Roles** sections below.

For additional details about controlling user access to Power Platform environments, Entra ID (formerly known as Azure Active Directory) security groups, and licensing, see this Microsoft documentation and contact your organization's system administrator.

Assign Security Roles to Users

						BrightWork 365 Solution Roles				
Dataverse Security Role	Security Type	Basic Role	Custom Privileges	Lookup Role	Source	Requestor	Team Member	Project Manager	Senior Manager	PMO Manager
Basic User	Security Role	Yes	No	No	Dataverse	√	√	√	√	√
BrightWork Request Submitter	Security Role	No	No	No	BrightWork 365	√				
BrightWork Team Member (including Request Submit)	Security Role	No	No	Yes	BrightWork 365		√	√	√	√
BrightWork Project Manager	Security Role	No	Can see Project Settings	Yes	BrightWork 365			√	√	√
BrightWork Stage Mover	Security Role	No	No	No	BrightWork 365			√*	√	√
BrightWork PMO Manager	Security Role	No	No	No	BrightWork 365					√
BrightWork Template Editor	Security Role	No	No	No	BrightWork 365					√
BrightWork Approvals Coordinator	Security Role	No	Can see Approvals tab	Yes	BrightWork 365					√
BrightWork Request Receiver	Security Role	Yes	No	Yes	BrightWork 365					√

In addition to adding users to the overall Power Platform environment as noted above, users will also need to be granted **security roles** after importing the BrightWork 365 solution. Security roles need to be assigned to users individually (not through the use of Entra ID (formerly known as Azure Active Directory) security groups), and this is done through the standard Power Platform role assignment process. You can also bulk assign security roles to multiple users with the User Roles Manager utility in XrmToolBox.

See the **BrightWork Security Roles Details** article for an explanation of the various security roles; for more granular details see the spreadsheet BrightWork 365 Security Roles.xlsx 📎

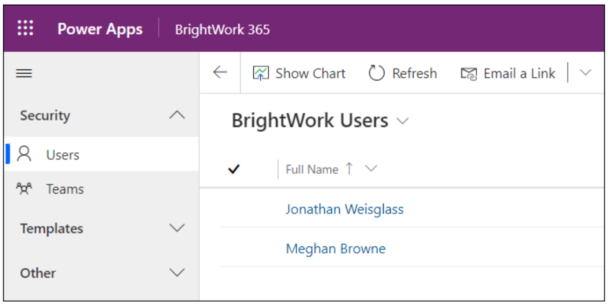
Basic User: All BrightWork 365 users must be assigned this security role in addition to any other security roles they may also be assigned.

BrightWork Request Submitter: If a user will be given a free BrightWork 365 license to be able to only submit project requests, they will also require this security role.

> **Note**
>
> - In addition to the free BrightWork 365 license, these users will also need a paid MS Power Apps license.
> - Although this limited user will only see the Requests area on the main nav, they still have access to other app areas through alternate navigation such as by clicking on linked columns, e.g., the **Program** column in the **Request** form.

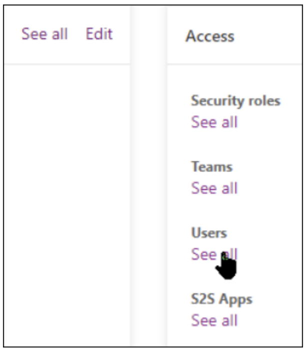
All **paid license** BrightWork 365 users at a minimum need the following security role in addition to **Basic User**:

- **BrightWork Team Member:** This security role consumes a BrightWork 365 license and is not for those users who will only be **Request Submitters** as noted above. Users granted the **BrightWork Team Member** security role will appear in the app's **Admin Area** in **Security > Users > BrightWork Users**.

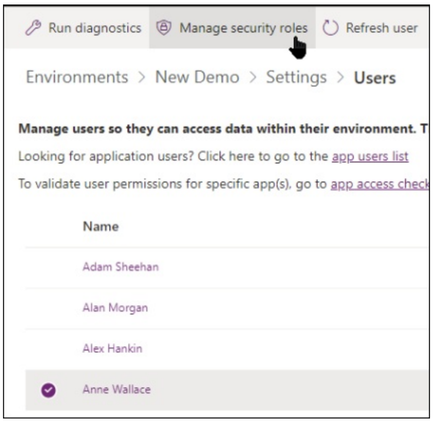


To assign security roles to users individually:

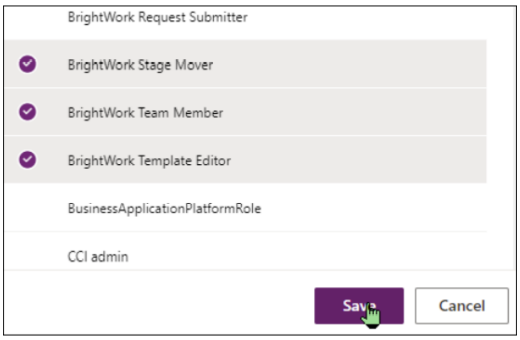
1. Login to your organization's Power Platform admin center and click the environment where you installed BrightWork 365.
2. Click **See all** under Users.



3. Select a user and click **Manage security roles**.



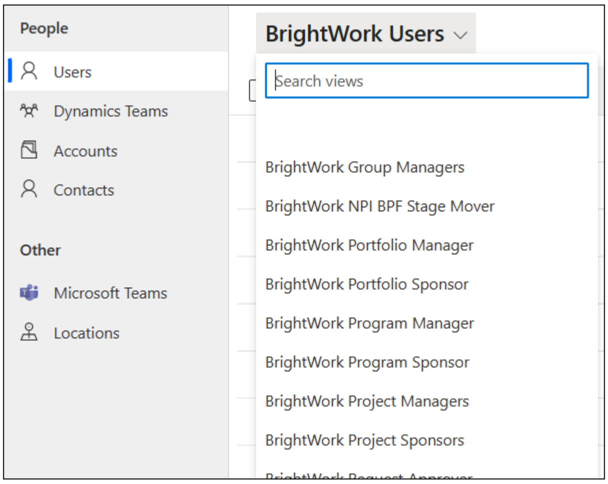
4. Select the roles you want to apply to the user and click Save.



> **Note** If security role changes are made to a user that is already logged in to the app, the user will need to either refresh the screen with Ctrl-F5 or log out of the BrightWork 365 app and log back in to utilize the security role changes.

View Current Security Role Assignments In-App

1. Go to the Admin Area.
2. Click on the Users table link in People section of the Site Map.
3. Click the drop-down arrow to view users assigned to the various security roles.



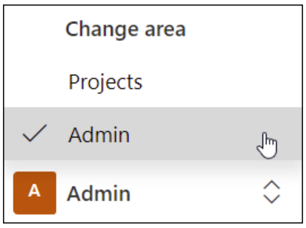
Create the Senior Managers Dynamics Team

The BrightWork 365 **Senior Managers** Dynamics Team is used to limit the users that are able to view cost and budget data for portfolios and programs, and to limit the users returned in the following form lookup columns:

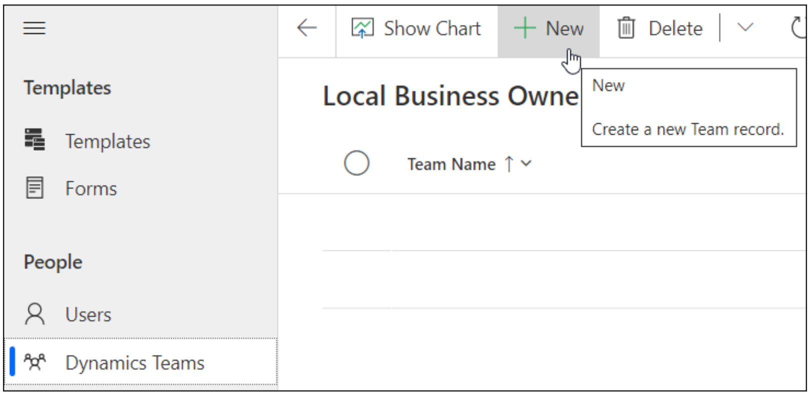
- Approvers (Project Requests)
- Group Manager
- Portfolio Manager
- Portfolio Sponsor
- Program Manager
- Program Sponsor

To create the Senior Managers Dynamics Team and add users:

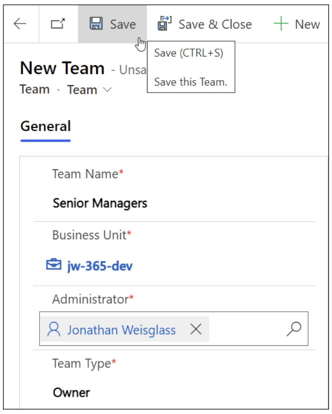
1. Login to the BrightWork App.
2. Switch to the **Admin** area.



3. Click **Dynamics Teams** and click **+ New.**



4. Name the team "**Senior Managers**".
5. Select a **Business Unit**, make yourself the Administrator and click **Save**.



6. Click **Add Existing User** to begin adding your users to the team.

> **Note** It is possible to more granularly limit the users returned in the lookup columns noted above beyond what is offered by the Senior Managers team with the use of additional lookup column security roles and related configuration changes. For more detailed information contact your BrightWork Customer Success Partner.

Troubleshooting

User Access Issues

With user diagnostics you can run through a series of checks to determine the health of a user account and view recommendations for resolving issues.

1. Navigate to the Power Platform admin center, Environment Details page.
2. Click on Settings | Users.
3. Select the user and choose Run diagnostics from the top of the screen.
4. Check the diagnostic Status and Results notes for any issues and resolution recommendations.

BrightWork Security Roles Details

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

BrightWork 365 provides multiple security roles to choose from, each with a different purpose. The roles noted below are grouped by how they are used in the solution. For more granular security role details see the spreadsheet BrightWork 365 Security Roles.xlsx 📎

BrightWork 365 Privilege-Based Security Roles

> **Note** These security roles are additive not cumulative so you will need to assign users to multiple roles if you need them to have the corresponding combined privileges. An exception is the **BrightWork Request Submitter** role which should not be combined with any other BrightWork security role.

						BrightWork 365 Solution Roles				
Dataverse Security Role	**Security Type**	**Basic Role**	**Custom Privileges**	**Lookup Role**	**Source**	**Requestor**	**Team Member**	**Project Manager**	**Senior Manager**	**PMO Manager**
Basic User	Security Role	Yes	No	No	Dataverse	√	√	√	√	√
BrightWork Request Submitter	Security Role	No	No	No	BrightWork 365	√				
BrightWork Team Member (including Request Submit)	Security Role	No	No	Yes	BrightWork 365		√	√	√	√
BrightWork Project Manager	Security Role	No	Can see Project Settings	Yes	BrightWork 365			√	√	√
BrightWork Stage Mover	Security Role	No	No	No	BrightWork 365			√*	√	√
BrightWork PMO Manager	Security Role	No	No	No	BrightWork 365					√
BrightWork Template Editor	Security Role	No	No	No	BrightWork 365					√
BrightWork Approvals Coordinator	Security Role	No	Can see Approvals tab	Yes	BrightWork 365					√
BrightWork Request Receiver	Security Role	Yes	No	Yes	BrightWork 365					√

Basic User

All users of BrightWork 365 must be assigned the **Basic User** security role, in addition to any other security role they are also assigned.

BrightWork Request Submitter

A Request Submitter uses a free BrightWork 365 license and will therefore only have access to the BrightWork Requests app, a limited version of the full BrightWork app. A Request Submitter will have access to much of the same Request functionality as found in the Requests section of the full BrightWork 365 app for paid users, but they will not see other links within the Projects area, nor will they see links to the other areas of the app such as the Portfolios or Reports areas.

A Request Submitter has access to their own requests but not those of others.

BrightWork Team Member

The BrightWork Team Member security role must be applied to any user who requires access to the full BrightWork 365 app. They can interact with all areas of the app with varying levels of privilege.

Users given the BrightWork Team Member security role will appear in the app's Admin area in Security | Users | BrightWork Users.

Added privileges:

- Request: Create, Read, Write.
- Assignment: Read.
- Project Tabs: Access to all tabs except Project Settings.
- Project Task: Create, Read, Write.
- Issue, Risk: Create, Read, Write. Delete only their own.
- Document: Create, Read, Write, Delete.
- Project Actions, Costs, Communications: Create, Read, Write. Delete only their own.
- Portfolio/Program - Actions, Communications: Create, View. Cannot view Costs data.
- Project Charter: Read, Write.
- Portfolio & Program Statement: Read, Write.
- Status Tab: Read, Write.
- Status Report: Create, Read, Write. Delete only their own.
- Template: Read.
- Dynamics Teams: Read.

Only members of this security role will display as a user choice in the form lookup columns Assigned To, Project Sponsor, and the Approver column in the Actions module.

BrightWork Project Manager

A BrightWork Project Manager can interact with most areas of the app, with varying levels of privilege per area. Only members of this security role will display as a user choice in the Project Manager column of a project.

Added privileges:

- Project: Create.
- Business Process Flow: Allowed to manually move projects to stages that do not require approvals.
- Project Costs: Create, Read, Write, Delete.
- Issue, Risk: Create, Read, Write, Delete.
- Portfolio/Program - Actions, Communications: Create, Read, Write, Delete.
- Assignment: Create, Read, Write, Delete.
- Project Settings Tab: Has access.
- Project Task: Create, Read, Write, Delete.

BrightWork Stage Mover

Added privileges for this security role:

- Business Process Flow: Allowed to manually move projects to those stages that do not require approvals.

BrightWork PMO Manager

The BrightWork PMO Manager role has the highest level of additional user-related privileges (not system administrator-related privileges) throughout the entire BrightWork 365 app.

Added privileges for this security role:

- Project: Delete.
- Program/Portfolio: Create, Read, Write, Delete.
- Project Actions, Communications: Create, Read, Write. Delete.
- Portfolio/Program - Costs: Create, Read, Write, Delete.

BrightWork Template Editor

Added privileges for this security role:

- Templates Area > Templates: Create, Read, Write.

BrightWork Approvals Coordinator

Added privileges for this security role:

- View the Approvals tab in Requests and Projects.
- Can be nominated as an Approvals Coordinator in Requests and Projects.
- Can change the Requestor value in Project Requests.

BrightWork Request Receiver

A Request Receiver is the first receiver of new project requests and will have access to view the Request Details tab. Depending on the applicable Request Business Process Flow, they will either give final approval to the request or pass it along to the Approvers noted in the Request form.

Only members of the BrightWork Request Receiver security role will display as a user choice in the Request Receiver column of a project request.

Optional Lookup Column Security Roles

The security roles noted below are not in use out of the box. These roles provide the option to be more granular than what is offered by the more generic **Senior Managers Dynamics Team** when specifying the users that can be chosen within the associated user lookup columns. To activate this functionality you will need to edit the corresponding system view in the Users section of the Admin area within a custom solution, and apply the role to any user you would like to appear as a choice in the column. Contact your Customer Success Partner if you require additional configuration information.

- BrightWork Group Manager
- BrightWork Portfolio Manager
- BrightWork Portfolio Sponsor
- BrightWork Program Manager
- BrightWork Program Sponsor

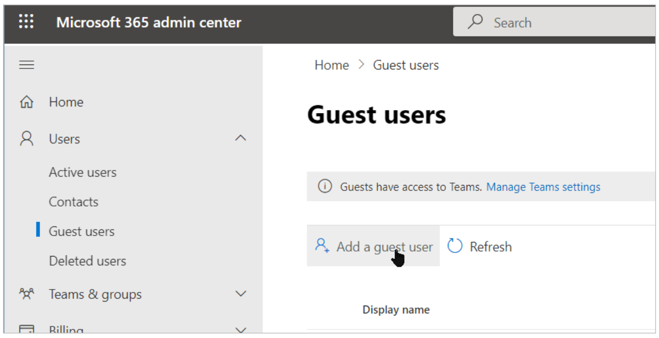
Deprecated Security Roles

- BrightWork Project Sponsor
- BrightWork Request Approvers
- BrightWork Request Reviewer

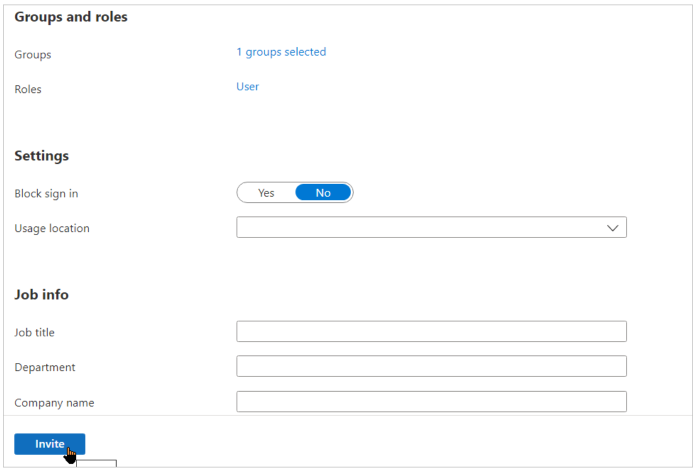
Add an External Guest User

An external guest user can be added to your Microsoft 365 tenant and Power Platform environment to allow the user access to the BrightWork 365 app.

1. Navigate to the Microsoft 365 Admin Center at https://admin.microsoft.com/.
2. Expand **Users** and click **Guest users**.
3. Click **Add a guest user**.



4. Select **Invite User** and fill out the form.
5. Scroll down, click **Groups** and add the user to the security group for the environment that contains your BrightWork 365 solution.
6. Click **Invite** - the user will receive an invite.



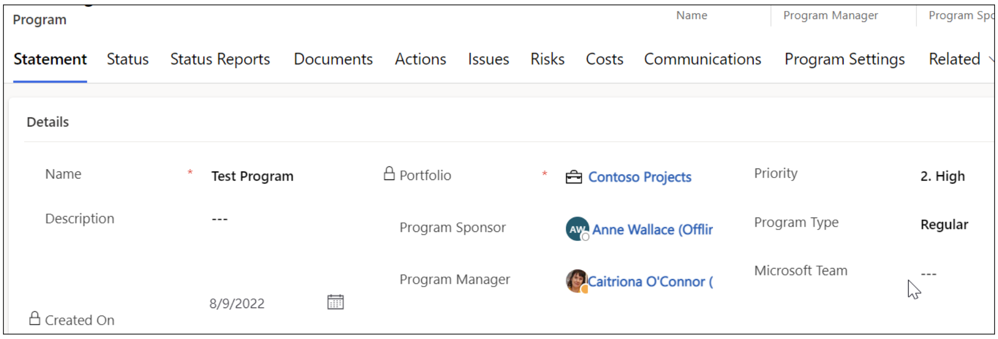
7. Provide the user with either a Power Apps Premium/Power Apps per user license (preferred) or Power Apps per app license. If the user needs access to Power BI reports and does not have their own Power BI Pro license, then you will need to also provide them with a Power BI Pro license.
8. Navigate to https://admin.powerplatform.microsoft.com/, open the relevant environment and add the user. Grant the user any security roles needed for their interaction with the BrightWork 365 app. Note that all BrightWork 365 licensing rules will apply to the guest user.

> **Note** If you encounter technical issues with this process, check with your internal IT group for any related restrictions that might be in place for your organization.

Create a Microsoft Team for a BrightWork 365 Program

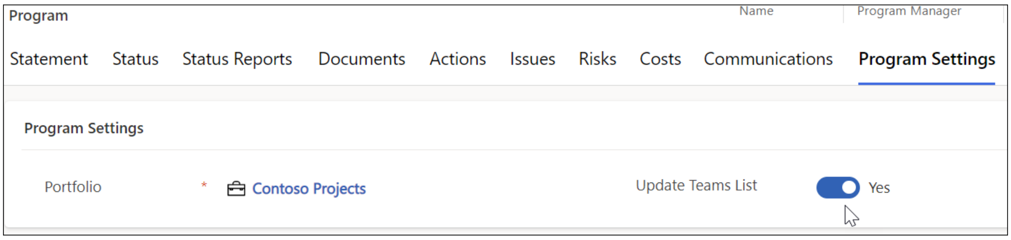
Before creating a Microsoft Team for a BrightWork 365 program, check if one has already been created and assigned to the program:

1. In the Portfolios > Program section of the Site Map, click in the Statement tab of the relevant program and check the **Microsoft Team** field to see if there is already a Microsoft Team assigned to the program or if it is blank.

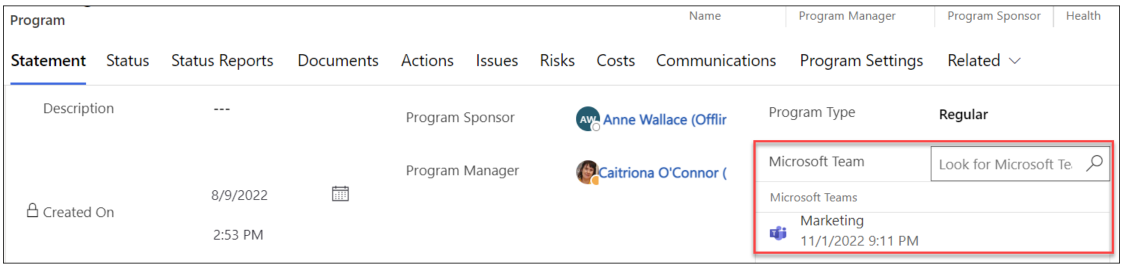


To create a Microsoft Team for a BrightWork 365 Program:

1. In Microsoft Teams create a Public Microsoft Team 'From scratch'.
2. Add the Owner of the Solution Flow **Get list of Microsoft Teams** as a Member of the new Microsoft Team; this is likely the service account used to install the BrightWork 365 solution as noted in our installation instructions.
3. In the relevant Program go to **Program Settings | Update Teams List** and switch the slider to **Yes**.
   Note: This process will run under the account of the Owner of the Solution Flow **Get list of Microsoft Teams**.



4. A process will run to populate the Teams table with the Teams that you have access to.
5. In the Program's **Statement** section choose the Microsoft Team you created; it may take a minute or so for the Team to be available for choosing.

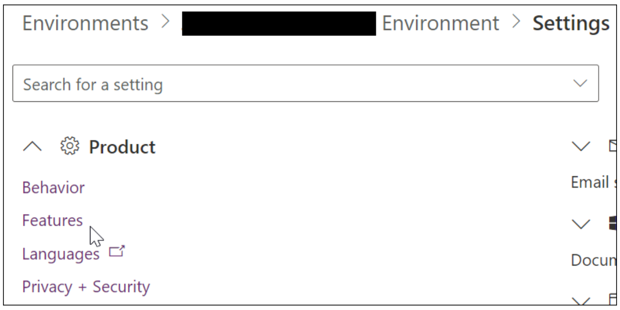


Tip

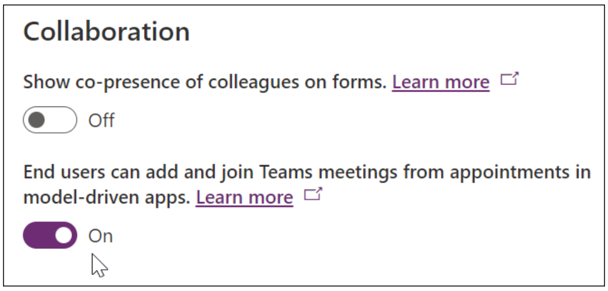
- Every time you add a new Program ensure that it points to a Microsoft Team.
- After attaching a Microsoft Team to a program, child projects of the program will be able to create channels within that same Team.

Enable the Teams Meeting Option for BrightWork 365 Appointments

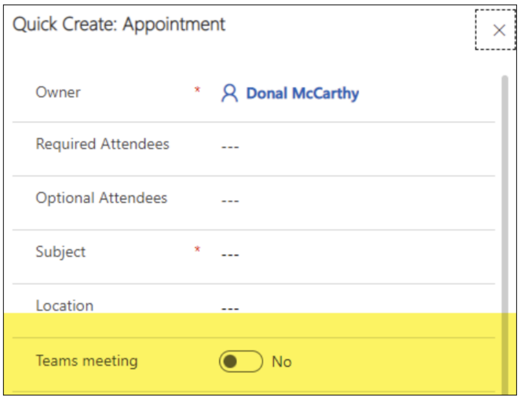
1. Navigate to https://admin.powerplatform.microsoft.com.
2. Open your environment.
3. Click Settings > Product > Features.



4. Turn on the Teams option.



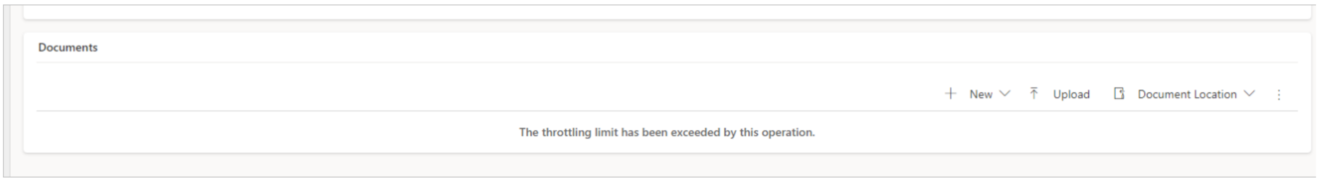
5. The **Teams meeting** option will now be available on the BrightWork 365 Appointment form.



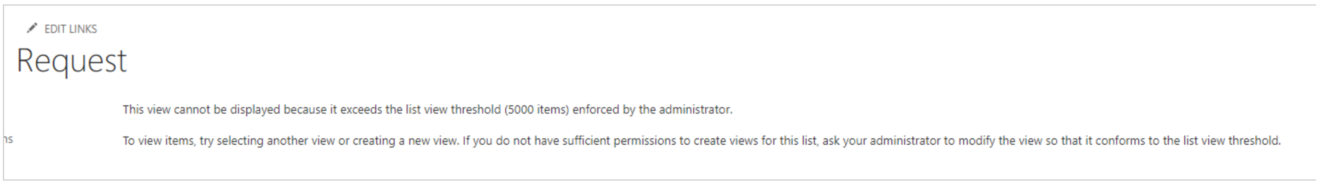
Managing the SharePoint Throttling Limit

Introduction

SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. When the limit is reached you will see a message like the one below:



> **Note** This is not just a limitation of the Power Platform, the classic SharePoint experience also will not display all documents when the library contains more than 5000 items.

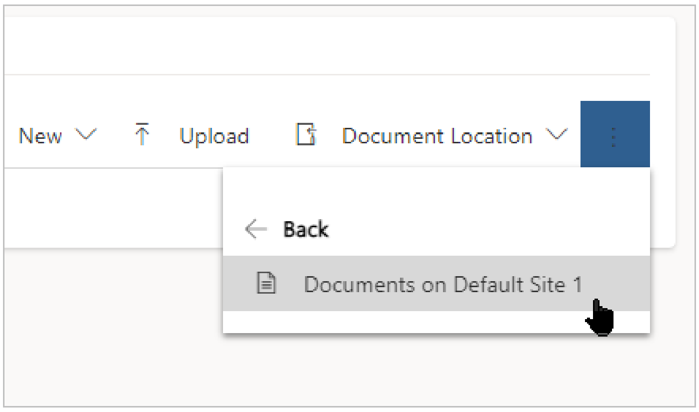


You should also be aware that deleting records in the Power Platform does not delete the documents associated with the record in SharePoint.

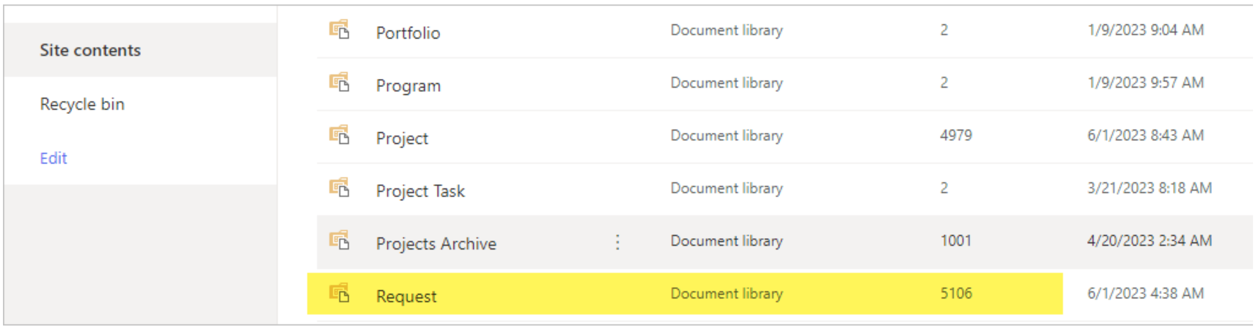
The simplest solution is to create another document library in SharePoint and selectively move folders from the library with more than 5000 items into it.

Set Up an Archive Document Library and View

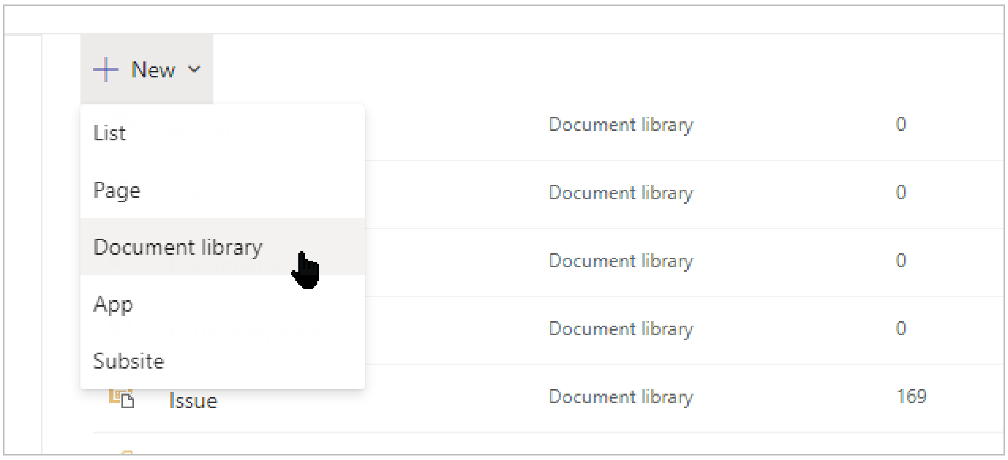
1. Click the three-dot menu on the Documents subgrid, expand Open Location and click the link to navigate to your SharePoint site.



Any document library with a count of more than 5000 will need to be remedied.

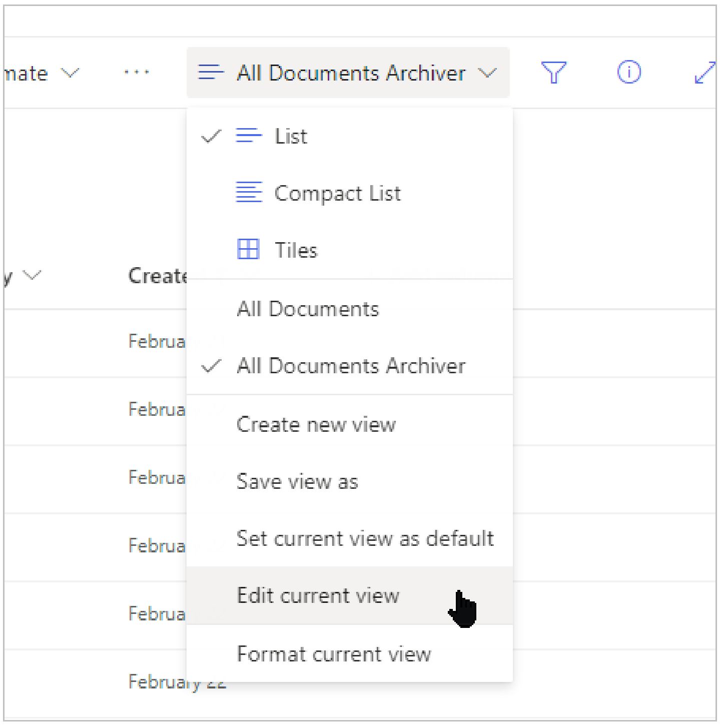


2. Create a new Document library for archiving the documents. You should create one per existing Document library that you need to work with. In this case, we will create a Document library called Request Archive.



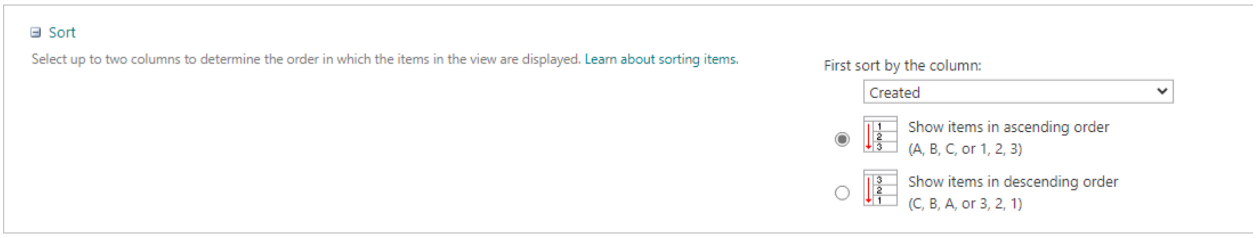
3. Navigate to the problem Document library and save the default view as a new view, e.g., **All Documents Archiver**.

4. Select **Edit current view** on the new view menu.

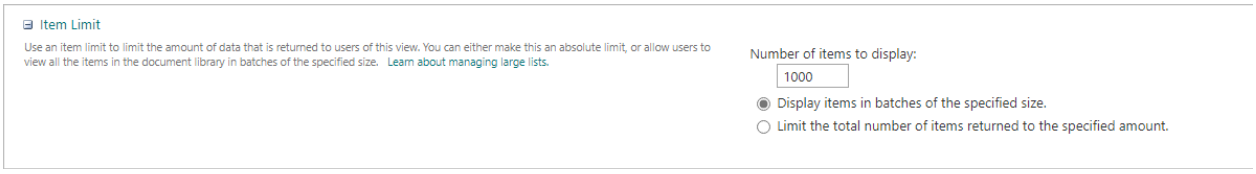


5. Add the **Created** column.

6. Set the **Created** column as the default sort column and set it so the items sort in ascending order – this will show the oldest items first.



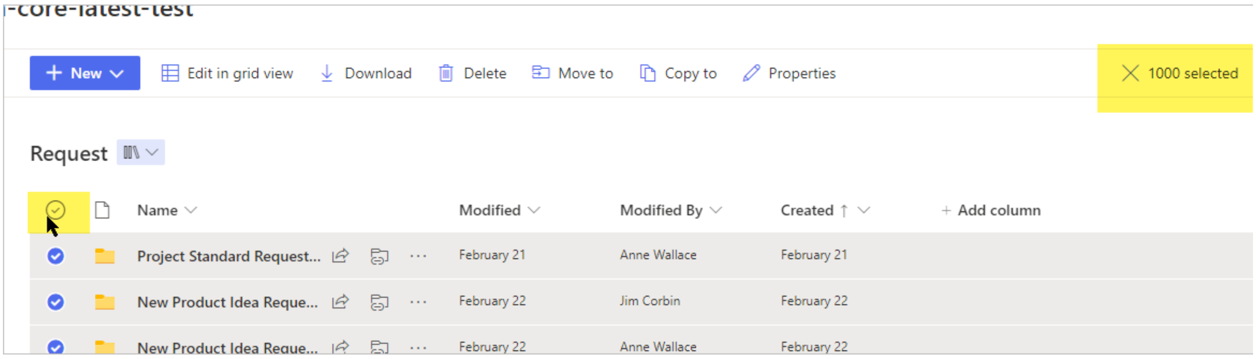
7. Scroll down further, expand the item limit section, and enter **1000** in the field.



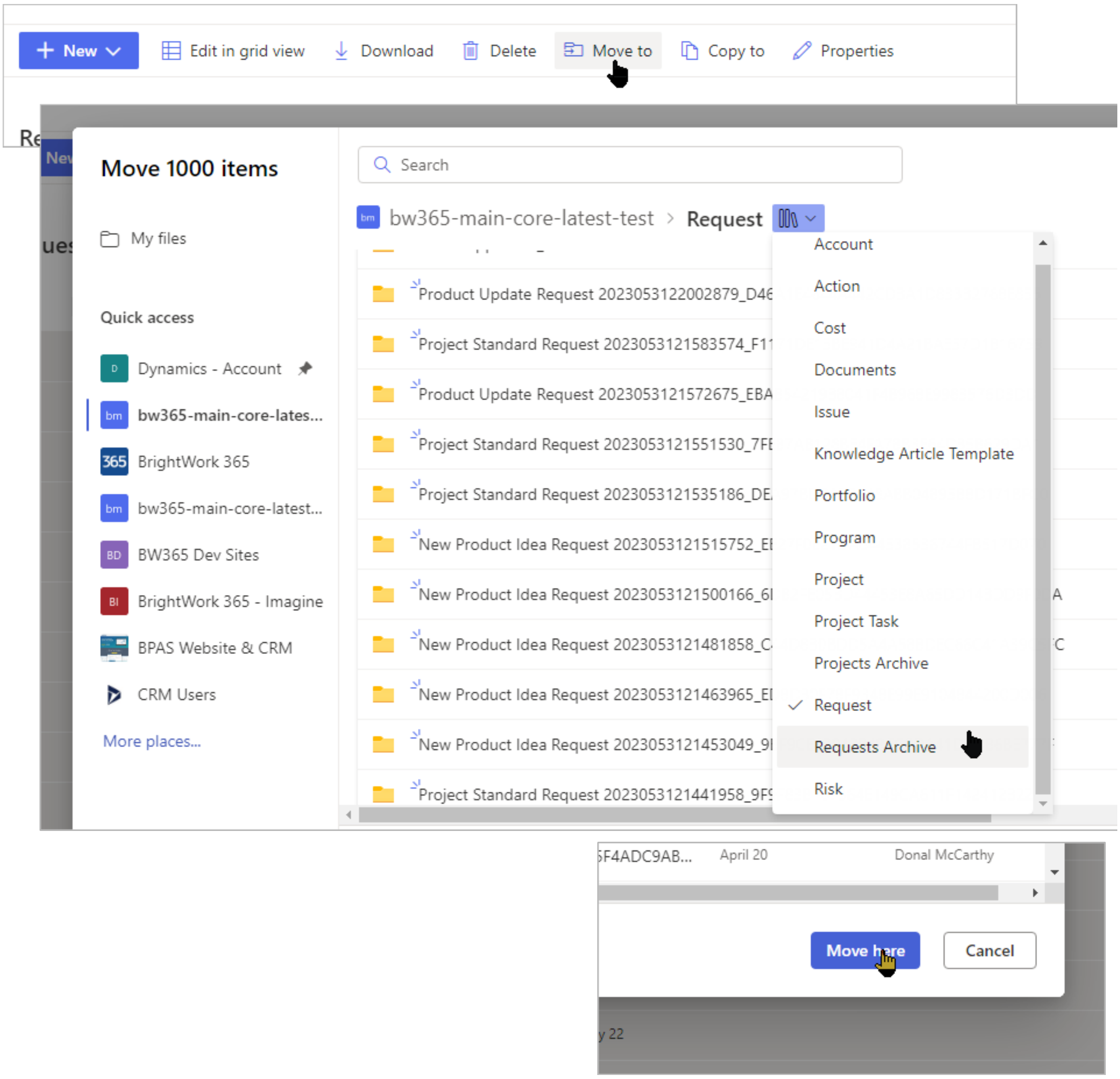
8. Click **OK** to save your changes to the view.

Move Documents to the Archive Library

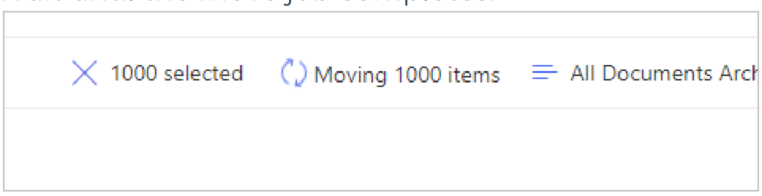
1. Navigate to the **All Documents Archive** view and click the selector at the top to select all the items in the view – it should say **1000 selected**.



2. Click **Move to**, select the archive Document library, and click **Move here**.



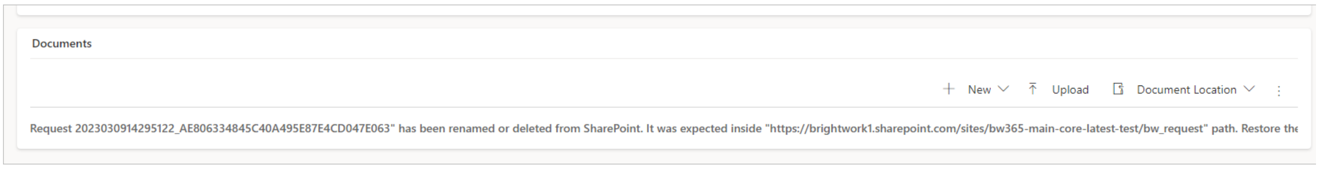
3. Wait until the move job completes.



Where are My Documents?

The above document archiving solution is a blunt one and may result in users inquiring about documents missing from their records.

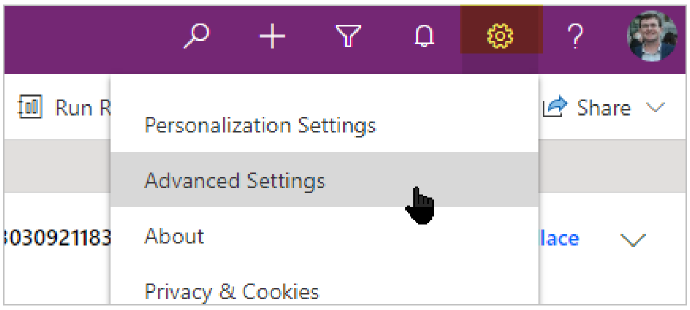
When you move the document folder associated with a record from one Document library to another, a message like the below will display in affected records.



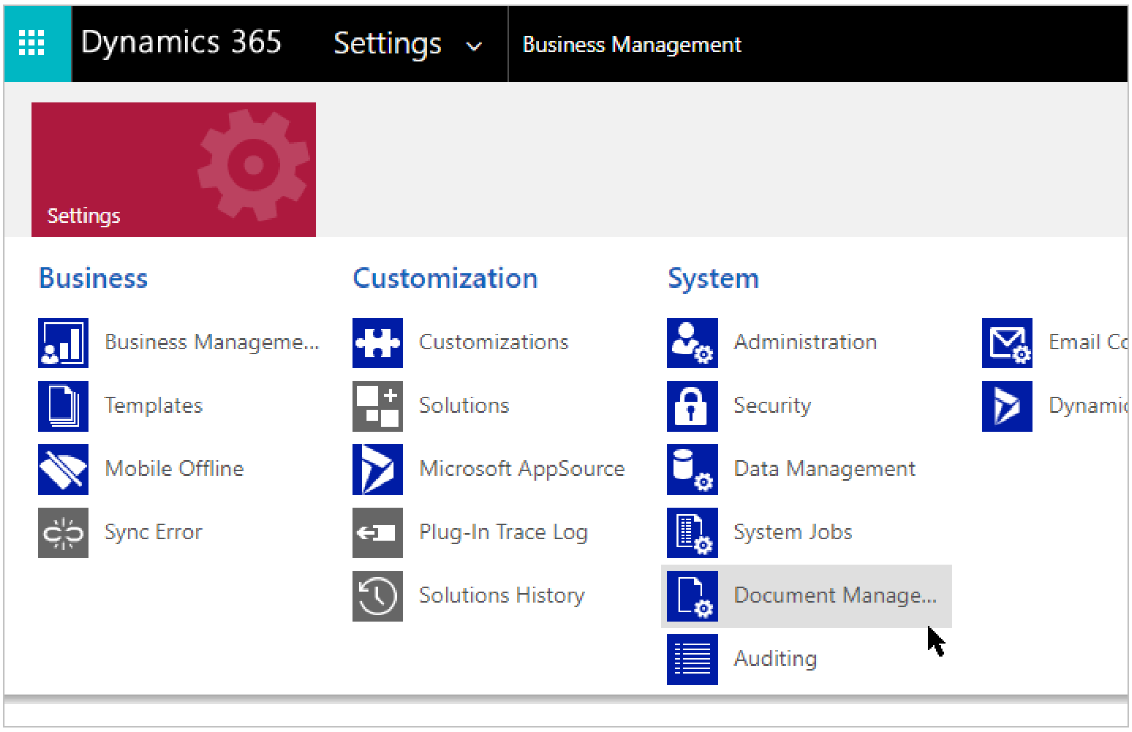
To fix this, you must create a new SharePoint Document Location record for the new Document library and switch the **Document Location** to it.

Create a New SharePoint Document Location

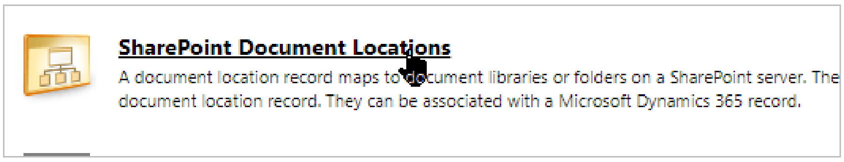
1. Click **Advanced Settings** on the Setting menu.



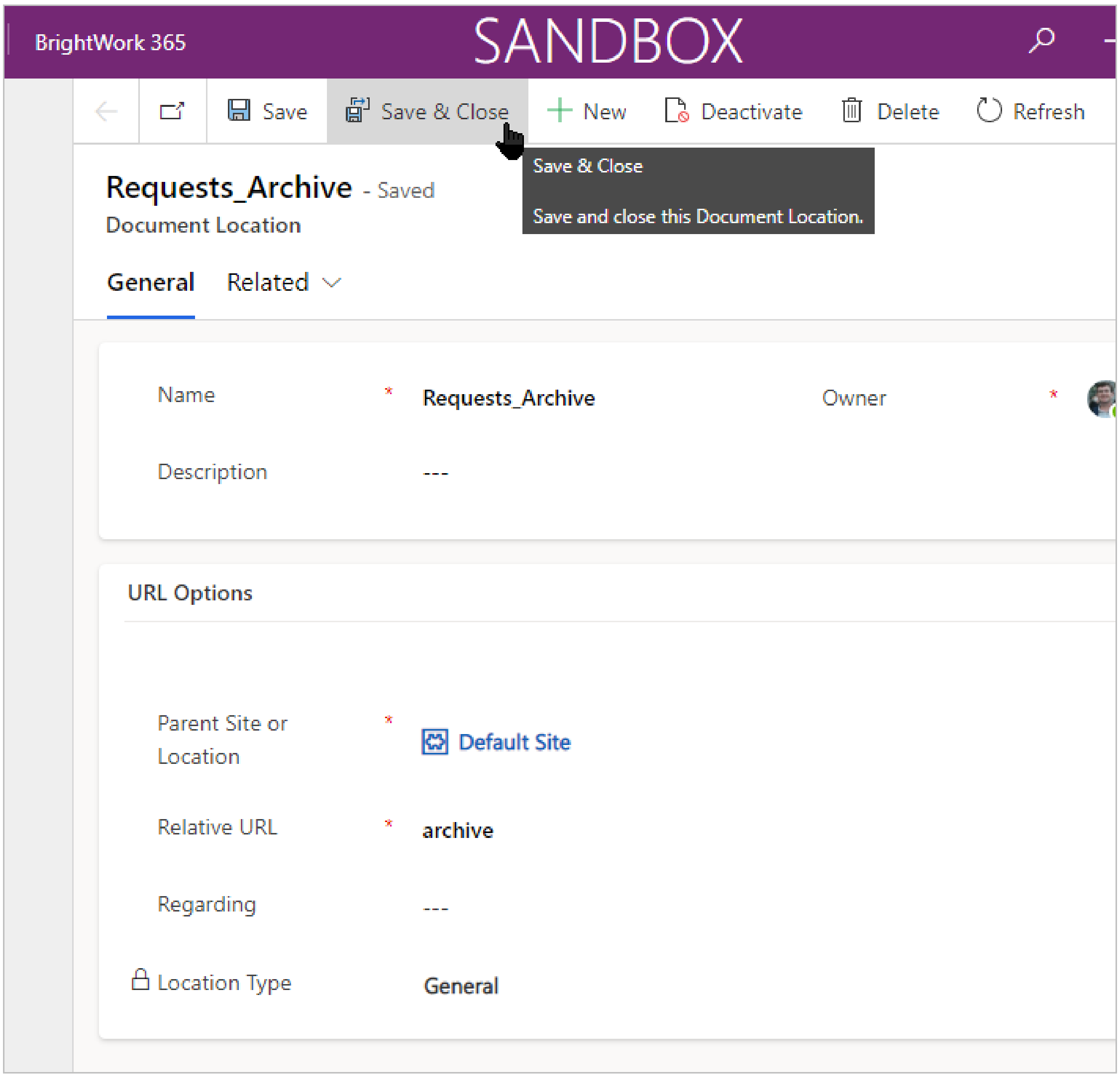
2. Expand the settings menu and click **Document Management**.



