# BrightWork 365 Knowledge Base PDF

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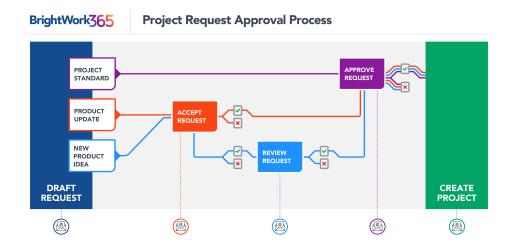
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### **Project Request Approval Process**

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.

Your browser does not support HTML5 video.



#### **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

#### **Details - Request Approval Process**

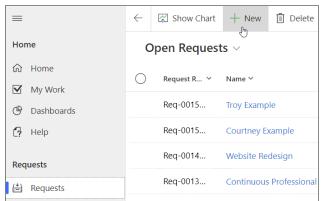
The project management lifecycle typically begins in BrightWork 365 Requests, where a requestor submits a new project request along with details needed for an approval decision. Through workflows, notifications and reports, the request process provides users with an efficient method for starting the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

New Request - Uns	aved	
Project Request 0 Stage Active for less than one mi		
Select Request Type		
Title	* Project Orange	
Request Template	Look for records	Q
	Results from: Request Templates Templates	
	New Product Introduction New Product Introduction	
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.

Select Request Type	
Title	* Project Acme
Request Template	Look for records
	Results from: Request Templates Templates

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.

Project Acme - Saved Request · Product Update ~			Project Acme Name	Draft Request Status
Request 2 Approvals Active for less than one mi	Draft (< 1 Min)	Accepted		Approved
Request Details Project Details Approvals	History Related $\vee$			
Approvals Detail				
Approvals Coordinator*	Request Template*	Auto-create Project		
Jonathan Weisglass (Busy)	🖆 Product Update			
Draft to Accepted				
Approvers	Additional Approval E	mail Text	Approval Start*	
Caitriona O'Connor X			Manual	
Accepted to Approved				
Approvers	Additional Approval E	mail Text	Approval Start*	
Donal McCarthy X			Automatic	

#### 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.

Templates	Project Standard - Unsaved Request Template					
🖶 Request Templates	Details Related $\vee$					
Froject Templates	Details					
Templates (Version 1)	Name * Project Standard					
	Approvals * Look for Approvals Coordinator					
	Coordinator       Approvals Coordinator: Required fields must be filled in.					

#### 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.

Request Details Pro	oject [	Details Approvals	History	Related $\sim$			
Request Details							
🔒 Request Reference		Req-003550		Project Description and Purpose		Out of Scope	
Request Template	*	😫 Product Update		Project Objectives		Support Project Type	
Title	*	Project Acme		Economic Impact		Submit Request	• No

#### **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

Project Acme - Saved Request · Product Update		0		0	Project Acme Name
Request 2 Approvals Active for less than one mi	<	Draft (< 1 Min)		Accepted	
Request Details Proje	ect Details Approvals	History Related	~		
	G				
Project Template	* E Product Update		Project Name		A Project
🖰 Content Template	置 Content Template	from Danista Proj	Project Manager	Anne Wallace (Offline)	🔒 Project Created
읍 Submit Date			Project Sponsor	Alex Hankin (Offline)	
Group Manager			Portfolio	ACME Portfolio	
			Program	烯 ACME Program	
			Project Type	Strategic	

#### 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**.

Project Acme - Saved Request · Product Update ~			Project Acme Name	Draft Request Status
Request 2 Approvals Active for less than one mi	Draft (< 1 Min)	Accepted		Approved
Request Details Project Details Approvals	History Related $\vee$			
Approvals Detail				
Approvals Coordinator*	Request Template*	Auto-create Project		
Jonathan Weisglass (Busy)	Product Update			
Draft to Accepted				
Approvers	Additional Approval E	Email Text	Approval Start*	
Caitriona O'Connor X			Manual	
Accepted to Approved				
Approvers	Additional Approval E	Email Text	Approval Start*	
😡 Donal McCarthy 🗡			Automatic	

#### **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.

Request 2 Approvals Active for 3 hours	Draft	Accepted	Approved (16 Min)
Request Details Project Details	Approvals History Related V		
Approvals Detail			
Approvals Coordinator*	A Request Template*	Auto-create Project	Create Project

#### **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.

Project Orange - Saved Request · Project Request ~		0	Project Orange Approved Name Request Statu
Request 2 ApprovalsActive for 1 minute	Draft	Accepted (< 1 Min)	
Request Details Project Details	Approvals History Related ∨		
Approvals Detail			
Approvals Coordinator*	습 Request Template* (축) Project Request 2 Approval	Auto-create Project	Start Approval

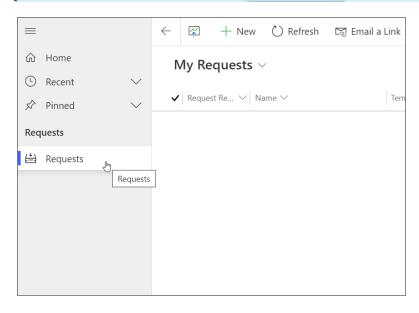
#### History

The History tab displays a history of the approvals process.