3. Click **SharePoint Document Locations**.



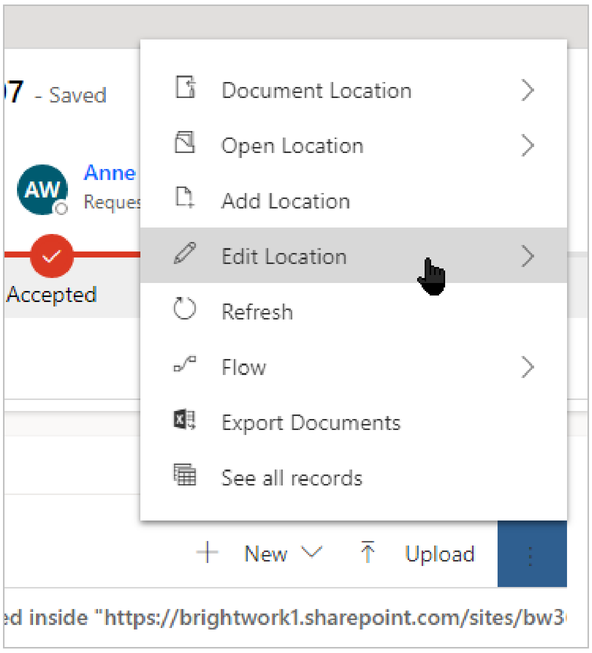
4. Click + New and fill out the form as below and click **Save & Close**.
   The two most important items are the Parent Site or Location – ensure to select **Default Site** and the Relative URL.
   The Relative URL is the part of the SharePoint Document Library URL that refers to the document library, in the example below it is **Archive**.
   https://contoso.sharepoint.com/sites/contoso-proj/Archive/Forms/AllItems.aspx

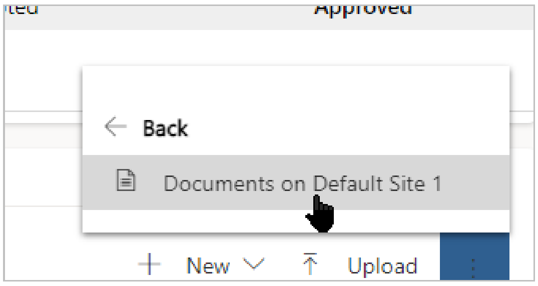


Switch Document Location

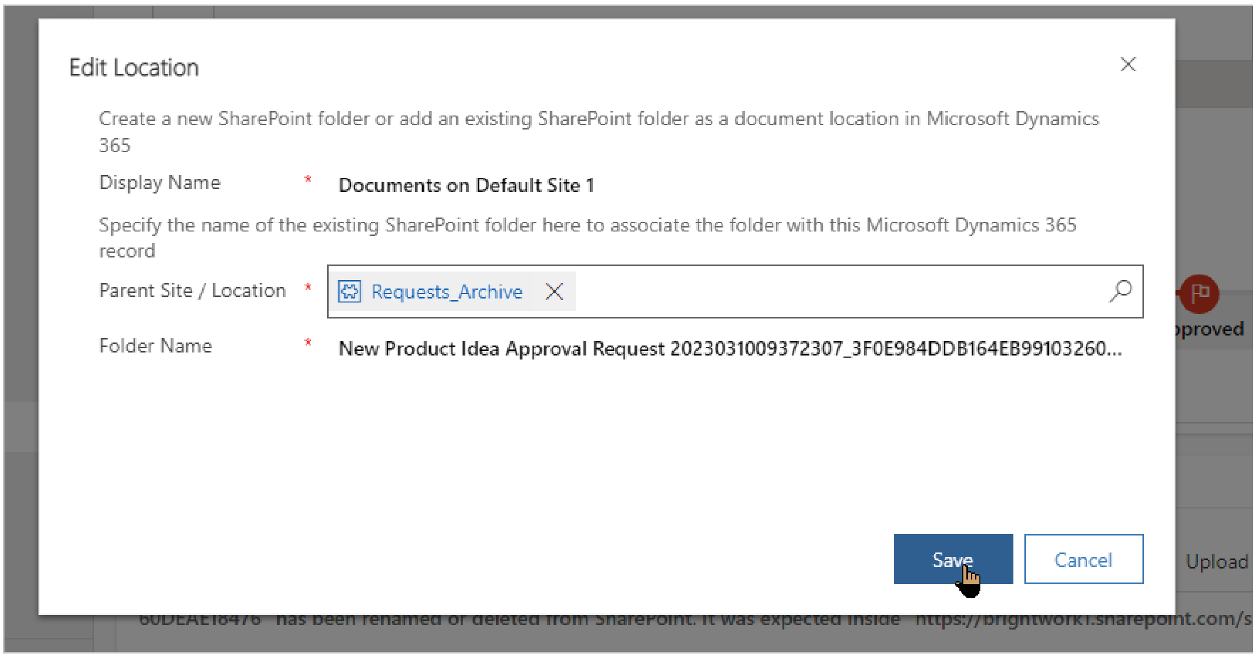
Once you have a Document Location setup for the new library, you can switch affected records as they turn up.

1. Click **Edit Location** on the three dot menu and click the Document location.

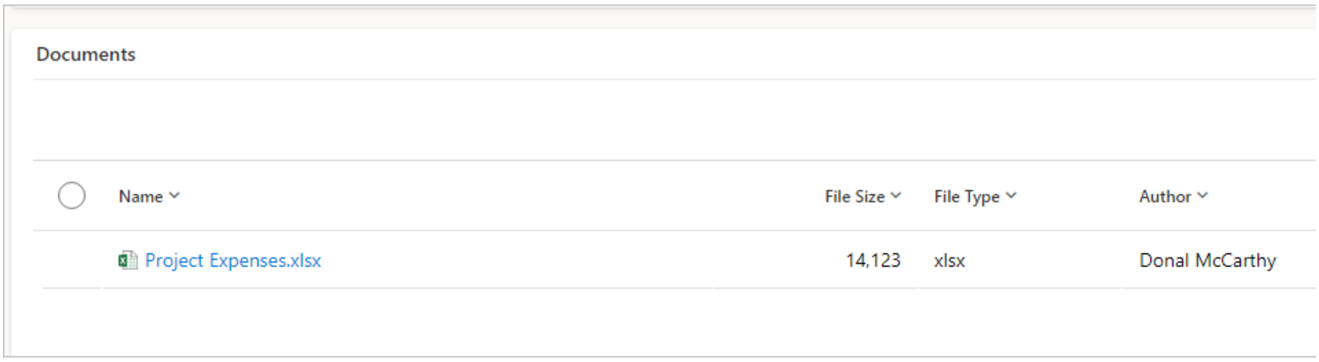




2. Select the new Document location, click **Save** and confirm that you want to switch.



The Documents subgrid will load correctly.

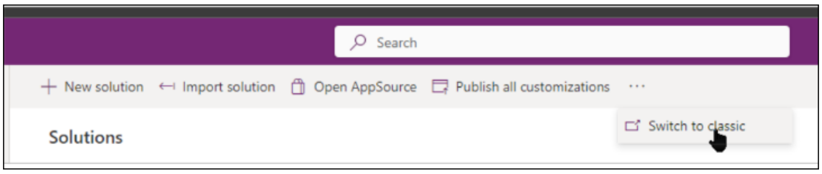

Documents
Name
File Size
File Type
Author
Project Expenses.xlsx
14,123
xlsx
Donal McCarthy

Add BrightWork Tables to Dynamics 365 App for Outlook

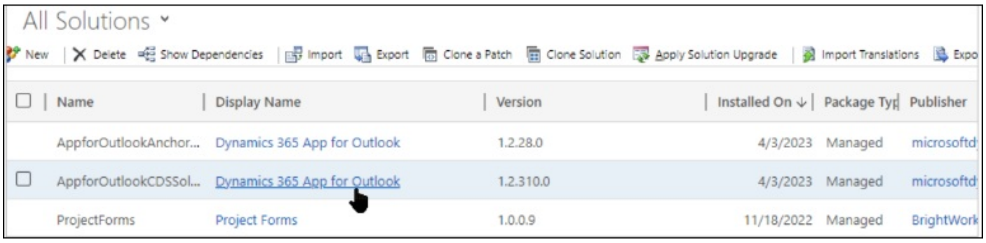
Microsoft Dynamics 365 App for Outlook allows you to track an email in your inbox against a record in BrightWork 365. By default, the only tables you can do this against are Accounts and Contacts. Should you wish to track against other tables (e.g., Projects) you must add them to the Dynamics App for Outlook. See the **Dynamics** section of the BrightWork 365 Install Guide.pdf for additional information.

These steps will use the **Projects** table as an example:

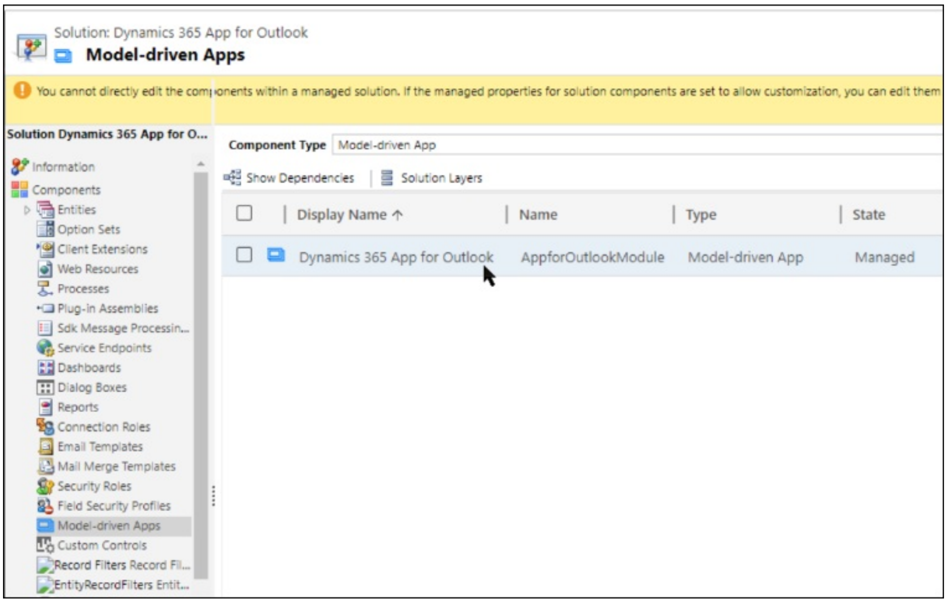
1. Navigate to https://make.powerapps.com/ and select the BrightWork 365 Environment.
2. Click the **Switch to classic** option.



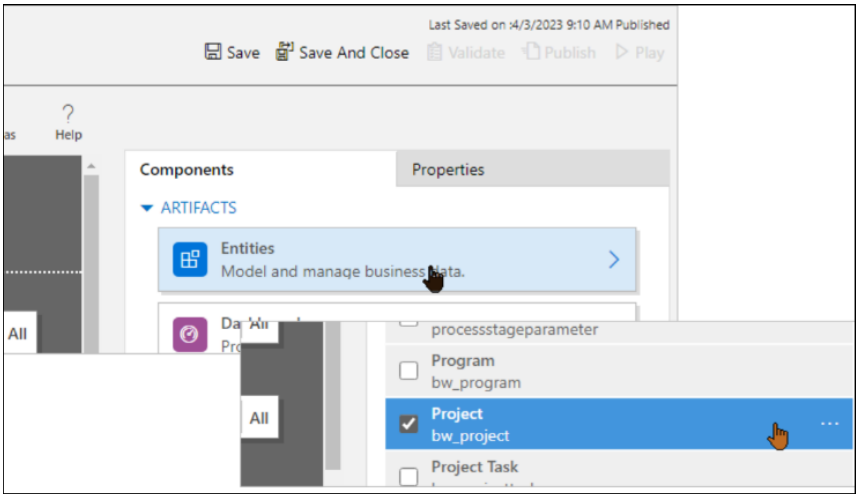
3. Open Dynamics 365 App for Outlook (the one with the highest version number).



4. Click **Model-driven Apps** and open **Dynamics 365 App for Outlook**.



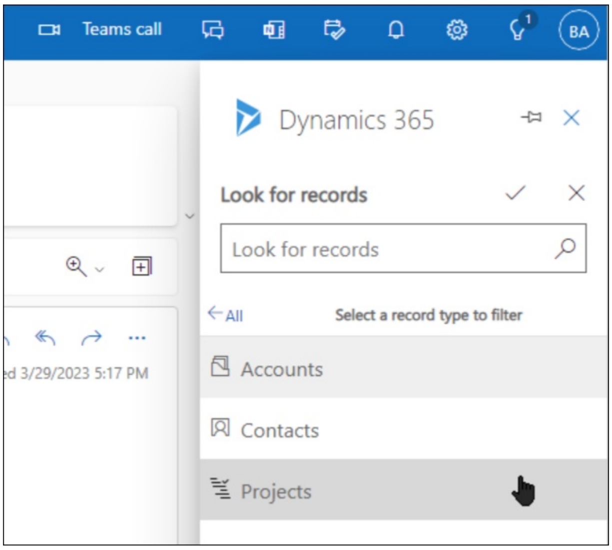
5. Expand **Entities**, scroll down and select **Project**.



6. Click **Back**, **Save**, and **Publish**.

7. Close the app and the classic solution window.

Users will now be able to use **Set Regarding** against a BrightWork 365 project.

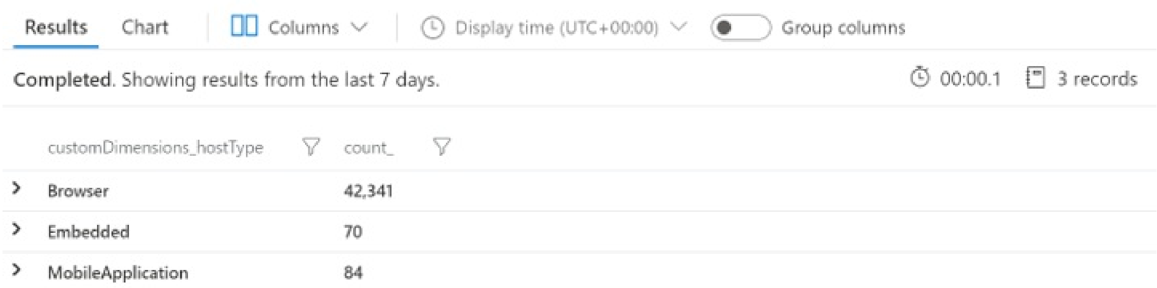


Telemetry Data

Telemetry provides data about what's going on within a model-driven app or on the server. Telemetry is crucial as it allows you to get a profile of app usage, detect performance problems and app crashes. Without this data, the app or service is a "black box"; the only way to get insight if you have an issue is to contact technical support. Telemetry enables you to detect and measure specific operations to better understand whether things are working normally or something is negatively affecting the system.

You can also use telemetry to observe overall performance trends so you can proactively manage them rather than react to user incidents. With Application Insights, you can define conditions where you'll be alerted when a metric exceeds a specific threshold.

The below screenshot shows a sample count of users accessing from browser, mobile, or embedded applications:



You can find more information and technical details in this article: https://learn.microsoft.com/en-us/power-platform/admin/analyze-telemetry.

Environment Backups

In order to protect your BrightWork 365 data you will want to ensure your environment is on a backup routine. We recommend checking with your organization's Microsoft 365 Power Platform Administrator to see which local policies and practices are in place. See the following article for details and options: Back Up and Restore Environments.

Uninstall BrightWork 365

Caution

- Removing a Solution or an Environment **deletes all** the associated data. This should be done with extreme caution.
- You need to be a Power Platform Administrator to carry out these steps.

You have two options to remove BrightWork 365 from your Power Platform tenant:

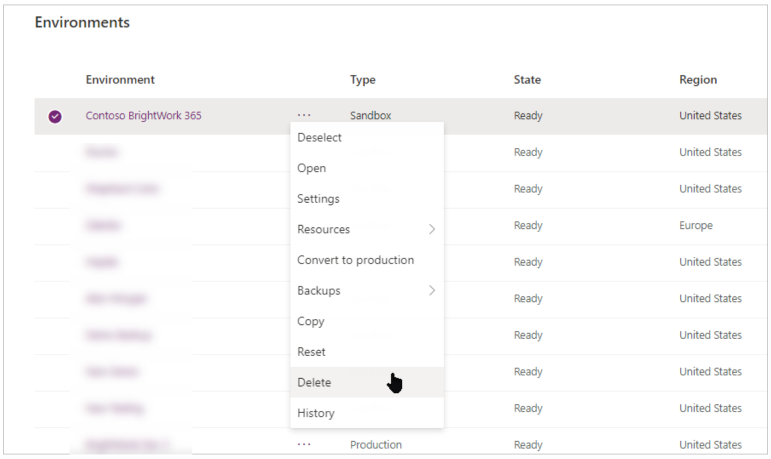
- Delete the BrightWork 365 environment
- Delete the BrightWork 365 solution and any other associated solutions

Delete the BrightWork 365 Environment

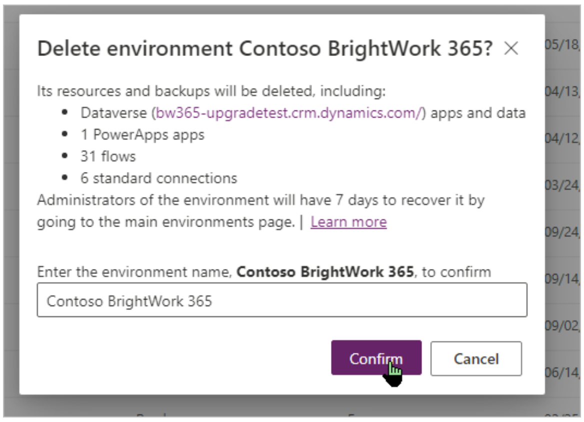
The easiest way to remove BrightWork 365 from your Power Platform tenant is to delete the environment into which BrightWork 365 is installed.

To delete the BrightWork 365 Environment:

1. Login to https://admin.powerplatform.microsoft.com/environments and select the environment into which you installed BrightWork 365.
2. Expand the ··· menu and click Delete.



3. Enter the environment name and click Confirm.

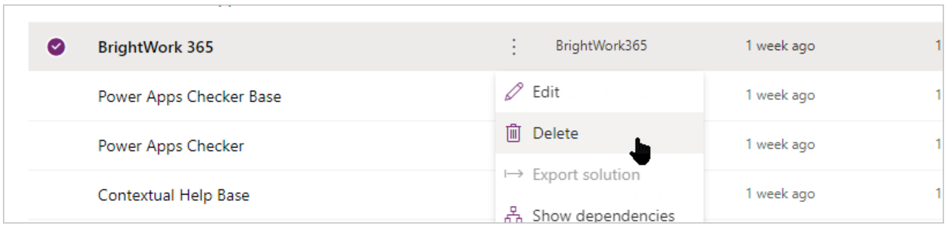


Delete the BrightWork 365 Solution

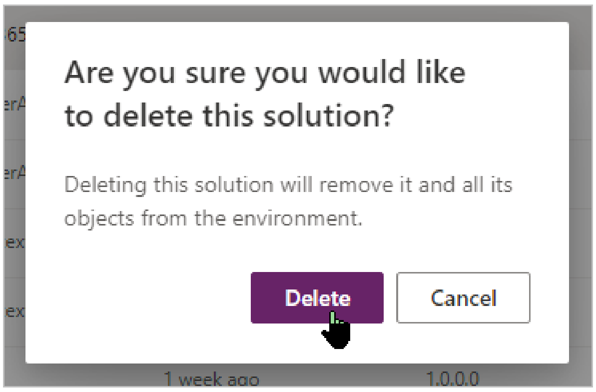
If you want to keep the environment, you can delete the BrightWork 365 solution from the environment. If you have a custom managed solution for BrightWork 365 on top of the main BrightWork 365 solution, you must delete the custom managed solution first.

To delete the BrightWork 365 solution:

1. Login to https://make.preview.powerapps.com/ and select the environment into which you installed BrightWork 365 from the environment switcher in the top right.
2. Select the BrightWork 365 Solution, expand the ··· menu and click Delete.



3. Click Delete to confirm that you want to delete the solution.



Release Notes

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Tip Installation and upgrade information can be found in the Knowledge Base Administration category.

September 2023 (v1.8)

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Projects

To learn more about how to manage Projects, click here.

Enhancements to **Projects** in this release include:

New Starter Project Templates

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- Project Light: This starter project template is for managing projects that are at the low end of the complexity spectrum for projects that require small amounts of project management.

- Project Standard: This is a new version of the previously available Project Standard starter template. This starter template provides a semi-structured process that is useful for a range of business departments to run their projects including sales, marketing, engineering, finance, etc. This template is in the middle of the complexity spectrum.
    - In this iteration of the Project Standard template, the Project Form and Business Process Flow have been renamed to BrightWork 365 Project.
- Project Structured: This starter template is for managing projects that are in the high end of the complexity spectrum.

Gantt

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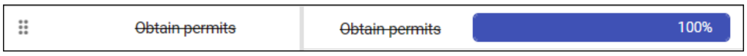
- Critical Path identification is now available in the Project Gantt. With the click of a button, you have the option to display the longest sequence of tasks that must be finished on schedule to complete the entire project on schedule.
- Gantt Task Unit % values can now be set by Team Members and Project Managers to something other than 100% so that project managers can more realistically track resource utilization.
- To clearly see which tasks are completed and which are not, a strikethrough is applied for tasks on the grid and on the Gantt when % Complete is 100; the strikethrough is removed when % Complete is less than 100.



- The size of the drag and drop hotspots for dependents has been increased for improved accessibility.
- Larger Task and Dependency information boxes for more efficient inputting of task data.
- You can now perform multi-select deletion of task rows to more quickly create the needed task hierarchy.
- While dragging a Gantt bar you will now be able to view its original location to see where it currently is relative to where it started.
- Faster Gantt rendering performance.

Stages

- Users now have the ability to view in the Stages tab the percent complete of stages within projects in order to easily get a high-level view of how different stages are progressing.

Request Templates and Project Templates

To learn more about Templates, click here.

To learn more about BrightWork 365 Starter Project Templates, click here.

Enhancements to **Templates** in this release include:

Form Configurator

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- The Form Configurator tool provides Template Editors with the ability to hide or show Project Template Form Tabs, Sections, and Columns with point and click ease. The Form Configurator allows users to adjust the amount of process in projects, and to better focus on the most relevant project elements.

Approval Timeout Behavior

- The new Approval Timeout Behavior setting for long running approvals in Requests and Projects sends alerts by email to relevant parties that the 28-day approval process time period limit was reached, so that they may take necessary actions.

Project Template Details Tab

- The Details tab of Project Templates now displays a description of the template, and a count of projects linked to each template. This enables users to gain valuable insights into the potential implications of their actions within the Templates Area.

Project Template Projects Tab

- View projects that are associated with the Project Template to easily view which projects would be impacted by changes made to the associated form.
- The link to Projects (which currently appears within the related dropdown) now appears to the right of the Form Configurator tab.
- The columns Project Status, Program, and Portfolio, have been added to the Projects tab.

Audit History Tab

- The Audit History tab tracks changes made to templates, including who made the change, when the changes were made, old values, and new values.

Dashboards (Power BI)

To learn more about the BrightWork 365 Dashboards that report across multiple projects, click here.

Enhancements to **Power BI Dashboards** in this release include:

Resource Utilization Reports

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- When viewing the Resource Utilization Power BI reports, the Task Unit % for resources that was entered in the Gantt or Assignment will be applied to the reports, which accounts for the variation of % utilization.

Portfolio and Projects Dashboard

- Visual improvements have been made to the Health Indicator in the Portfolio Dashboard and Project Status Dashboard.

June 2023 (v1.7)

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Requests and Approvals

To learn more about how to manage Requests, click here.

Enhancements to Requests in this release include:

- Requests can now be created with zero approvals (for v2 templates).
- The Approval Notification Email now includes the Project Name and a link to the project.

- The Project Name default value in Requests is now the Request Name (editable).
- The Project Created email now includes a link to the Project.

Projects

To learn more about how to manage Projects, click here.

Enhancements to Projects in this release include:

Gantt

- A Today indicator line has been added to the Gantt to clearly see where Today is in relation to task dates.
- Performance of the Gantt has been improved.
- The Task Import process has been made easier:
  - No longer necessary to add Start and Finish Dates to the spreadsheet.
  - An **Import Tasks** view has been added for a simpler import process.
  - The file format used for the import process is now XLSX instead of CSV.

Manually Add Project Team Members

- Team members can now be added to a project manually in the Team tab.

Costs

- Users can now see more items in the Cost Items section to save time scrolling and filtering.
- A Description column has been added to the Costs form.

Select the Microsoft Team for the Team Channel in Projects

- Users with appropriate permission can now select the Microsoft Team for the Microsoft Team Channel on the Project Settings tab (if a Team Channel has not yet been assigned to the project).

Approvals

- Notification emails include the Project Name in the email body.
- Rejected Stage approval emails now include a statement requesting that the user rectifies the detected issues.

My Work

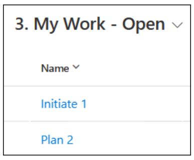
To learn more about how to manage My Work, click here.

Enhancements to My Work in this release include:

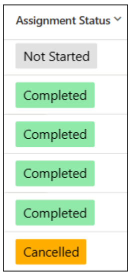
- The My Work layout inside each project is now the same as the My Work Grid view on

- The My Work layout inside each project is now the same as the My Work Grid view on the main nav for a more intuitive and consistent user experience.

- Work assignments from Cost, Issues, Risks, Actions, and Tasks can now be opened by clicking on the **Name** column in the Grid view.



- The **Assignment Status** column is now color coded based on the values such as Not Started, In Progress, Completed and Cancelled.



- The Percent Complete value is now editable in the work form for Gantt Tasks, Stages, Deliverables and Milestones, and the value propagates through to the Gantt.

Dashboards (Power BI)

To learn more about the BrightWork 365 Dashboards that manage across multiple projects, click here.

Enhancements to Power BI Dashboards in this release include:

New Resource Utilization Dashboard

- A new Resource Utilization Dashboard has been added to provide insight as to which resources are over and under utilized.

New Project Status Dashboard

- A new Project Status Dashboard has been added as a tab to the existing Portfolio and Projects - Power BI Dashboard. This enhanced status report helps keep users better informed about how projects are progressing throughout the system in a convenient single location.

Enhanced Project Documents Dashboard

- The Project Documents Dashboard has been rebuilt to enhance usability and improve refresh speed.

Portfolio and Projects Dashboard

- In the Projects Timeline & Projects and Tasks Timeline tabs in the Portfolio and Projects Dashboard, the Month Selector has been replaced with a Date Slider.
- The Cost and Budgets tab is renamed Costs and Budgets.

Status Reports

To learn more about how to use Status Reports to effectively communicate Project, Program, and Portfolio progress, see Project Status Reporting and Portfolio & Program Status Reporting.

Enhancements to Status Reports in this release include:

- Include Additional Email Recipients: When a new Status Report is created users can now add other environment users to a list that will receive the report, so that it can circulate more widely.
- Status Report emails can now come from the Status Report creator (instead of the install account) if Send As or Send on Behalf is enabled in Exchange for the user that created the status report as well as the install account (i.e., the install account is allowed to Send As for the user that created the report).
- A Projects Schedule Date section has been added to Portfolio and Program Status Reports so that Project dates can be compared to the Portfolio and Program dates, and ensure that the Portfolio and Program Target Dates are clearly associated with roll-up Project Dates.

Bug Fixes & Other Notes

- Two Microsoft Teams Channels are no longer added to Microsoft Teams when a user refreshes while the related flow is running.
- Dates in approval emails show the date the response occurred and are sorted by earliest date first.
- The Project Type value is now passed to Projects from Project Templates.
- Summary Task rollups for Percent Complete, Current Start dates, and Current Finish dates are now more precisely accurate.
- Export to PDF is now hidden from the Gantt action bar; we expect this to be reintroduced in a near term future release.

February 2023 (v1.6)

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Request Templates & Project Templates

- Approvals in BrightWork 365 have been substantially redesigned to provide much greater control and numerous configuration options including the ability to:
    - Work with any Business Process Flow up to 10 stages.
    - Set Per-Stage Approvers.
    - Use custom approval labels.
    - In Requests, decide if the next approval should start manually or automatically.
    - In Requests, decide if the creation of an approved project should be automatically or manually triggered.
    - In Projects, specify if approval for changing stages is required.
- New Request Template and Project Template tables for setting approval and other settings relevant to Requests and Projects.
- Project Templates include a New Project Defaults section, where the following can be specified and will populate corresponding columns in new Requests and Projects:
    - Content Template
    - Portfolio
    - Program
    - Project Manager
    - Project Sponsor
    - Project Type
- Updated Approval email content and design, with new capability to include additional custom email text. Messages are clearer in their intent to allow for quick processing of appropriate approval decisions.
- Enhanced Request Template & Project Template copy functionality that brings the user into the copy when the copy process has completed.
- New BrightWork Approvals Coordinator security role.
    - This security role is required to view the Approvals tab in Requests and Projects, be nominated as an Approvals Coordinator, and configure the approvals process.
    - Approvals Coordinator gets notified when a new approval starts and of the approval outcome.
- The original Templates table and associated functionality will be deprecated in a future release.

Form Templates

- New Request Forms and Project Forms to support the new Approval process.
- A Version column has been added in Form Templates to restrict Version 1 Form Templates to be selected only in Templates, and Version 2 Form Templates to be selected only in the new Request Templates and Project Templates.

Requests

- New Approvals tab for the Approvals Coordinator to be able to configure the request approval process and adapt it as necessary.
- The Requests app has been updated with the same enhanced functionality as Requests in the full BrightWork 365 app.

Projects

- New Approvals tab for the Approvals Coordinator to be able to configure the project stage approval process and adapt it as necessary.

Gantt

- Gantt Grid View:
  - The Assigned To column has been added to the grid side of the Gantt for greater visibility and to facilitate finding task assignees, and tasks that still require an assignment.
  - The columns on the grid side of the Gantt can be filtered to limit the tasks displayed.
  - Column widths can be adjusted.
  - Displayed columns are now better tuned to support task tracking.
- Gantt Task Dialog:
  - A Task Description field has been added to Task Details.
  - Resources tab now displays individuals in alphabetical order.
  - Dependency list is wider and easier to read.
- The Gantt Chart is now responsive to the screen space available and will resize to make best use of the available space.
- When adding a new task below another task, the new task copies the start date of the task above it and sets Percent Complete to 0%.
- Percent Complete now rounds to the nearest whole number.
- The date format displayed in the Gantt now uses the format specified in the logged in user's personal options settings.
- Improved contrast shading for the Percent Complete bar.
- Export to CSV option.
- More robust and stable Gantt functionality.
- Change in behavior when creating a new Task:
  - Default Duration for new Tasks is now 1 day.
  - Target dates are blank by default.

Site Map

- Addition of a new Templates Area. The Templates Area includes the following tables:
    - Form Templates
    - Request Templates
    - Project Templates
    - Templates (Version 1) - for customers upgrading from earlier versions of BrightWork 365

Form UI Updates

- New People Picker column type: Easier to use and lighter weight - does not create records, only stores the user name and email address.

Knowledge Base

- Updated Getting Started content.
- Updated Deployment content.
- Articles specific to prior versions of BrightWork 365 are now hidden; links to the hidden content are present in the related articles for this new version of BrightWork 365. Older articles will be deprecated with a future release.

Bug Fixes

- OneNote onetoc2 entries are now removed from the Power BI Documents report.
- Searching through the Gantt with "0" now works the same as with other numbers.

September 2022 (v1.5)

Enhancements to Status Reporting (Projects, Programs, Portfolios)

Several enhancements have been made to status reporting for Projects, Programs, and Portfolios:

- In projects you can now choose to have the app automatically set the Health KPI (Green, Yellow, Red), or have it set manually.
- Status Reports now have their own tab with relevant data exposed in a grid view.
- Emailed status reports now use HTML output instead of Microsoft Word.
- Quick Create has been replaced with the full form experience.
- Improved historical reporting.

Power BI Dashboard Reporting

- Power BI Dashboard reports are now divided into three pages for quicker refresh: My Work, Portfolio and Projects, and Project Documents.
- Power BI reports have been moved to the Dashboards section of the Site Map.
- Power BI login is no longer required (Microsoft licensing is still required, same as previously).
- Direct links to work items have been added to Work and My Work reports.

- A Costs and Budgets reporting tab has been added.
- Reporting now includes Project Type and Project Priority charts.
- "Open in Power BI" service is now available for greater flexibility and sharing options.

Site Map

- A separate Requests section has been added to the Site Map.
- The Projects Area switcher has been renamed to "Project Area".
- The Admin Area switcher has been renamed to "Admin Area".
- The My Work report has been moved to the top of the Site Map for more convenient access.

See BrightWork 365 Basic Orientation for related information.

Templates

- Task assignments in Content Templates are now carried over to new projects.
- A Priority column has been added to the Charter section of projects.
- A Project Type column has been added to the Project Details tab ofproject requests, and to the Charter tab of projects.
- The Risk Exposure column has been added to relevant views.
- Projects can be moved to different Programs and Programs can be moved to different Portfolios by users with appropriate BrightWork security roles; all child items will be updated accordingly.
- Issue and Risk escalations now automatically default to the current hierarchy location (Project, Program, Portfolio).
- Team members are now sorted by name in the Team tab of projects.
- The Project Stage details screen now includes Communications options in the Timeline section.
- The Program Settings tab in Programs has been restricted to users with the BrightWork PMO Manager security role.

Other Updates

- Home page summary metrics now have the metric name in the first column followed by the metric value.
- The Power BI My Work report now has direct links to the individual work items.
- Program and Portfolio reports no longer show % Complete.
- Cancelled approvals cancel the associated flow and send a message.

Bug Fixes

- Gantt handling of target dates has been improved, as well as calculations related to duration.
- Team members can now delete Issues and Risks that they've created themselves.

Release Upgrade Steps

Please contact your Customer Success Partner for details.

June 2022 (v1.4)

Home Page Project Summary Metrics

Live metric data from across all app areas have been added to the Home Page. Metric items link directly to their corresponding views.

Portfolio & Program Area Enhancements

In this release BrightWork 365 adds the Portfolio and Program features noted below for additional options to track and control your projects:

- Portfolio and Program Actions, Costs & Communications Logs.
- Enhanced Portfolio and Program Status pages: Added a Program Schedule section and renamed the Schedule section to Project Schedule.

New Power Apps Dashboards

- View and analyze critical portfolio data with a large variety of new Power Apps Dashboards with selectors and drill-down options.

Power BI Report Enhancements

- Documents from Actions and Costs are now included in the Power BI Project Documents dashboard.
- Added an Active Stage column and a Project Status filter to Power BI dashboards so users can find projects that have specific criteria.
- Added Last Refresh Date information to report pages.

Other Updates

- The Requests feature has been moved to the Projects area and the Requests area has been deprecated.
- There is a new Reports area, accessible from the main nav.
- The My Work reports have been moved from the Projects area to the Reports area.
- PBI Reports has been renamed to Power BI Reports and moved from the Portfolios area to the Reports area.
- Accessibility enhancements have been implemented including improved descriptive tool tips and

link titles, screen reader compatibility, and navigation ease of use.
- Dates entered by users throughout the app will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.
- Admin > Teams is now named Admin > Dynamics Teams to better differentiate it from Teams within the Microsoft Teams app.
- Project views now place the Project Name column first instead of the Project Reference column.

Release Upgrade Steps

In the BrightWork 365 Install Guide.pdf 📎 be sure to review the section **Upgrade BrightWork 365**, including the additional steps related to setting up the **Costs and Budgets** field security profile, and republishing the Power BI template.

March 2022 (v1.3)

Actions | Costs | Communications

In this release BrightWork 365 adds the features noted below for additional options to track and control your projects' various actions, costs and communications:

- Actions: Log project actions, decisions, and changes.
- Costs: Costs provides a comprehensive method for capturing and tracking project budgets and actual costs at the project and individual item levels.
- Communications: Initiate and save project related Emails and Appointments directly in the BrightWork 365 app and save these as well as Phone Call details and Notes within associated projects.

Accounts & Contacts Lists

Save detailed Account and Contact information about companies and people external to your organization who play a crucial role in your projects and use the built-in integration between this data and your projects.

Gantt

When a task in the Gantt is edited either in the dialog or in the grid, the zoom factor for the Gantt will remain the same allowing users to continue editing tasks in a more convenient manner.

Cost and Work Reports

New cost-related Power Apps Charts and work-related Power BI Dashboards have been added in this release.

February 2022 (v1.2.1)

Copy Custom Request Columns to Projects

BrightWork 365 is now able to copy data from custom columns in a project request form to projects created from the request. New flow **Copy Custom Request Columns to Project** with data mapping functionality has been added to the BrightWork 365 solution. See the related article for customization instructions.

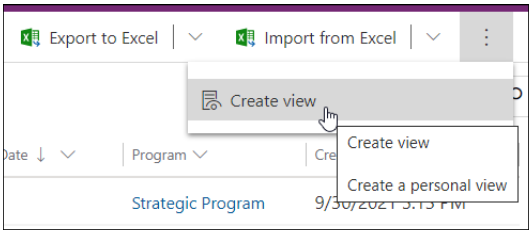
New Multiline Text Request Column "Target Customers"

New multiline text column **Target Customers** has been added to the Request template **New Product Introduction**. The older single line of text column **Target Customers** has been deprecated.

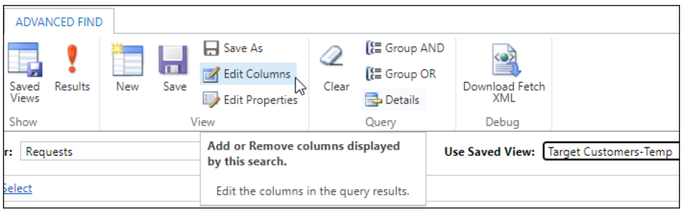
How to Copy Data from Deprecated Single Line of Text Column "Target Customers" to the new Multiline Text Column

If you previously added data to the now deprecated single line of text **Target Customers** column, follow these instructions to copy the data to the new multiline text column:

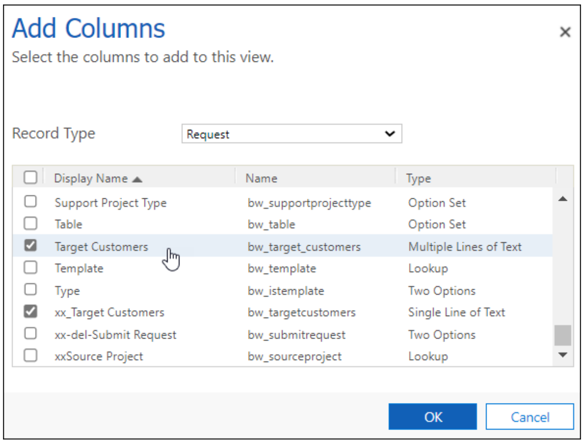
1. In the Requests Area choose to create a personal view.



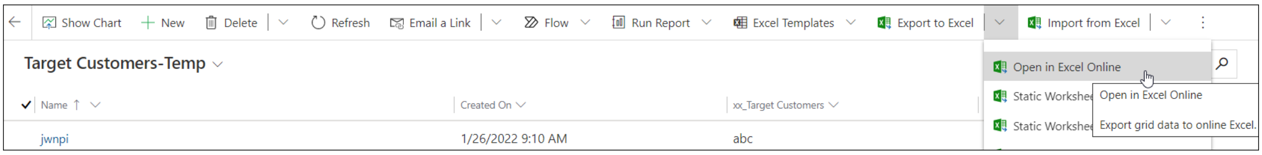
2. In the personal view configuration screen click Edit Columns.



3. Using Record Type **Request** add the new column **Target Customers** and the deprecated column **xx_Target Customers**.



4. Click OK and save and close the view.
5. In the Requests Area switch to your new personal view.
6. Click Open in Excel Online.



7. In Excel Online copy the data from the deprecated **xx_Target Customers** column to the new **Target Customers** column as you would typically do in a spreadsheet.
8. Save the Excel file, click Track Progress, wait for the Excel Online import process to complete and close the import screen.
9. Return to your custom view, refresh the screen and confirm that the old column data has been successfully copied into the new column.

January 2022 (v1.0.4)

New Requests App

The new Requests app provides unlicensed BrightWork 365 users that have the BrightWork Request Submitter role a means with which to log requests outside of the full BrightWork 365 app. Users of this app will have access to much of the same functionality as found in the Requests Area of the full BrightWork 365 app.

Status Reports in Portfolios & Programs

You can now create a status report in portfolios and programs in addition to individual projects.

The status report is converted to a Microsoft Word document and added to the document folder associated with the portfolio or program.

You can also optionally email the Portfolio or Program Sponsor a copy of the Status Report docx.

Audit History in Projects, Tasks, Issues and Risks

Audit history has been enabled in the following tables:

- Project Task
- Request
- Issue
- Risk

See Audit Tables.xlsx 📎 for a list of the columns that are audit-enabled.

Documents Report in Power BI

The BrightWork 365 PBIT has been updated to include a report that shows all the documents associated with a project.

This includes documents in the tables below:

- Project Task
- Request
- Issue
- Risk

Bug Fixes

- Clicking the home page logos brings you to the associated tables instead of opening the tables in a popup.
- **Create Teams Channel** now uses 'Project Name - Reference Number' to create the channel. This is to prevent the flow failing due to a channel with that name already existing. In addition, if this flow fails (e.g. If the channel name exceeds 50 character), the person triggering the flow receives an email with an error message.

Request a Project

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Request a Project

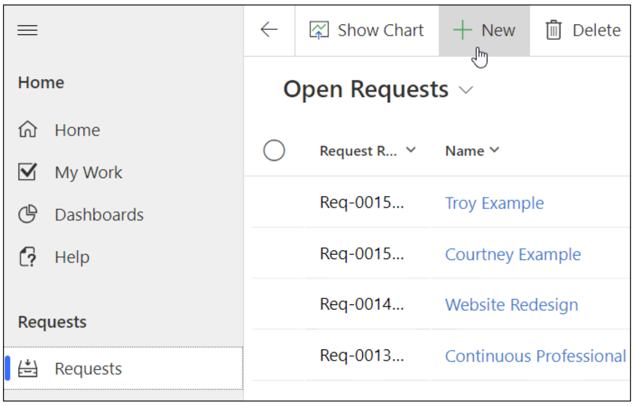
The project management lifecycle will typically begin in the BrightWork 365 Requests area, where a Requestor submits a new project request along with details needed for an approval decision. Through workflows, notifications and reports, the request process affords users an efficient method for starting the project management process.

Note

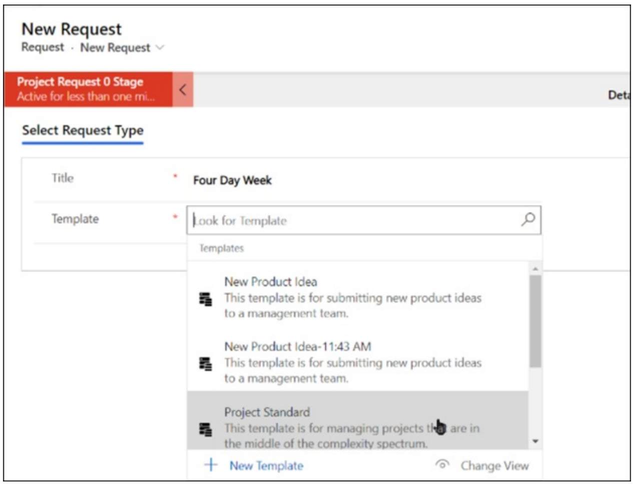
- The request process and forms are different for users with different security roles.
- To submit a project request, at a minimum the user will need the security role Basic User and either BrightWork Request Submitter if only accessing the limited Requests app, or BrightWork Team Member if accessing the full BrightWork 365 app.
- The request process and form settings can be configured differently than the out of the box versions by users with appropriate permissions.

The Request process begins with the Requestor filling in the Request form:

1. Click into the **Requests** area, and **+ New**.



2. A preliminary short form displays where a project title is entered, and a template from which to create the project is chosen.
   Note: Project titles must be unique, have a maximum of 50 characters, and should not contain any special characters including < > : * ? |

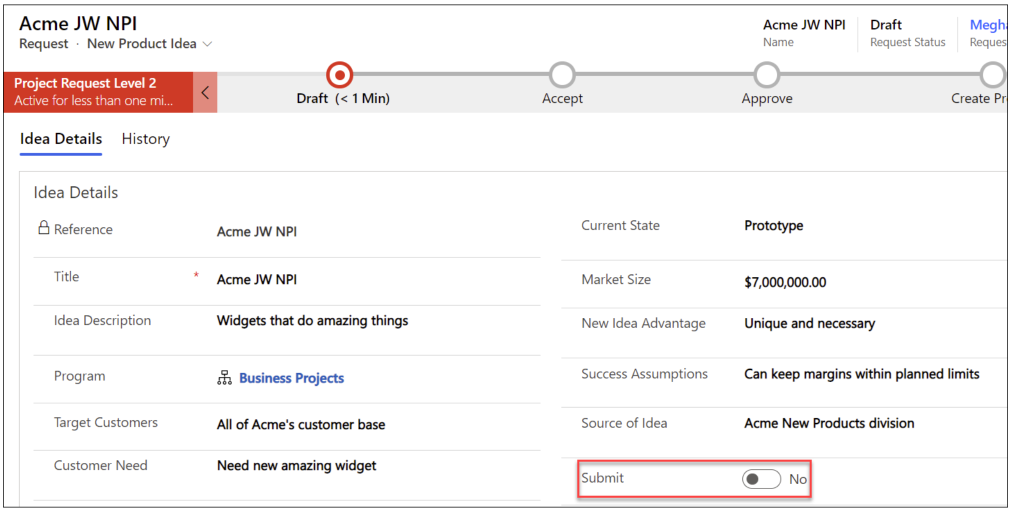


Note BrightWork ships with three templates out of the box: Project Standard, New Product Introduction, and Product Update. For template details see Templates Overview.

The selected template defines:

- The forms used in the request.
- The number of approval stages in the request. See Request Approval Stages.
- The Business Process Flow (BPF) to apply to the project. The BPF is the process map at the top of the form.
- The forms to apply to the project. The form is all the columns and tabs used to display information about the project.
- The Content Template that will be used to create the project if one is specified in the chosen template. Content Templates include content (i.e. stages, deliverables, tasks, issues, risks) copied in from another project.

3. A longer form related to the chosen template type will then display for additional details to be entered. The number of fields displayed will be determined by the requestor's BrightWork security role. The Requestor fills in the request fields (and adds documents if desired) in order to activate the request **Submit** switch.



4. After the Requestor clicks the **Submit** switch, the value will change to **Yes**. Save and Close the

request, and an email with request details will be sent to whomever has been set as the Request Receiver, thereby initiating the approval process.

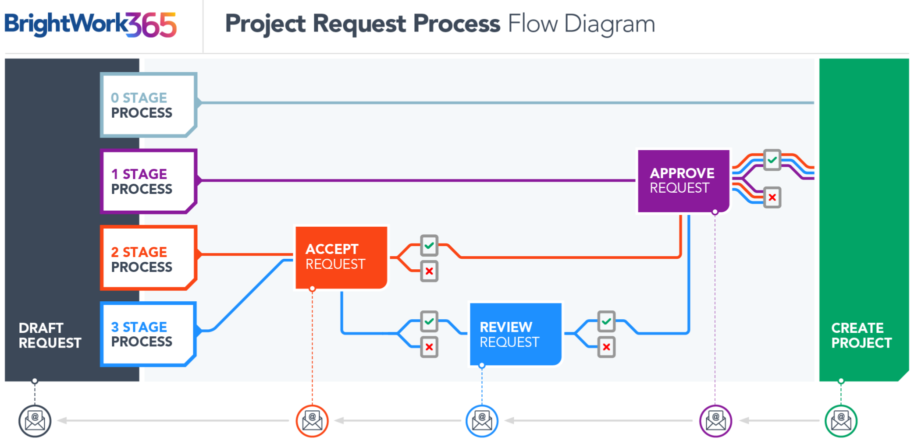
The notification's From address will be set as the owner of the associated workflow.

Note

- The list of available users to choose from in the **Request Receiver** column is limited to those users given the **BrightWork Request Receiver** security role.
- The list of available users to choose from in the **Approvers** column is limited to those users in the **Senior Managers** Dynamics Team.
- A Requestor can only see their own requests unless they have elevated privileges.

Request Approval Stages

Out of the box, BrightWork 365 supports four request approval stages. The stages relate to the number of approval reviews (0, 1, 2, or 3) a project request will need to pass through before a project gets created.



Project Request - 0 Stage

No approval stages: The project is created without approval. This is to support organizations that do not need an approval process for projects, but still want to retain a record of the project creation.

The associated Business Process Flow has one process element before a project gets created:

- Draft

Project Request - 1 Stage

One stage of approval: The Receiver approves the project for creation.

The associated Business Process Flow has two process elements before a project gets created:

1. Draft
2. Approve

Project Request - 2 Stage

Two stages of approval: The Receiver accepts the request and sends it to the nominated Approvers for approval and subsequent project creation.

The associated Business Process Flow has three process elements before a project gets created:

1. Draft
2. Accept
3. Approve

The following templates use the Project Request - 2 Stage Business Process Flow out of the box:

- Project Standard (can be changed to use a different stage level if desired)
- New Product Introduction
- Product Update

Project Request - 3 Stage

Three stages of approval: The Receiver accepts the request and sends it to the Reviewer for review. If they accept the request, it gets sent to the nominated Approvers for approval and subsequent project creation.

The associated Business Process Flow has four process elements before a project gets created:

1. Draft
2. Accept
3. Review
4. Approve

Request Business Process Flow

The request level is defined by the Business Process Flow (BPF) that is selected in the template settings. BrightWork 365 ships with the four BPFs necessary to support this process.

Customers will be able to add forms of their own to the Request table to support their local request process. However, the forms they choose in the template must include the columns necessary to support the selected request level, e.g., if they opt for Project Request - 3 Stage, the form must have the Receiver, Reviewers and Approvers columns.

Request Notification Workflow

The request notification workflow uses both Power Automate and the Power Automate Approvals solution. There are three flows: Accept Request Approval, Review Request Approval, and Approver Request Approval. The approval solution is used inside of these flows. For example, when a request is submitted, it starts the approval. This sends the approval email to the approvers. If the request is approved/rejected/sent back to draft, an email is sent using the Outlook Connector inside the flow.

- **1 Stage:**
  - Accept Request Approval
- **2 Stage:**
  - Accept Request Approval
  - Approve Request Approval
- **3 Stage:**
  - Accept Request Approval
  - Review Request Approval
  - Approve Request Approval

Successful completion (i.e. approval) of the last flow in a stage sequence triggers the **Create Project** flow. This flow is also triggered by the creation and submission of a 0 Stage request.

Receiver Review of the Project Request

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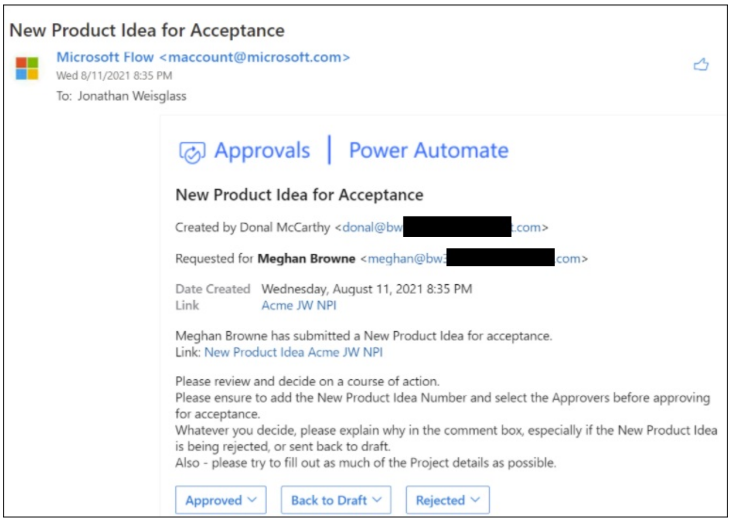
Receiver Review of Requests

To view a request that is available for review, the Receiver can check the email that was automatically sent when the Requestor submitted the request.



The Receiver can decide to:

- Accept the submitted request and send it for approval as dictated by the process Approval Stage Level.
- Send the request back to Draft status so that missing information can be added by the Requestor.
- Reject the request.

After a decision is made by the Receiver, a notification email will be sent to the Requestor and the request form will be updated accordingly.

Donal McCarthy
Thu 12/08/2021 02:54
To: Meghan Browne

Dear Meghan,

The New Product Idea 'Acme JW NPI' you submitted has been accepted and will shortly be sent for approval.

If it passes approval, it will progress to a project. You will be informed of the outcome of each stage.
See below for a summary of the acceptance response.
Thank you for your submission.

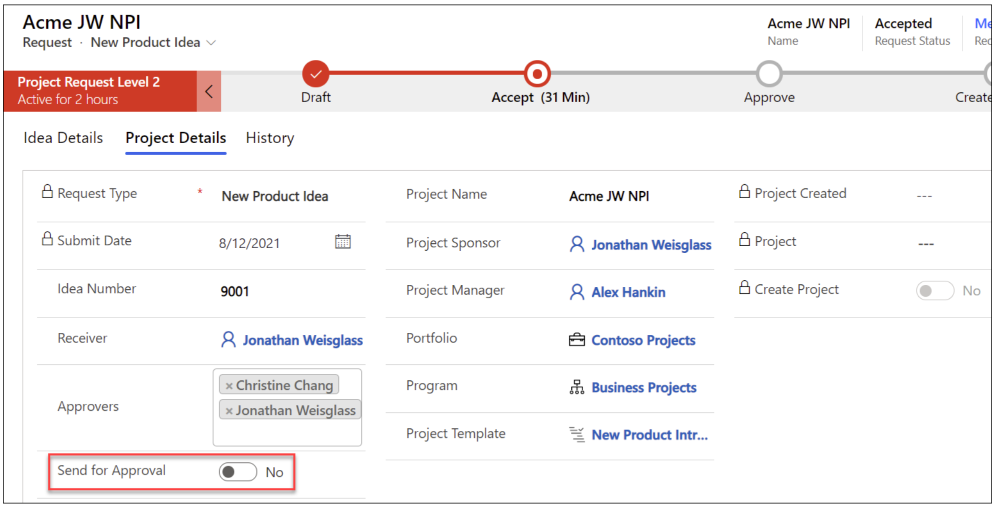
Stage	User	Response	Comments	Date
Draft	Meghan Browne	Submitted	Request Submitted	Thursday, August 12, 2021 1:35 AM
Accept	Jonathan Weisglass	Approved	Thank you for submitting this request, it is approved.	Thursday, August 12, 2021 1:54 AM

Approver Review and Project Creation

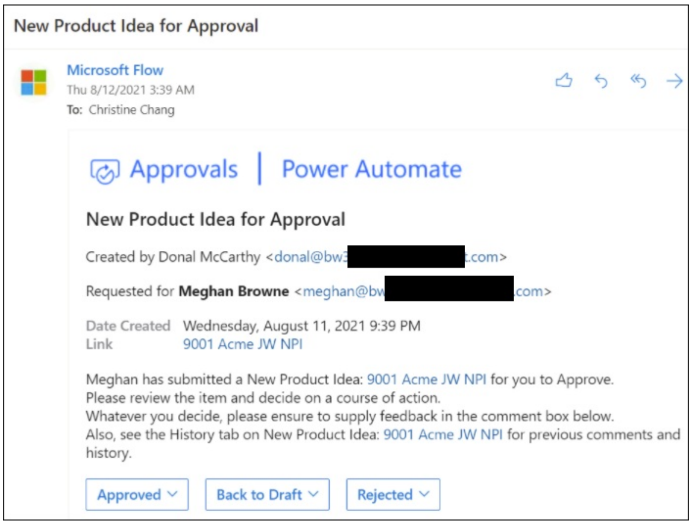
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Approver Review and Project Creation

After the project request has been accepted by the Receiver, the Receiver will complete filling in the remaining Project Details fields, including the Approvers field; the **Approvers** field does a lookup to the **Senior Managers** list in the Admin Area. For relevant approval stage processes, when all fields have required values, the **Send for Approval** switch will be enabled so it can be switched to **Yes**.



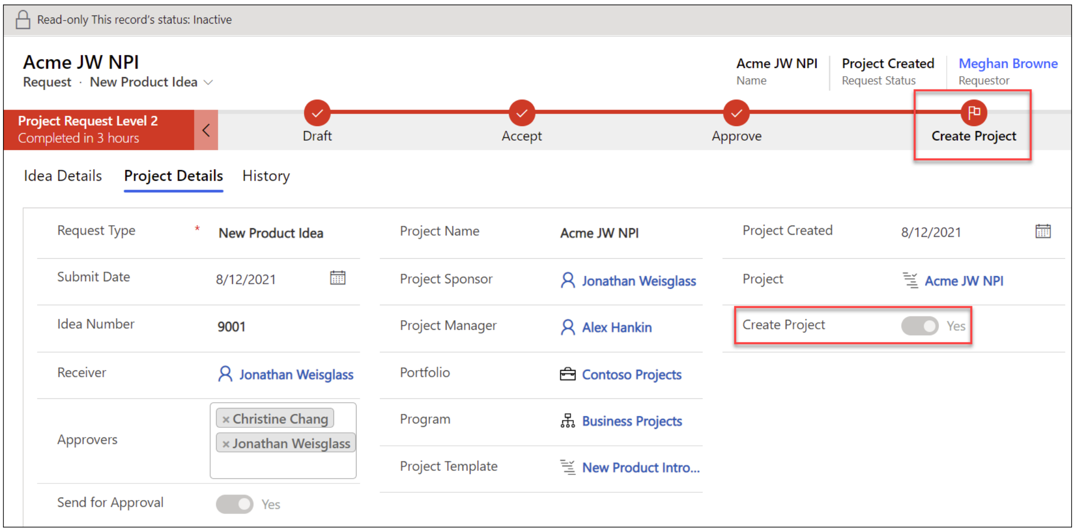
The Approver(s) will receive an email requesting an approval decision.

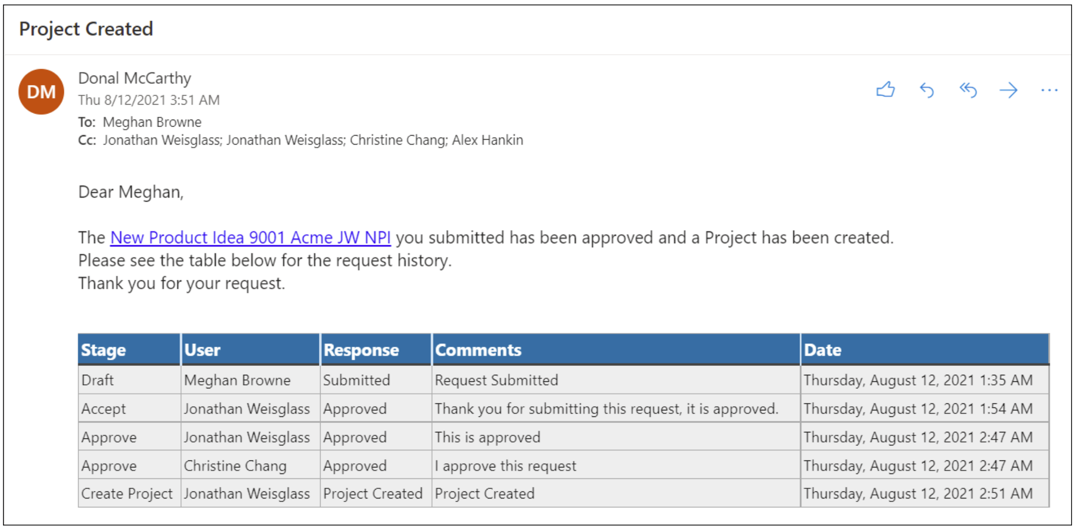


Note If there are multiple Approvers listed in the project request, all must approve the request before it is settled as Approved.

If the request is fully approved, the request form will be updated accordingly, and an email will be sent to all relevant users. A project will then automatically get created and will be based on the associated requested template.

If a Content Template is associated with the chosen Project Template, the duration of the project creation process will depend on the number of child rows (Tasks, Issues, Risks, etc.) present in the project that is getting created.





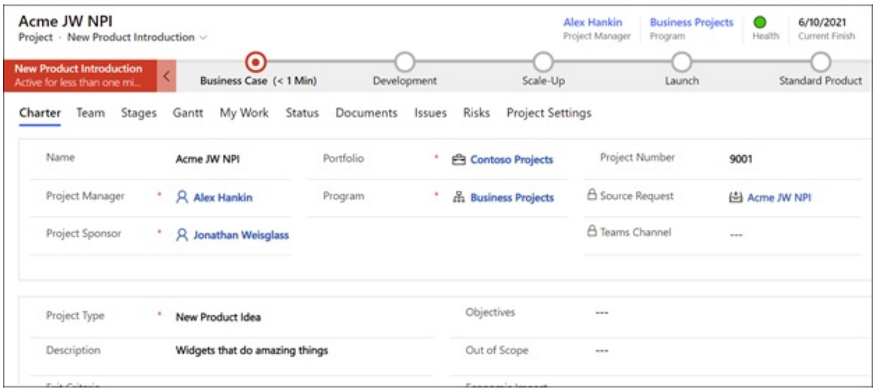
Project Created

DM Donal McCarthy
Thu 8/12/2021 3:51 AM
To: Meghan Browne
Cc: Jonathan Weisglass; Jonathan Weisglass; Christine Chang; Alex Hankin

Dear Meghan,

The New Product Idea 9001 Acme JW NPI you submitted has been approved and a Project has been created.
Please see the table below for the request history.
Thank you for your request.

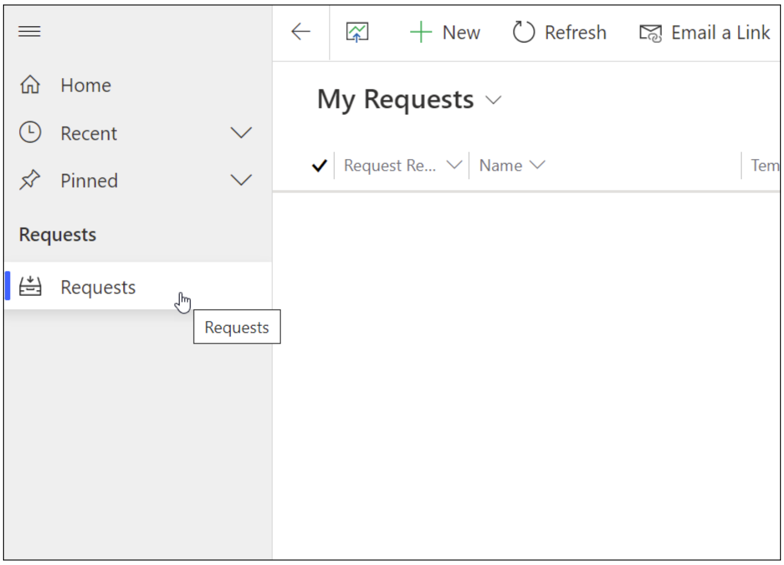
Stage	User	Response	Comments	Date
Draft	Meghan Browne	Submitted	Request Submitted	Thursday, August 12, 2021 1:35 AM
Accept	Jonathan Weisglass	Approved	Thank you for submitting this request, it is approved.	Thursday, August 12, 2021 1:54 AM
Approve	Jonathan Weisglass	Approved	This is approved	Thursday, August 12, 2021 2:47 AM
Approve	Christine Chang	Approved	I approve this request	Thursday, August 12, 2021 2:47 AM
Create Project	Jonathan Weisglass	Project Created	Project Created	Thursday, August 12, 2021 2:51 AM



Note The Project Request "Approval Date" value uses a time zone independent UTC date; the same date value will be displayed for all users irrespective of time zone.

BrightWork Requests App

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.



In addition to the full BrightWork 365 app, organizations have the option to also install and assign users to the limited Requests app. The Requests app provides users who have only been given a free BrightWork 365 license and assigned the **BrightWork Request Submitter** role a means with which to log requests outside of the full BrightWork 365 app. Users of this app will have access to much of the same request functionality as found in the Requests Area of the full BrightWork 365 app for paid users, but they will not see the other full app areas on the Site Map such as the sections Projects, and Portfolios. However, note that these users still have access to these other app areas by navigating to them through other routes such as by clicking on linked columns, e.g., the Program column in the Request form.

Note As with all other functionality in BrightWork 365, Requests App users will need one of the following licenses from Microsoft: Power Apps Premium/Power Apps per user, Power Apps per App, or Dynamics.

Approvals in Microsoft Teams App

Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

Approvals in Microsoft Teams

In addition to reviewing and acting on approval requests via the automatically generated approval request emails, you can also do so within Microsoft Teams by installing Approvals in Microsoft Teams.

See the articles below for more information about Approvals in Microsoft Teams:

- https://learn.microsoft.com/en-us/power-automate/teams/native-approvals-in-teams
- https://learn.microsoft.com/en-us/power-automate/teams/manage-approvals-app

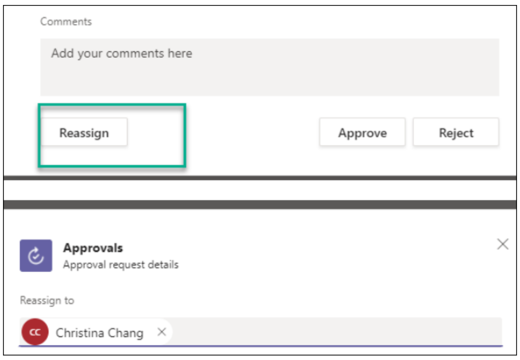
Canceling In Progress Approvals

An approval that is still in progress can be cancelled by the Request Submitter from within Approvals in Microsoft Teams. To do so, from the **Sent** tab in the Approvals app the user selects the approval they want to cancel and then selects the **Cancel** option. Only approvals that are currently in progress can be canceled.

Your browser does not support HTML5 video.

Reassigning In Progress Approvals

In progress approvals can be reassigned from within the Approvals app in Microsoft Teams by clicking the **Reassign** button.



Although the new approver will receive notifications to take an approval action and their actions will show in email history logs, the original approvers will be maintained in the email **Approvers** field.

Hi Anne,

A project stage approval that you submitted has been approved. See below for the details:

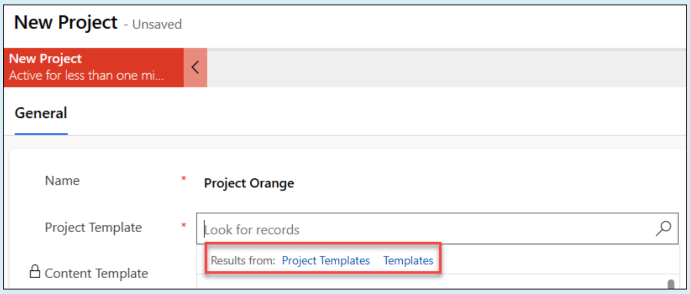
- Project: Proj-001611: Product Update with CT
- Approval Stage: Close Out to Closed
- Approvers: Caitriona O'Connor;

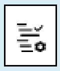
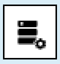
User	Stage
Christina Chang	Execution to Close Out
Christina Chang	Chartering to Execution
Christina Chang	Execution to Close Out
Christina Chang	Close Out to Closed

Create Projects

Note

- BrightWork 365 ships with 3 starter Project Templates out of the box: Project Standard, Product Update, and New Product Introduction. For template details, see the Templates article.
- Customers that have upgraded from BrightWork 365 versions prior to v1.6 will have the option to choose either a new version template included in a later version of BrightWork 365 from the **Project Templates** table, or one of the older version templates from the **Templates** table. To choose, click the search icon and click one of the options.



The newer version Project Templates can be identified by icon , and older version Project Templates by icon .

Note Project titles must be unique, have a maximum of 50 characters, and should not contain any special characters including < > : * ? |

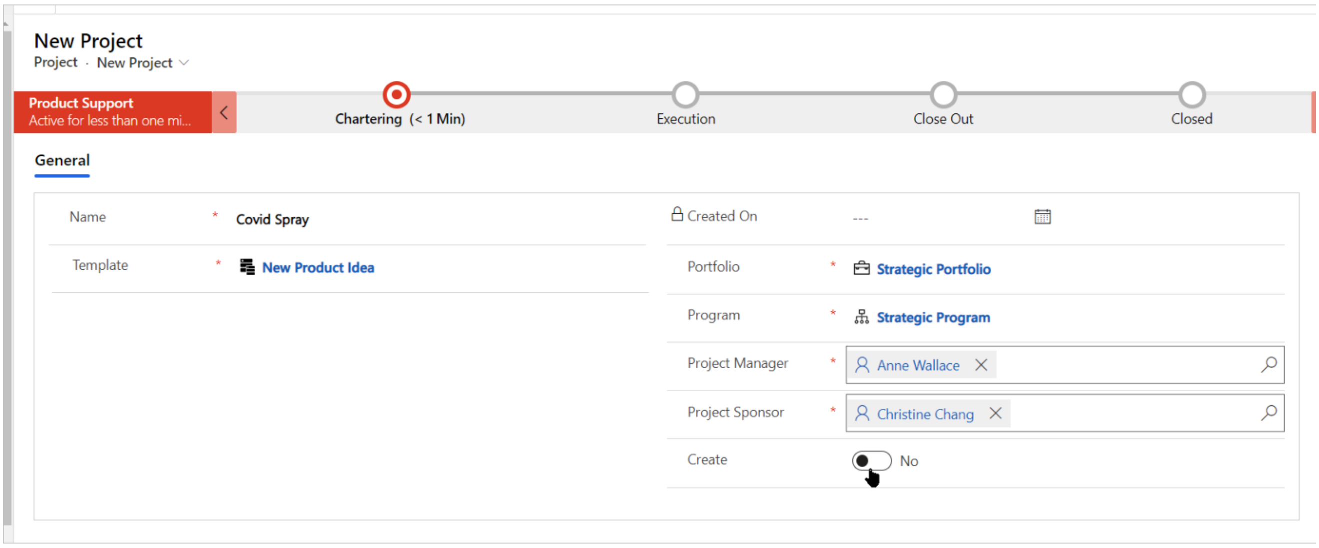
Method 1: Create Projects With a Request

The project management lifecycle will typically begin with BrightWork 365 Requests, where a Requester submits a new project request along with details needed for an approval decision. Through workflows, notifications and reports, the request process affords users an efficient method for starting the project management process. You can find detailed information about the formal request process in the Requests section of the Knowledge Base.

Method 2: Create Projects Without a Request

Some organizations will not need a formal request process for all of their projects and will therefore allow certain users to create projects directly in the Projects app section. Users with the BrightWork Project Manager or BrightWork PMO Manager security role will be able to create projects from a template using a simple interface skipping the formal request process.

If a user with the necessary security role clicks **+ New** in **Projects**, they will be presented with a project creation form. After filling in all necessary column values, switching the **Create** switch to **Yes** will initiate the project creation process.



- If the Template selected is not associated with a Content Template (a template with predefined data), the project will be created instantly, and the form will transition to the Project form. When the project is ready to be used, the user that initiated the creation process will receive an email.
- If the Template selected is associated with a Content Template, the form will not transition to the Project form until the Create Project Flow has completed processing. The user that initiated the project creation process will receive an email when the flow has completed. The duration of the project creation process will depend on the number of child rows (Tasks, Issues, Risks, etc.) present in the Content Template. When the project is ready to be used, the user that initiated the creation process will receive an email.

Troubleshooting

Script Errors When Creating a Project

In the associated Project Template, ensure there are values in the **Approvals Coordinator** field and in all of the **New Project Defaults** fields.

Project Stage Approval Process

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

> **Note** For BrightWork 365 versions older than v1.6 see Prior Release Articles.

Your browser does not support HTML5 video.

In a Nutshell - Project Stage Approval Process

Here's a summary of the project stage approval process from start to finish as it operates out of the box:

1. (Optional) A user given the BrightWork Template Editor security role configures the default properties for Project Templates.
2. (Optional) A user given the BrightWork Approvals Coordinator security role (a user chosen in the Approvals Coordinator field and also given the BrightWork Approvals Coordinator security role) configures approval related properties for a specific project from the project's Approvals tab.
3.
    1. If approval is not required for a stage, the project can be moved to the stage by a user with the BrightWork Project Manager or BrightWork Stage Mover security role.
    2. If approval is required for a stage:
        1. The project cannot be moved to the stage manually, and a user given the BrightWork Project Manager security role can activate the Send Stage for Approval button in the project's Project Settings tab when it's time to move the project to the stage.
        2. The stage Approvers make a decision (Accept, Reject), and the Project Manager, Approvals Coordinator, and Approvers receive an approval notification.
        3. If the Approvers accept the request, the project moves to the next stage. If the Approvers reject the request, the project stage does not change.
4. When the Project Manager is ready, steps 3 through 6 will be repeated until the closing of the project.

Details - Project Stage Approval Process

The default field values for the users chosen for approving the movement of the project from one stage to the next (e.g., from Initiate to Plan), the nominated **Approvals Coordinator**, the approval button labels, and any additional approval email text, are all configured in **Templates Area | Project Templates**. Many of these settings can be overridden in the **Approvals** tab of a project by the Approvals Coordinator.

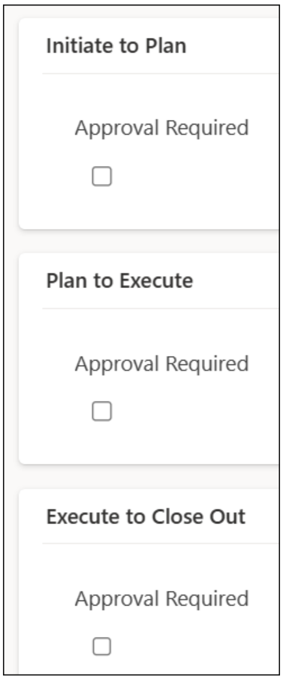
Project stages can be moved backward by a user given the **BrightWork Project Manager** or **BrightWork Stage Mover** security role. Project stages can also be moved forward by one of these users unless the field **Approval Required** is set to **Yes** in the Approvals tab for the next stage, in which case stages can only progress forward via completed approvals by nominated Approvers.

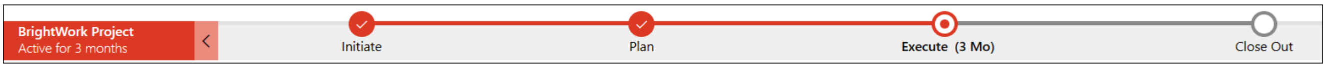
While a stage is out for approval some areas of the project will be read-only and a message will display in the Charter tab until the approval process completes. The Business Process Flow will not be disabled, but users will be prevented from moving a stage forward or backward.

If the stage is Approved, the project will move to the next stage, relevant users will be notified, and the project will no longer be read-only.

If the stage is Rejected, the project stage will not be changed, all listed users will be notified, and the project will no longer be read-only.

Business Process Flow Stages are used to control the number of stages and the stage names in the approval sections of the **Approvals** tab. The default settings are controlled by the configuration set in Templates Area > Project Templates; different project templates have different stages. Additional stages beyond what is included out of the box can be added through Business Process Flow customization for up to a total of 10 stages.





The Approvals Coordinator and stage Approvers will be sent approval related notifications when the process for moving from one stage to the next is initiated.

Note

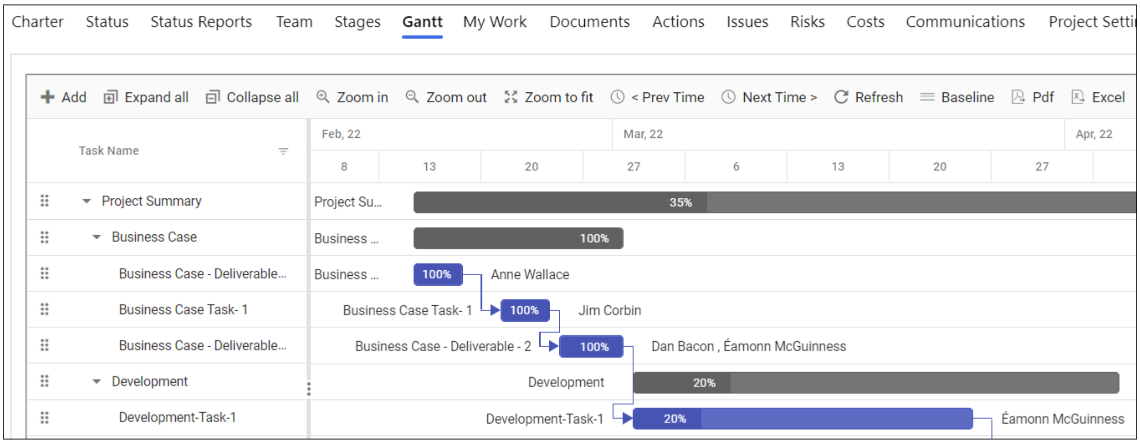
- The approval emails come from the BrightWork 365 installation account's email.
- If there are multiple Approvers, all of them must approve in order for the stage to be approved.

Task Management

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

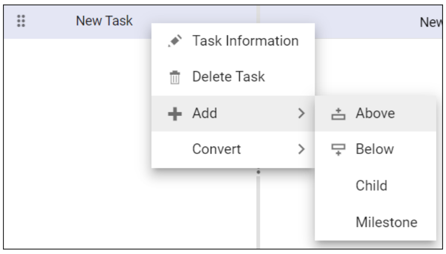
Note For BrightWork 365 versions older than v1.6 see Prior Release Articles.

Overview Demo	Extra Features
	Your browser does not support HTML5 video.



Create a New Gantt Task

1. Click into the Gantt tab within a project.
2. You can add a new task in a couple of ways:
    1. In the Gantt menu click + Add.
       Or,
    2. Right-click near an existing task and click + Add and choose from the available options.



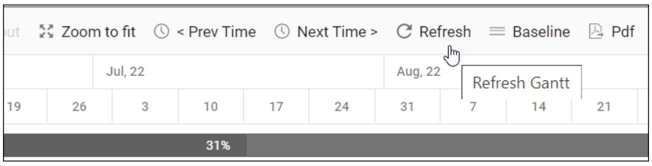
3. Fill in the task details as explained in **Gantt Sections** below.

> **Note**
>
> - There is a technical limit of 1,000 tasks for the Gantt, but in order to have a reasonably responsive Gantt there is likely to be a practical lower limit based on performance in your environment, affected by variables such as the number of dependencies and levels of hierarchy.
> - When adding a new task below another task, the new task copies the start date of the task above it and sets Percent Complete to 0%.

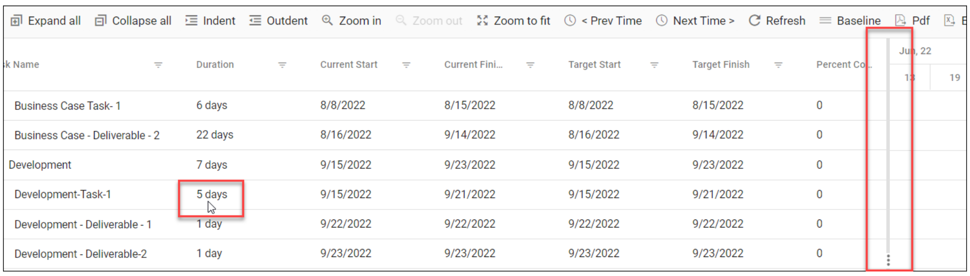
Edit a Gantt Task

> **Note**
>
> - If there are concurrent editors of tasks in the same Gantt, the last save will win.
> - In order to see other users' changes to Gantt data, a browser refresh is required.

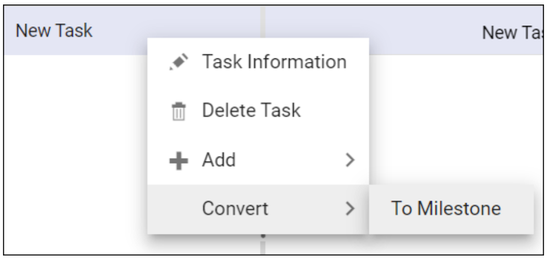
To edit an existing task either single-click next to the task name and then click **Edit** in the menu bar, or double-click in the row of the task in the Gantt section of the window. If the Gantt is not displaying updates you made to underlying data, click the **Refresh** button in the Gantt ribbon.



You can also make inline grid edits by dragging the Gantt divider line to the right to expose additional grid columns, and then double-clicking an existing value.



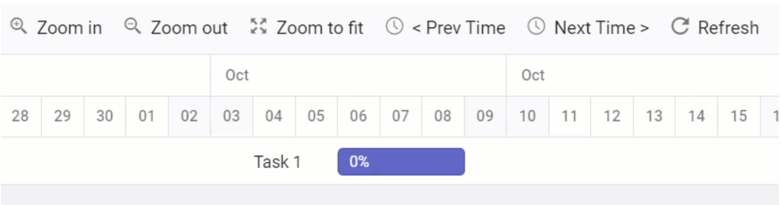
Additionally, with a right-click on an existing task you can access task-related options.



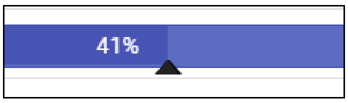
Gantt Sections

General

- Task Name: The given name of the task.
- Duration: The number of days between the Current Start and Current Finish dates. When dates are updated in the Task record, the Duration will be automatically calculated upon saving the task. When Duration is updated in the Task record, the Finish Date will be automatically calculated upon saving the task. The Duration value cannot be less than 0.13 of a Day as the Gantt does not support durations of less than 1 hour.
- Current Start and Current Finish: The Start and Finish dates entered at the time of task edit, or that were automatically set through a dependency. Task dates can be changed by dragging the left, center, or right part of the date bar and dragging. Task dates cannot fall on a weekend.



- Target Start and Target Finish: The target dates entered manually, or automatically entered when the project was last baselined. See section **Baseline the Schedule** below.
- Percent Complete: Add an estimated Percent Complete - this will be part of the algorithm used to automatically calculate the task's parent (summary task) overall percent complete. The Percent Complete value can also be set in the left-side grid portion of the Gantt, as well as in the Gantt Chart section by dragging the Percent Complete bar (it cannot be set from within work reports).



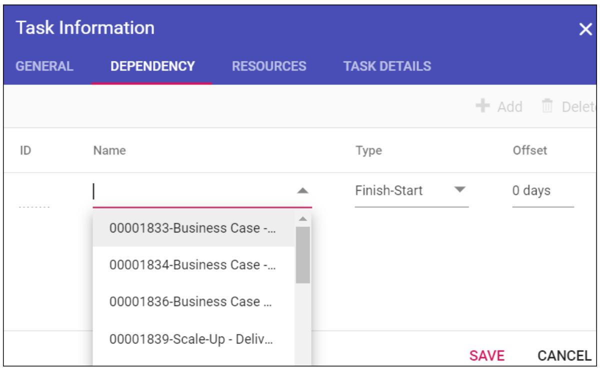
- ID: System generated value, not editable.

> **Note**
>
> - User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.
> - The date format displayed in the Gantt uses the format specified in the logged in user's

personal options settings.

Dependency

Add a task dependency (aka Predecessor) from the dropdown **Name** list, and set the dependency **Type** and any necessary **Offset** days.



Dependency Types:

- Finish-Start: The predecessor task must be completed before the successor task can start.
- Start-Start: The successor task cannot begin until the predecessor task begins.
- Finish-Finish: The successor task cannot be completed until the predecessor task is completed.
- Start-Finish: The successor task cannot be completed until the predecessor task begins.

Note A successor milestone task that has a Finish-Start relationship with its predecessor will have a Start Date and Finish Date that is equal to the Finish Date of the predecessor.

Caution If a task with dependencies (predecessor or successor tasks) later becomes a summary task, the dependencies will be removed.

Resources

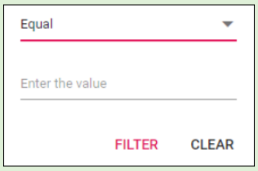
Choose one or more resources to be assigned to the task.

The **Resources** list of users is limited to users given the **BrightWork Team Member** security role.

Note

- If the user assigning the resource does not have sufficient privileges, the assignment will not be saved.
- The Resource **Unit** value will revert back to 100 if changed.

Tip To easily view tasks that still require an assignment, on the **Assigned To** grid column use the filter **Equal** and set it to a blank value.

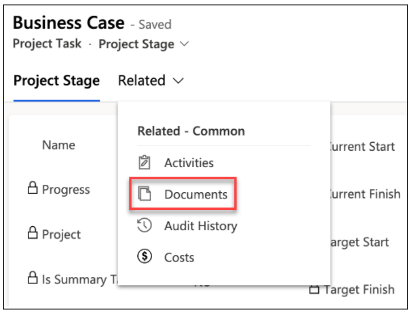


Task Details

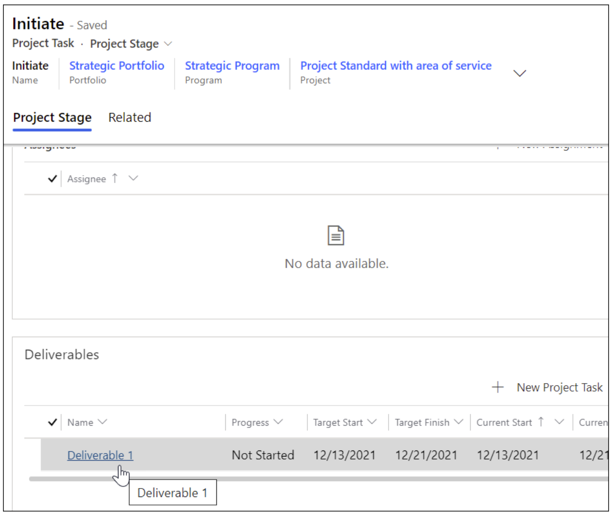
- **Task Type:** Choose the relevant Task Type from the drop-down:
  - **Task:** The lowest level piece of work that needs to be completed.
  - **Stage:** Configures the task as a Stage which will automatically get added to the **Stages** tab of the project. Use the Stage designation when creating a parent task for indented child tasks. It is recommended to match the Gantt stage names with the stages of the project's Business Process Flow.

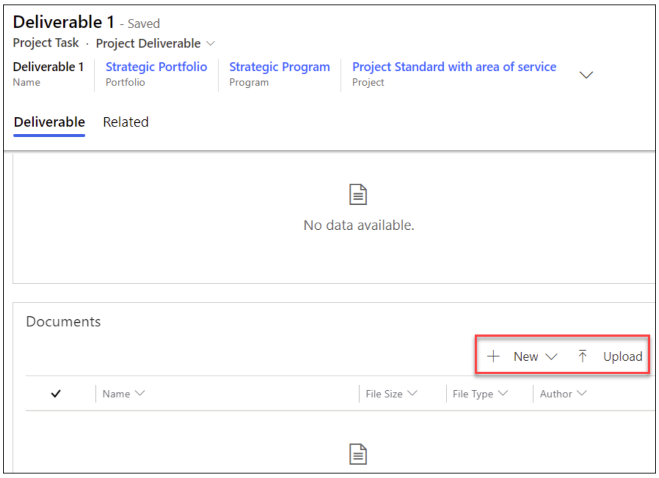
    

    Documents can be added directly to a stage by clicking into the **Stages** tab, clicking on the stage name, clicking on the **Related** tab, and then clicking **Documents**.

  - **Deliverable:** If a task is set to the **Deliverable** task type, documents can be attached to the task by clicking into its parent stage in the **Stages** tab, clicking on the task name in the **Deliverables** section on the displayed Project Stage form, and then choosing to create a new document or upload an existing document.



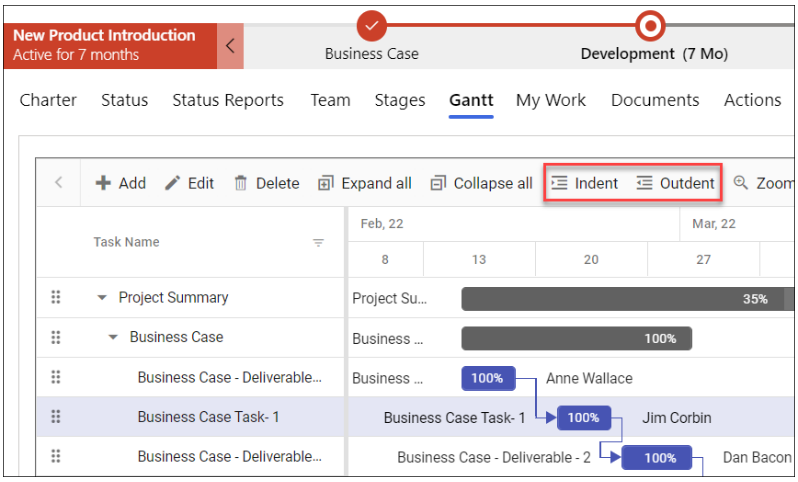


Note We do not support adding a new task with the **+ New Project Task** option found on the **Project Stage** form.

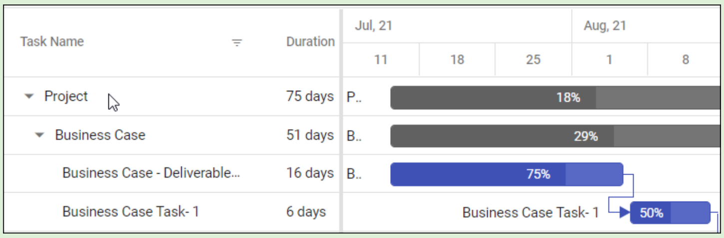
- **ID:** System generated value, not editable.
- **Description:** Add notes to the task.

Indent a Task (Child Task) or Outdent a Task (Parent Task)

To indent or outdent a task, choose the related tool at the top of the Gantt, or right-click on the task. Indenting a task will automatically set the task above it as a parent task.

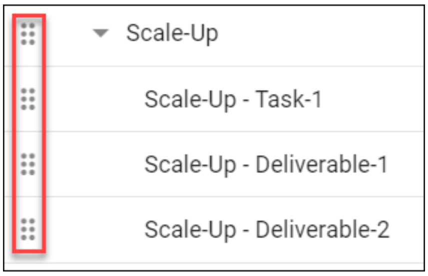


Tip You can get a full rollup of all task data, including overall percent complete, by creating a top-level task and indenting all other tasks underneath it. Note that you will still need to manually enter the **% Complete** value in the **Status** tab of the project.



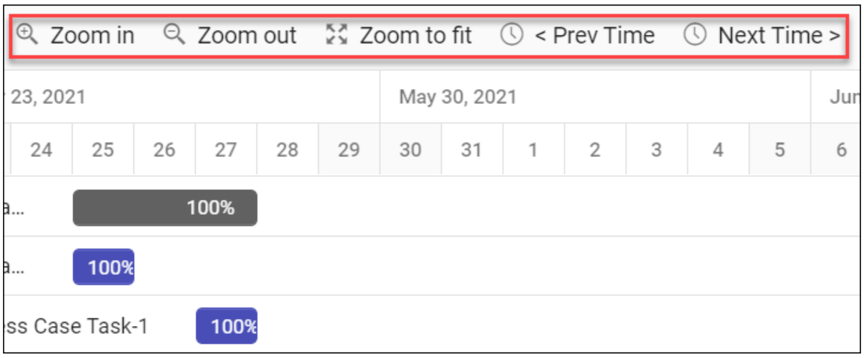
Move Tasks

To move a task simply click to grab the handle on the left side of the task and move the task up or down.



Change the Date Focus in the Gantt Chart

Prev Time and Next Time will display the previous or next day, week, month, or year, depending on the Zoom level chosen for the Gantt.