Request 2 Approvals Active for 24 hours	Draft (24 Hrs	5)	Acce	epted
Request Details Project Details	Approvals History	Related $\vee$		
Name Y	Stage ∽	Outcome Y	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**

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**

**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

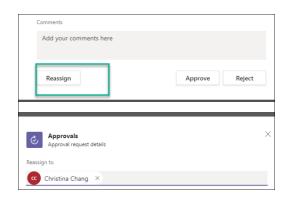
#### **Canceling In Progress Approvals**

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: <u>Proj-001611: Product Update with CT</u>
   Approval <u>Stage: Close Out to Closed</u>
   Approven: 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**

BrightWorkZ65 | Template Spectrum

Brightwork 303		Template Spectrum								
TO MANAGE		LEVEL OF MANAGEMENT								
	LIGHT	LIGHT STANDARD								
New Project Requests	No Approval	2-Stage Approval	Multi-Stage Approval							
Work	My Work	My Work + Actions	My Work + Actions + Resource Utilization Reports							
Protosta	Project Light	Project Standard	Project Structured							
Projects		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		Aicrosoft Teams for Communicatio								
	Sharei	Point Online for Document Manag	gement							
Automation and	SIMPLE	Power Automate for Workflows	COMPLEX							
Integration	SIMPLE	Power BI for Reporting	COMPLEX							
	SIMPLE Power Apps for Custom Forms COMPLEX									

**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.

Project Light - Saved Project Template	
Details Form Configurator Projects Related $\vee$	
✓ Charter	$\checkmark$
~ Status	$\checkmark$
✓ Status Reports	
∽ Team	<b>~</b>
∼ Stages	
∼ Gantt	$\checkmark$
~ My Work	$\checkmark$
~ Documents	$\checkmark$
~ Actions	
~ Issues	
∽ Risks	
~ Costs	

#### 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.

Charter Status	Status Reports Tear	n Stages	Gantt	My Work	Documents	Action	lssues	Risks	Costs	Projec	t Settings
Name	* JW product u	pdate 826	Crea Cha	ate Teams nnel		No			d Charter a tt for Appr		
🖰 Туре	Project			y to New Con plate	tent	Yes	/	A Mov	e to Close	Out	
Template	* 📱 Product U	pdate		et Target Date roject Tasks	s in	No			d Close Ou roval	it for	
A Reference Type	Manual			Health		No					
A Project Creation Method	Project Area		Auto	omatically		140					
Portfolio	* 🖻 Contoso P	rojects									
Program	* 🖧 Marketing										

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.

Widget Project · E		<b>e</b> - Saved k 365 Project ∨											Jonathan Weisglass Project Manager	Main Program Program	 Health	 Current Finish
BrightWork Active for les				Initiate	(< 1 Min)			P	lan			Execut	e		Close Ou	ut
Charter	Status	Status Reports	Team	Gantt	My Work	Documents	Actions	Issues	Project Se	ttings	Approvals	Related $\sim$	/			
Schedule	e						Indic	ators								
Proje	ct Status	* Not Star	ted				н	ealth			Red		Yellow		Gr	een
% Co	mplete	0		0			н	ealth Com	ment							
% Cor Comr	mplete nent						Ti	me			Red		Yellow		Gr	een
A Curre	nt Start						Ti	me Comm	ent							
<b>∂</b> Curre	nt Finish					Ē		cope			Red		Yellow		Gr	een
🔒 Targe	t Start					Ē	So	cope Comr	nent							
🔒 Targe	t Finish															

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**.

+	New Pro	ject Team Me	Ü	Refresh	¢⁄۵	Flow $\checkmark$	:
Finish 🗡	d	Add New Project	Team I	Member			
		Add a related Pro	ject Te	am Membe	er to th	is record.	