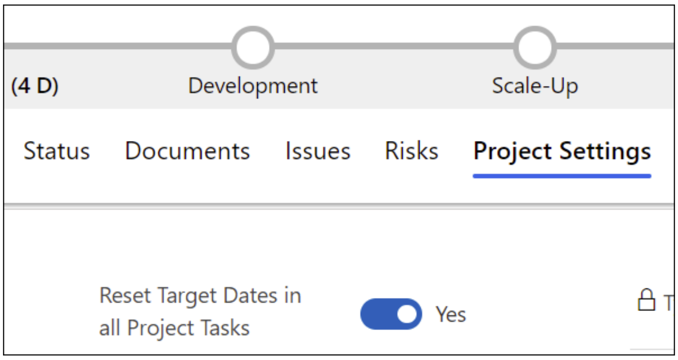


The following zoom options are available in the Gantt toolbar:

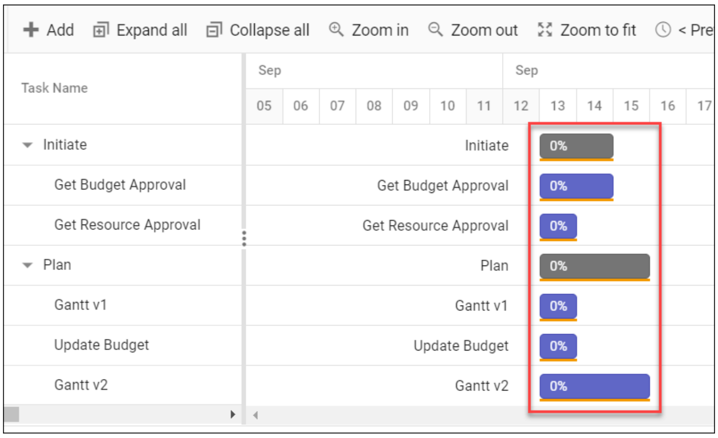
- Zoom In - To perform zoom in action on Gantt timeline.
- Zoom Out - To perform zoom out action on Gantt timeline.
- Zoom To Fit - To show all tasks with timeline fit into the available chart width.

Reset Target Dates in all Project Tasks (Baseline the Schedule)

To baseline the task schedule, click into Project Settings and choose **Reset Target Dates in all Project Tasks**.



You can verify the successful completion of the baseline reset by checking that the task date bar and the colored baseline bar below it are in alignment with one another.



Gantt Chart Keyboard Navigation

Keyboard Navigation

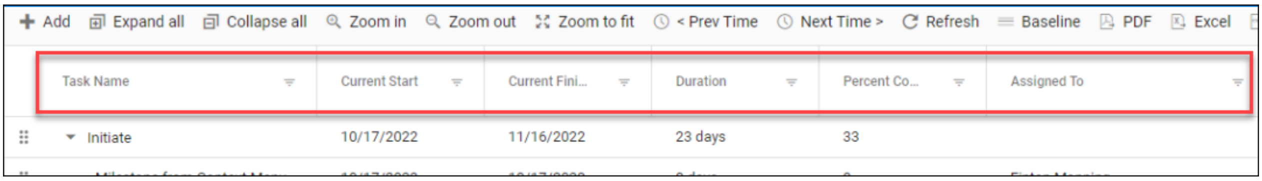
The below table lists Gantt keyboard navigation shortcuts. For best results, click on the timeline side of the screen (right-side) prior to using the navigation shortcuts. Certain keys will not work in older versions of BrightWork 365.

Keys	Description
Home	First Row Selection
End	Last Row Selection
DownArrow	Move Row Selection Down
UpArrow	Move Row Selection Up
Ctrl + UpArrow	Collapse All
Ctrl + DownArrow	Expand All
Ctrl + Shift + UpArrow	Collapse Row
Ctrl + Shift + DownArrow	Expand Row
Enter	Save Request
Esc	Cancel Request
Insert	Add Record
Ctrl + Insert	Add Record By Dialog
Ctrl + F2	Edit Record By Dialog
Delete	Delete Row
Ctrl + Shift + F	Focus Search TextBox
Shift + F5	Focus Task

Gantt Grid

The Gantt grid is on the left side of the Gantt tab screen. The Gantt grid surfaces important task information without clicking into individual tasks, and allows for easy inline editing of task information.

- The **Assigned To** column has been added to the grid side of the Gantt: Easily view and search for task assignees as well as which tasks still require an assignment.
- The columns on the grid side of the Gantt can be filtered to limit the tasks displayed.



  - Filtering to view specific or related records based on filter criteria, by using the filter menu support and toolbar search support.
- Search will run a query against the following columns:

    - Task Name
    - Assignee
    - Dates (Current Start, Current Finish, Target Start, Target Finish)

Troubleshooting

Duplicate Task

If a task is manually created immediately after a project first gets created, this can occasionally result in the creation of a duplicate task.

Gantt Row Display

- When your browser display zoom is set to a value below 100% you may notice the task names not aligning with their corresponding Gantt bars when scrolling vertically. Setting the browser display zoom to 100% fixes this issue.

New Task Added Between Existing Tasks Instead Gets Added to Bottom of Gantt

This issue can be caused by a user adding a task to the Gantt without refreshing the screen after another user added a task to the same Gantt. To resolve this issue:

1. Drag and drop the newly created task from the bottom of the Gantt to the top of the Gantt.
2. Drag and drop each of the other two tasks to the top of the Gantt Chart.
3. Drag and drop the tasks to the desired positions.

Deliverables

- If you change a **Deliverable** type task into a task of a different type (**Stage** or **Task**), in order to view any documents that were attached to the original deliverable you will need to temporarily change the task type back to **Deliverable** so you may once again have access to the document. When done saving the document you can change the task type again as desired.
- If you change a **Stage** type task into a **Deliverable** type task, this new Deliverable will not automatically attach itself to its parent Stage. You will not be able to view this deliverable within its parent stage until you make an update to the Deliverable beyond changing the task type, such as updating its name or one of the date field values.

Gantt Baseline Resets and Milestone Dates

After a Gantt baseline reset, the Target Date values of milestone tasks may not equal Current Date values.

Right-Click "Task Information" Does Not Display Information

After right-clicking on a task row and selecting **Task Information**, no information is displayed.

Workaround

Double-click the task row on the Gantt chart side (right side) of the Gantt window to display the Task Information screen.

Searching for Dates Does Not Yield Any Results

It is not possible to search for date strings.

Import Project Gantt Tasks

Note

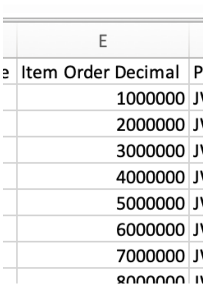
- The **BrightWork Team Member** security role is required to import tasks.
- There is a technical limit of 1,000 tasks for the Gantt, but in order to have a reasonably responsive Gantt there is likely to be a practical lower limit based on performance in your environment.

Caution Only import tasks into a project that has an empty Gantt task list.

Import Tasks Into a BrightWork 365 Project Gantt

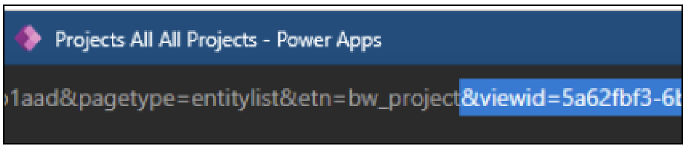
This import method will result in a flat task list in the specified order with durations, but without dependencies or parent-child relationships.

1. Create a new empty project from a template that is not associated with any Content Template.
2. Open the supplied CSV file 📎 that contains the required column headings and sample values in the proper format.
3. Add your tasks in the order you want them to appear in the Gantt.
4. Specify the **Project Task Type:** Use **Stage**, **Task**, or **Deliverable**.
5. Enter **Current Start** and **Current Finish** dates (use the correct date format for your environment); leave these cells blank if the row is for a **Stage** type task.
6. Enter a **Duration** and enter **Days** as the **Duration Type**.
7. If you want the task to be a milestone, specify a Duration of**0** and enter **Yes** in the **Is Milestone** cell.
8. Enter **1000000** in the first **Item Order Decimal** cell and **2000000** in the second cell beneath it. Select both cells and drag down to the bottom to increment the numbers, e.g., 1000000, 2000000, 3000000, etc....

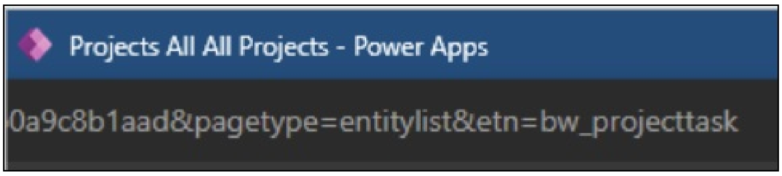


9. Enter the **Project, Program and Portfolio** names exactly as they appear in BrightWork 365. These names must be unique in the BrightWork 365 environment – if they are not unique, the import will fail.
10. Save the CSV file.
11. Click **Projects** on the main nav to open a project view. Next you will update the URL of this view to open a project tasks view.
12. In your browser URL area, click between **bw_project** and the **&**, and click **Shift | End** on your

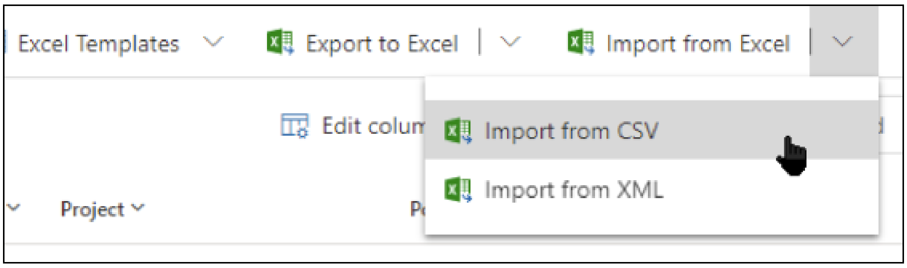
keyboard to select all the text after bwproject.



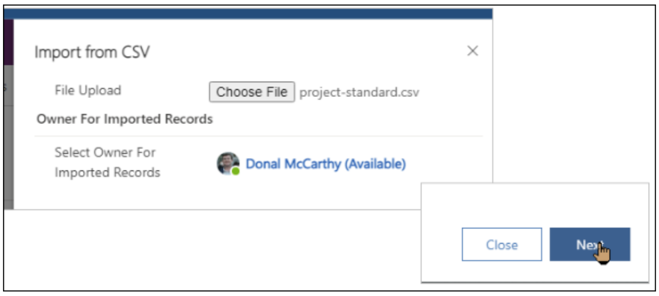
13. Type **task** and click Return on your keyboard – the end of the URL should now read **=bw_projecttask**.



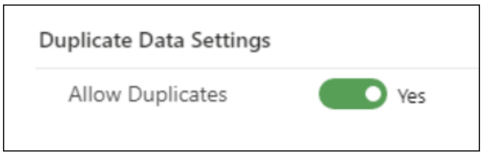
14. Bookmark the project tasks view that opens for future use.
15. Click **Import from Excel > Import from CSV** .



16. Select the CSV file you created earlier and click**Next**.

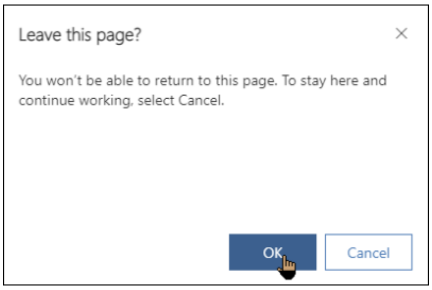


17. Set **Allow Duplicates** to **Yes**.

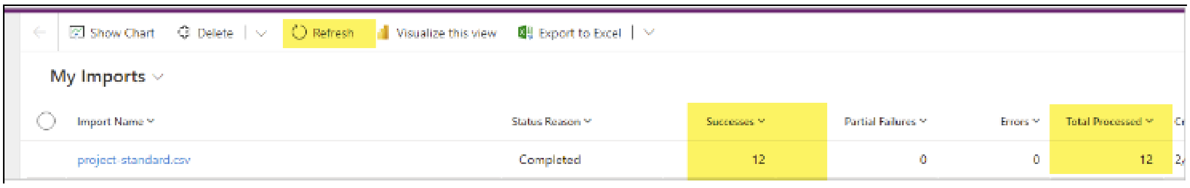


18. Click **Review Mapping**.
19. Click **Finish Import**.
20. Click **Track Progress**.

21. Click **OK**.



22. On the tracking page click **Refresh** until the import has completed. The **Successes** number should be the same as the **Total Processed** number.



23. Navigate to your project and click the **Gantt** tab to view the saved tasks. Next you will need to indent tasks under their parent tasks and create dependencies; see the below section **Post Import Hierarchy Build Option** for a method to accomplish this.

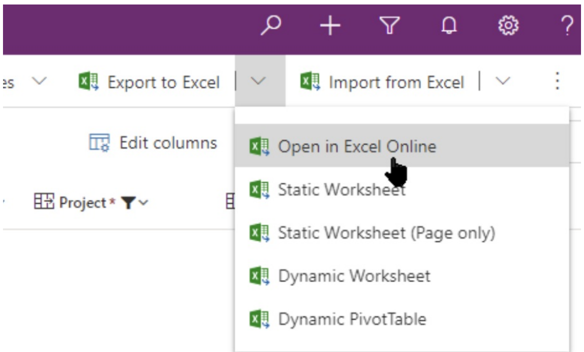
Post Import Hierarchy Build Option

The below process provides a method to indent your imported tasks under a top-level Project Summary Task, and create dependencies between the tasks.

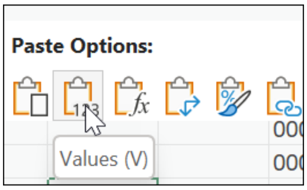
1. In the Gantt tab of the project used in the above import process, indent the second task under the very top first task (assuming the first task will be a Summary Task). Proceed to create a dependency between the second and third tasks and save the Gantt; this is to create reference values to be used later in the process.

   > **Note** The Parent Summary Task must have a unique name relative to *all* projects' Gantt tasks throughout the entire BrightWork 365 environment.

2. Return to the app's **Active Project Tasks** page that was bookmarked earlier (see above).
3. Add the **Dependency** column to the view (not to be confused with the **Dependency Type** column which is not necessary for this process).
4. Filter the **Project** column to the name of the relevant project.
5. Set the sort order of the **TID** column to **A to Z**.
6. Click **Export to Excel > Open in Excel Online** .



7. Copy the value in the column **Parent** and paste it all the way down the column; do not drag the cells down the column because the values need to be equal (not incremented) all the way down the column.
8. Copy the value in the column **PID** and paste it all the way down the column; do not drag the cells down the column because the values need to be equal (not incremented) all the way down the column.
9. Beginning from the first child task, select and copy all the values from the **TID** column all the way down the column, skipping the final bottom-most cell.
10. Return to the desktop CSV file used earlier and paste the **TID** values into an empty column beginning from the same row as the second child task.
11. In another empty column's cell enter the formula **=text(CR,"00000000")&"FS"** where C equals the letter of the column you pasted into in the preceding step, and R equals the number of the row you pasted into in the preceding step. The **FS** will be appended to the end to create a Finish-to-Start relationship.
12. Drag the cell contents all the way down the column to autofill the rest of the cells with incrementing values.
13. Copy all of the column cell values from the preceding step and **paste as Values (V)** into another empty spreadsheet column; this is to create clean data without any formula elements.



14. Copy all the new cleaned column values from the CSV file and paste them into the **Dependency** column in the Excel Online sheet beginning from the second child task down.
15. Save the Excel Online sheet.
16. Choose to **Track the progress** and check for any errors in the **Errors** column.
17. Once the save is completed, return to the relevant project's Gantt tab and confirm the tasks have been updated as expected.

Note If you encounter failures during the above process:

- Confirm you have appropriate permission to save the Excel Online sheet. You can do this by making an initial simple change in Excel Online, e.g., by slightly changing the name of a task and then saving the Excel Online sheet successfully.
- Confirm that the Parent Summary Task name is not the same as any other task in any other project in the BrightWork 365 environment.

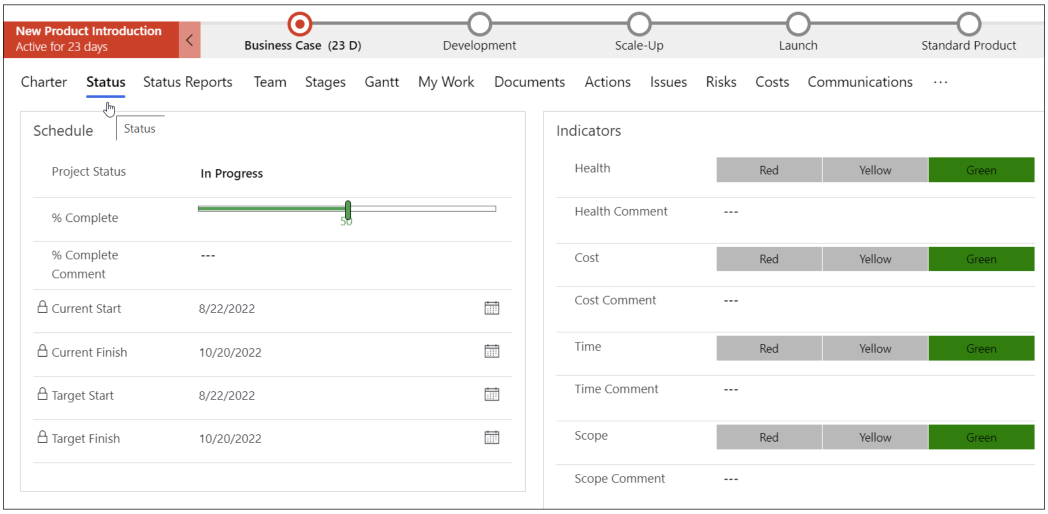
Project Status Reporting

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note For BrightWork 365 versions older than v1.6 see Prior Release Articles.

Status Tab

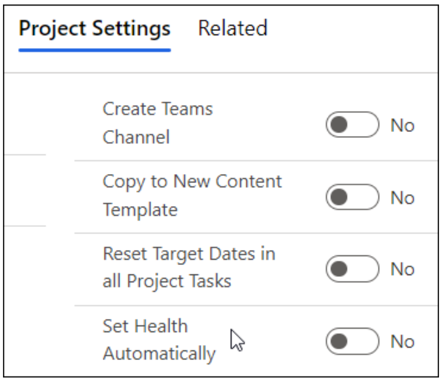
The Status tab displays current metrics and KPIs about the project.



The Schedule date values will automatically populate based on work item dates, and the values for Project Status, % Complete (Percent Complete), and other KPIs are manually set by the project manager.

The Health KPI can either be set manually by a user with appropriate privileges, or automatically by the system. If set automatically, the KPI color will match whatever is the "worst" color value among the other KPIs (Yellow is worse than Green and Red is worse than Yellow); any manual changes made to the KPI will not be saved permanently.

To toggle the automatic Health KPI setting on and off, in Project Settings use the Set Health Automatically switch.



Status Reports Tab

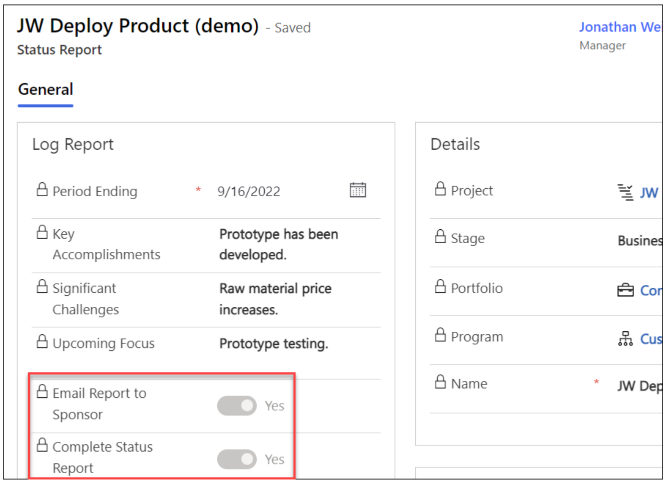
In the Status Reports tab a snapshot record of the current status information can be saved, and the history of previously created status reports can be viewed.

Saved status reports will be added to the list of any previously created status reports. The status report data is stored within your Microsoft 365 Dataverse.

To create a new status report snapshot:

1. In the Status Reports tab click the ellipses and **+ New Status Report**.
2. Fill in all relevant columns.
3. To save the status report:
    1. To save a draft: Click **Save** or **Save and Close** in the ribbon.
    2. To save a final version of the status report set **Complete Status Report** to **Yes**.

When you first set **Email Report to Sponsor** to **Yes**, and then set **Complete Status Report** to **Yes** (in that order), an HTML report will be emailed to the Sponsor, the Project Manager and the person that set the report to the completed status. The email will be sent from the account that was used to install BrightWork 365.



Note Status related icons may fail to load in older versions of the Outlook desktop client.

Actions

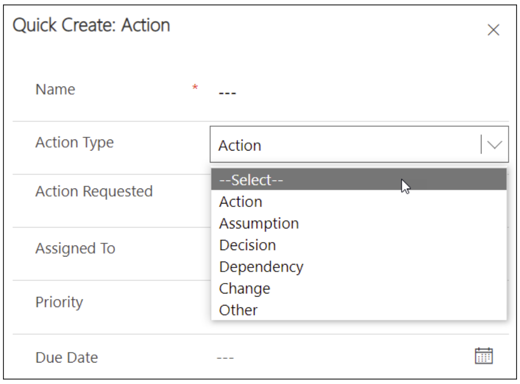
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Actions

The Actions tab provides users with the ability to create, edit and view details in relation to an Action, a Resolution, an Approval, and to Notes, to help keep projects on track.

To access Actions, click on the **Actions** tab within a program, a portfolio, or a project created from one of the templates that contains this tab. Click **+ New Action** to create a new Action.

Clicking **+ New Action** brings up a Quick Create form with the most relevant fields. The form's **Action Type** field allows you to choose from several available types of actions.



Action Items

The Action tab within an individual Action item provides several sections to capture additional details about an Action.

Action

Fields include:

- Name: Provide a name for the action.
- Action Type: Choose either Action, Assumption, Decision, Dependency, Change, or Other.
- Action Requested: Enter the action requested.
- Assigned To: The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.
- Priority: Choose the priority level.
- Due Date: Choose the date the requested action is due.

Resolution

Fields include:

- Action Status: Choose from among the available Status choices.
- Progress Indicator: Choose from among the available schedule related choices.
- Action Taken: Describe any actions taken.
- Date Actioned: Choose the date the action was taken.

Approval

Fields include:

- Approver: Enter the name of the person responsible for approving the action. The list of available users to choose from in the **Approver** column is limited to those users given the **BrightWork Team Member** security role.
- Approval Date: Enter the date the approval was given.
- Resolution Rating: Choose a star rating for the resolution.
- Notes: A place to capture notes about the action.

Documents Tab

View, create, or upload documents associated with the action item. Documents will be saved in the project's SharePoint Online folder.

Related Tab

Click the **Related** tab to access the Audit History of the action item. The Audit History provides action item data change details including the change date, user who made the change, the changed field, and the old and new values.

Costs & Budgets

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Costs tab provides a comprehensive method for capturing and tracking budgets and costs at the project and individual cost item levels.

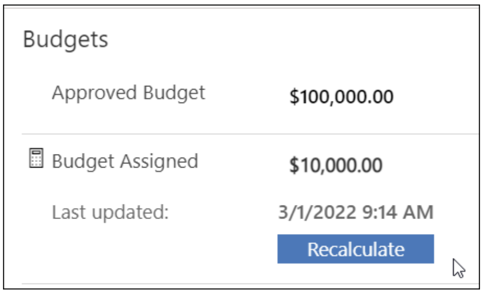
Project Level Cost Tracking

To enter the Costs module, click on the Costs tab within an individual project created from a template that contains this tab. The initial screen is comprised of many high-level cost tracking fields separated into several screen sections.

Budgets

Fields include:

- Approved Budget: Enter the overall approved budget for the project. This is the first step for setting up cost management for the project.
- Budget Assigned: Calculates the sum of the total budget assigned to all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the **Recalculate** button.



- Budget Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Current Forecast. Automatically calculated.

Costs

Fields include:

- Current Forecast: Calculates the total spend forecast of all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Actual to Date: Calculates the total money spent to date for all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Cost to Complete: Current Forecast - Actual to Date. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator

icon and then the Recalculate button, as noted above.

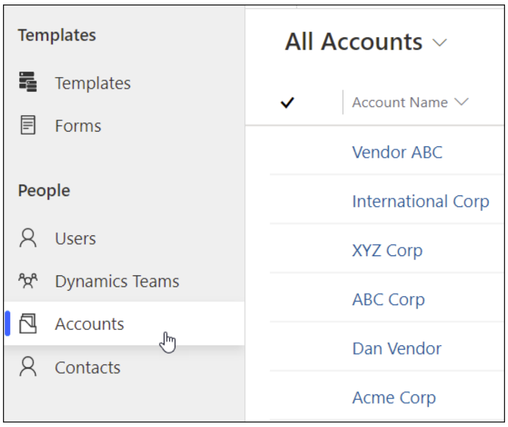
Individual Cost Item Tracking

The Cost Items section is where you will enter the individual cost items with associated details. The grid surfaces important details about each of these items. Click **+ New Cost** to enter the new cost form.

Cost Form

The **Cost** form is comprised of several cost tracking detail fields including:

- Name: Enter the name of the cost item.
- Cost Type: Choose from among the available Type choices.
- Cost Category: Choose from among the available Category choices.
- Vendor: The available vendor choices are pulled from the Accounts page in the Admin area.



- Assigned To: The list of available users to choose from in the Assigned To column is limited to those users given the **BrightWork Team Member** security role.
- Forecast Spend Date: Date by which the item's budget is expected to be spent.
- Related Task: Choose from a lookup to tasks on the project's Gantt chart.
- Cost Status: Choose from among the available Status choices.
- Current Forecast: The amount you believe the item will eventually cost in total.
- Actual to Date: Total spent on the item to date.
- Cost to Complete: Current Forecast - Actual to Date. Automatically calculated.
- Date Spend Complete: The date all costs associated with the cost item have been spent. Automatically sets the Cost Status column to Completed.
- Budget Assigned: The total approved and assigned budget for the cost item.
- Budget Assigned Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Budget Current Forecast. Automatically calculated.

- Timeline: A place to capture notes about the cost item.

Documents

View, create, or upload documents associated with the cost item. Documents will be saved in the project's SharePoint Online folder.

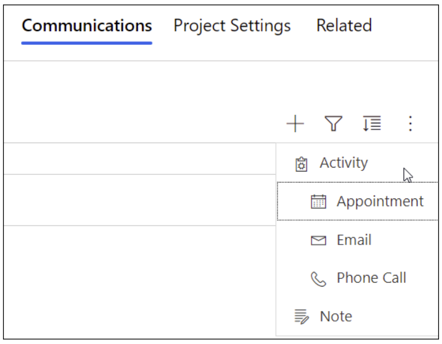
Related

Click the **Related** tab to access the Audit History of the cost item. The Audit History provides cost item data change details including the change date, user who made the change, the changed field, and the old and new values.

Communications

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Communications tab provides a comprehensive method for capturing various communication related activities at the project, program, or portfolio level. To access Communications, click on the **Communications** tab. The initial screen will display a history of previously entered Communications items. Click **"+"** to create a new Communications item of type Appointment, Email, Phone Call, or Note.



You can also access communications options from within the **Timeline** section of a **Project Stage** details screen.

Appointment

When creating a new Appointment the Quick Create form will display with relevant fields. If the creator's email and calendar are configured properly, an invite will be sent to the Attendees, and the appointment will be added to the creator's calendar.

The Appointment **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Appointments can be set as a Microsoft Teams meeting. If your organization is not yet configured to work with Teams, see our Microsoft Teams Admin Guide.

Email

The new email screen presents the typical email fields such as To, CC, Subject, and email body. If the email creator's email is configured properly, an email will be sent to the addressees and a copy of the email will be saved in the Communications item record.

Phone Call

The Phone Call function provides a way to capture details about a call that was initiated outside the system. The details will be saved as part of the Communication record.

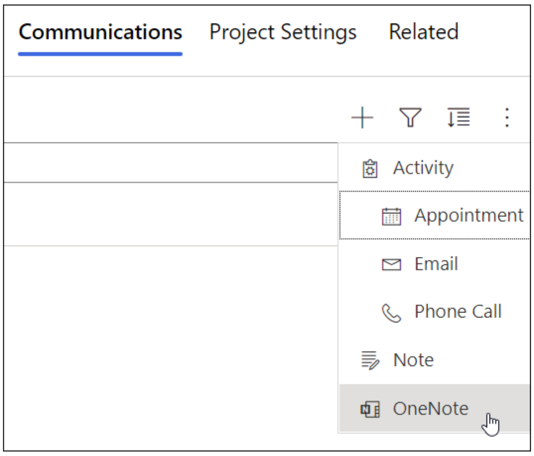
The Phone Call **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Note

You can create a note with a title, note body (with formatting), and attachments and save the note as part of the Communications record.

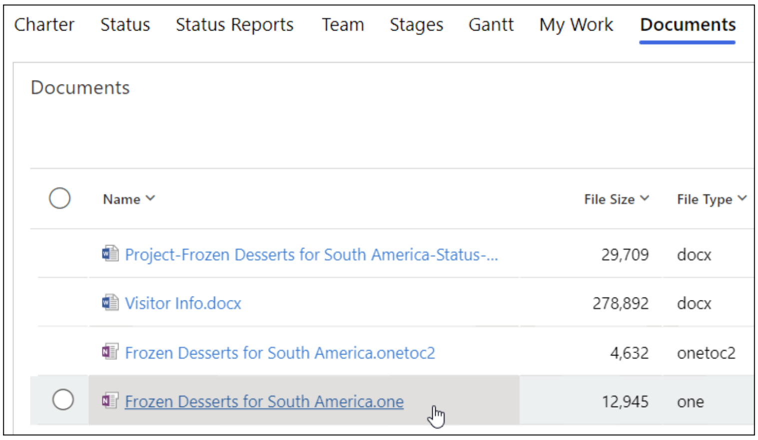
OneNote

In addition to the standard note mentioned above, you also have the option to create Microsoft OneNote notes that are saved as part of an associated OneNote notebook. To access the OneNote notebook after it's created, you can either click on the OneNote link displayed when you click the + sign in the Communications module:



Or,

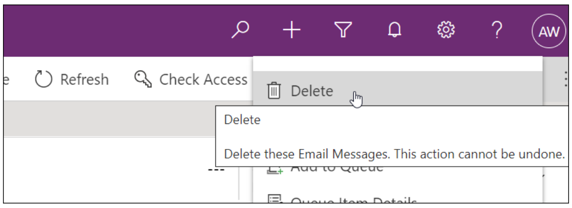
click on the **.one** file within the Documents tab:



Communications Tab - User Actions

You can take various actions on open Communications items directly in the main Communications screen.

If you need to delete a closed Communications item, e.g., delete an email after it was sent, you will need to do this from the toolbar within the item record instead of from the main Communications screen.



Note Users can only modify or delete their own Communications activities, not those of other users.

Dynamics 365 App for Outlook

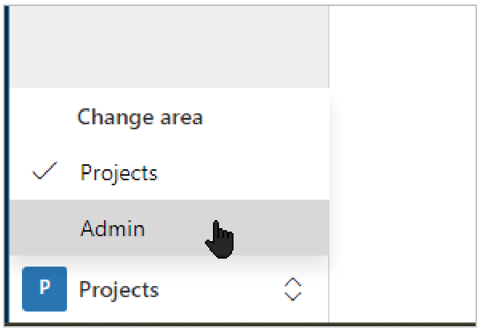
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web, or mobile. See Use Dynamics 365 App for Outlook for additional information.

Troubleshooting

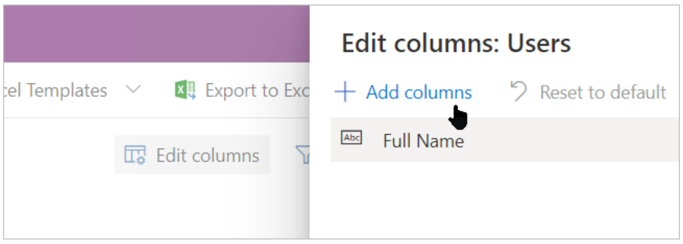
Communication activities not working for some users

A Power Platform Admin can check within the BrightWork 365 app if the affected user accounts are enabled for communication related activities:

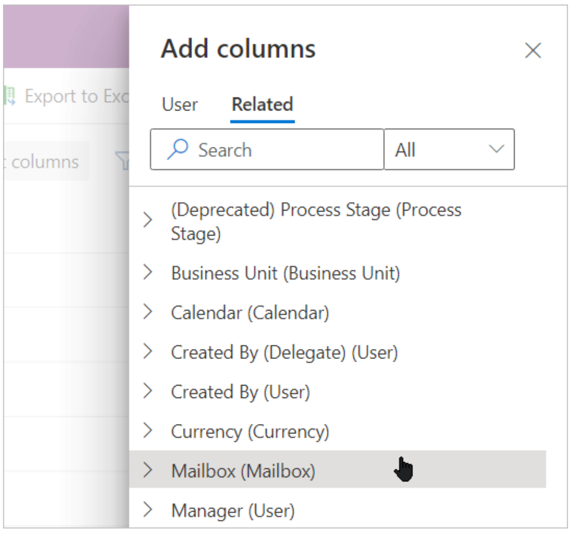
1. Click Projects in the bottom left of the page and click Admin.



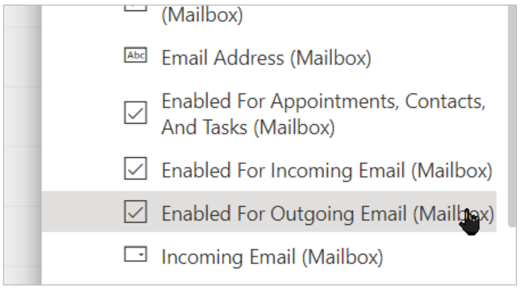
2. Click Users to load the BrightWork Users report.
3. Click Edit columns and then click Add columns.



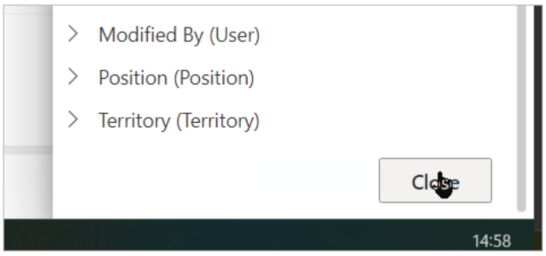
4. Click Related and Select Mailbox.



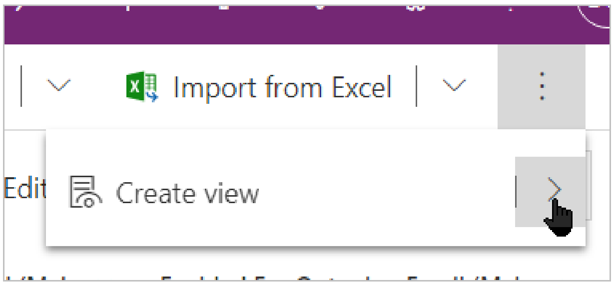
5. Add the three Enabled for... columns.



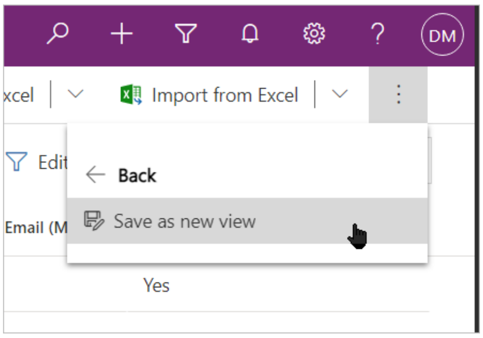
6. Scroll down to the bottom and click close.



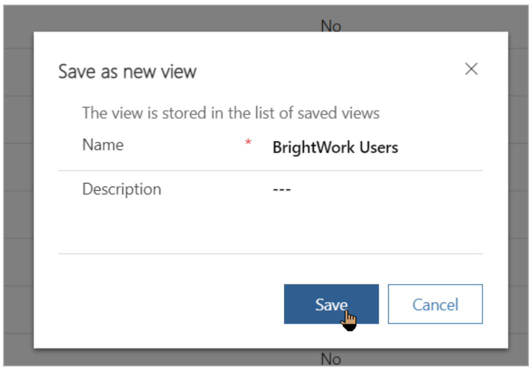
7. Click Apply.
8. Expand the three dots in the top right and click the arrow beside Create view.



9. Click Save as new view.

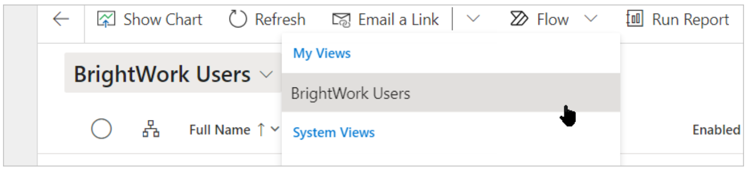


10. Rename the view if desired (optional), and click Save.



11. The new view is available to check if the user accounts are enabled for communication related

activities.



If further configuration is required, see the **Setup Dynamics Email** section of the BrightWork 365 Install Guide.pdf.

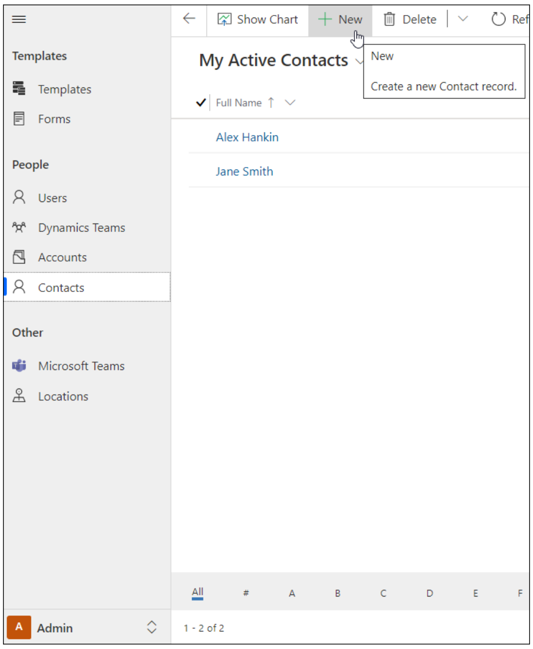
Contacts

Located in the Admin Area > People section of the app, the **Contacts** feature provides a location to store information about people external to your organization such as vendors and contractors. These contacts can also be used to assign primary contacts to Accounts.

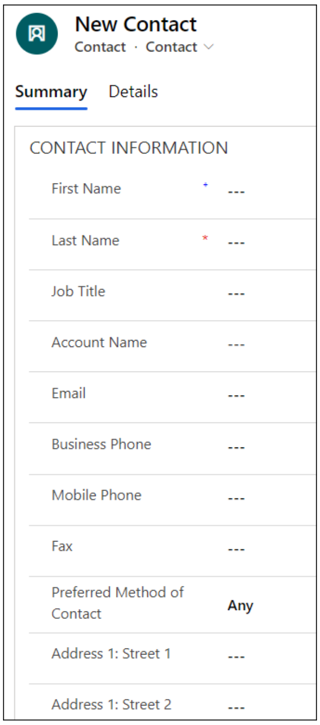
Contacts can be added, edited and deleted by the BrightWork Project Manager and BrightWork PMO Manager.

Add a Contact

1. Click into Admin Area > Contacts.
2. Click + New.



3. Fill in the relevant contact information.



Add a Primary Contact to an Account

If you assign a contact to an account and the contact has an email address attached to its record, you will be able to email the account by using the email feature of a project's Communications module.

To assign a Primary Contact to an Account, in the Contact's **Account Name** field choose the relevant Account.

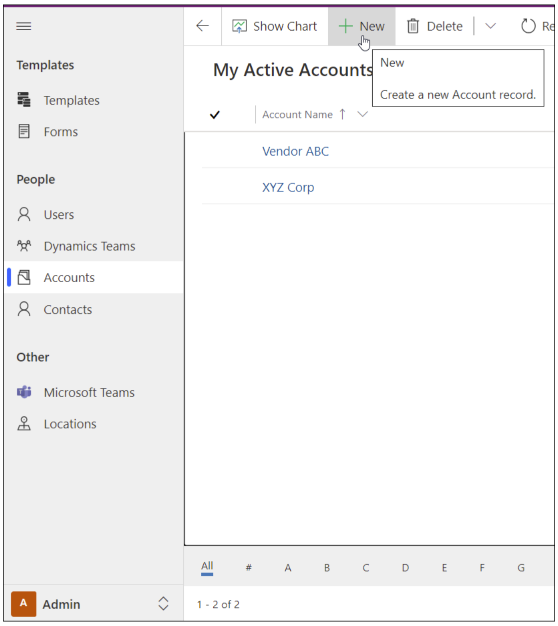
Accounts

Located in the Admin Area > People section of the app, the **Accounts** feature provides a location to store information about external organizations such as vendors and contractors. This data can be used in other areas of BrightWork 365 including a project's Costs module and the email function within a project's Communications module.

Accounts can be added, edited and deleted by the BrightWork Project Manager and BrightWork PMO Manager.

Add An Account

1. Click into Admin Area > Accounts.
2. Click + New.



3. Fill in the relevant Account information and save the record.

Add a Primary Contact to an Account

Among the fields present to capture all the details about these entities is the field Primary Contact. In addition to noting who is the primary contact, if the contact has an email address attached to their record, you will be able to email the account by using the email feature of a project's Communications module.

To assign a Primary Contact to an Account:

1. Create the contact in the Contacts list if not already present.
2. In the Account's **Primary Contact** field choose the relevant contact.

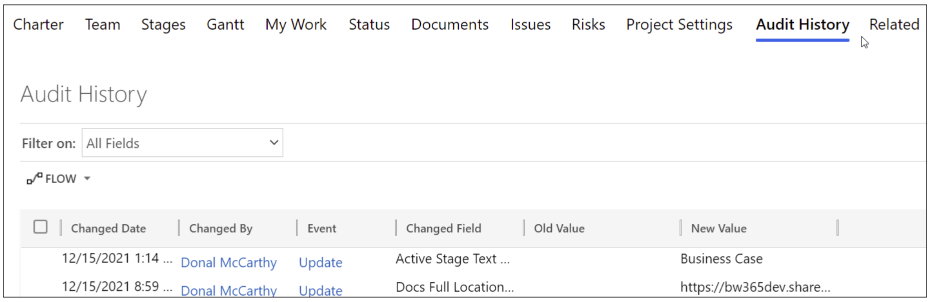
Audit History

BrightWork 365 together with the Microsoft Power Platform provides organizations with the ability to track data change history and activity logging for use in analysis and reporting purposes. BrightWork 365 audit history has been enabled in the following tables:

- Project Task
- Request
- Issue
- Risk

See Audit Tables.xlsx for a list of the columns that are audit-enabled.

To view Audit History, within a project click on the **Related** tab and choose **Audit History**.



Note that in the **Filter on:** drop-down, there are more fields listed than are actually available in the Audit History.

For additional Audit information see these related Microsoft articles:

- Auditing Overview
- Power Apps Activity Logging
- Configure Tables and Columns for Auditing

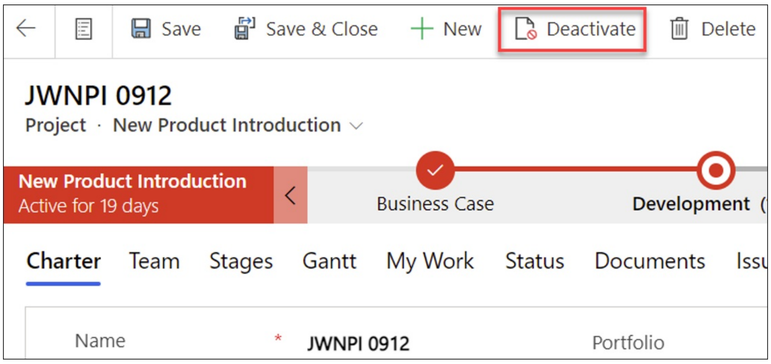
Archive or Delete a Project

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

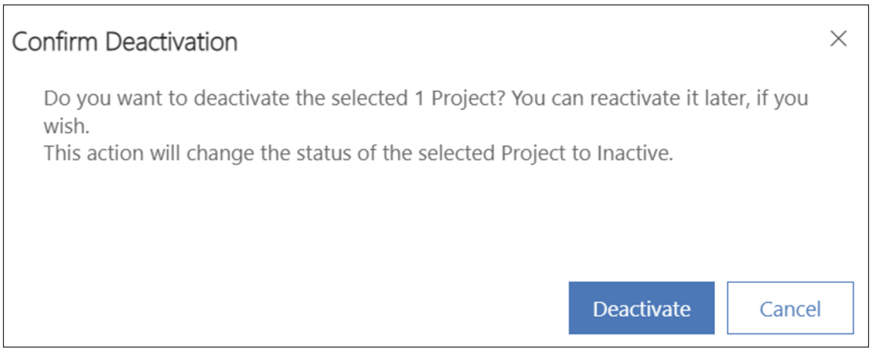
Archive a Project

When it is no longer necessary for a project to be in **Active** status, for example because it is deferred or closed, it can be archived and put into **Read-only** mode. Archiving is usually preferred over deletion of a project because deleted projects cannot be recovered. Only users with the **BrightWork PMO Manager** security role can delete projects.

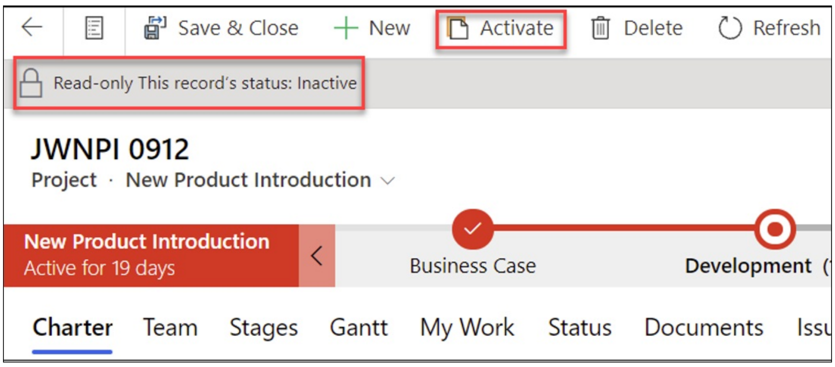
1. While in a project record click **Deactivate**.



2. Click **Deactivate** to confirm the deactivation request.



3. You can re-activate a project by entering the project record and clicking Activate.

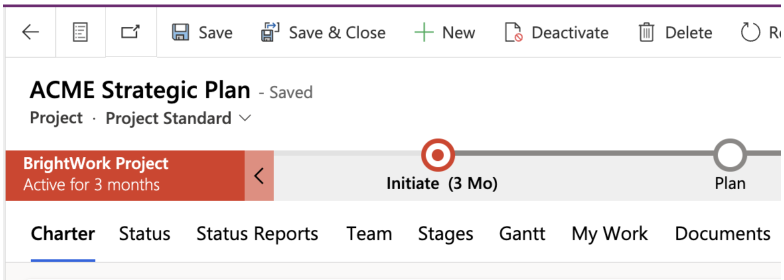


Delete a Project

Caution Deleted projects are permanently removed and cannot be recovered.