#### 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.

Charter	Status	Status Reports	Team	Stages	Gantt	My Work
3. My V	Vork - Ope	en ∨				
System	/iews		ype 🗸	Assignn	nent Sta `	✓ Due Date ∨
2. My V	Vork - All					
3. My V	Vork - Ope	n	ge	In Pro	gress	2/2/2023
1. All W	/ork					
4. My V	Vork - Con	npleted				

**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.

Gantt My Work	Documents Actions	Issues Risks Costs Project Settings
A Reference Type	Automatic	Create Teams Channel   No
A Project Creation Method	Project Area	Copy to New Content Template No
Microsoft Team		Reset Target Dates in all Project Tasks

**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.

-O Plar	1				Execute				Close C
tions	Issues	Risks	Costs	Communi	cations	Project Sett	ings	Approvals	Related
Auto	matic				Create T	eams Channel		No	
					Copy to Template	New Content		No	
					Reset Ta all Proje	rget Dates in ct Tasks		No	
					Set Heal Automat			No	
					Send Sta Approva			No No	

#### **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.

Approv	al 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.

Initiate to Plan
Approval Required
Plan to Execute
Approval Required
Execute to Close Out
Approval Required

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.

Charter	Status	Team	Gantt	My Work	Documents	Project Settir	ngs Audit History	Related $ \smallsetminus $
Audit	Histor	У						
Filter on:	All Fields			~				
⊔∕ <sup>¤</sup> FLOW								
	Changed Dat	e   c	Changed By	Event	: Chan	ged Field	Old Value	New Value
9/	22/2023 5:	02 BV	V365 Adm	in Updat	e Create	Ye	25	No

#### **Project Light**

The elements below are also included in this template:

### Header, Business Process Flow, Project Management

### **Tabs and Charter Columns**

Widget Green - Saved Project · BrightWork 365 P BrightWork 365 Project	roject ~			-0	Project N	an Weisglass Main Progra Manager Program	Health	 Current Finisł
tive for 54 minutes Charter Status Team	Gantt My Work Documents		Approvals	Plan Related $\vee$	Execute		Close Ou	t
Ivalle	* Widget Green	A Portfolio	*	Ain Portfolio	🛆 Created On	9/13/2023 8:33 PM		İ
△ Project Reference Project Manager	Proj-001017  Jonathan Weisglass (Available)	🖰 Program	*	ភិ Main Program	🔒 Source Reques	st		
Project Sponsor	* Jonathan Weisglass (Available)				🔒 Teams Channe	el		
Project Type	Strategic			Priority				
Description								

### Status

Charter <b>Status</b> Te	eam Gantt My Work	Documents Project Settings	Approvals Audit History	Related $\vee$		
Schedule			Indicators			
Project Status	* Not Started		Health	Red	Yellow	Green
% Complete	0	0	Health Comment			
% Complete Comment						
🛆 Current Start						
🔒 Current Finish						
🔒 Target Start		Ē				
🛱 Target Finish		Ē				

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

7th Sept New Project Project · BrightWork 365 Pr			0		tt Manager ACME Program 9/13/2023 Program Health Current Finish
BrightWork 365 Project Active for 11 days	< Initiate (11 D)		Plan	Execute	Close Out
Charter Status Status	s Reports Team Stages Gantt	My Work Documents	Actions Issues Project Setting	gs Approvals Related $\sim$	
Name	* 7th Sept New Project	A Portfolio	* 🖻 Contoso Projects	🛆 Created On	9/7/2023 🛅 7:21 AM
🔒 Project Reference	Proj-002359	🛆 Program	ំ 🖧 ACME Program	A Source Request	
Project Manager	* 😋 Christina Chang			🖰 Teams Channel	
Project Sponsor	• Anne Wallace				
Project Type	Strategic		Priority		
Description			Objectives		

### Status

Schedule				Indicators						
Project Status	* Not Started			Health		Red	Yellow	Green		
% Complete	0	0	-	Health Comment						
% Complete Comment				Time		Red	Yellow	Green		
🔒 Current Start			<b></b>	Time Comment						
Current Finish			Ē	Scope		Red	Yellow	Green		
🔒 Target Start			Ē	Scope Comment						
🖞 Target Finish			<b></b>							

See the Project Status Reporting article for more information.

### **Status Reports**

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.

#### 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.



- The default sorting for the Stages list is by Current Start Older to Newer.
- 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.