To delete a project permanently:

1. Click into the project and click **Delete** at the top of the screen.



Note After the project is deleted you may see "Record not found" messages displayed on the screen; these messages can be safely ignored.

BrightWork 365 Starter Project Templates

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

All Templates

> **Tip** See our project template-related best practice webinar for additional information.

> **Note**
>
> - Only templates that are linked with a Content Template will be prepopulated with project data.
> - User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.

Project Management Tabs

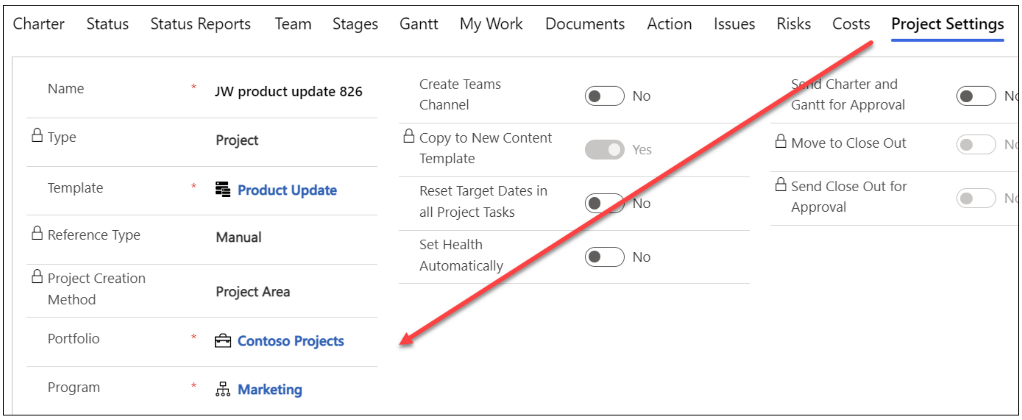
Charter

The Charter tab contains high level metadata about the project, including the project title and stakeholder information.

The following columns limit their user lookup values to the corresponding mapped BrightWork security role:

- Project Sponsor column to BrightWork Team Member security role
- Project Manager column to BrightWork Project Manager security role

The **Charter** tab also contains the mandatory columns **Program** and **Portfolio**. The values for these columns can later be changed in the **Project Settings** tab by a user with elevated privileges (see the **Project Settings** section below). All associated child items will be automatically adjusted to reflect these value changes.



Status & Status Reports

The Status tab allows the project manager to set current project metrics and KPIs, and the Status Reports tab provides the project manager with the ability to create snapshot status reports of the project's current standing, and view a history of status reports. See Status Reporting for details.

Team

Automatically populates with the names of work item assignees, and the earliest start dates and latest finish dates across all the work assigned to them.

> **Note**
>
> - We do not support manually adding existing project team members from within the Team section. However, you can add a person to the Team without them being permanently assigned to a work item by assigning them temporarily to a work item, briefly waiting until they show up in the Team tab, and then unassigning them from the work item – they will stay in the Team.
> - To remove a Team Member, a user with the Project Manager security role can remove the member from any assigned work, and then highlight the member's row in the grid and choose Delete Project Team Member in the section's top menu.
> - Dates will not update in the Teams tab until an update of some kind is made in the Gantt tab, which will trigger the date update.

Gantt

List of project tasks with a corresponding bar chart that represents the project schedule with task start and end dates. Visually depicts dependency relationships between the tasks as well as task status. See also the Task Management article.

My Work

A list of all work of any type that is assigned to the logged in user.

Documents

Create new Microsoft Office documents and upload existing documents, and store these files in your organization's SharePoint document library that is associated with BrightWork 365.

> **Note** SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

Actions

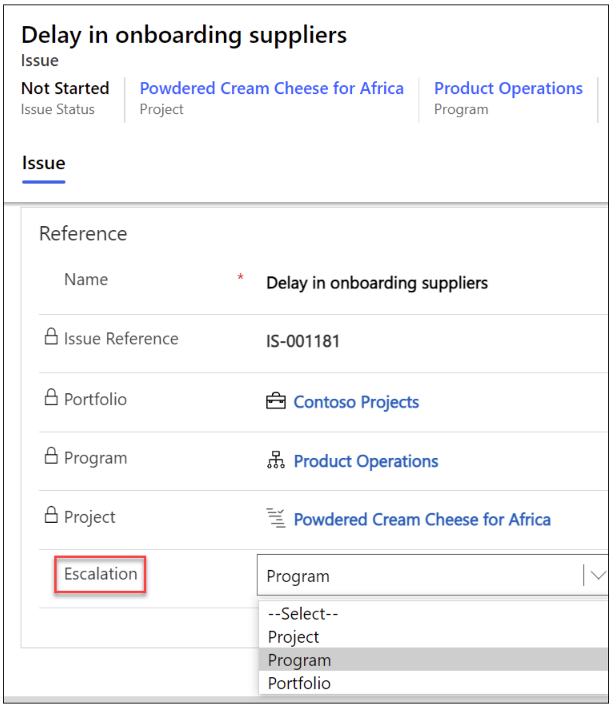
Log project actions, decisions, and changes. See the Actions article for details.

Issues

In the **Issues** section you can create a new issue by clicking **+ New Issue** (do not use the Add Existing Issue option).

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.

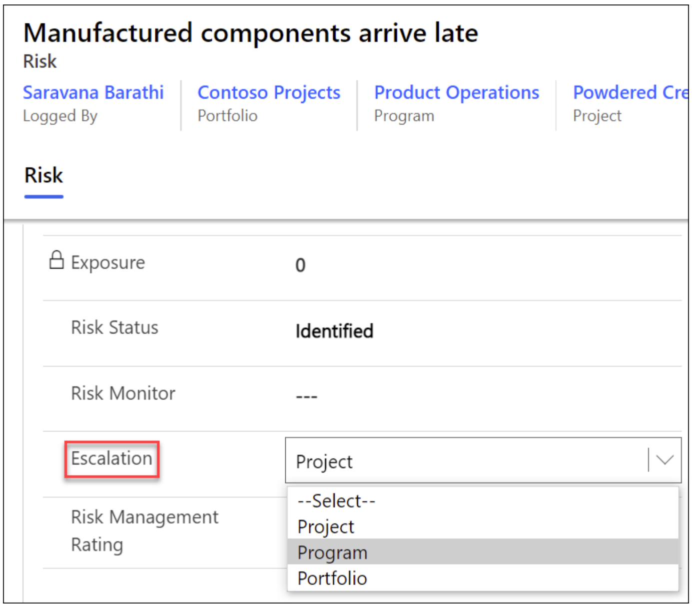


Risks

In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Risks can be added to the project's associated program or portfolio by clicking into the risk and choosing the relevant escalation location.



Costs

The Costs tab provides a comprehensive method for capturing and tracking project budgets and actual costs at the project and individual item levels. See the Costs article for details.

Communications

Initiate and save project related Emails and Appointments directly in the BrightWork 365 app and save these items as well as Phone Call details and Notes, within associated projects. See the Communications article for details.

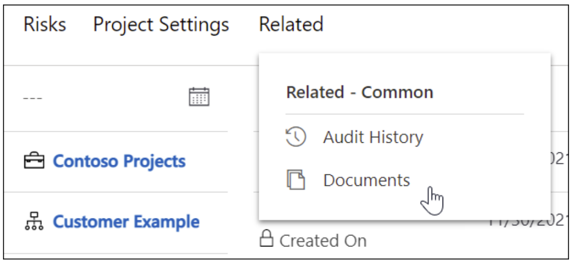
Project Settings

The Project Settings screen provides additional project information and gives the manager the ability to change the portfolio or program associated with the project, reset the baseline dates in all project tasks, and create a Microsoft Teams Channel for the Team associated with the project's related program (if the project is later moved to a different program, the project's Microsoft Team Channel will not move to the new program's Microsoft Team).

Only users with the **BrightWork Project Manager**, **BrightWork PMO Manager** or **BrightWork Program Manager** security role can access the Project Settings tab.

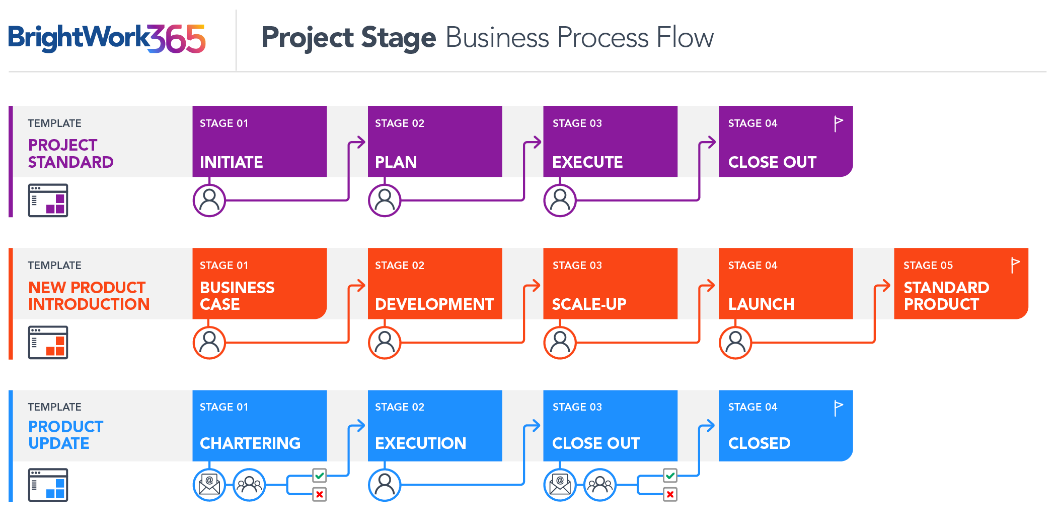
Related

You can view documents related to entities within a project such as Issues or Risks, and project audit history, by clicking on the **Related** tab.



Project Stages

Each project template has its own project stage business process flow - details are noted within each template section of this article.



Project Standard

Template Overview

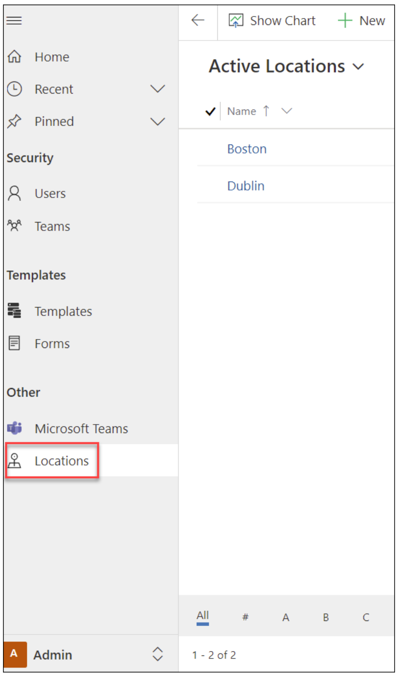
The Product Update template is used to request projects for complex support issues. It follows a gated approach with approvals required to move from the Charter stage into Execution, and to close out the project.

Project Management Tabs

Charter

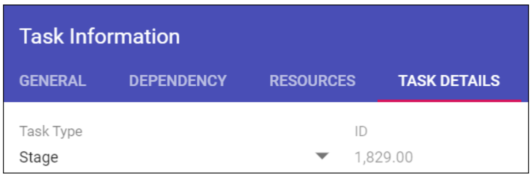
- The Charter contains high level metadata about the project, including project title, stakeholder information, parent Program & Portfolio, and Location.
    - The **Location** drop-down menu choices that are found in the Product Update template are

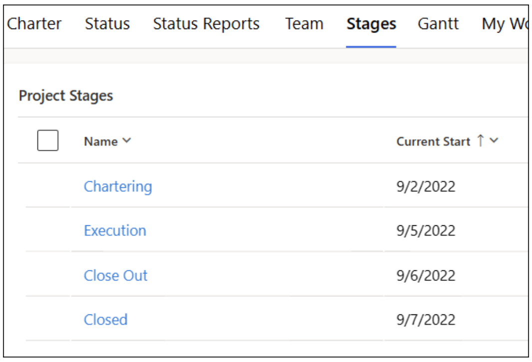
configured in **Admin Area | Locations**.



Stages

- Stages are automatically listed in the **Stages** tab after being created in the Gantt tab by setting the Task Type of a task to **Stage** in **Task Details**. We do not support manually adding stages from within the Stages section.



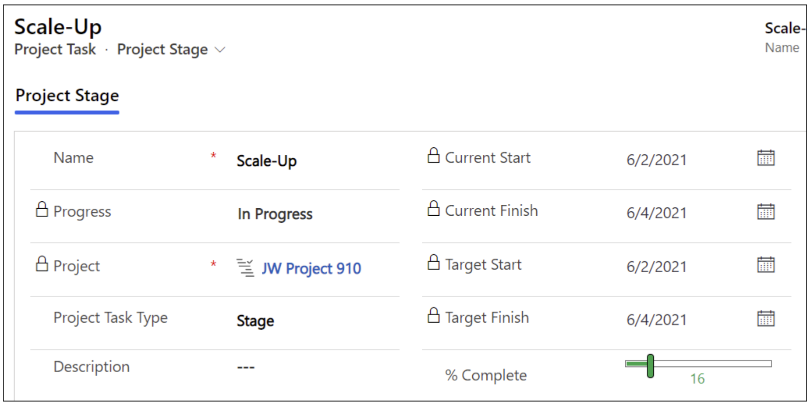


Name	Current Start
Chartering	9/2/2022
Execution	9/5/2022
Close Out	9/6/2022
Closed	9/7/2022

- The Stage date values are tied to the date values of the Stages in the Gantt.

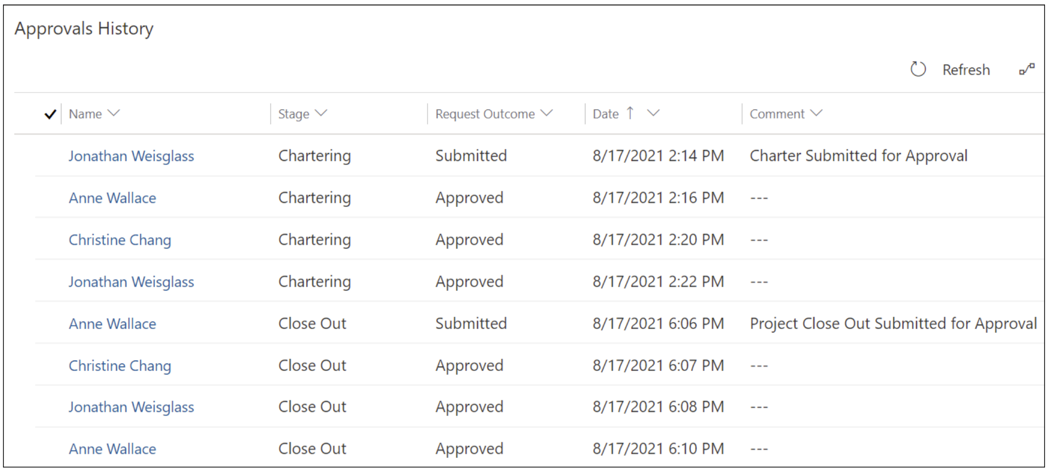
Name	Current Start	Current Finish	Target Start	Target Finish
Chartering	9/2/2022	9/2/2022	9/2/2022	9/9/2022
Execution	9/5/2022	9/5/2022	9/2/2022	9/6/2022
Close Out	9/6/2022	9/6/2022	9/2/2022	9/1/2022
Closed	9/7/2022	9/7/2022	9/2/2022	9/7/2022

- Click on a stage link to view additional details about the stage including description and status information.



Project Settings

- The **Project Settings** screen provides additional project information and gives the Project Manager the ability to reset the baseline dates in all project tasks, and to create a Microsoft Teams Channel for the Team associated with the project's related Program.
- The **Project Settings** screen is also used for project stage approval purposes as detailed in the **Business Process Flow** section below.
- Approvals History: A history of project stages and the related approval request outcomes can be viewed in the Approvals History window.

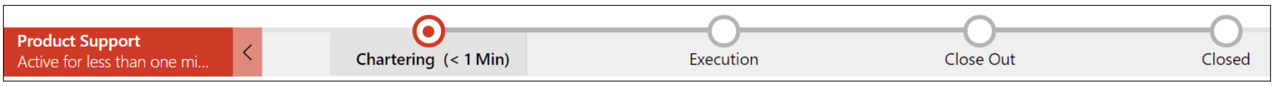


Approvals History

Refresh

Name	Stage	Request Outcome	Date	Comment
Jonathan Weisglass	Chartering	Submitted	8/17/2021 2:14 PM	Charter Submitted for Approval
Anne Wallace	Chartering	Approved	8/17/2021 2:16 PM	---
Christine Chang	Chartering	Approved	8/17/2021 2:20 PM	---
Jonathan Weisglass	Chartering	Approved	8/17/2021 2:22 PM	---
Anne Wallace	Close Out	Submitted	8/17/2021 6:06 PM	Project Close Out Submitted for Approval
Christine Chang	Close Out	Approved	8/17/2021 6:07 PM	---
Jonathan Weisglass	Close Out	Approved	8/17/2021 6:08 PM	---
Anne Wallace	Close Out	Approved	8/17/2021 6:10 PM	---

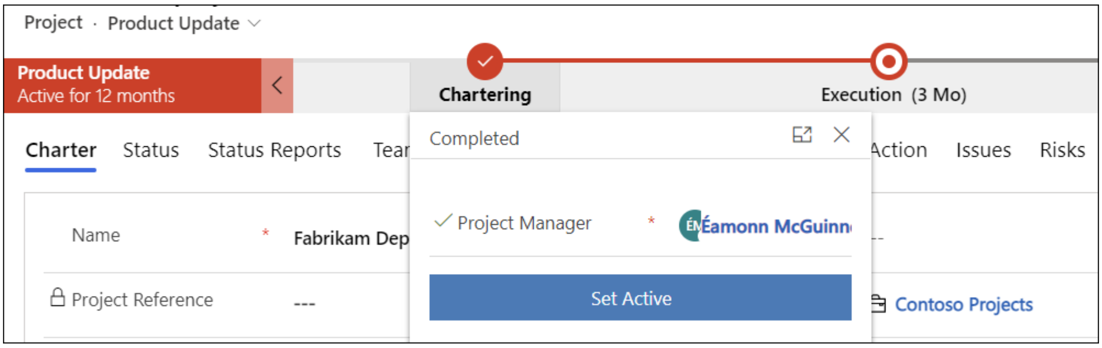
Business Process Flow



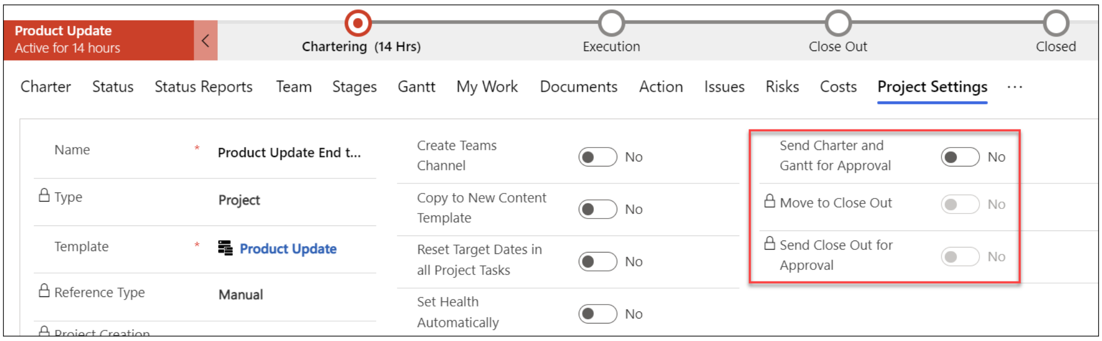
The Business Process Flow (BPF) in the Product Update template has several predefined stages. In the BPF, the progression from one stage to the next is tied to the status of the BPF Stage approval requests triggered in the **Project Settings** tab.

- When **Send Charter and Gantt for Approval** is set to **Yes** in **Project Settings**, notifications will be

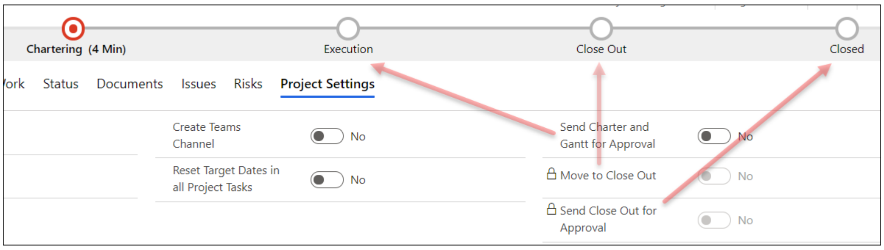
- When **Send Charter and Gantt for Approval** is set to **Yes** in **Project Settings**, notifications will be sent to the Project Manager, Project Sponsor, and Group Manager seeking approval. After all these users have submitted their approval, the BPF will automatically progress to **Execution**.
  - The BPF can be set back to **Chartering** from any other stage if a user with proper permissions clicks on the BPF **Chartering** stage and then clicks the **Set Active** button.



The relevant BPF Stage approval request switches in the **Project Settings** tab will once again be set to **No**.



- Once the project is in Execution, the **Move to Close Out** option will become active and can be set to **Yes** in **Project Settings** at the appropriate time; the BPF will then automatically progress to **Close Out**. Refresh the page to enable the setting **Send Close Out for Approval** which will be used at a later time.
- When you're ready to fully close the project, in **Project Settings** set **Send Close Out for Approval** to **Yes.** Notifications will be sent to the Project Manager, Project Sponsor, and Group Manager, and after they all submit their approvals the BPF will automatically progress to the Closed stage, Percent Complete will be set to 100% and Project Status to Completed, and the project will change to a read-only state.



Default Product Update Template Forms

Request Business Process Flow	*	Project Request 2 Stage
Request Form	*	Product Update Request
Project Business Process Flow	*	Product Update
Project Form	*	Product Update

Create Projects

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Request Process Overview **Create Projects Without a Request**

Note Project titles must be unique, have a maximum of 50 characters, and should not contain any special characters including < > : * ? |

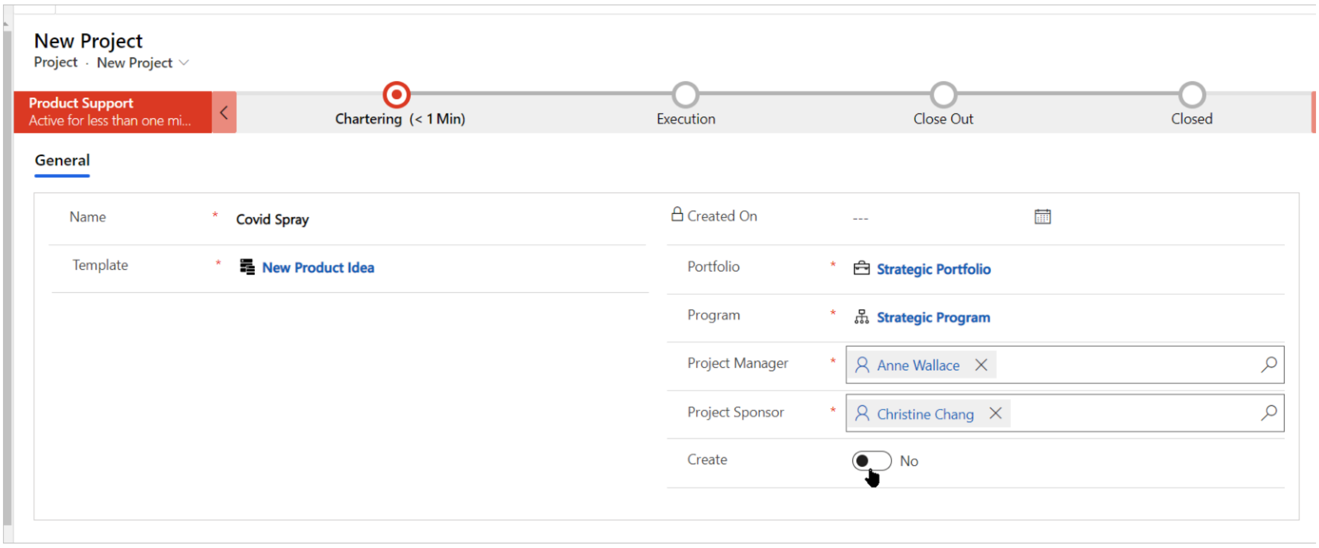
Method 1: Create Projects With a Request

The project management lifecycle will typically begin in the BrightWork 365 Requests Area, where a Requester submits a new project request along with details needed for an approval decision. Through workflows, notifications and reports, the request process affords users an efficient method for starting the project management process. You can find detailed information about the formal request process in the Requests section of the Knowledge Base.

Method 2: Create Projects Without a Request

Some organizations will not need a formal request process for all their projects and will therefore allow certain users to create projects directly in the Projects section. Users with the Project Manager or PMO security role will be able to create projects from a template using a simple interface skipping the formal request process.

If a user with the Project Manager or PMO Manager security role clicks **+ New** in **Projects**, they will be presented with a project creation form. After filling in all necessary column values, switching the **Create** switch to **Yes** will initiate the project creation process.



- If the Template selected is not associated with a Content Template (a template with predefined data), the project will be created instantly, and the form will transition from the request form to the project form. The user that initiated the project creation process will receive an email indicating the project has been created.
- If the Template selected is associated with a Content Template, the form will not transition to the Project form until the Create Project Flow has completed processing; the user that initiated the project creation process will receive an email when the flow has completed. The duration of the project creation process will depend on the number of child rows (Tasks, Issues, Risks, etc.) present in the Content Template.

> **Note** BrightWork 365 ships with 3 starter templates out of the box: Project Standard, New Product Introduction, and Product Update. For template details see the Templates Overview.

Task Management

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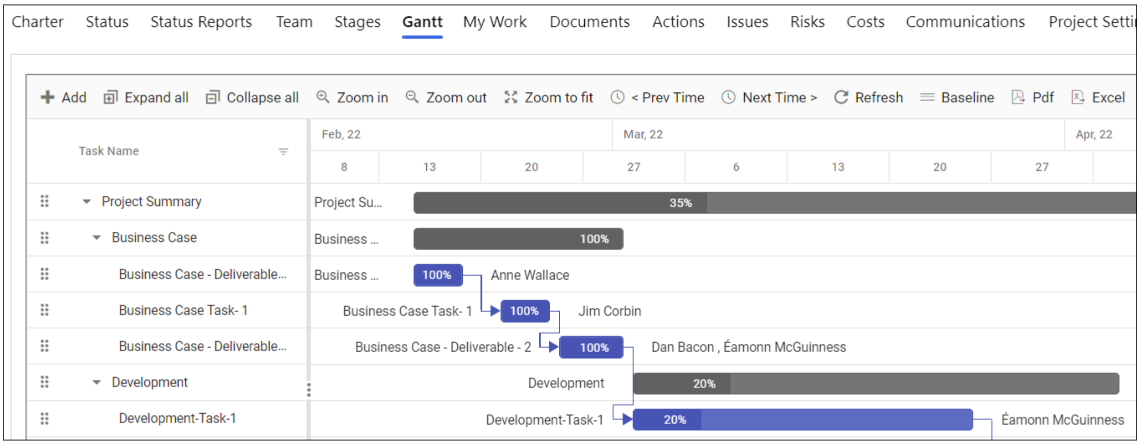
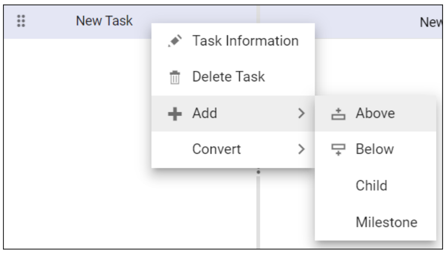


Create a New Task

1. Click into the Gantt tab within a project.
2. You can add a new task in a couple of ways:
    1. In the Gantt menu click + Add.
       Or,
    2. Right-click near an existing task and click + Add and choose from the available options.



3. Fill in the task details as explained in **Gantt Sections** below.

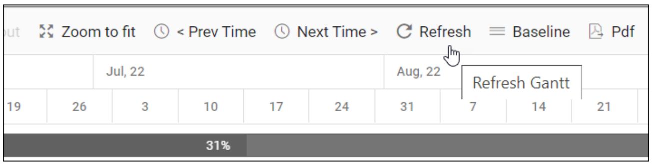
Note There is a technical limit of 1,000 tasks for the Gantt, but in order to have a reasonably responsive Gantt there is likely to be a practical lower limit based on performance in your environment, affected by variables such as the number of dependencies and levels of hierarchy.

Edit a Task

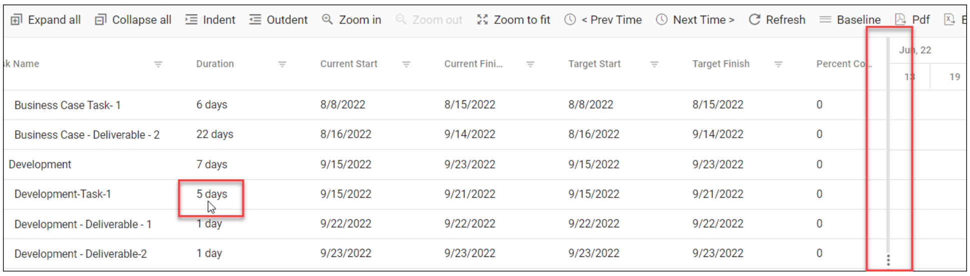
Note

- If there are concurrent editors of tasks in the same Gantt, the last save will win.
- In order to see other users' changes to Gantt data, a browser refresh is required.

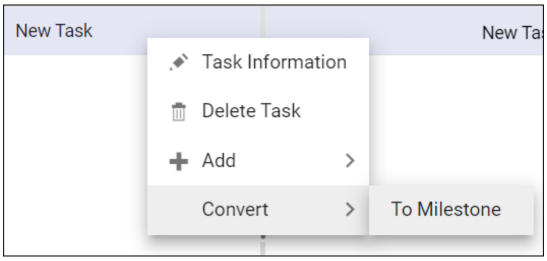
To edit an existing task either single-click next to the task name and then click **Edit** in the menu bar, or double-click in the row of the task in the Gantt section of the window. If the Gantt is not displaying updates you made to underlying data, click the **Refresh** button in the Gantt ribbon.



You can also make inline grid edits by dragging the Gantt divider line to the right to expose additional grid columns, and then double-clicking an existing value.



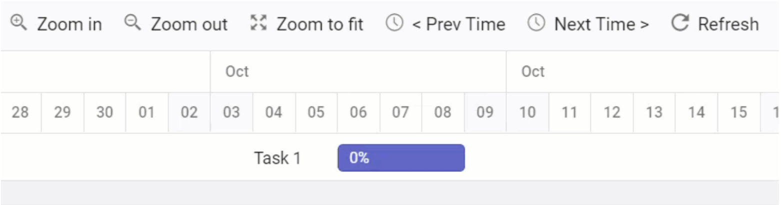
Additionally, with a right-click on an existing task you can access task-related options.



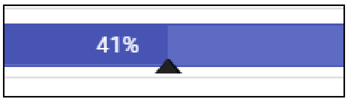
Gantt Sections

General

- Task Name: The given name of the task.
- Duration: The number of days between the Current Start and Current Finish dates. When dates are updated in the Task record, the Duration will be automatically calculated upon saving the task. When Duration is updated in the Task record, the Finish Date will be automatically calculated upon saving the task. The Duration value cannot be less than 0.13 of a Day as the Gantt does not support durations of less than 1 hour.
- Current Start and Current Finish: The Start and Finish dates entered at the time of task edit, or that were automatically set through a dependency. Task dates can be changed by dragging the left, center, or right part of the date bar and dragging. Task dates cannot fall on a weekend.



- Target Start and Target Finish: The target dates entered manually, or automatically entered when the project was last baselined. See section **Baseline the Schedule** below.
- Percent Complete: Add an estimated Percent Complete - this will be part of the algorithm used to automatically calculate the task's parent (summary task) overall percent complete. The Percent Complete value can also be set in the left-side grid portion of the Gantt, as well as in the Gantt Chart section by dragging the Percent Complete bar (it cannot be set from within work reports).



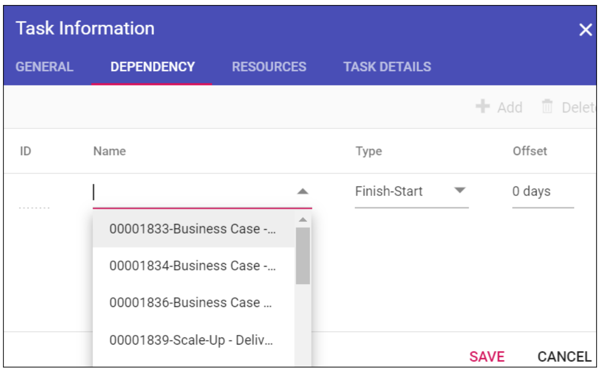
- ID: System generated value, not editable.

Note

- User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.
- The date format displayed in the Gantt uses the format specified in the logged in user's personal options settings.

Dependency

Add a task dependency (aka Predecessor) from the dropdown **Name** list, and set the dependency **Type** and any necessary **Offset** days.



Dependency Types:

- Finish-Start: The predecessor task must be completed before the successor task can start.
- Start-Start: The successor task cannot begin until the predecessor task begins.
- Finish-Finish: The successor task cannot be completed until the predecessor task is completed.
- Start-Finish: The successor task cannot be completed until the predecessor task begins.

Resources

Choose one or more resources to be assigned to the task.

The **Resources** list of users is limited to users given the **BrightWork Team Member** security role.

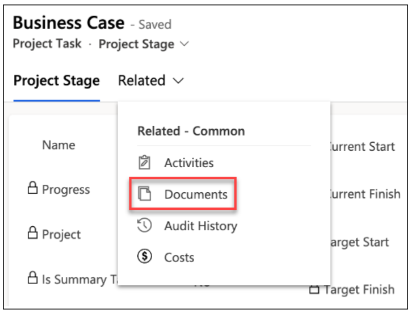
> **Note**
> - If the user assigning the resource does not have sufficient privileges, the assignment will not be saved.
> - The Resource **Unit** value will revert back to 100 if changed.

Task Details

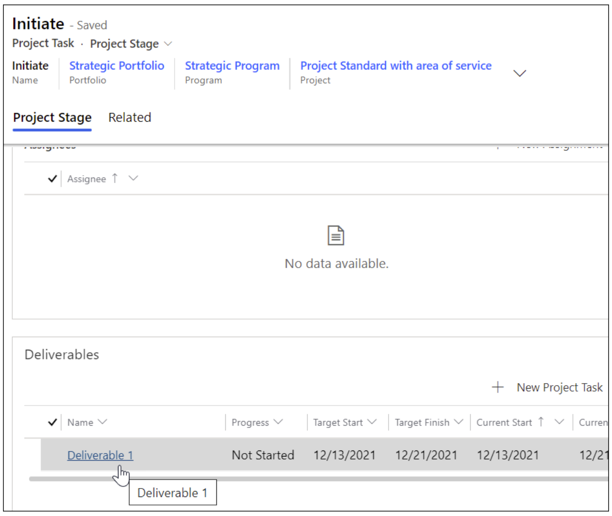
- **Task Type:** Choose the relevant Task Type from the drop-down:
  - **Task:** The lowest level piece of work that needs to be completed.
  - **Stage:** Configures the task as a Stage which will automatically get added to the **Stages** tab of the project. Use the Stage designation when creating a parent task for indented child tasks. It is recommended to match the Gantt stage names with the stages of the project's Business Process Flow.

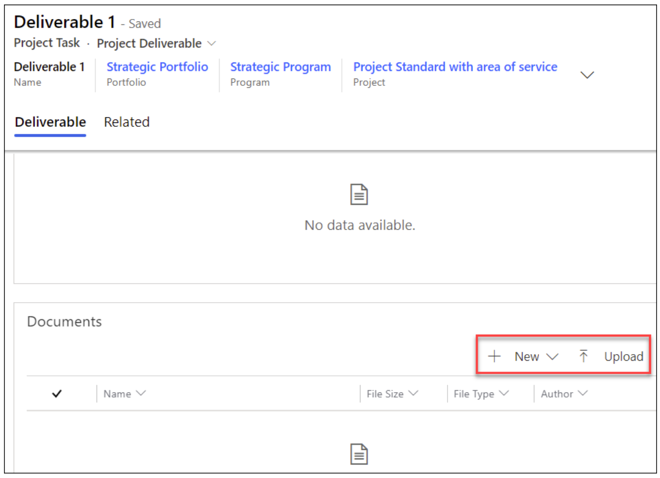
    

    Documents can be added directly to a stage by clicking into the **Stages** tab, clicking on the stage name, clicking on the **Related** tab, and then clicking **Documents**.

  - **Deliverable:** If a task is set to the **Deliverable** task type, documents can be attached to the task by clicking into its parent stage in the **Stages** tab, clicking on the task name in the **Deliverables** section on the displayed Project Stage form, and then choosing to create a new document or upload an existing document.



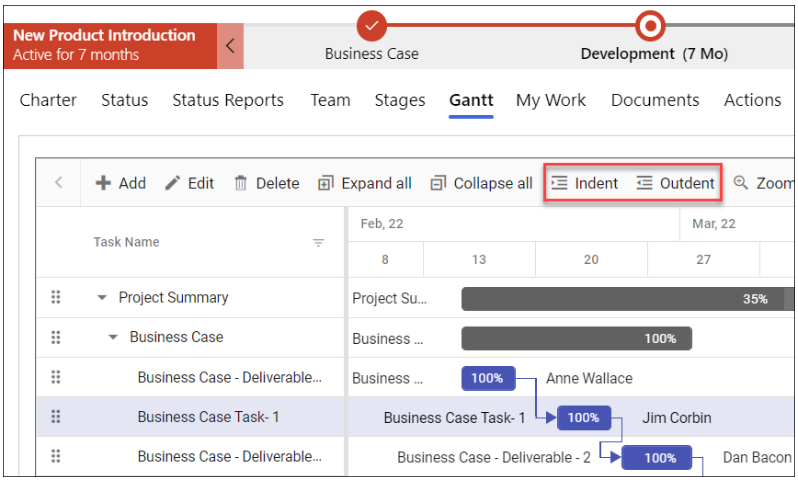


Note We do not support adding a new task with the **+ New Project Task** option found on the **Project Stage** form.

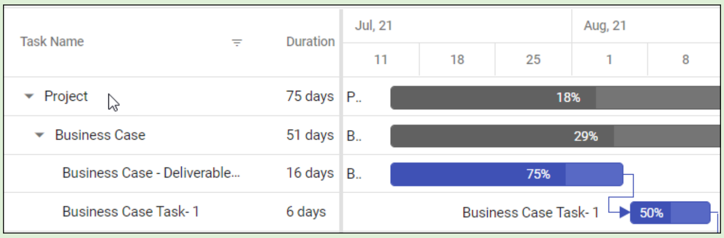
- **ID:** System generated value, not editable.

Indent a Task (Child Task) or Outdent a Task (Parent Task)

To indent or outdent a task, choose the related tool at the top of the Gantt, or right-click on the task. Indenting a task will automatically set the task above it as a parent task.

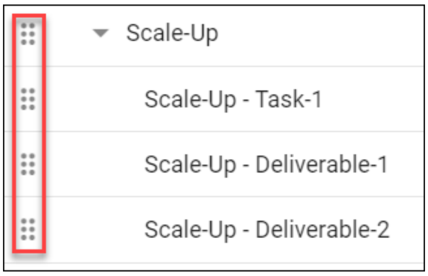


Tip You can get a full rollup of all task data, including overall percent complete, by creating a top-level task and indenting all other tasks underneath it. Note that you will still need to manually enter the **% Complete** value in the **Status** tab of the project.



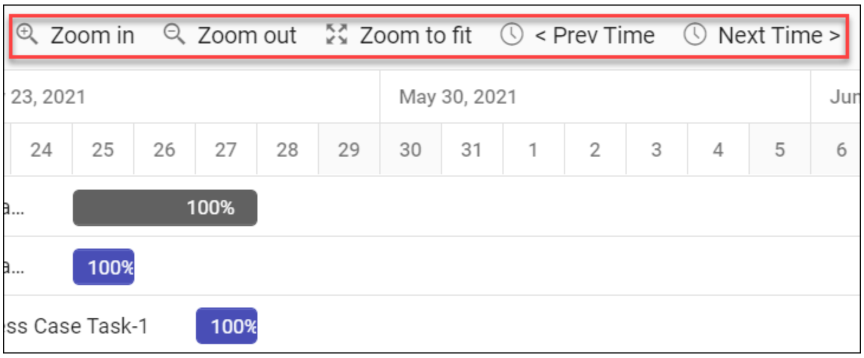
Move Tasks

To move a task simply click to grab the handle on the left side of the task and move the task up or down.



Change the Date Focus in the Gantt Chart

Prev Time and Next Time will display the previous or next day, week, month, or year, depending on the Zoom level chosen for the Gantt.

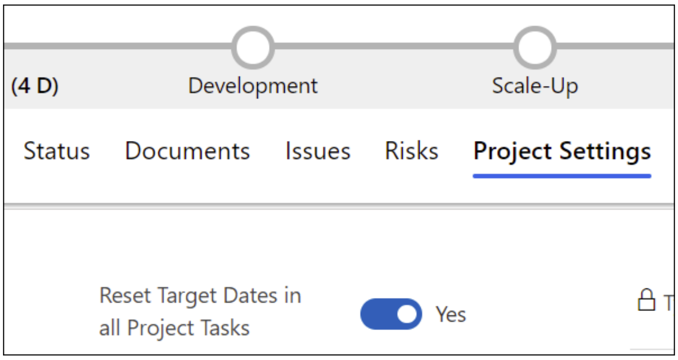


The following zoom options are available in the Gantt toolbar:

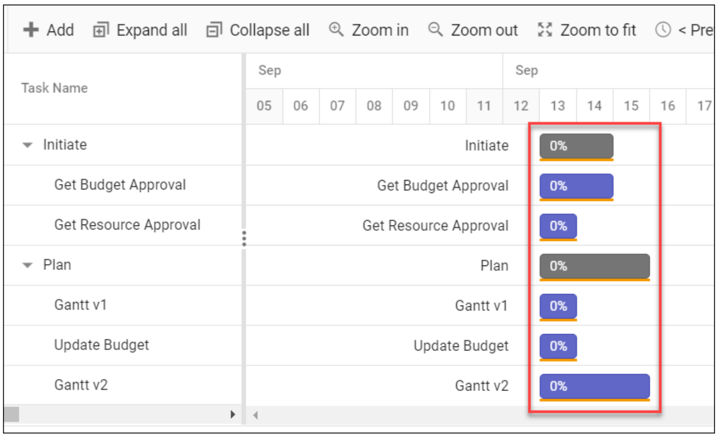
- Zoom In - To perform zoom in action on Gantt timeline.
- Zoom Out - To perform zoom out action on Gantt timeline.
- Zoom To Fit - To show all tasks with timeline fit into the available chart width.

Baseline the Schedule

To baseline the task schedule, click into Project Settings and choose **Reset Target Dates in all Project Tasks**.



You can verify the successful completion of the baseline reset by checking that the task date bar and the colored baseline bar below it are in alignment with one another.



Gantt Chart Keyboard Navigation

The below table lists Gantt keyboard navigation shortcuts. For best results, click on the timeline side of the screen (right-side) prior to using the navigation shortcuts. Certain keys will not work in older versions of BrightWork 365.

Keys	Description
Home	First Row Selection
End	Last Row Selection
DownArrow	Move Row Selection Down
UpArrow	Move Row Selection Up
Ctrl + UpArrow	Collapse All
Ctrl + DownArrow	Expand All
Ctrl + Shift + UpArrow	Collapse Row
Ctrl + Shift + DownArrow	Expand Row
Enter	Save Request
Esc	Cancel Request
Insert	Add Record
Ctrl + Insert	Add Record By Dialog
Ctrl + F2	Edit Record By Dialog
Delete	Delete Row
Ctrl + Shift + F	Focus Search TextBox
Shift + F5	Focus Task

Troubleshooting

Duplicate Task

If a task is manually created immediately after a project first gets created, this can occasionally result in the creation of a duplicate task.

Gantt Row Display

- When your browser display zoom is set to a value below 100% you may notice the task names not aligning with their corresponding Gantt bars when scrolling vertically. Setting the browser display zoom to 100% fixes this issue.

Deliverables

- If you change a **Deliverable** type task into a task of a different type (**Stage** or **Task**), in order to view any documents that were attached to the original deliverable you will need to temporarily change the task type back to **Deliverable** so you may once again have access to the document. When done saving the document you can change the task type again as desired.

- If you change a **Stage** type task into a **Deliverable** type task, this new Deliverable will not automatically attach itself to its parent Stage. You will not be able to view this deliverable within its parent stage until you make an update to the Deliverable beyond changing the task type, such as updating its name or one of the date field values.

Gantt Baseline Resets and Milestone Dates

After a Gantt baseline reset, the Target Date values of milestone tasks may not equal Current Date values. We are working on a resolution.

Right-Click "Task Information" Does Not Display Information

After right-clicking on a task row and selecting **Task Information**, no information is displayed.

Workaround

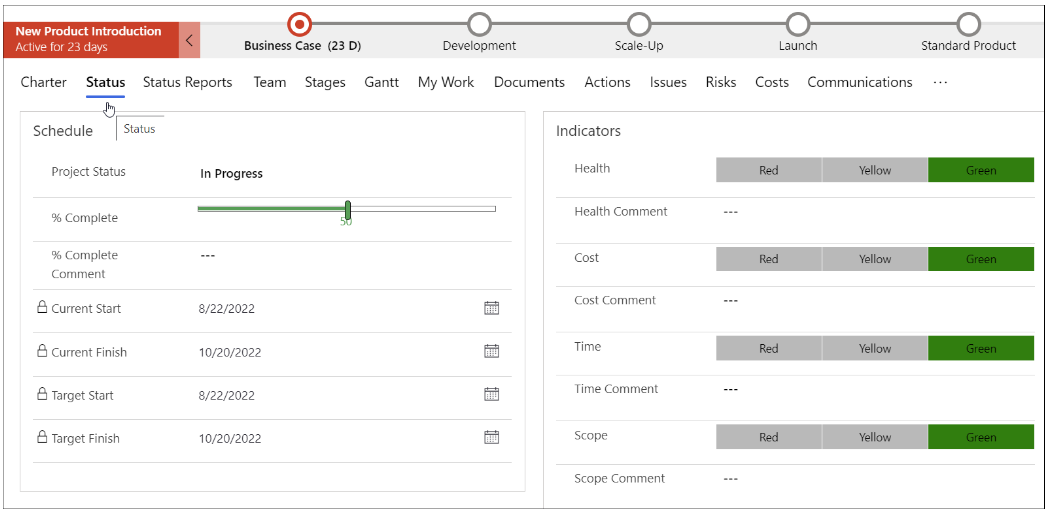
Double-click the task row on the Gantt chart side (right side) of the Gantt window to display the Task Information screen.

Project Status Reporting

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Status

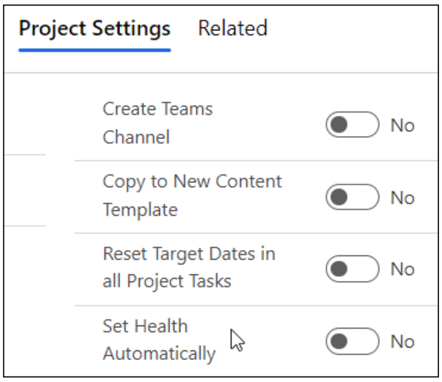
The Status tab displays current metrics and KPIs about the project.



The Schedule date values will automatically populate based on work item dates, and the values for Project Status, % Complete (Percent Complete), and other KPIs are manually set by the project manager.

The Health KPI can either be set manually by a user with appropriate privileges, or automatically by the system. If set automatically, the KPI color will match whatever is the "worst" color value among the other KPIs (Yellow is worse than Green and Red is worse than Yellow); any manual changes made to the KPI will not be saved permanently.

To toggle the automatic Health KPI setting on and off, in Project Settings use the Set Health Automatically switch.



Status Reports

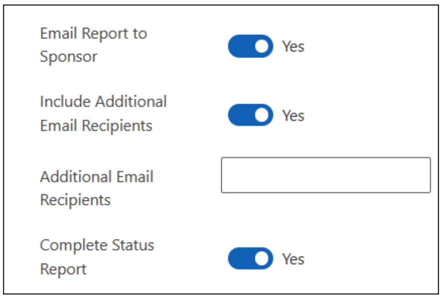
In the Status Reports tab a snapshot record of the current status information can be saved, and the history of previously created status reports can be viewed.

Saved status reports will be added to the list of any previously created status reports. The status report data is stored within your Microsoft 365 Dataverse.

To create a new status report snapshot:

1. In the Status Reports tab click the ellipses and **+ New Status Report**.
2. Fill in all relevant columns.
3. To save the status report:
    1. To save a draft: Click **Save** or **Save and Close** in the ribbon.
    2. To save a final version of the status report set **Complete Status Report** to **Yes**.

When you first set **Email Report to Sponsor** to **Yes**, and then set **Complete Status Report** to **Yes** (in that order), an HTML report will be emailed to the Sponsor, the Project Manager and the person that set the report to the completed status. The email will be sent from the account that was used to install BrightWork 365.

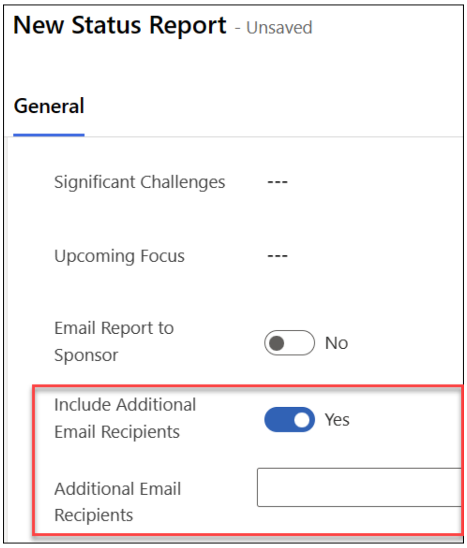


Note Status related icons may fail to load in older versions of the Outlook desktop client.

Send On Behalf Of

Out of the box, when a status report is emailed to Project Sponsors or other stakeholders, it will be sent from the account that was used to install BrightWork 365. This email sending account can be changed to the account of the user submitting the status report if that account has been given **Send On Behalf of** mailbox permission, which can be configured by your organization's Microsoft 365 System Admin; for instructions see Microsoft article Give mailbox permissions to another user.

Include Additional Email Recipients



When creating a new Status Report, BrightWork 365 provides the option to add additional users to a list that will receive the report, so that status reports can be distributed more widely.

> **Note**
> - You can only include additional users that are part of the BrightWork 365 environment.
> - If you choose not to email the **Sponsor**, and also leave the **Additional Email Recipients** column empty, it will use the **Modified by** person's email for the **To** address.
> - There is no imposed limit on the number of additional users that can be entered.

Actions

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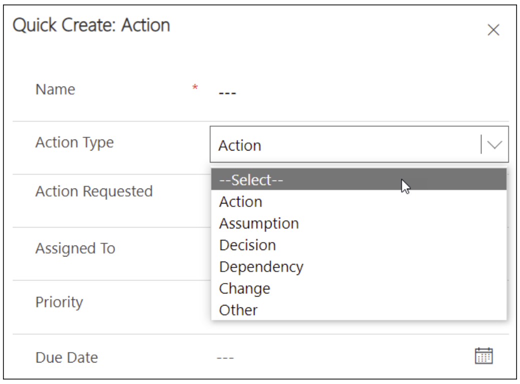
Actions

The Actions tab provides users with the ability to create, edit and view details in relation to an Action, a Resolution, an Approval, and to Notes, to help keep projects on track.

To access Actions, click on the **Actions** tab within a program, a portfolio, or a project created from one of the templates that contains this tab. Click **+ New Action** to create a new Action.

Clicking **+ New Action** brings up a Quick Create form with the most relevant fields. The form's **Action Type** field allows you to choose from several available types of actions.



Action Items

The Action tab within an individual Action item provides several sections to capture additional details about an Action.

Action

Fields include:

- Name: Provide a name for the action.
- Action Type: Choose either Action, Assumption, Decision, Dependency, Change, or Other.
- Action Requested: Enter the action requested.
- Assigned To: The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.
- Priority: Choose the priority level.
- Due Date: Choose the date the requested action is due.

Resolution

Fields include:

- Action Status: Choose from among the available Status choices.
- Progress Indicator: Choose from among the available schedule related choices.
- Action Taken: Describe any actions taken.
- Date Actioned: Choose the date the action was taken.

Approval

Fields include:

- Approver: Enter the name of the person responsible for approving the action. The list of available users to choose from in the **Approver** column is limited to those users given the **BrightWork Team Member** security role.
- Approval Date: Enter the date the approval was given.
- Resolution Rating: Choose a star rating for the resolution.
- Notes: A place to capture notes about the action.

Documents Tab

View, create, or upload documents associated with the action item. Documents will be saved in the project's SharePoint Online folder.

Related Tab

Click the **Related** tab to access the Audit History of the action item. The Audit History provides action item data change details including the change date, user who made the change, the changed field, and the old and new values.

Costs & Budgets

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Costs tab provides a comprehensive method for capturing and tracking budgets and costs at the project and individual cost item levels.

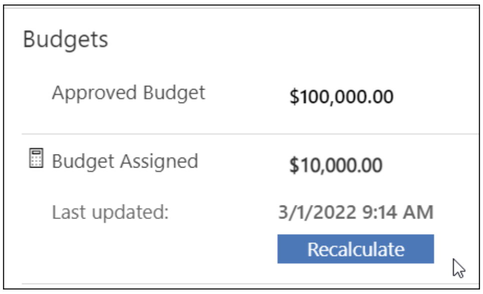
Project Level Cost Tracking

To enter the Costs module, click on the Costs tab within an individual project created from a template that contains this tab. The initial screen is comprised of many high-level cost tracking fields separated into several screen sections.

Budgets

Fields include:

- Approved Budget: Enter the overall approved budget for the project. This is the first step for setting up cost management for the project.
- Budget Assigned: Calculates the sum of the total budget assigned to all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the **Recalculate** button.



- Budget Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Current Forecast. Automatically calculated.

Costs

Fields include:

- Current Forecast: Calculates the total spend forecast of all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Actual to Date: Calculates the total money spent to date for all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Cost to Complete: Current Forecast - Actual to Date. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator

icon and then the Recalculate button, as noted above.

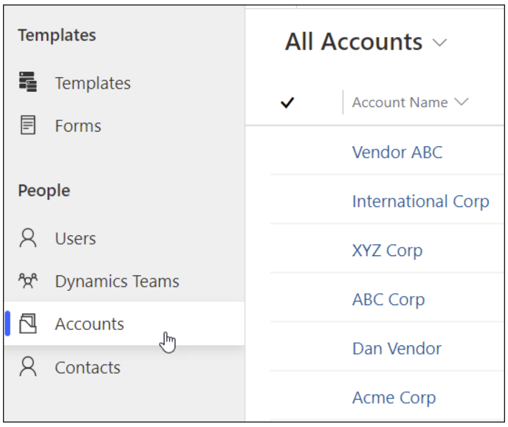
Individual Cost Item Tracking

The Cost Items section is where you will enter the individual cost items with associated details. The grid surfaces important details about each of these items. Click **+ New Cost** to enter the new cost form.

Cost Form

The **Cost** form is comprised of several cost tracking detail fields including:

- Name: Enter the name of the cost item.
- Cost Type: Choose from among the available Type choices.
- Cost Category: Choose from among the available Category choices.
- Vendor: The available vendor choices are pulled from the Accounts page in the Admin area.



- Assigned To: The list of available users to choose from in the Assigned To column is limited to those users given the **BrightWork Team Member** security role.
- Forecast Spend Date: Date by which the item's budget is expected to be spent.
- Related Task: Choose from a lookup to tasks on the project's Gantt chart.
- Cost Status: Choose from among the available Status choices.
- Current Forecast: The amount you believe the item will eventually cost in total.
- Actual to Date: Total spent on the item to date.
- Cost to Complete: Current Forecast - Actual to Date. Automatically calculated.
- Date Spend Complete: The date all costs associated with the cost item have been spent. Automatically sets the Cost Status column to Completed.
- Budget Assigned: The total approved and assigned budget for the cost item.
- Budget Assigned Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Budget Current Forecast. Automatically calculated.

- Timeline: A place to capture notes about the cost item.

Documents

View, create, or upload documents associated with the cost item. Documents will be saved in the project's SharePoint Online folder.

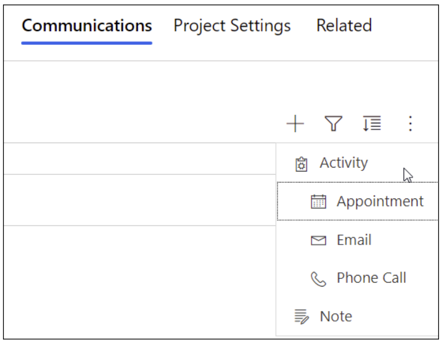
Related

Click the **Related** tab to access the Audit History of the cost item. The Audit History provides cost item data change details including the change date, user who made the change, the changed field, and the old and new values.

Communications

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Communications tab provides a comprehensive method for capturing various communication related activities at the project, program, or portfolio level. To access Communications, click on the **Communications** tab. The initial screen will display a history of previously entered Communications items. Click **"+"** to create a new Communications item of type Appointment, Email, Phone Call, or Note.



You can also access communications options from within the **Timeline** section of a **Project Stage** details screen.

Appointment

When creating a new Appointment the Quick Create form will display with relevant fields. If the creator's email and calendar are configured properly, an invite will be sent to the Attendees, and the appointment will be added to the creator's calendar and displayed as 'Free'.

The Appointment **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Appointments can be set as a Microsoft Teams meeting. If your organization is not yet

configured to work with Teams, see our Microsoft Teams Admin Guide.

Email

The new email screen presents the typical email fields such as To, CC, Subject, and email body. If the email creator's email is configured properly, an email will be sent to the addressees and a copy of the email will be saved in the Communications item record.

Phone Call

The Phone Call function provides a way to capture details about a call that was initiated outside the system. The details will be saved as part of the Communication record.

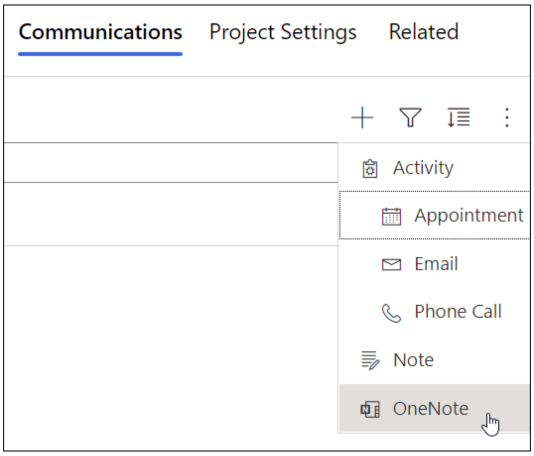
The Phone Call **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Note

You can create a note with a title, note body (with formatting), and attachments and save the note as part of the Communications record.

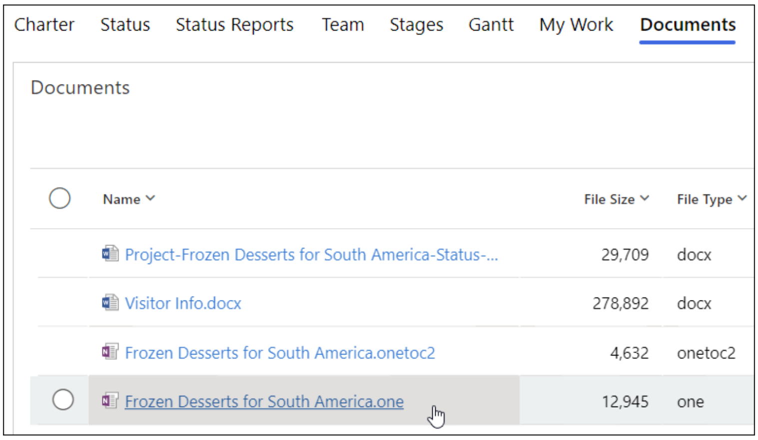
OneNote

In addition to the standard note mentioned above, you also have the option to create Microsoft OneNote notes that are saved as part of an associated OneNote notebook. To access the OneNote notebook after it's created, you can either click on the OneNote link displayed when you click the + sign in the Communications module:



Or,

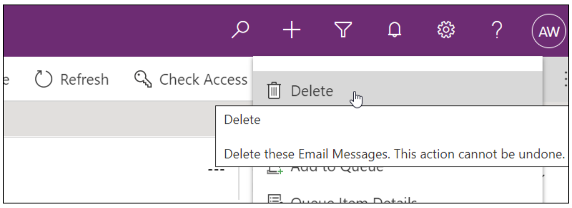
click on the **.one** file within the Documents tab:



Communications Tab - User Actions

You can take various actions on open Communications items directly in the main Communications screen.

If you need to delete a closed Communications item, e.g., delete an email after it was sent, you will need to do this from the toolbar within the item record instead of from the main Communications screen.



> **Note** Users can only modify or delete their own Communications activities, not those of other users.

Dynamics 365 App for Outlook

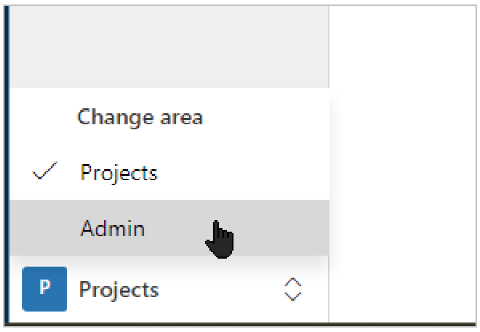
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web, or mobile. See Use Dynamics 365 App for Outlook for additional information.

Troubleshooting

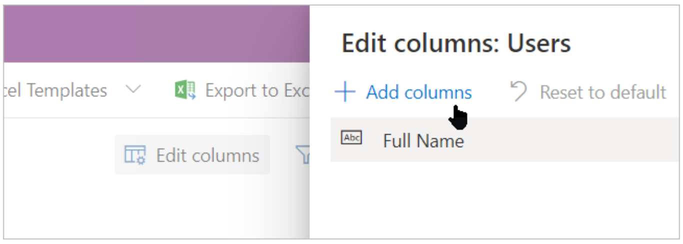
Communication activities not working for some users

A Power Platform Admin can check within the BrightWork 365 app if the affected user accounts are enabled for communication related activities:

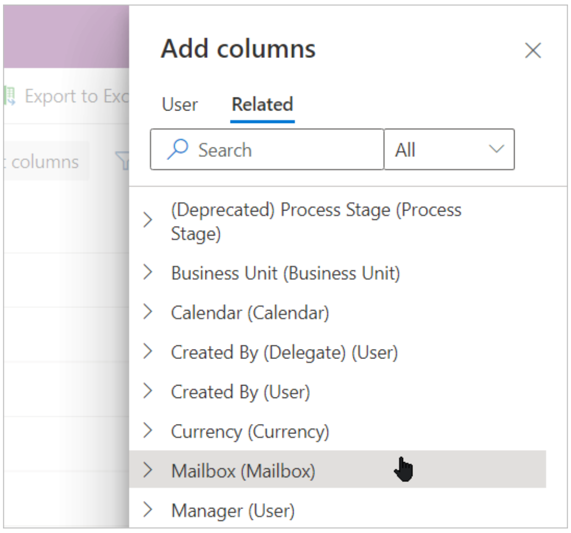
1. Click Projects in the bottom left of the page and click Admin.



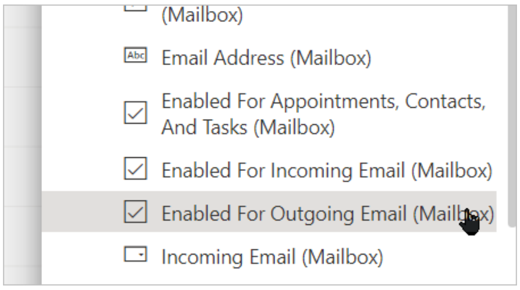
2. Click Users to load the BrightWork Users report.
3. Click Edit columns and then click Add columns.



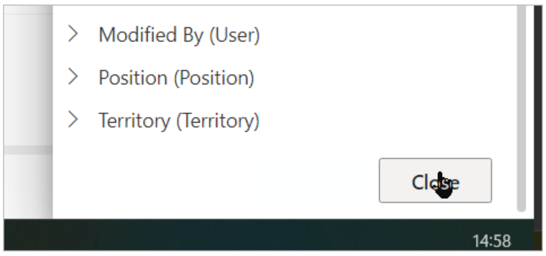
4. Click Related and Select Mailbox.



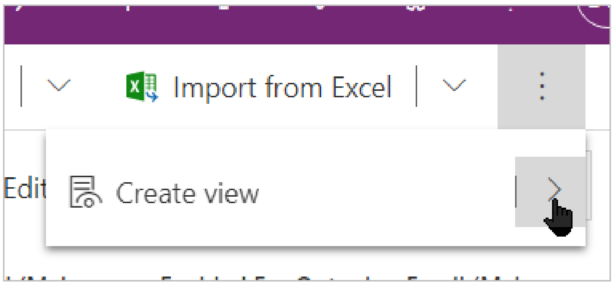
5. Add the three Enabled for... columns.



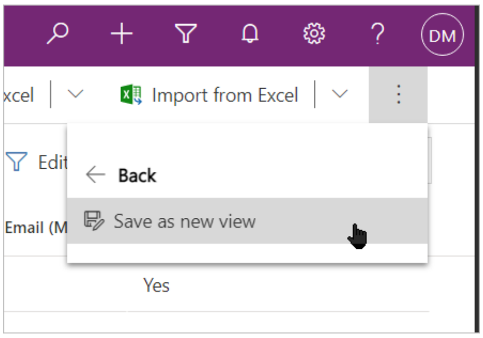
6. Scroll down to the bottom and click close.



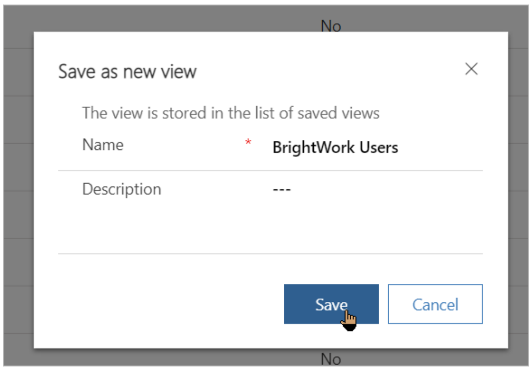
7. Click Apply.
8. Expand the three dots in the top right and click the arrow beside Create view.



9. Click Save as new view.

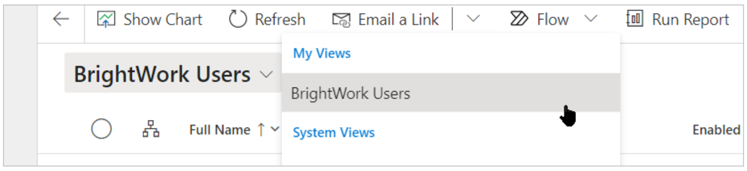


10. Rename the view if desired (optional), and click Save.



11. The new view is available to check if the user accounts are enabled for communication related

activities.



If further configuration is required, see the **Setup Dynamics Email** section of the BrightWork 365 Install Guide.pdf.

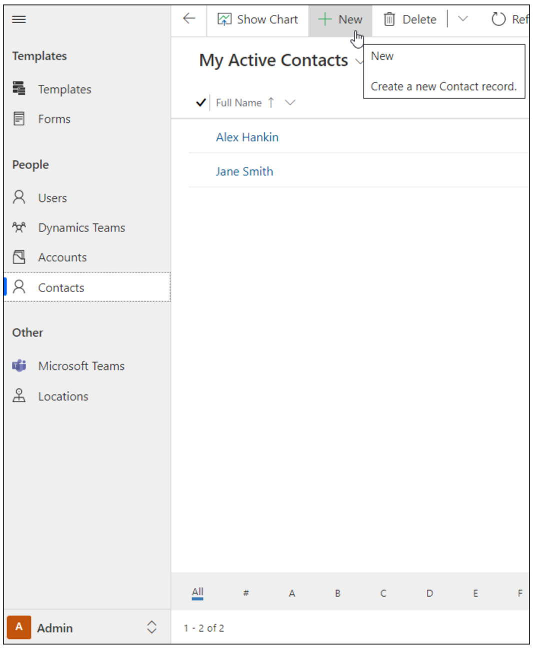
Contacts

Located in the Admin Area > People section of the app, the **Contacts** feature provides a location to store information about people external to your organization such as vendors and contractors. These contacts can also be used to assign primary contacts to Accounts.

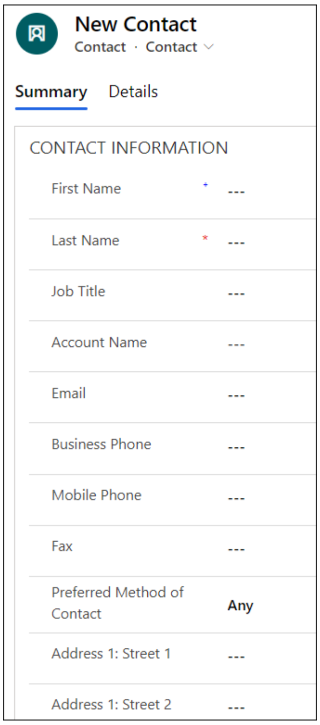
Contacts can be added, edited and deleted by the BrightWork Project Manager and BrightWork PMO Manager.

Add a Contact

1. Click into Admin Area > Contacts.
2. Click + New.



3. Fill in the relevant contact information.



Add a Primary Contact to an Account

If you assign a contact to an account and the contact has an email address attached to its record, you will be able to email the account by using the email feature of a project's Communications module.

To assign a Primary Contact to an Account, in the Contact's **Account Name** field choose the relevant Account.

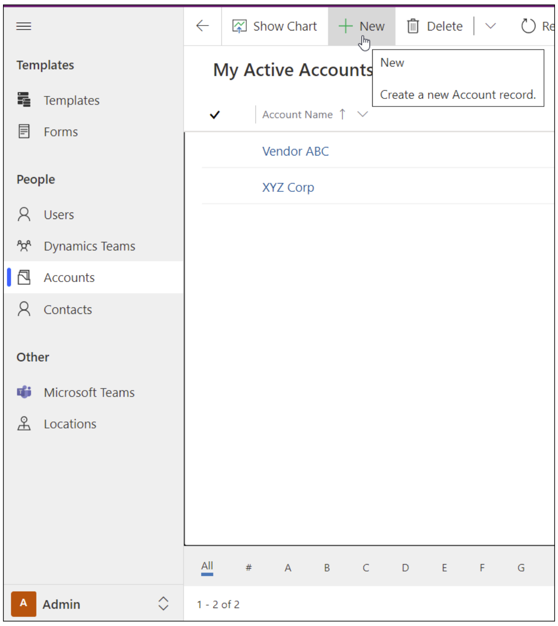
Accounts

Located in the Admin Area > People section of the app, the **Accounts** feature provides a location to store information about external organizations such as vendors and contractors. This data can be used in other areas of BrightWork 365 including a project's Costs module and the email function within a project's Communications module.

Accounts can be added, edited and deleted by the BrightWork Project Manager and BrightWork PMO Manager.

Add An Account

1. Click into Admin Area > Accounts.
2. Click + New.



3. Fill in the relevant Account information and save the record.

Add a Primary Contact to an Account

Among the fields present to capture all the details about these entities is the field Primary Contact. In addition to noting who is the primary contact, if the contact has an email address attached to their record, you will be able to email the account by using the email feature of a project's Communications module.

To assign a Primary Contact to an Account:

1. Create the contact in the Contacts list if not already present.
2. In the Account's **Primary Contact** field choose the relevant contact.

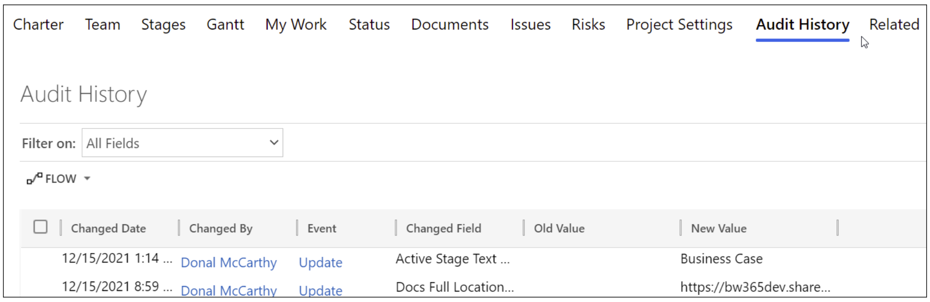
Audit History

BrightWork 365 together with the Microsoft Power Platform provides organizations with the ability to track data change history and activity logging for use in analysis and reporting purposes. BrightWork 365 audit history has been enabled in the following tables:

- Project Task
- Request
- Issue
- Risk

See Audit Tables.xlsx 📎 for a list of the columns that are audit-enabled.

To view Audit History, within a project click on the **Related** tab and choose **Audit History**.



Note that in the **Filter on:** drop-down, there are more fields listed than are actually available in the Audit History.

For additional Audit information see these related Microsoft articles:

- Auditing Overview
- Power Apps Activity Logging
- Configure Tables and Columns for Auditing

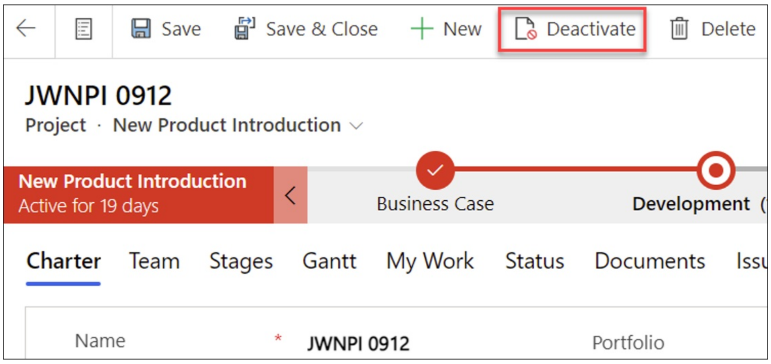
Archive Projects

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

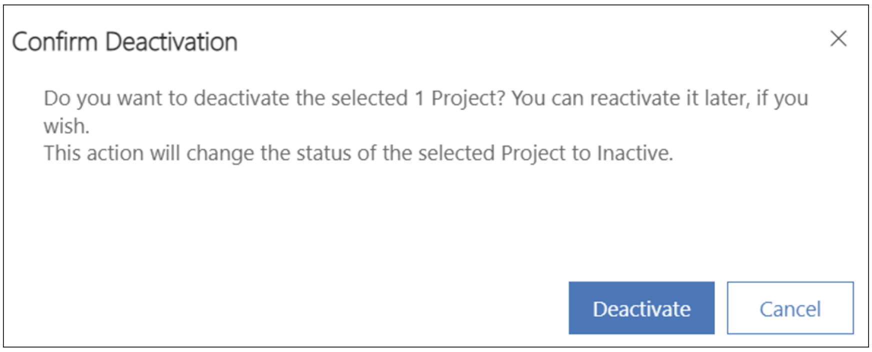
Archive a Project

When it is no longer necessary for a project to be in **Active** status, for example because it is deferred or closed, it can be archived and put into **Read-only** mode. Archiving is usually preferred over deletion of a project because deleted projects cannot be recovered. Only users with the **BrightWork PMO Manager** security role can delete projects.

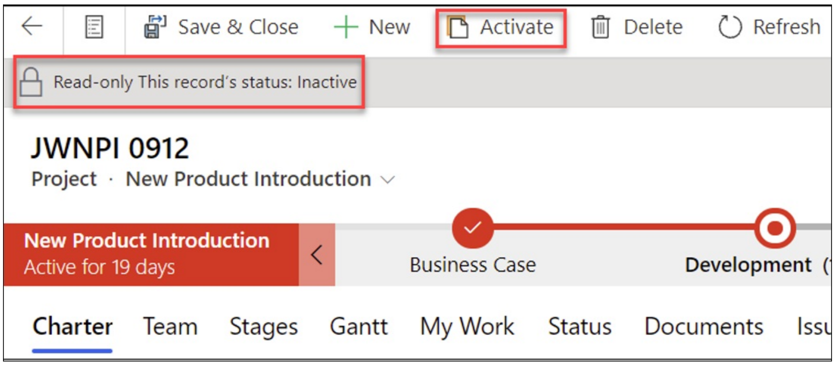
1. While in a project record click **Deactivate**.



2. Click **Deactivate** to confirm the deactivation request.



3. You can re-activate a project by entering the project record and clicking Activate.



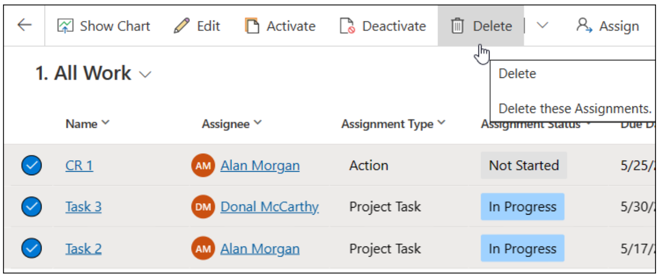
Delete a Project

Caution Deleted projects are permanently removed and cannot be recovered.

Remove Work Assignments

In order for a project to be deleted, there cannot be any work assignments present in the project. A relatively quick way to achieve this is via the **My Work** link in the Main Nav (the assignments will be permanently deleted):

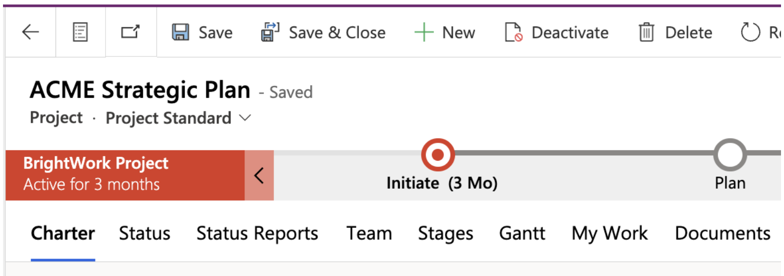
1. Click on **My Work** on the main nav.
2. Change the view to **All Work**.
3. Filter the **Project** column to the relevant project.
4. Select all the assignment rows and click **Delete** at the top of the screen.



Delete a Project

To delete a project permanently:

1. Click into the project and click **Delete** at the top of the screen.



Note After the project is deleted, you may see "Record not found" messages displayed on the screen; these messages can be safely ignored.

Portfolios

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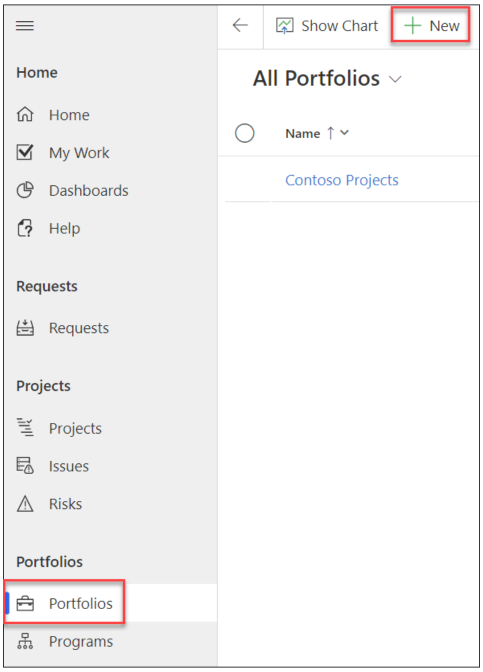
Portfolios Introduction

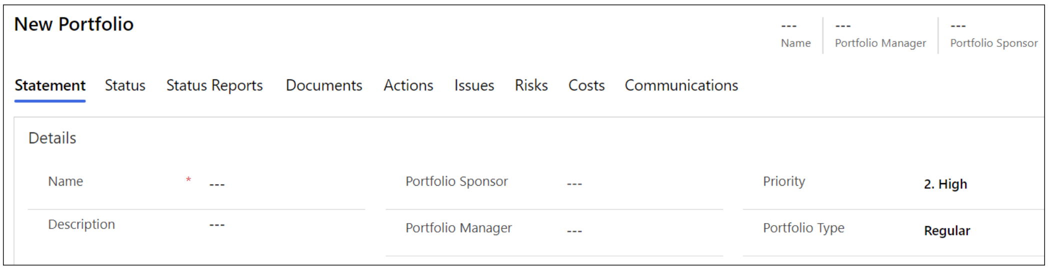
Portfolios are the highest parent level within the BrightWork 365 hierarchy. Portfolios consist of child programs and all of the projects within the respective programs. Your BrightWork 365 environment can have more than one portfolio.

Creating Portfolios

1. Click into the **Portfolios** page, and then click **+ New** at the top of the page.



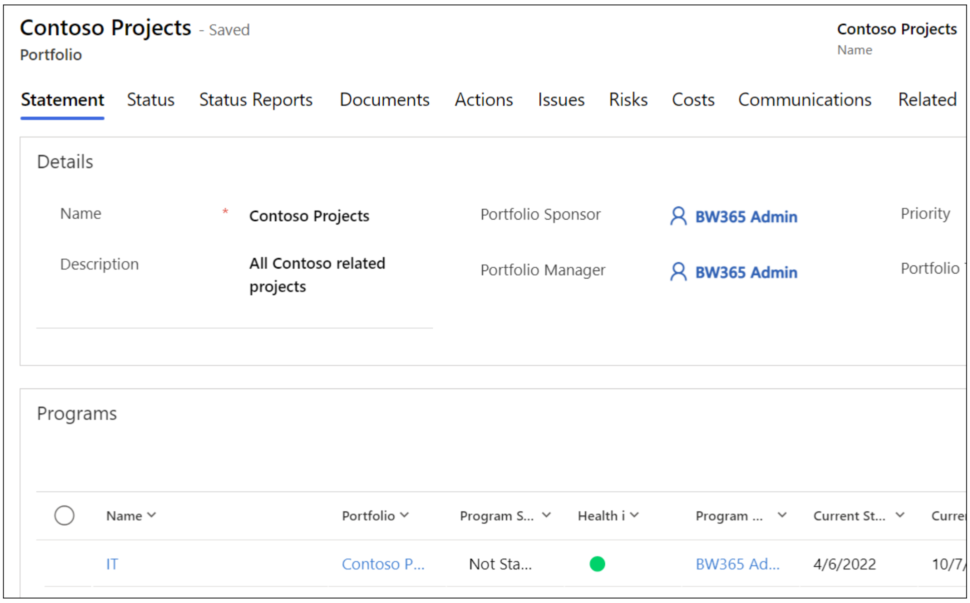
2. In the **Statement** screen, fill in all the required fields and click **Save**.



Portfolio Tabs

Statement

You can easily view the Portfolio Statement with all child Programs by clicking on the **Statement** tab.



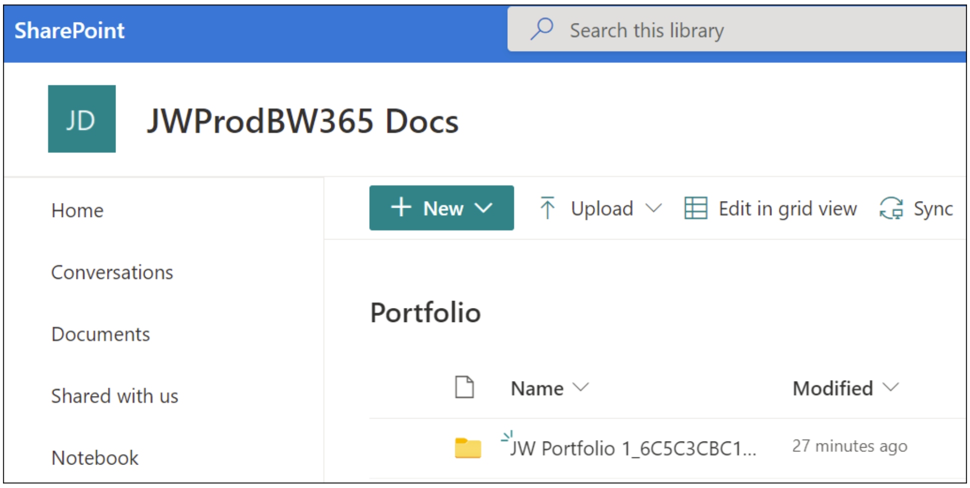
The list of available users to choose from in the **Portfolio Sponsor** and **Portfolio Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

Status & Status Reports

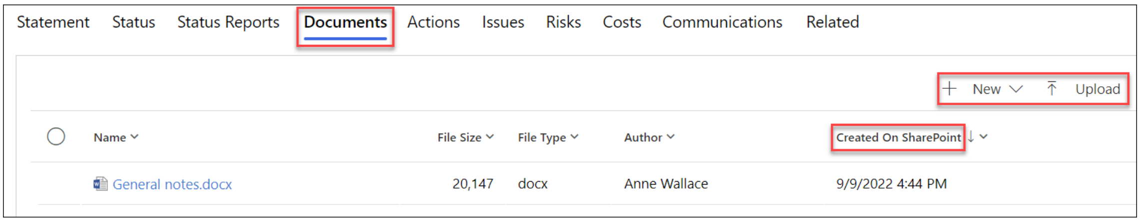
The **Status** tab allows the manager to set current project metrics and KPIs, and the **Status Reports** tab provides the manager with the ability to create snapshot status report. See the Status Reporting article for details.

Documents

During the installation of BrightWork 365 a SharePoint site and accompanying document library were created for the environment. A folder for each Portfolio exists in this library.



You can create new Microsoft Office documents or upload existing documents into this library through the **Documents** tab of the Portfolio record.



Note SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

Actions

See the Actions article for detailed information.

Issues

Click on the Issues link to view and create Portfolio related Issues.

The Assigned To lookup column is limited to users given the BrightWork Team Member role.

Risks

Click on the Risks link to view and create Portfolio related Risks.

The Risk Monitor lookup column is limited to users given the BrightWork Team Member role.

Costs

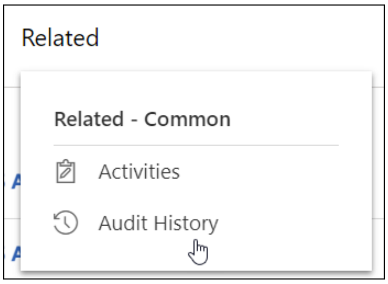
See the Costs article for detailed information.

Communications

See the Communications article for detailed information.

Related

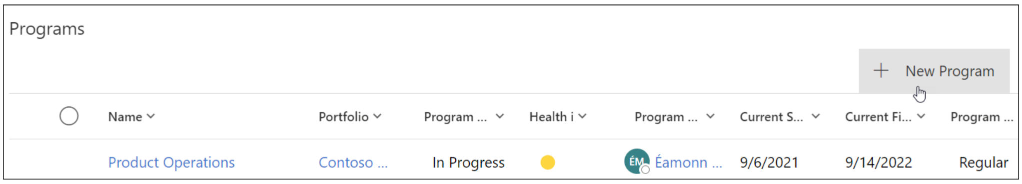
Click on Related > Audit History to view the audit change history.



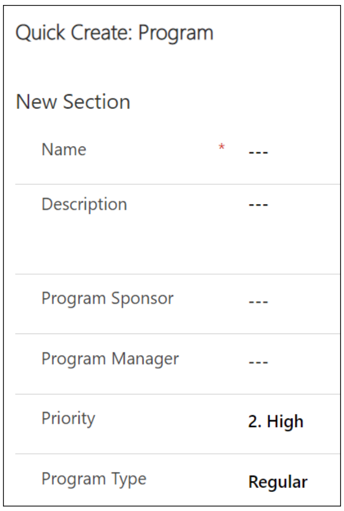
Quick Create - New Program from Portfolio Record

Managers can quickly create a new Program from a Portfolio record using Quick Create.

1. In the Portfolio's Programs section in the Statement tab, click **+ New Program**.



2. Fill in the form and click **Save and Close**.



Programs

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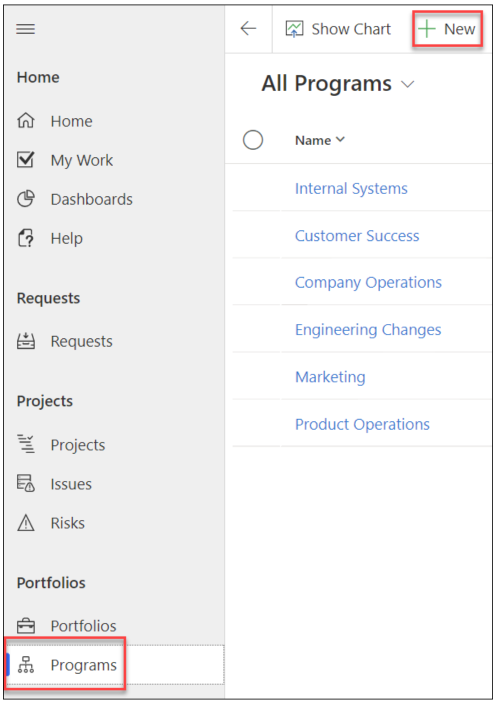
Programs Introduction

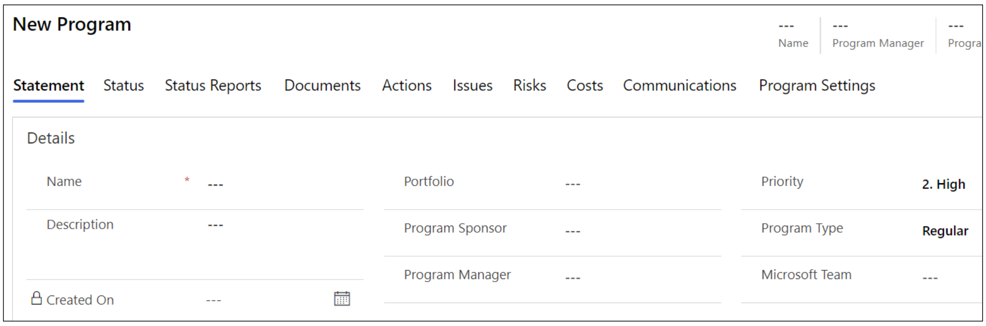
A Program is the first child level under a Portfolio. It allows users to group related projects together in order to manage and report on them in a coordinated way.

Creating Programs

1. Click into the **Programs** page and then click **+ New** at the top of the page.



2. In the **Statement** tab fill in all the required fields and click **Save**.



Program Tabs

You can easily view all Projects, Documents, Issues, Risks, and Program Settings that are related to a selected Program by clicking into the associated tabs within the Program record.

Statement

You can view the Program Statement and all child Projects by clicking on the **Statement** tab.

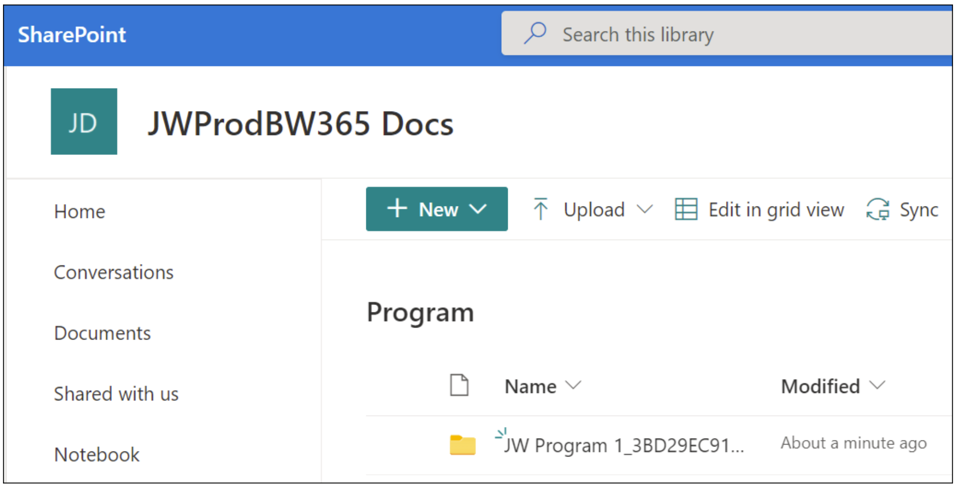
The list of available users to choose from in the **Program Sponsor** and **Program Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

Status & Status Reports

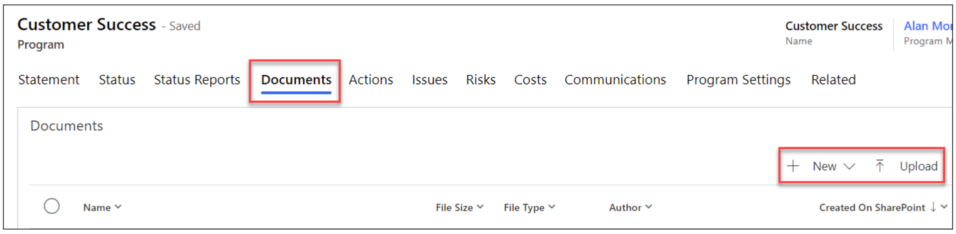
The Status tab allows the manager to set current project metrics and KPIs, and the Status Reports tab provides the manager with the ability to create snapshot status report. See the Status Reporting article for details.

Documents

During the installation of BrightWork 365 a SharePoint site and accompanying document library were created for the environment. A folder for each Program exists in this library.



You can create new Microsoft Office documents or upload existing documents into this library through the **Documents** tab of a Program record.



> **Note** SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

Actions

See the Actions article for detailed information.

Issues

Click on the Issues link to view and create Portfolio related Issues.

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Risks

Click on the Risks link to view and create Portfolio related Risks.

The list of available users to choose from in the **Risk Monitor** column is limited to those users given the **BrightWork Team Member** security role.

Costs

See the Costs article for detailed information.

Communications

See the Communications article for detailed information.

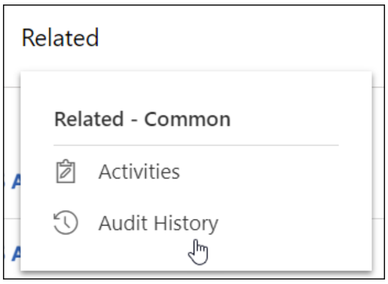
Program Settings

The Program Settings tab provides the ability to change the portfolio associated with the program, and to update the Microsoft Teams list to facilitate the creation of a Microsoft Teams Team for the program.

Only users with the BrightWork PMO Manager security role can view the Program Settings tab.

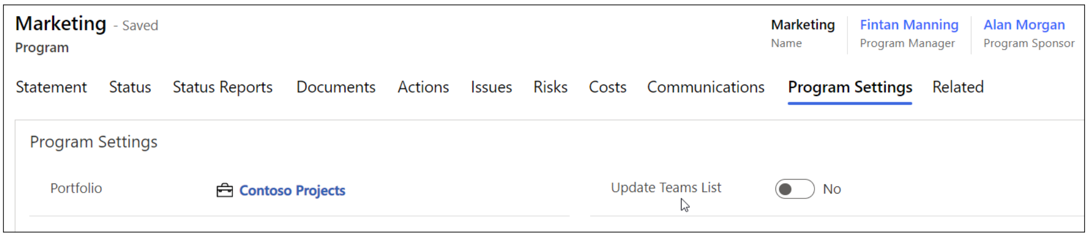
Related

Click on Related > Audit History to view the audit change history.

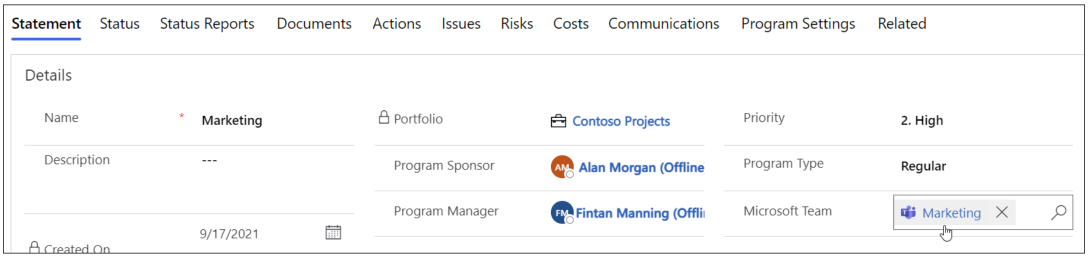


Program Settings & Microsoft Teams

You can update the Microsoft Teams list in the Program Settings screen:



and then choose the Microsoft Team in the Program's Statement screen:

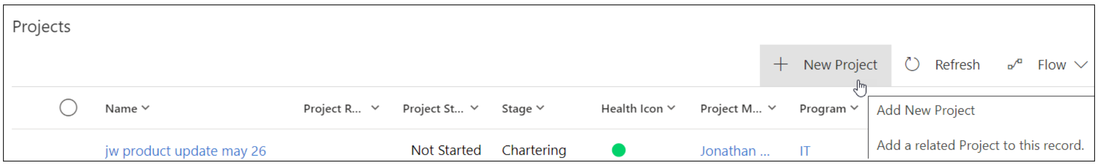


> **Note** In order for the Teams list to update properly and include the program Team, the Team must have been created previously, and the Owner of the solution flow **Get list of Microsoft Teams** must have been added as a Member of the Team. See Microsoft Teams Admin Guide for more information.

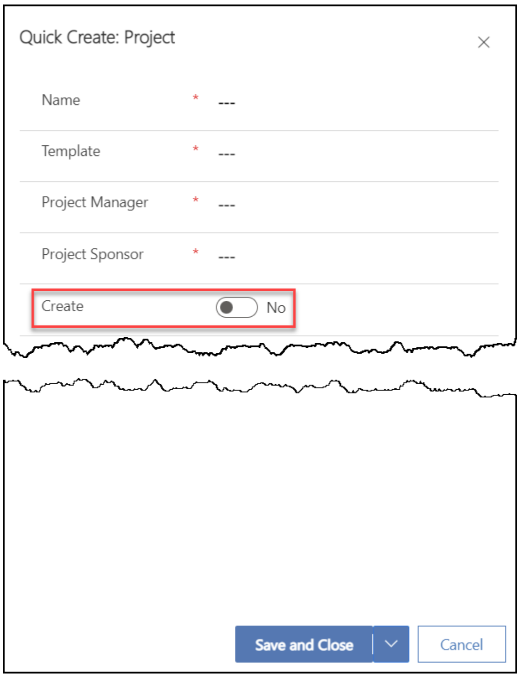
Quick Create - New Project

Managers can quickly create a new Project from a Program record using Quick Create.

1. In the Program's Projects section in the Statement tab, click **+ New Project**.



2. Fill in the short form, switch **Create** to **Yes**, and click **Save and Close**.



Portfolio & Program Status Reporting

Status Tab

The **Status** tab displays current metrics and KPIs.

The **Schedule** date values will automatically populate based on work item dates, and the values for the current overall Status, Health, Cost, and other metrics and KPIs are manually set by the manager.

Status Reports Tab

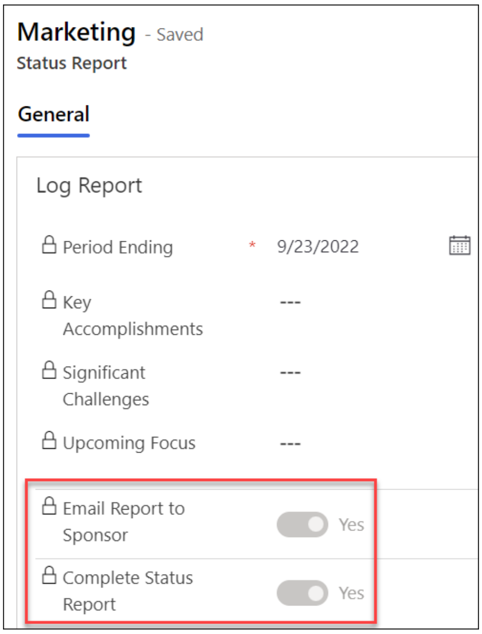
In the Status Reports tab a snapshot record of the current status information can be saved, and the history of previously created status reports can be viewed.

Saved status reports will be added to the list of any previously created status reports. The status report data is stored within your Microsoft 365 Dataverse.

To create a new status report snapshot:

1. In the Status Reports tab click the ellipses and **+ New Status Report**.
2. Fill in all relevant columns.
3. To save the status report:
    1. To save a draft: Click **Save** or **Save and Close** in the ribbon.
    2. To save a final version of the status report set **Complete Status Report** to **Yes**.

When you first set **Email Report to Sponsor** to **Yes**, and then set **Complete Status Report** to **Yes** (in that order), an HTML report will be emailed to the Sponsor, the Portfolio or Program Manager, and the person that set the report to the completed status. The email will be sent from the account that was used to install BrightWork 365.



Note Status related icons may fail to load in older versions of the Outlook desktop client.

Portfolio & Program Actions

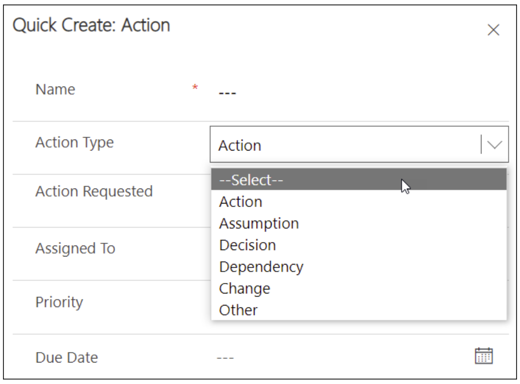
> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Actions

The Actions tab provides users with the ability to create, edit and view details in relation to an Action, a Resolution, an Approval, and to Notes, to help keep projects on track.

To access Actions, click on the **Actions** tab within a program, a portfolio, or a project created from one of the templates that contains this tab. Click **+ New Action** to create a new Action.

Clicking **+ New Action** brings up a Quick Create form with the most relevant fields. The form's **Action Type** field allows you to choose from several available types of actions.



Action Items

The Action tab within an individual Action item provides several sections to capture additional details about an Action.

Action

Fields include:

- Name: Provide a name for the action.
- Action Type: Choose either Action, Assumption, Decision, Dependency, Change, or Other.
- Action Requested: Enter the action requested.
- Assigned To: The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.
- Priority: Choose the priority level.
- Due Date: Choose the date the requested action is due.

Resolution

Fields include:

- Action Status: Choose from among the available Status choices.
- Progress Indicator: Choose from among the available schedule related choices.
- Action Taken: Describe any actions taken.
- Date Actioned: Choose the date the action was taken.

Approval

Fields include:

- Approver: Enter the name of the person responsible for approving the action. The list of available users to choose from in the **Approver** column is limited to those users given the **BrightWork Team Member** security role.
- Approval Date: Enter the date the approval was given.
- Resolution Rating: Choose a star rating for the resolution.
- Notes: A place to capture notes about the action.

Documents Tab

View, create, or upload documents associated with the action item. Documents will be saved in the project's SharePoint Online folder.

Related Tab

Click the **Related** tab to access the Audit History of the action item. The Audit History provides action item data change details including the change date, user who made the change, the changed field, and the old and new values.

Portfolio & Program Costs and Budgets

> **Tip** The BrightWork 365 **Costs** tab in Portfolios and Programs provides an easy method for rolling up Project budgets and costs.

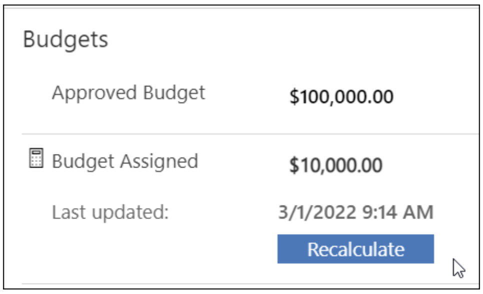
Portfolio & Program Level Cost Tracking

To enter the Costs section, click on the **Costs** tab of a portfolio or program. The screen is comprised of high-level budget and cost tracking fields separated into two screen sections.

Program Budgets

Fields include:

- Approved Budget: Enter the overall approved budget for the project. This is the first step for setting up cost management for the project.
- Budget Assigned: Calculates the sum of the total budget assigned to all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the **Recalculate** button.



- Budget Remaining: Approved Budget - Actual to Date. Automatically calculated.
- Budget Variance: Approved Budget - Current Forecast. Automatically calculated.

Program Costs

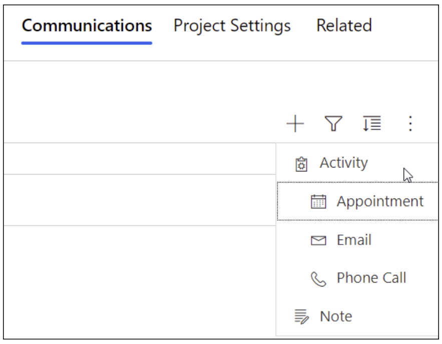
Fields include:

- Current Forecast: Calculates the total spend forecast of all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Actual to Date: Calculates the total money spent to date for all individual cost items. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.
- Cost to Complete: Current Forecast - Actual to Date. The calculation is updated by the system hourly if there are data changes, and you can also update it on demand by clicking the calculator icon and then the Recalculate button, as noted above.

Portfolio & Program Communications

Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

The BrightWork 365 Communications tab provides a comprehensive method for capturing various communication related activities at the project, program, or portfolio level. To access Communications, click on the **Communications** tab. The initial screen will display a history of previously entered Communications items. Click **"+"** to create a new Communications item of type Appointment, Email, Phone Call, or Note.



You can also access communications options from within the **Timeline** section of a **Project Stage** details screen.

Appointment

When creating a new Appointment the Quick Create form will display with relevant fields. If the creator's email and calendar are configured properly, an invite will be sent to the Attendees, and the appointment will be added to the creator's calendar.

The Appointment **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Appointments can be set as a Microsoft Teams meeting. If your organization is not yet configured to work with Teams, see our Microsoft Teams Admin Guide.

Email

The new email screen presents the typical email fields such as To, CC, Subject, and email body. If the email creator's email is configured properly, an email will be sent to the addressees and a copy of the email will be saved in the Communications item record.

Phone Call

The Phone Call function provides a way to capture details about a call that was initiated outside the system. The details will be saved as part of the Communication record.

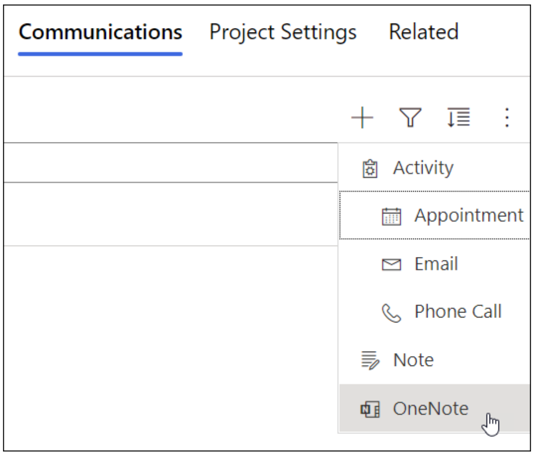
The Phone Call **Related** tab provides access the Audit History of the Appointment item. The Audit History provides data change details including the change date, user who made the change, the changed field, and the old and new values.

Note

You can create a note with a title, note body (with formatting), and attachments and save the note as part of the Communications record.

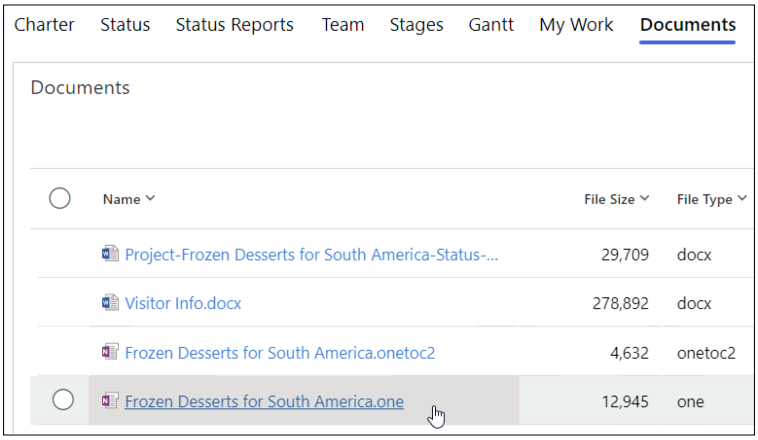
OneNote

In addition to the standard note mentioned above, you also have the option to create Microsoft OneNote notes that are saved as part of an associated OneNote notebook. To access the OneNote notebook after it's created, you can either click on the OneNote link displayed when you click the + sign in the Communications module:



Or,

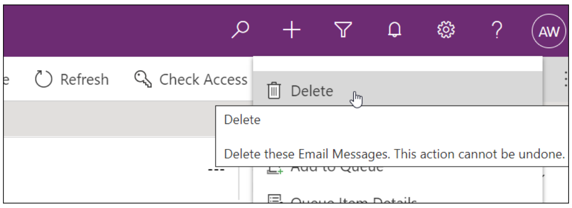
click on the **.one** file within the Documents tab:



Communications Tab - User Actions

You can take various actions on open Communications items directly in the main Communications screen.

If you need to delete a closed Communications item, e.g., delete an email after it was sent, you will need to do this from the toolbar within the item record instead of from the main Communications screen.



Note Users can only modify or delete their own Communications activities, not those of other users.

Dynamics 365 App for Outlook

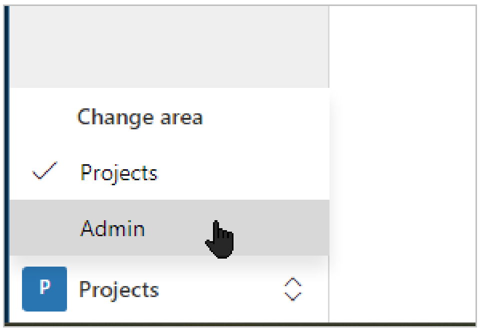
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web, or mobile. See Use Dynamics 365 App for Outlook for additional information.

Troubleshooting

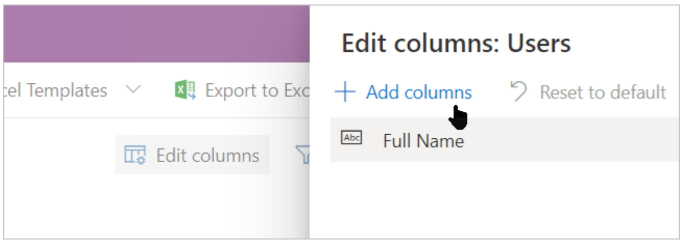
Communication activities not working for some users

A Power Platform Admin can check within the BrightWork 365 app if the affected user accounts are enabled for communication related activities:

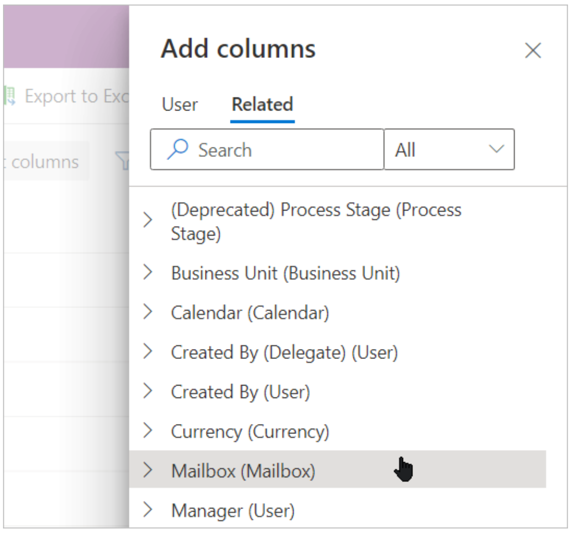
1. Click Projects in the bottom left of the page and click Admin.



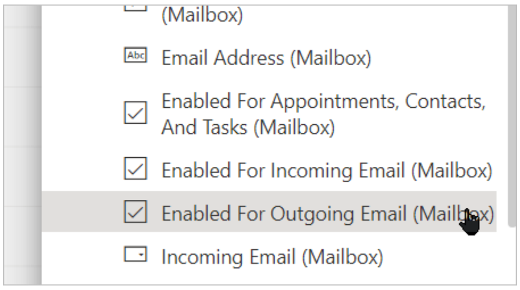
2. Click Users to load the BrightWork Users report.
3. Click Edit columns and then click Add columns.



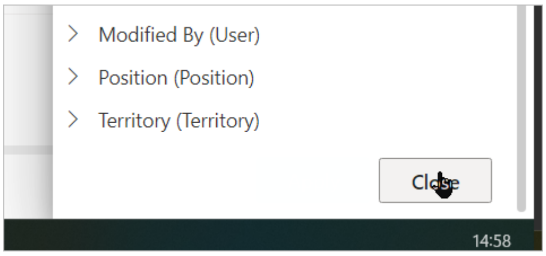
4. Click Related and Select Mailbox.



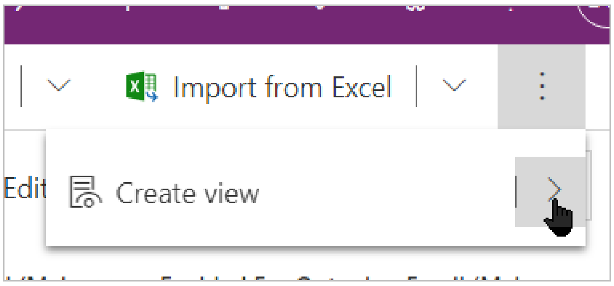
5. Add the three Enabled for... columns.



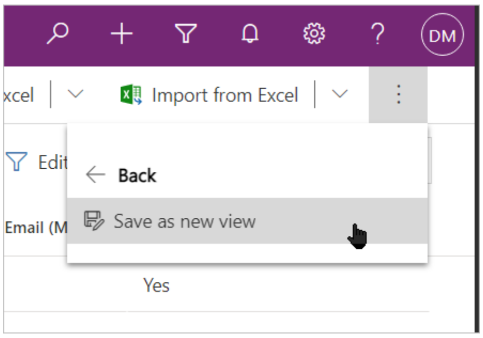
6. Scroll down to the bottom and click close.



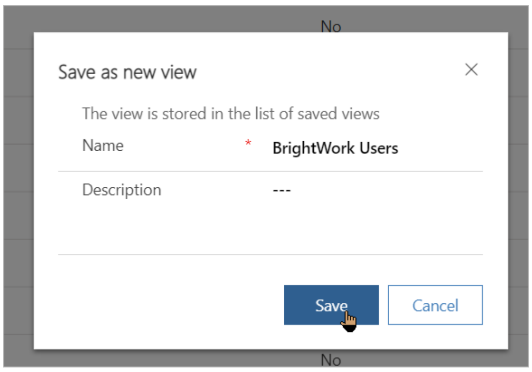
7. Click Apply.
8. Expand the three dots in the top right and click the arrow beside Create view.



9. Click Save as new view.

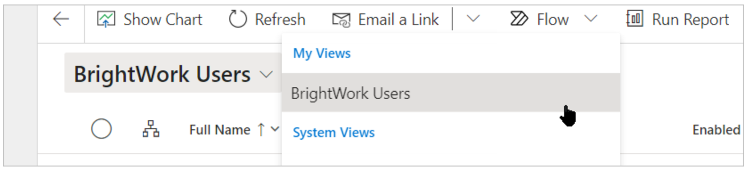


10. Rename the view if desired (optional), and click Save.



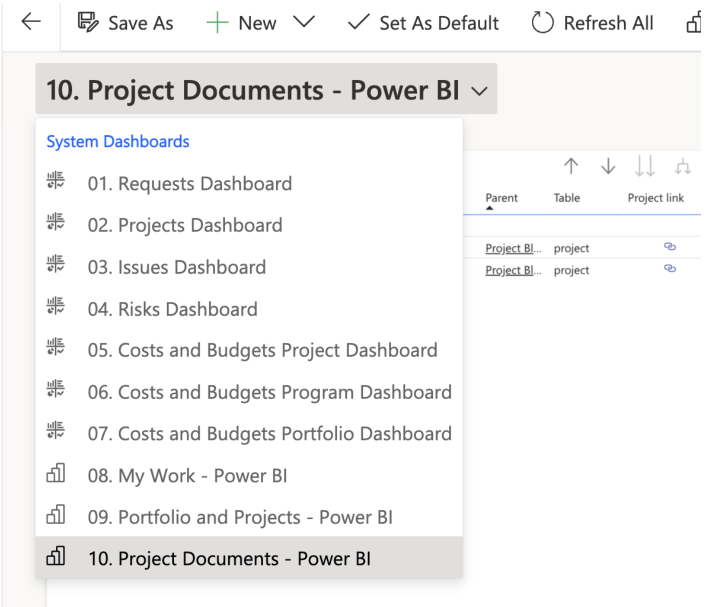
11. The new view is available to check if the user accounts are enabled for communication related

activities.



If further configuration is required, see the **Setup Dynamics Email** section of the BrightWork 365 Install Guide.pdf.

Project Documents Dashboard - Power BI



The **Project Documents** Power BI Dashboard displays documents from across your projects and includes links for easy access. The report includes documents from:

- Project Requests
- Project Tasks
- Project Issues
- Project Risks
- Project Actions
- Project Costs

Work Allocation Reports

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

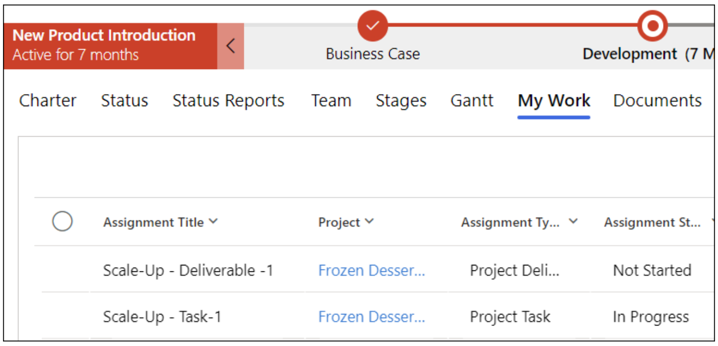
BrightWork 365 provides a number of rollup work-related reports for the various types of work that can be assigned to project team members.

> **Note** % Complete cannot be set from within work reports; set this value within the actual work record.

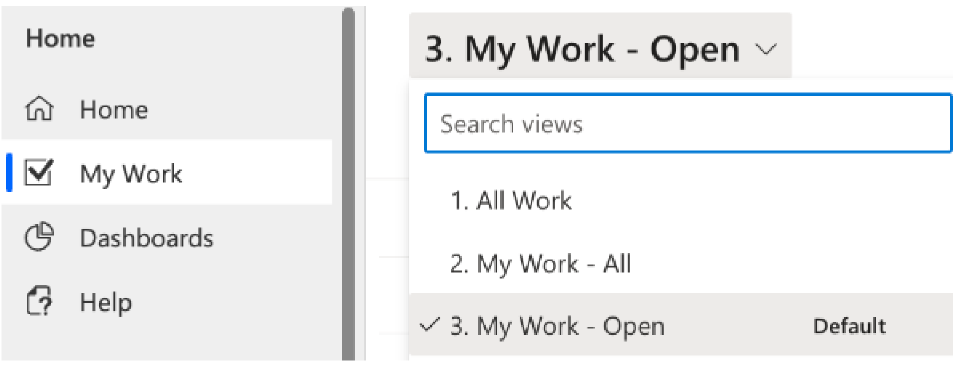
My Work

The My Work report rolls up all work items assigned to the logged in user either in an individual project or across all projects, depending on where the **My Work** link is clicked.

To view all work assigned to you as the logged in user for one specific project, click into the **My Work** tab within the project.

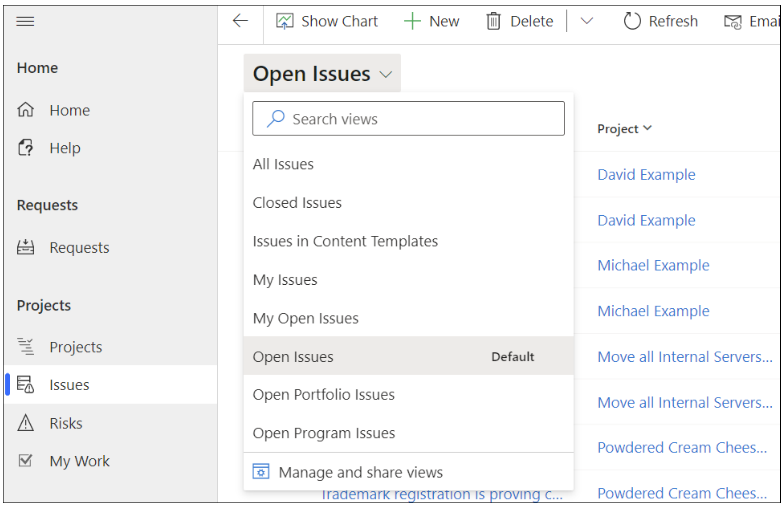


To view all work assigned to you as the logged in user across all projects, click into the **My Work** link on the Site Map. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



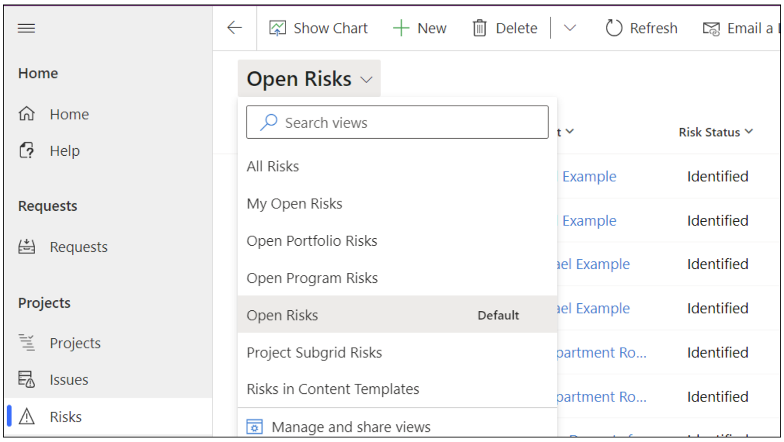
Issues

The Issues report rolls up all issues recorded throughout all projects. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



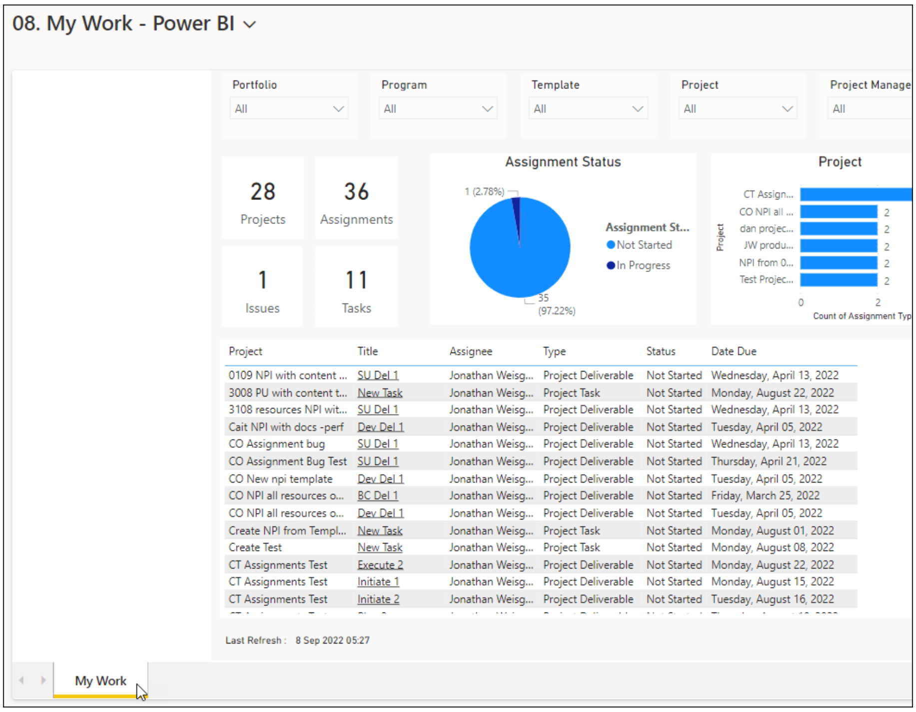
Risks

The Risks report rolls up all risks recorded throughout all projects. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



Work Allocation Reports - Power BI

With the pairing of BrightWork 365 and Microsoft Power BI, there are many resource related report options available for your team to review and analyze. Two main areas for resource reports are the **Work** and **My Work** reports. As with other Power BI reports, the work reports are interactive and details can be zoomed into by clicking into the various chart regions.



Note As referenced in the Install Guide, in order for the My Work Power BI reports to function properly for a user they must be added to the Power BI Workspace with Viewer access (Admin access will display work for all users, not just for themselves), and to the user security group for the report dataset.

Training Introduction

Introduction

This training guide can be used as an introductory roadmap for how to use BrightWork 365 to manage projects and portfolios on the Microsoft Power Platform. This content is intended to give a first-time user a tour of what it is like to use BrightWork 365 as a BrightWork Champion, Project Requester, Project Manager, Team Member and Senior Executive, following the usual lifecycle of a project. Detailed training for these key user types served by BrightWork 365 is available in the 'Role-Based Guides' in this Knowledge Base section, and training on project template setup and adjustments can be found in the Customization section of the Knowledge Base.

Extensive training can also be obtained through our various BrightWork 365 service offerings. See the Deployment section of this Knowledge Base for additional information.

BrightWork 365 Basics

Prior to moving on to the subsequent training guides we recommend completing a review of our Basic Orientation articles. This content will provide you with the fundamental knowledge to help ease your way into the subsequent training guides.

Sample Training Syllabus

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.

We recommend working through the roles in the order presented, starting with the BrightWork Champion role to setup the necessary app elements for further use by the other roles.

1-BrightWork Champion

Approximately 2 hours

BrightWork 365 Overview

- What is a BrightWork Champion?
- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- BrightWork User Management | BrightWork Security Roles Details
- Frequently Asked Questions

Portfolios & Programs

- Use Case Discussion
- Create a Portfolio
- Create a Program
- Exercise

Requests

- Use Case Discussion
- Create a Project Request
- How to Create a Project Without a Request
- Request Approval Stages and Built-in Approval Business Process Flows
- Exercise

Project Standard Template

- Template Details
- Task Management
- Documents

- Status Reporting
- Project Settings
- Exercise

New Product Introduction Template

- Template Details including Differences from Project Standard
- Exercise

Product Update Template

- Template Details including Differences from Project Standard
- Exercise

Work Reports (Issues, Risks, My Work)

- Use Case Discussion
- Work Allocation Reports
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Customization

- Customization Overview
- Template Configuration
- Content Template Configuration
- Power BI Customization

Open Forum Q&A

2-Project Manager

Approximately 2 hours

BrightWork 365 Overview

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- Frequently Asked Questions

Requests

- Use Case Discussion
- Create a Project Request
- How to Create a Project Without a Request
- Request Approval Stages and Built-in Approval Business Process Flows
- Exercise

Project Standard Template

- Template Details
- Task Management
- Documents
- Status Reporting
- Project Settings
- Exercise

New Product Introduction Template

- Template Details including Differences from Project Standard
- Exercise

Product Update Template

- Template Details including Differences from Project Standard
- Exercise

Work Reports (Issues, Risks, My Work)

- Use Case Discussion
- Work Allocation Reports
- Demo
- Exercise

Interface

- System & Personal Views & Charts

- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

3-Team Member

Approximately 1 hour

Training Topics

- Navigating BrightWork 365
- Find Assigned Work and Update Work Progress
- Document Management
- Microsoft Teams
- Configure a Personal View
- Exercise

Open Forum Q&A

4-Senior Executive

Approximately 1 hour

BrightWork 365 Overview

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- Frequently Asked Questions

Requests

- Use Case Discussion
- Create a Project Request
- Request Approval Stages and Built-in Approval Business Process Flows

- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

BrightWork Champion

Who Is This Guide For?

This guide is geared to the customer organization's BrightWork Champion, who is responsible for the initial in-app setup of BrightWork 365, including the Program and Portfolio structure, prior to the management of projects within the app. The Champion gains a thorough understanding of BrightWork 365 top to bottom, helps define their organization's requirements, and acts as an invaluable subject matter resource for their peers.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- BrightWork User Management | BrightWork Security Roles Details

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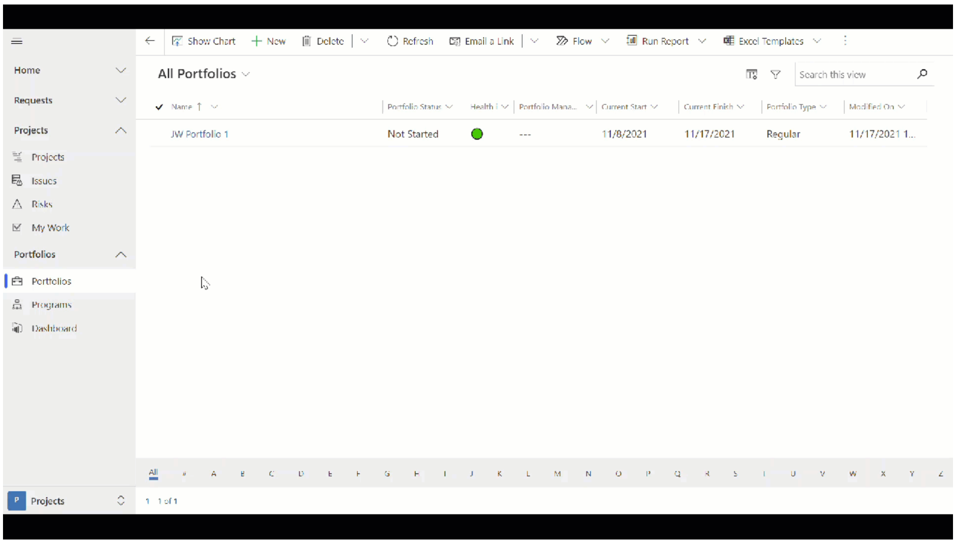
Create the Portfolio and Program Structure

In order to submit project requests and manage projects in BrightWork 365, you'll first need to create at least one parent Portfolio and one child Program associated with the Portfolio. Once this initial structure is in place you can move on to setting up your first project.

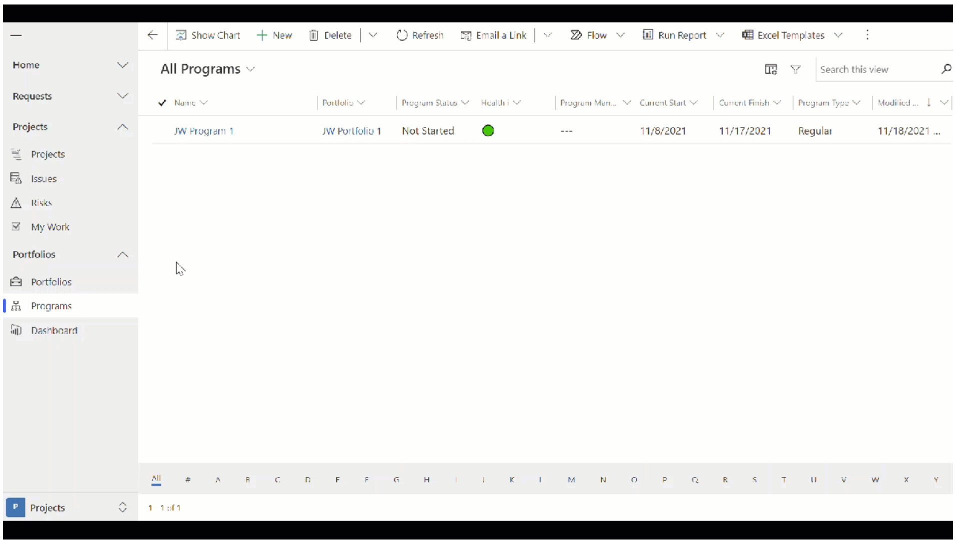
Create a Portfolio

Click the Portfolios link, click + New and fill out the form fields.



Create a Program

Click the Programs link, click + New and fill out the form fields.



Deeper Dive - Portfolios & Programs

- Portfolios
- Programs

What's Next?

We suggest you next move on to the Project Manager role-based guide.

Project Requester

Who Is This Guide For?

This guide is aimed primarily at members of the organization who will be using BrightWork 365 to submit requests for projects that will be created through the Request process.

Prerequisites

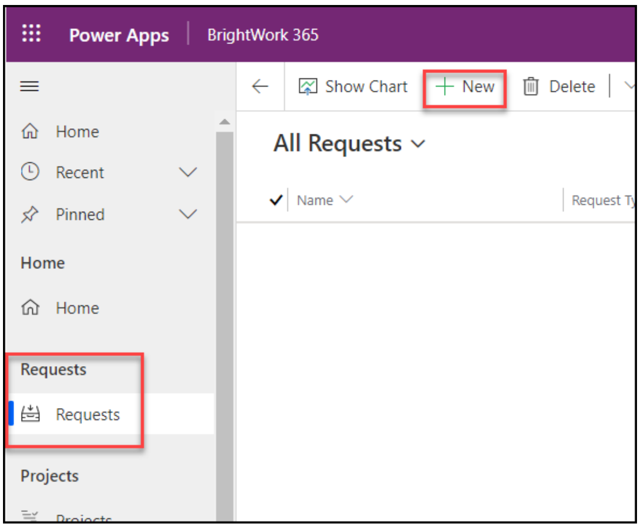
We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

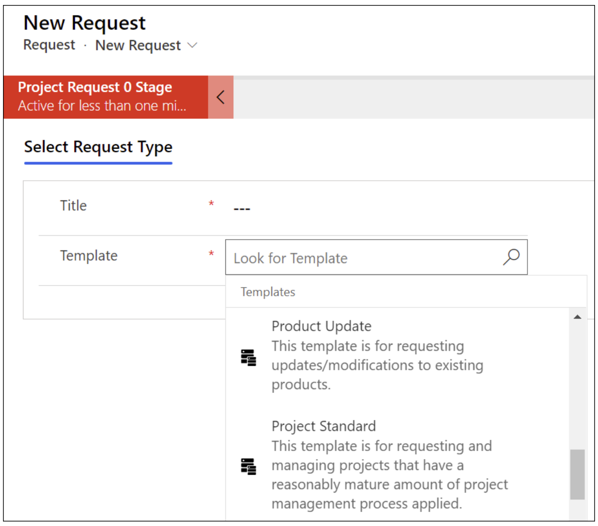
- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

Submit a New Project Request

The BrightWork 365 project management process typically begins in the Requests Area. Here you can choose from different project templates for an efficient and consistent way to create new projects.

- Create and submit a new request by clicking into the **Requests Area** in the Main Nav, and then **+ New**. Fill in the necessary fields including the selection of a BrightWork 365 template to choose as the foundation from which to base your new project. You'll need to either choose an existing program that this project should be attached to or create a new program during the request process (appropriate user permission required).

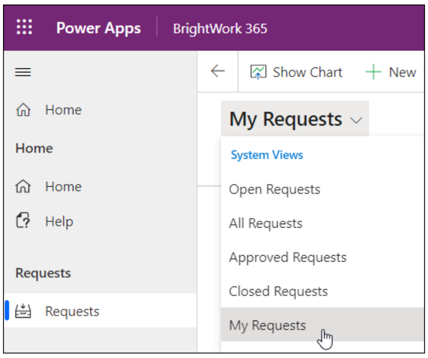




Note: Users who only have the **BrightWork Request Submitter** security role will only see the **Requests Area** and not the other areas of the full app such as **Projects** and **Portfolios**.

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests in the navigation area and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down view list.



For additional detailed information see our related articles and videos.

Project Manager

Who Is This Guide For?

This guide is primarily aimed at Project Managers who will be using BrightWork 365 to manage projects. However, this guide will also be useful for any member of the organization who will be using BrightWork 365 extensively.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

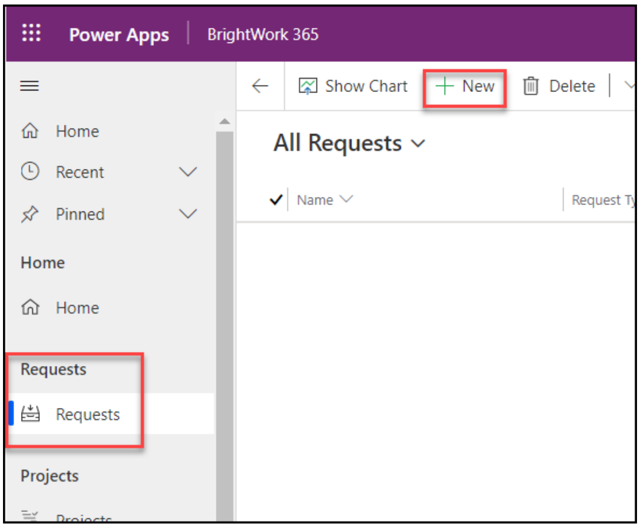
- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

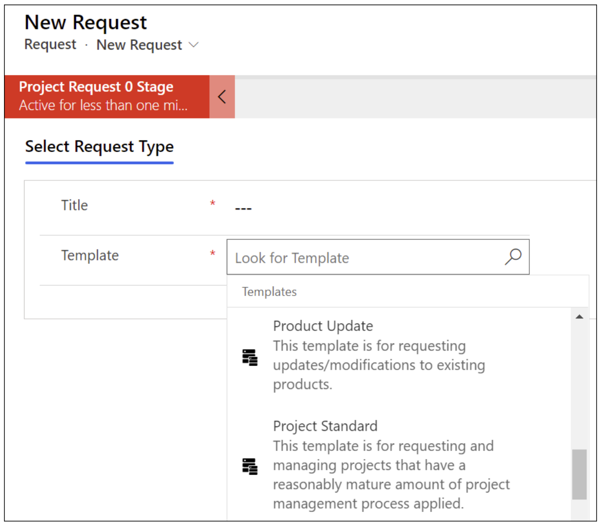
Submit a New Project Request

Tip For more information beyond what is in this Getting Started section, see the Requestscategory.

The BrightWork 365 project management process typically begins in the Requests Area. Here you can choose from different project templates for an efficient and consistent way to create a new project.

- Create and submit a new request by clicking into the **Requests Area** in the Main Nav, and then **+ New**. Fill in the necessary fields including the selection of a BrightWork 365 template to choose as the foundation from which to base your new project. You'll need to either choose an existing program that this project should be attached to or create a new program during the request process (appropriate user permission required).

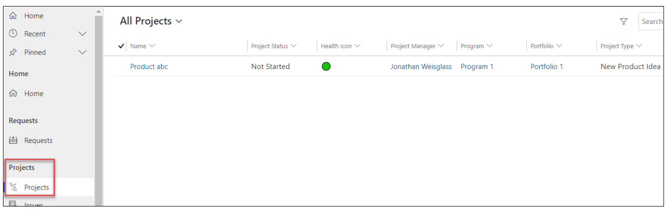


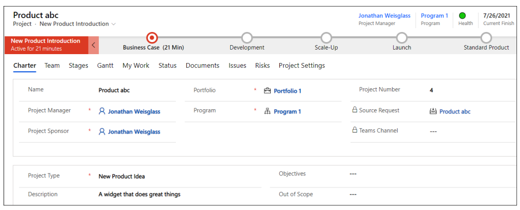


Manage a Project

For more information beyond what's in this Getting Started section, see the Projects category.

After your new project is created click into the **Projects Area** in the Main Nav to see a list report of all projects. Click on your project link and its various tabs to display project information and to make any necessary updates as the project flows through its lifecycle.



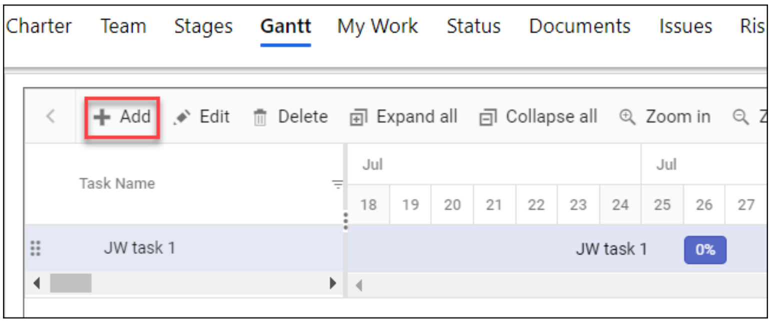


Charter

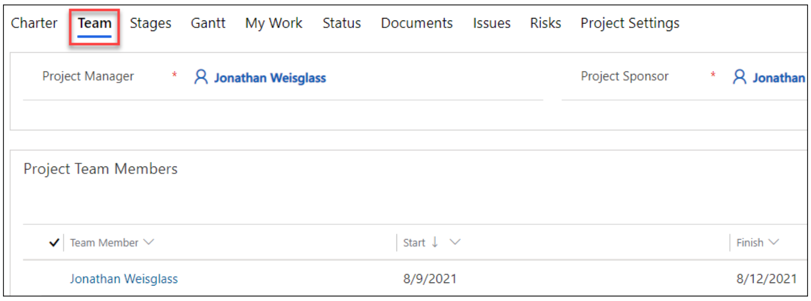
After your project is created you will find Charter columns available for you to add high level details about the project, beyond what was included in the project request form.

Gantt

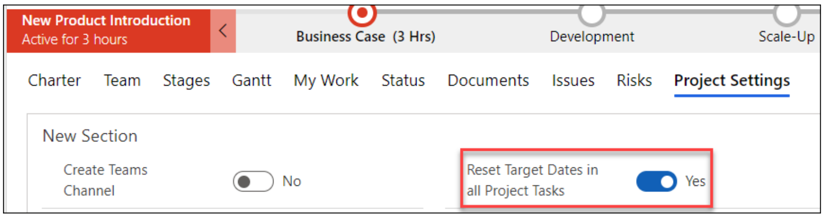
Click into the Gantt tab and update any tasks that were included as part of the template that the project was based on and add new tasks you and the team decide should be included in the project.



As you assign tasks to colleagues the Team section of the project will automatically populate associated assignee and task date information.

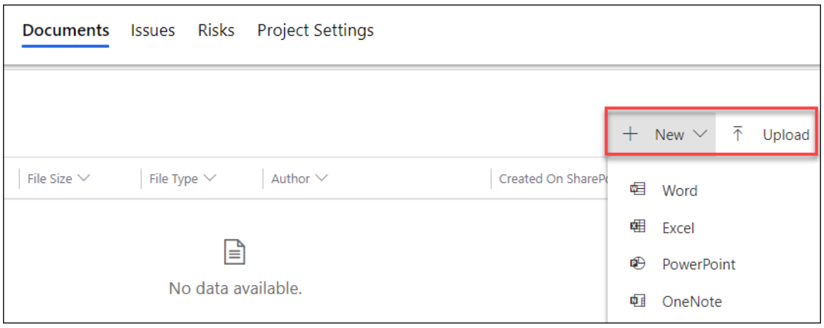


After the project team agrees on the task structure and dates, you can lock-in the schedule by baselining it - in the **Project Settings** tab choose **Yes** for **Reset Target Dates in all Project Tasks**.



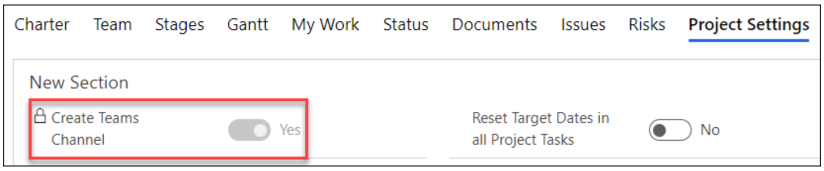
Documents

In the Documents section you have the option to create a new Microsoft Office document or upload external documents to the project's associated SharePoint library as deliverables get drafted.



Create a Microsoft Teams Channel

It's a best practice to create a Microsoft Team for every program (see below), and to create a Team Channel in Project Settings for every project in the program.

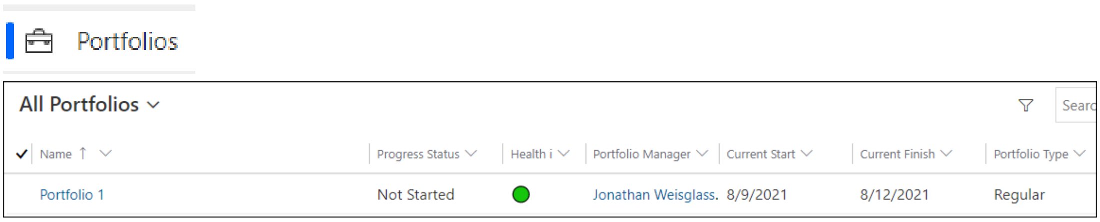


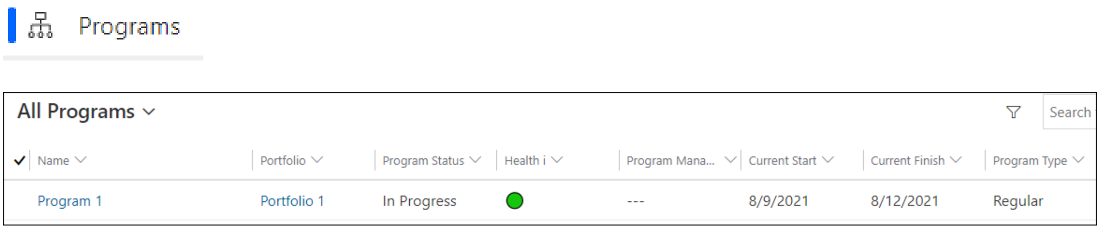
See the Microsoft Teams article for more details about configuring Microsoft Teams integration.

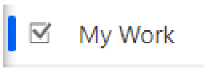
View Reports

Portfolio Reports

In the **Portfolios Area** of BrightWork 365 you can check on the health and status of Portfolios, Programs, and all assigned work.





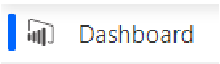


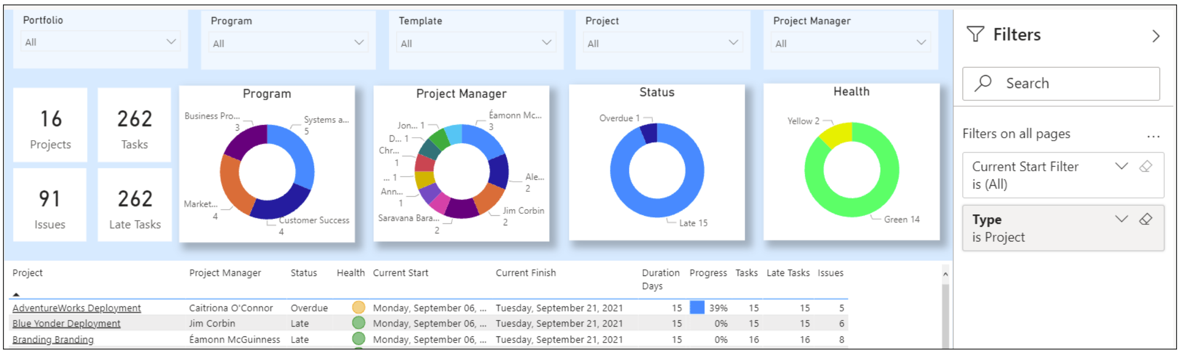
For a detailed explanation of the Portfolios Area see Portfolios.

Power BI Reports

> **Note** In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

Power BI dashboard reports allow for interactive analysis of critical project and portfolio data.





See the Power BI Reports article for more details.

For additional detailed information see our related articles and videos.

What's Next?

If you'd like to dive into the granular details of Power Apps for business users, check out the related article.

Team Member

Who Is This Guide For?

This guide is aimed primarily at team members; however, any member of the organization who will be using BrightWork 365 and is new to the Power Platform will also benefit from this guide.

Prerequisites

We suggest you first review the BrightWork 365 Basic Orientation content to familiarize yourself with the fundamentals of the solution.

To obtain maximum benefit from this training material it's advised that a project manager assign some work items to you in a project you have access to. Confirm with your project manager that this has been completed before continuing with this training.

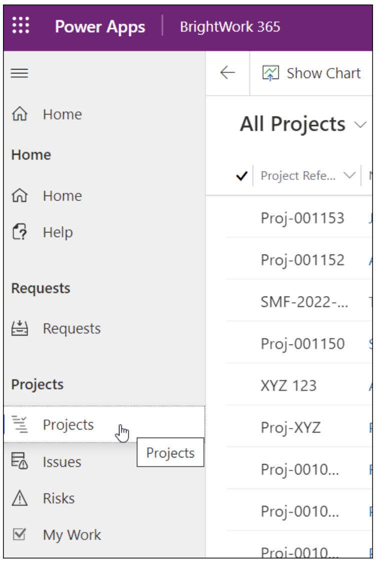
Introduction

BrightWork 365 is a Microsoft Power Platform solution for managing work and projects of varying sizes and types. BrightWork 365 includes a set of best practice project management templates, fields and dashboards that mimic the reality of the varying degrees of work and project management found in most organizations today.

This Team Member training guide will help you learn how to use BrightWork 365 to effectively manage your work. The training guide will teach you BrightWork 365 basics, how to find your work and how to manage work and documents.

Find Your Training Project

To find the project site with your assigned work, you can either click on a direct link provided by your project manager or navigate to the project in the Projects Area of BrightWork 365.



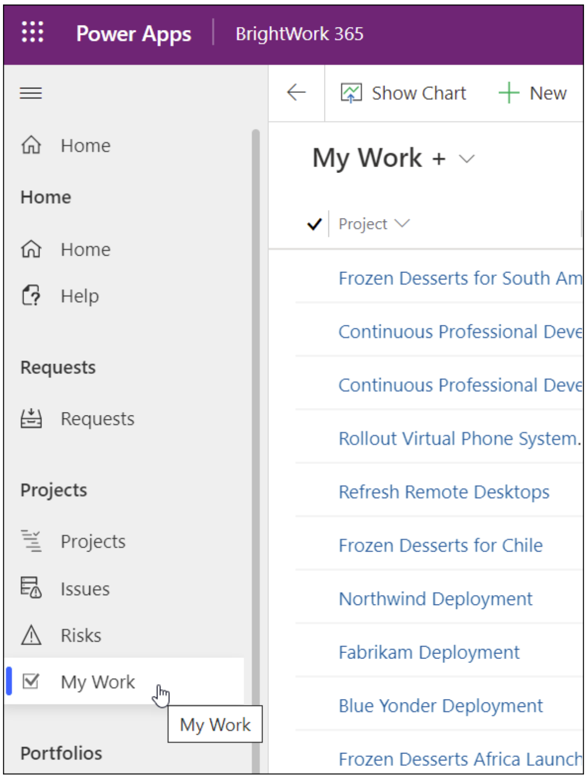
Find Assigned Work

There are various ways you can find work assigned to you in BrightWork 365. If you are used to a project management environment where work is assigned and managed via email, you will know that keeping track of this work can be inefficient. BrightWork makes this process easy and efficient by providing several ways to find your assigned work.

My Work Power Apps Views

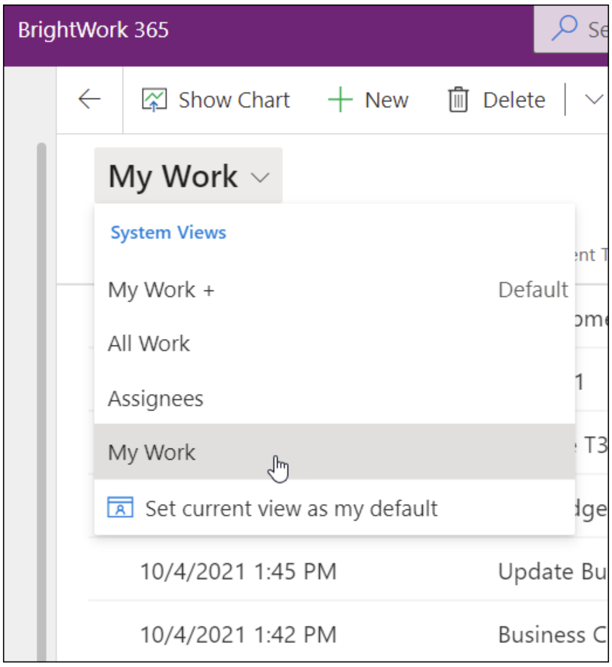
The My Work views, available from a link on the Projects Area navigation, are reports that display and link to all the work items owned by, or assigned to, the logged in user (i.e., you). For added convenience the view can display work items from multiple types of work in a single view.

To access this view, click the **My Work** link in the navigation section of the Projects Area.



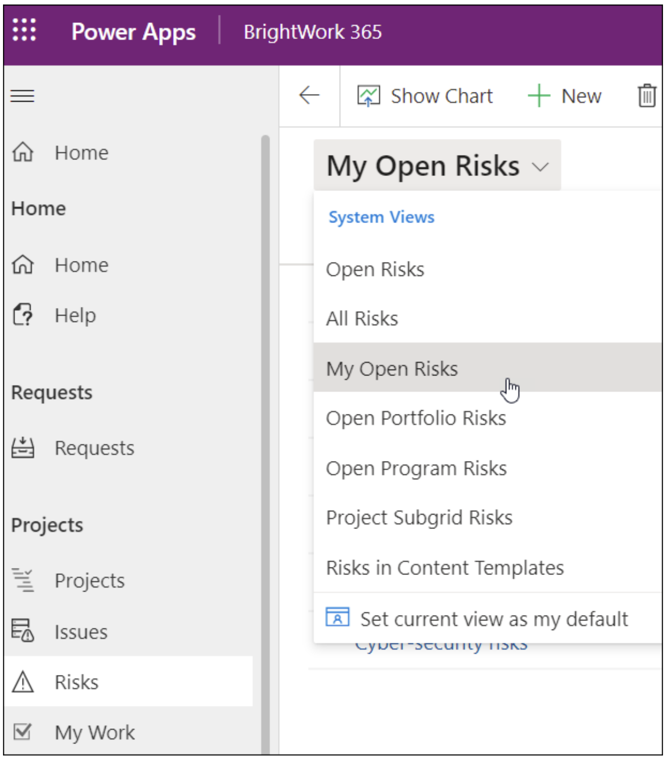
The initial view **My Work +** provides a link to the associated project site in addition to work related information.

The alternate view **My Work** provides only work-related information. To access this view as well as other available views, click on the view drop-down.



If you'd like to narrow down your search to only issues or risks assigned to you, click on the

desired option in the navigation and switch the view to one of the "My" views.

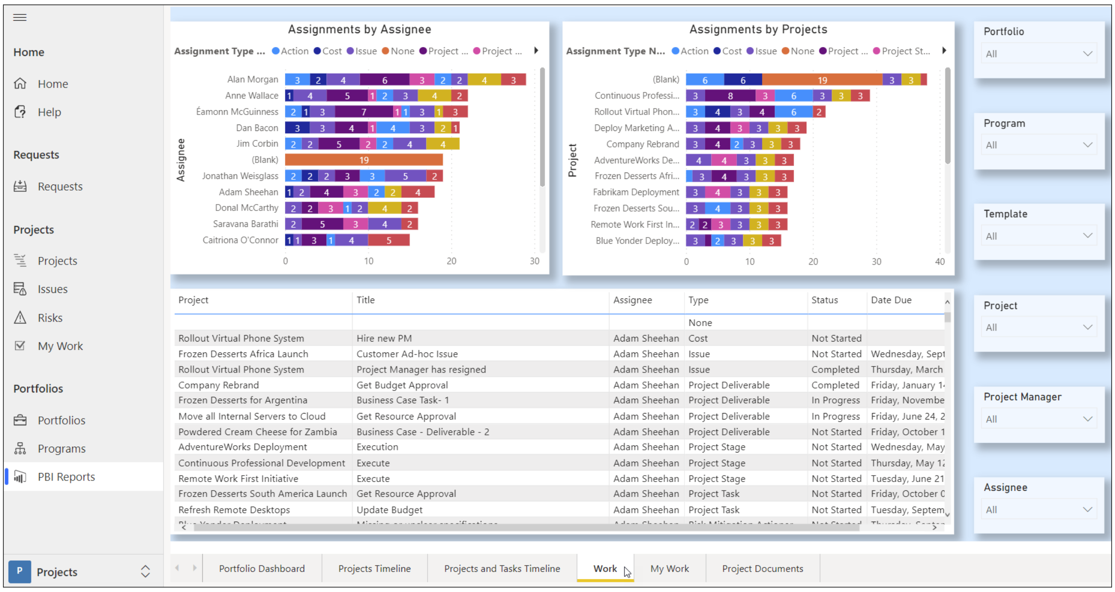


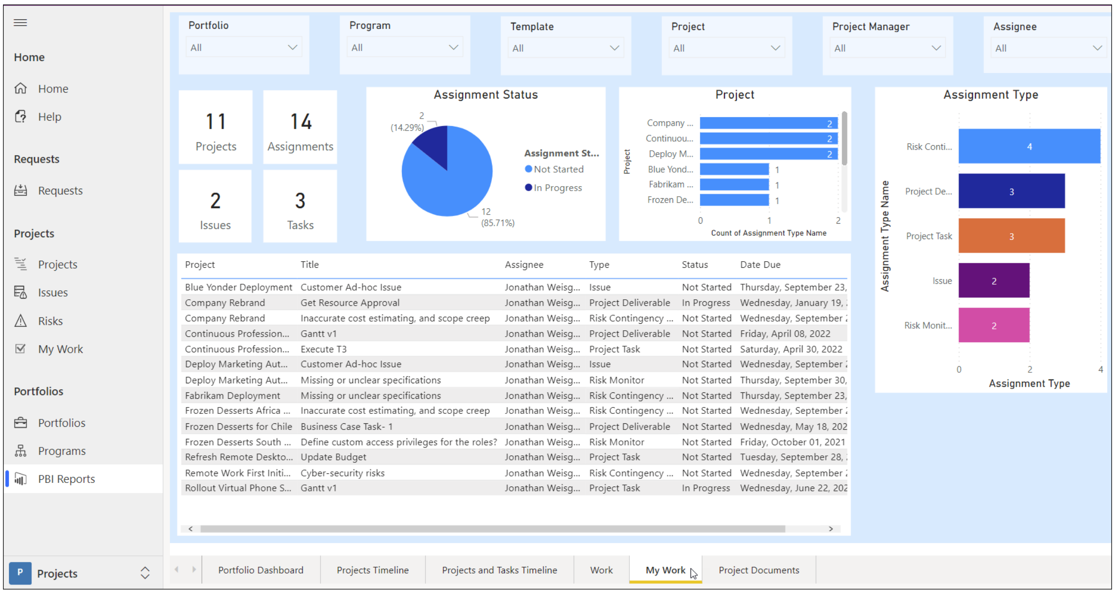
You can also choose to create your own personal view of work assigned to you to make these reports even more personally relevant.

Power BI Work Reports

> **Note** In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

With the coupling of BrightWork 365 and Microsoft Power BI, there are many resourcing report options available for your team to review and analyze. A main area for resourcing reports is in **PBI Reports > Work** and **PBI Reports > My Work**. As with other Power BI reports, the work reports are interactive, and details can be zoomed into by clicking into the various chart regions. Additional Microsoft licensing requirements apply.





Manage Work and Documents

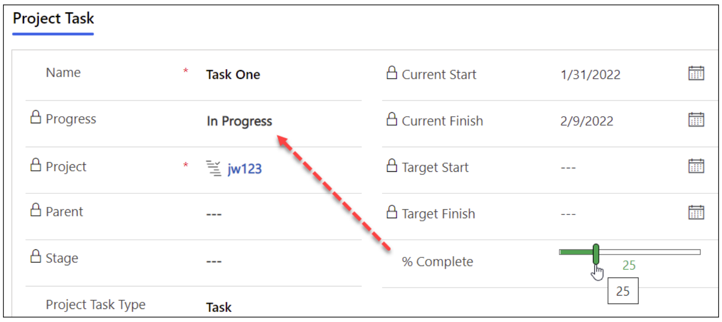
This section explains how to update the details of your work items, log a project issue, and work with documents.

Form Based Update

You can use the Gantt form to make updates to work items assigned to you.

1. Click into a **My Work** view as described above.
2. Double-click on the name of a work item assigned to you to open up the related form for the item.
3. In the form, change the **% Complete** value and click **Save**; the **Progress** value will automatically

change accordingly.

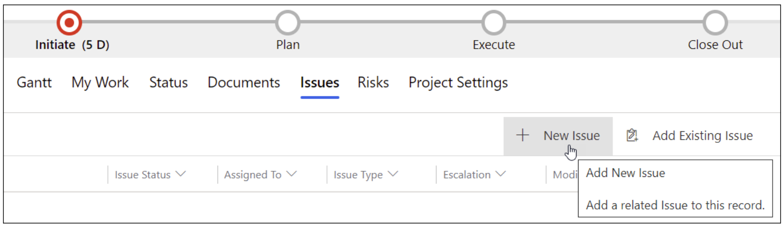


4. Click **Save & Close** to complete the operation.

Log an Issue via Form Entry

As a team member you may need to log an issue about something you feel threatens the success of the project, e.g., the schedule, quality or cost of the project.

1. Click into the **Issues** tab within a project record.
2. Click **+ New Issue**.



3. Fill in the Issue form and click **Save and Close**.

Document Management

BrightWork 365 provides the ability to create and upload documents to be shared with other project team members. Users with Microsoft Office can edit files as if they were on a local or network drive. See the Document Management article for detailed information.

For additional detailed information see our Project articles and videos.

Senior Executive

Who Is This Guide For?

This guide is aimed primarily at Senior Executives and Program Managers who need to maintain oversight of work and projects across an entire project portfolio in the organization. In this training guide you'll learn about reporting features available with BrightWork 365.

Prerequisites

If you are new to BrightWork 365 and the Microsoft Power Platform, we recommend you first complete the Basic Orientation and Team Member training guides.

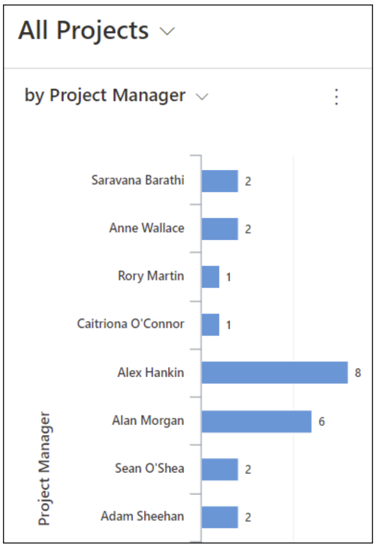
If you will be more directly involved in managing projects, we recommend that you complete the Project Manager training guide prior to using this guide.

Report Types

In this section you will learn about the different report types available in BrightWork 365. There are a number of cross-table and cross-project report types that can be used for a range of scenarios.

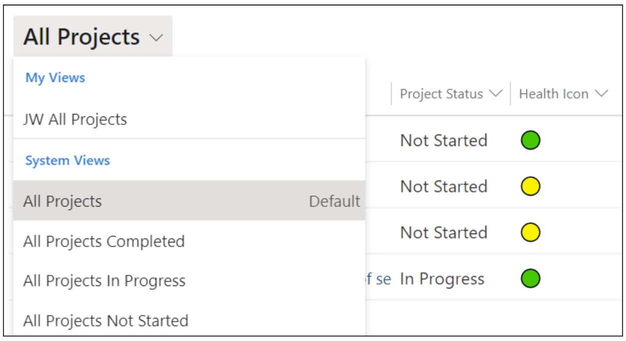
Chart Reports

Chart reports can be configured to display data from across project records in visual reports such as Pie, Bar, and 3D.



Area Report Views

Through the use of System views and Personal "My" views in the Requests, Projects, and Portfolios areas, you can easily obtain crucial project and portfolio information from a single screen. These reports have multiple variations allowing you to zoom in on just the specific data you need.



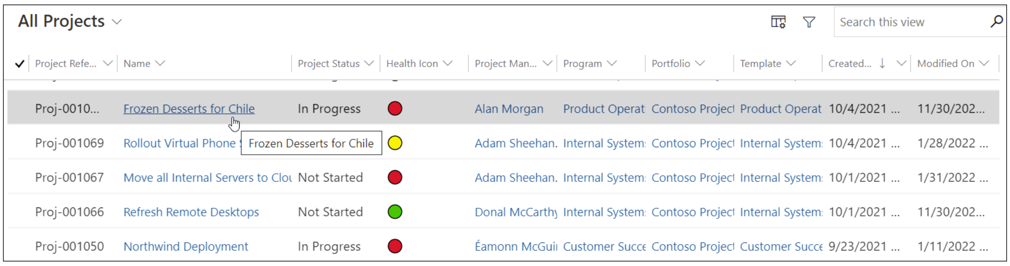
Power BI Dashboards

If your organization is licensed for Microsoft Power BI, there are a number of additional dashboard reports available in BrightWork 365.

Project Management Reports

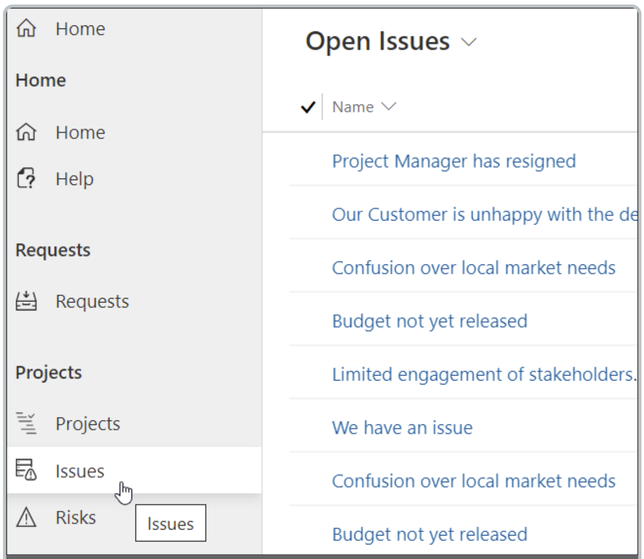
Project

BrightWork 365 Project reports, which can be accessed from the Projects link in the nav bar, display high-level information about individual projects. These reports are best for focusing on high-level details, but they also offer an easy way to drill down into very specific project information by clicking on various hyperlinks in each row.

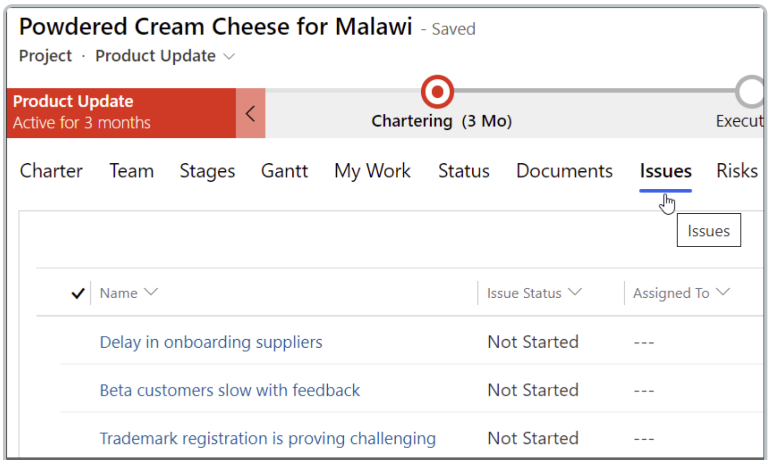


Issues

The Issues reports display all the issue items created within project records, with the option to switch between different views.



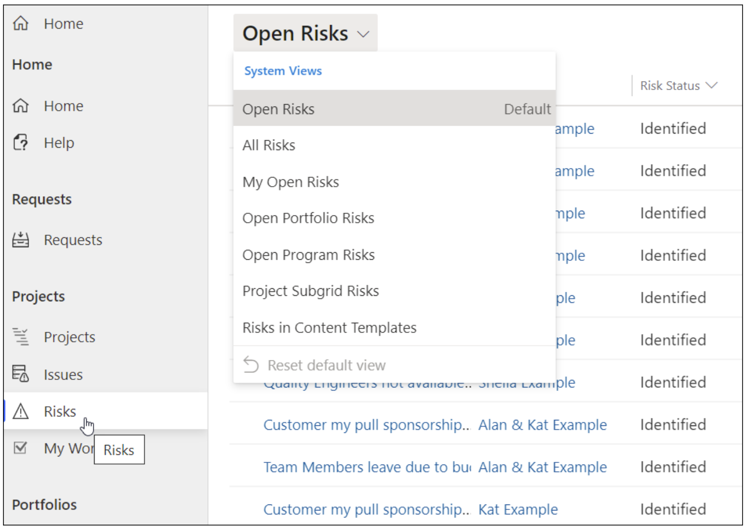
Issues Report View in the Projects Area



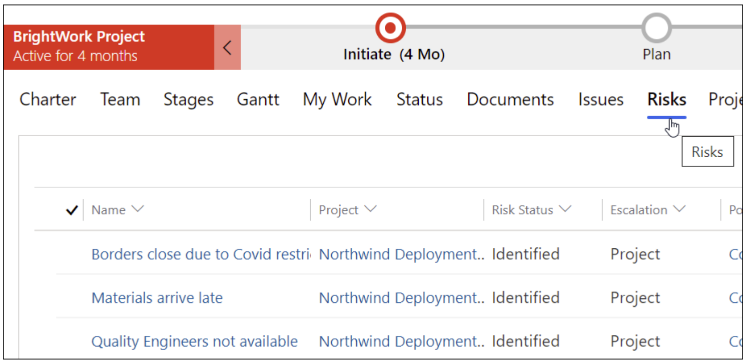
Issues Tab in the Project Record

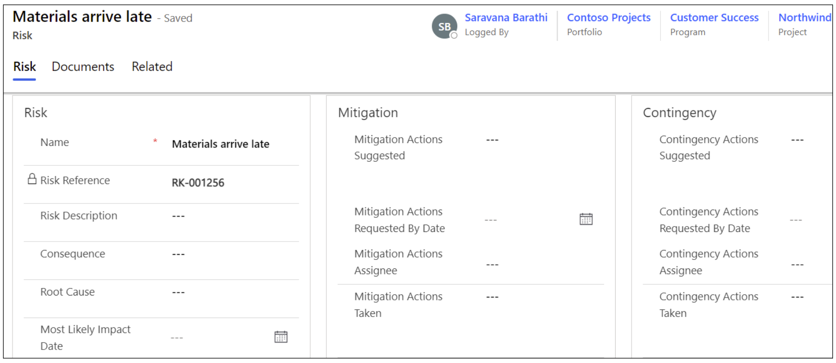
Risks

Project Area Risk reports allow you to quickly see items across projects that have been identified as potential future issues, with Status, Impact, Exposure, and other relevant risk details. There are also various report views available for viewing the risks.



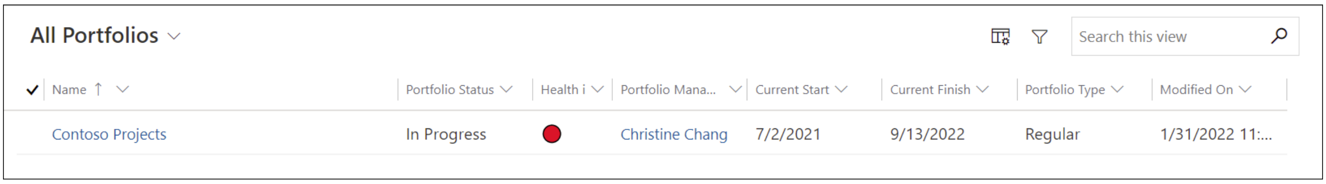
Risks can be easily logged from within project records.



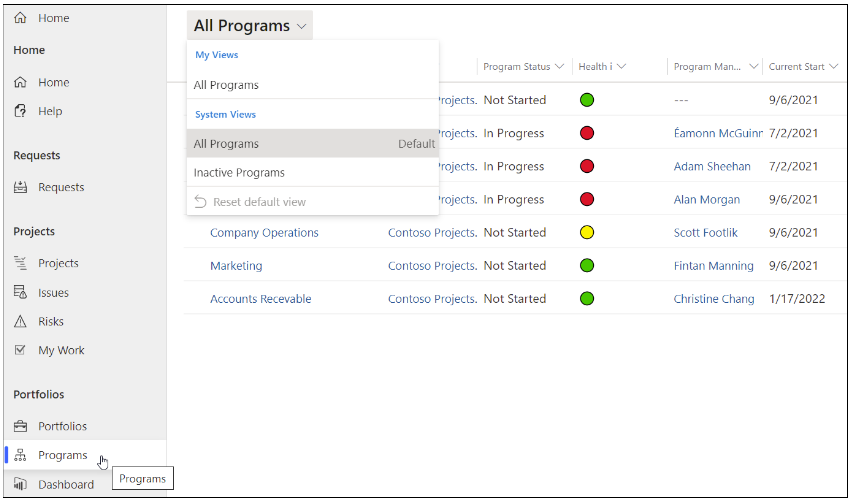


Portfolio Reports

Portfolio reports allow you to see the highest level information about the portfolios that have been created within BrightWork 365.



Program reports display high-level information about the programs that fall under the portfolio(s). There are various views available to focus on programs with different criteria, and new personal views can be created as well.



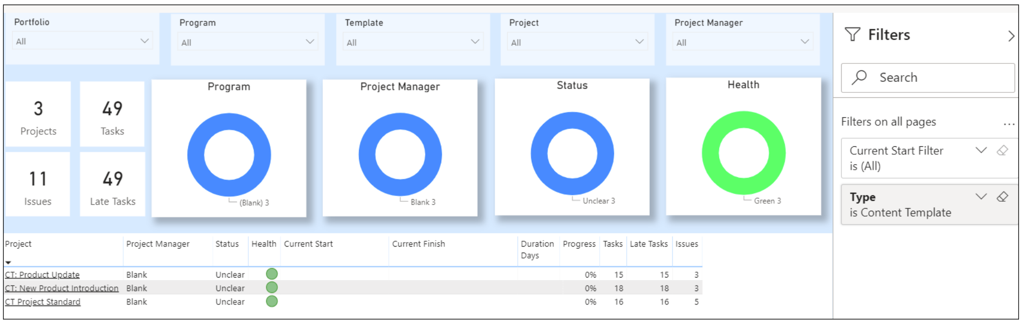
BrightWork 365 Dashboard with Power BI

> **Note** In order to use the BrightWork 365 Power BI reports, users must have a Microsoft Power BI Pro license or an E5/G5 plan (which includes PBI), and at least Viewer permission for the relevant Power BI Workspace.

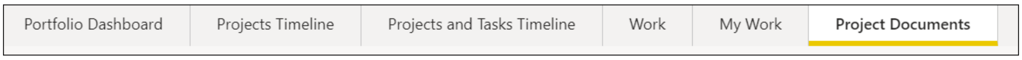
Together BrightWork 365 and the Microsoft Power BI business analytics tool provide exceptional data visualization functionality.

To view the Dashboard and use out of the box reports, click into **Portfolios | Dashboard**. Additional Power BI reports can be added as desired.

The Dashboard includes detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart objects, or with the **Filters** configuration options on the side of the screen.



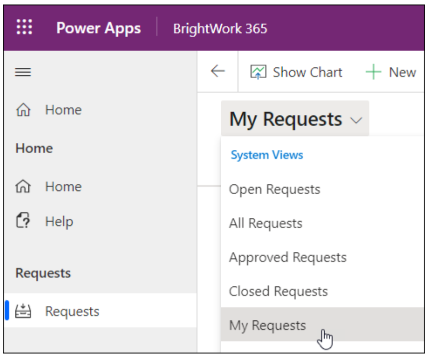
At the bottom of the Dashboard screen there are tabs for additional report focus options.



Project Requests

View Your Submitted Requests

In order to track the progress of requests you've previously submitted, simply click on Requests in the navigation area and depending on your security role you'll either be presented with the **My Requests** view immediately, or you can easily switch to the **My Requests** view from the drop-down list.



Manage Project Requests

As part of your role in program and project management you may be asked to participate in the project request approval process. BrightWork 365 has a robust solution for managing the entire lifecycle of project requests including an approval mechanism. For detailed project request submission and approval details see the Requests section of this knowledge base.

For additional detailed information see our related articles and videos.

System Admin

Who is this Guide for?

This guide is intended primarily for administrators who will be working on BrightWork 365 installations, upgrades and the overall maintenance of the technologies encompassing the solution; these technologies include BrightWork 365, Microsoft 365, and the Microsoft Power Platform.

Prerequisites

We recommend first familiarizing yourself with the various components of the BrightWork 365 solution:

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365

Installation & User Management

Learn how to install and upgrade BrightWork 365

- Product Licenses, Installation & Upgrading.

User Management & Access

- In order for users to be able to access BrightWork 365, the BrightWork User Management setup steps for the Microsoft Power Platform environment and the BrightWork 365 app will need to be completed.
- Learn about the various BrightWork Security Roles that can be applied to your organization's users.
- After granted access, users will log in to BrightWork 365 using the same credentials used to access the organization's Microsoft 365 environment.

Business User - Extended Training

Microsoft Power Platform

The following links provide extensive training for the Microsoft Power Platform solution and is intended for business users, e.g., Project Managers, Marketing, Inside Sales, and Operations staff:

1. Microsoft Power Platform Fundamentals
2. Introduction to Microsoft Power Platform
3. Introduction to Dataverse
4. Introduction to Power Apps
5. Introduction to Power Automate
6. Introduction to Power BI
7. Consume data with Power BI

Power BI Dashboard Interface

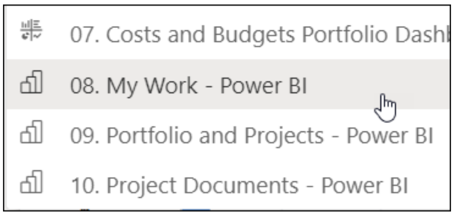
> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Intro to BrightWork 365 Power BI Dashboards

> **Note**
>
> - In order to use BrightWork 365 Power BI Dashboards, users must have a Microsoft Power BI Pro license or E5/G5 plan, and at least **Viewer** permission for the relevant Power BI Workspace.
> - Specific examples of BrightWork 365 Power BI Dashboards can be found throughout this Knowledge Base in relevant articles including Project Documents Dashboard and Work Allocation Reports.

BrightWork 365 and the Microsoft Power BI business analytics tool provide exceptional data visualization functionality.

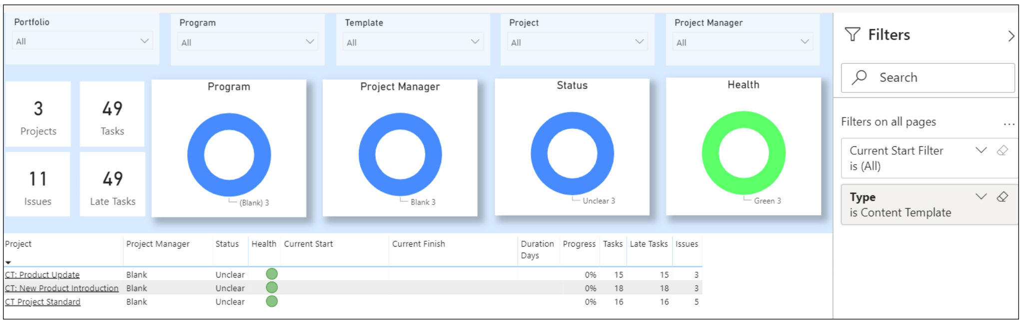
To view Power BI dashboards, click into the Home section of **Main Nav > Dashboards**, and use the Dashboard drop-down to choose the desired Power BI Dashboard. Power BI Dashboards are differentiated from Power Apps Charts in the drop-down by having the words **Power BI** in their titles.



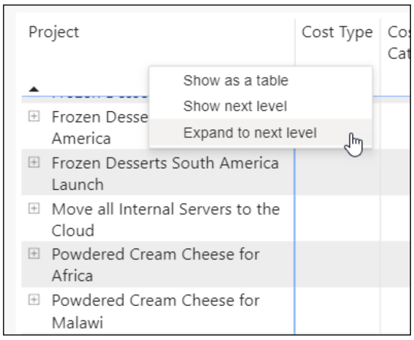
Additional Power BI reports can be added as desired through customization (contact your Customer Success Partner for more information).

Navigating Power BI Dashboards

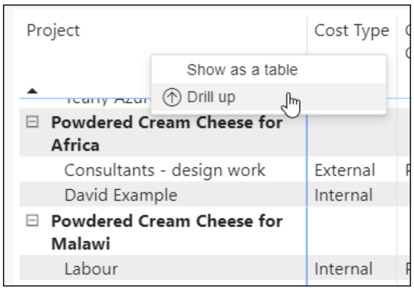
The Power BI dashboards include detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart objects or the checkboxes within an object, or with the **Filters** configuration options on the side of the screen.



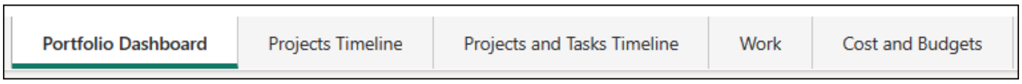
To expand all report list groupings, right-click on the grouped column (e.g.,**Project**) and click **Expand to next level**.



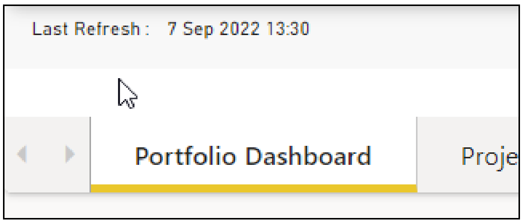
To collapse all report list groupings, right-click on the grouped column (e.g., **Project**) and click **Drill up**.



Along the bottom of Power BI Dashboard screens are tabs for additional report focus options - below is an example from the **Portfolio and Projects** Power BI Dashboard:

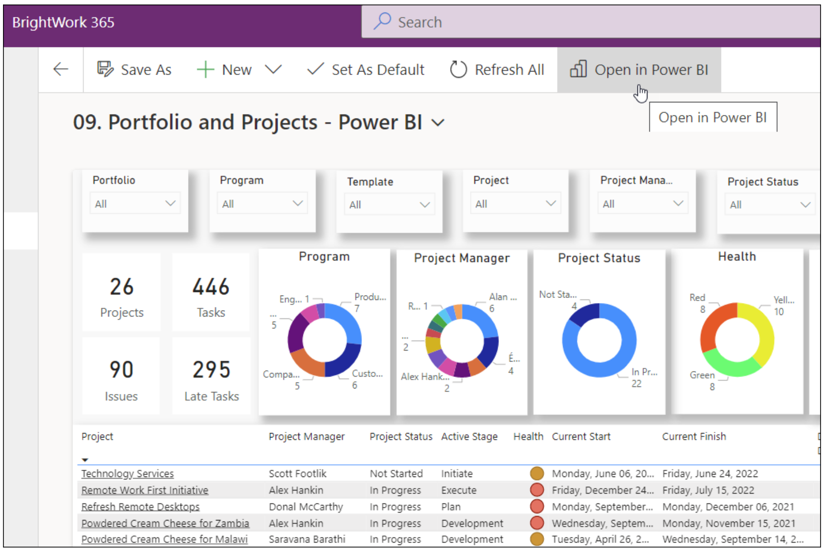


You can view the **Last Refresh** time of reports at the bottom of report pages. BrightWork does not force refreshes after data changes, the refreshes will occur on the schedule your administrator configures in your organization's Power BI admin settings.

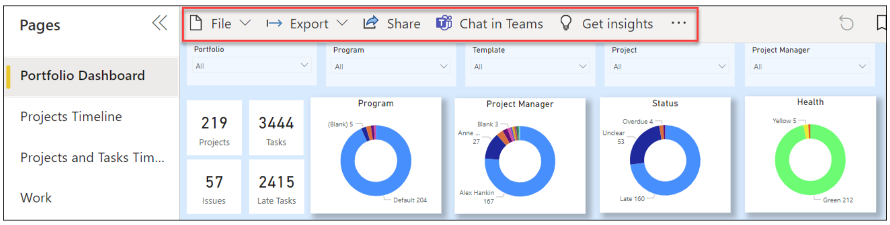


Open in Power BI Service

Microsoft **Open in Power BI Service** offers additional options to interact with BrightWork 365 reports. Users can conveniently access the service by clicking **Open in Power BI** on a BrightWork 365 Power BI dashboard page.



After navigating to the Power BI page, users are presented with menu options along the top of the web page including File (Print, Embed), Export (PDF, PowerPoint), Share (Copy link, Mail, Teams), and Chat in Teams.



For more information see Customize Power BI Dashboards and these Microsoft resources:

- https://docs.microsoft.com/en-us/power-bi/
- https://docs.microsoft.com/en-us/learn/powerplatform/power-bi?WT.mc_id=powerbi_landingpage-docs-link

Customer Success Training Syllabus

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.

We recommend working through the roles in the order presented, starting with the BrightWork Champion role to setup the necessary app elements for further use by the other roles.

1-BrightWork Champion

Approximately 2 hours

BrightWork 365 Overview

- What is a BrightWork Champion?
- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- BrightWork User Management | BrightWork Security Roles Details
- Frequently Asked Questions

Portfolios & Programs

- Use Case Discussion
- Create a Portfolio
- Create a Program
- Exercise

Requests

- Use Case Discussion
- Create a Project Request
- How to Create a Project Without a Request
- Request Approval Stages and Built-in Approval Business Process Flows
- Exercise

Project Standard Template

- Template Details
- Task Management
- Documents

- Status Reporting
- Project Settings
- Exercise

New Product Introduction Template

- Template Details including Differences from Project Standard
- Exercise

Product Update Template

- Template Details including Differences from Project Standard
- Exercise

Work Reports (Issues, Risks, My Work)

- Use Case Discussion
- Work Reports
- Demo
- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Customization

- Customization Overview
- Template Configuration
- Content Template Configuration
- Power BI Customization

Open Forum Q&A

2-Project Manager

Approximately 2 hours

BrightWork 365 Overview

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- Frequently Asked Questions

Requests

- Use Case Discussion
- Create a Project Request
- How to Create a Project Without a Request
- Request Approval Stages and Built-in Approval Business Process Flows
- Exercise

Project Standard Template

- Template Details
- Task Management
- Documents
- Status Reporting
- Project Settings
- Exercise

New Product Introduction Template

- Template Details including Differences from Project Standard
- Exercise

Product Update Template

- Template Details including Differences from Project Standard
- Exercise

Work Reports (Issues, Risks, My Work)

- Use Case Discussion
- Work Reports
- Demo
- Exercise

Interface

- System & Personal Views & Charts

- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A

3-Team Member

Approximately 1 hour

Training Topics

- Navigating BrightWork 365
- Find Assigned Work and Update Work Progress
- Document Management
- Microsoft Teams
- Configure a Personal View
- Exercise

Open Forum Q&A

4-Senior Executive

Approximately 1 hour

BrightWork 365 Overview

- What is BrightWork 365?
- BrightWork 365 Structure
- Technologies Used
- Navigating BrightWork 365
- Frequently Asked Questions

Requests

- Use Case Discussion
- Create a Project Request
- Request Approval Stages and Built-in Approval Business Process Flows

- Exercise

Interface

- System & Personal Views & Charts
- Document Management
- Microsoft Teams
- Microsoft Excel
- Search

Power BI Reports

- Use Case Discussion
- Power BI Reports Overview
- Demo
- Exercise

Open Forum Q&A