BrightWork		<	Initiate (37 H	Hrs)		Plan
Charter	Status	Status Reports	Team Stages	Gantt	My Work	Documents A
Project	Stages					
$\bigcirc$	Curre	∽ Name ∽		Current	tStart ↑ ∽	Current
	•	Initiate		6/13/2	022	6/14/20
		Plan		6/15/2	022	6/15/20
	0	Execute		6/16/2	022	6/16/20

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

000	▼ Scale-Up	Scale-Up 1	16%
***	Scale-Up - Task-1	Scale-Up - Task-1 🕞	1
**	Scale-Up - Deliverable-1	Scale-Up - Deliverable-1 🔶	ŀ
000	Scale-Up - Deliverable-2	Scale-Up - Deliverable-2	→

- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information.

cale-Up roject Task · Project Sta	age $\vee$			Scale Name
roject Stage				
Name	* Scale-Up	Current Start	6/2/2021	
A Progress	In Progress	🖰 Current Finish	6/4/2021	
🖞 Project	* 🚆 JW Project 910	🔒 Target Start	6/2/2021	
Project Task Type	Stage	🛆 Target Finish	6/4/2021	
Description		% Complete	<b></b> 16	

### 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.

Issue	Not Started Powdered Cream Cheese for Africa Product Operations									
Issue										
Reference										
Name	* Delay in onboarding suppliers									
A Issue Reference	IS-001181									
A Portfolio	🛱 Contoso Projects									
A Program	品 Product Operations									
A Project	E Powdered Cream Cheese for Africa									
Escalation	Program   ~									
	Select Project Program Portfolio									

#### **Project Structured**

The elements below are included in this template:

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

Widget Blue - Save Project · BrightWork 3				6				onathan Weisglass roject Manager	Main Program Program		 Current Finish
rightWork 365 Project ctive for 34 minutes	<	Initiate (34 Min)		Plan			Execute			Close Out	
Charter Status St	tatus Reports Team	Stages Gantt	My Work Documents	Actions Is	sues Risks	Costs	Communications	Project Settings	Approvals	Related 丶	/
Name	* Widget Blue		🗄 Portfolio	* 🖻 Main	Portfolio		☐ Created	On	9/13/2023		
A Project Reference	Proj-001018		🔒 Program	* 🖧 Main	Program			٤	8:49 PM		
Project Manager	* 🥊 Jonathan W	Veisglass (Available)					🔒 Source F	Request			
Project Sponsor	* 🫃 Jonathan W	Veisglass (Available)					🛆 Teams C	hannel			
Project Type	Strategic				Priority						
Description					Objectives						
Exit Criteria					Overall Proje	ct Risk					
Approval Requirements					Economic Im	pact					
Out of Scope											

#### Status

Charter Status S	Status Reports Team Stag	ges Gantt My Work	Docur	nents Actions Issues	Risks Costs	Communication	s Project Settings A	Approvals Related $\vee$
Schedule				Indicators				
Project Status	* Not Started			Health		Red	Yellow	Green
% Complete	<b>[</b>	0	-	Health Comment				
% Complete Comment				Cost		Red	Yellow	Green
🗄 Current Start			<b></b>	Cost Comment				
🔒 Current Finish				Time		Red	Yellow	Green
A Target Start				Time Comment				
A Target Finish			Ē	Scope		Red	Yellow	Green
5				Scope Comment				

See the Project Status Reporting article for more information.

#### **Status Reports**

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.

### 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.

Task Information											
GENERAL	DEPENDENCY	RESOURCES	TASK DETAILS								
Task Type		ID									
Stage		▼ 1,8	29.00								

- The default sorting for the Stages list is by Current Start Older to Newer.
- 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.

BrightWorl Active for 3		<	Initiate (37 H	Hrs)		Plan
Charter	Status	Status Reports	Team Stages	Gantt	My Work	Documents
Project	Stages	✓ Name ✓		Current	t Start ↑ ∽	Current
	•	Initiate		6/13/2		6/14/2
		Plan		6/15/2	2022	6/15/2
		Execute		6/16/2	2022	6/16/2

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

0 0 0 0 0 0	▼ Scale-Up	Scale-Up	16%
**	Scale-Up - Task-1	Scale-Up - Task-1 🛶	Ч
**	Scale-Up - Deliverable-1	Scale-Up - Deliverable-1	
** ** **	Scale-Up - Deliverable-2	Scale-Up - Deliverable-2	<b>F</b>

- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information.

	<b>cale-Up</b> roject Task · Project Sta	ige ~				Scale- Name
P	roject Stage					
	Name	*	Scale-Up	🛆 Current Start	6/2/2021	
	A Progress		In Progress	🛆 Current Finish	6/4/2021	
	🛆 Project	*	JW Project 910	🖞 Target Start	6/2/2021	
	Project Task Type		Stage	🔒 Target Finish	6/4/2021	
	Description			% Complete	16	

### 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.

Delay in onboarding suppliers										
Not StartedPowdered Cream Cheese for AfricaProduct OperationsIssue StatusProjectProgram										
lssue										
Reference										
Name *	Delay in onboarding suppliers									
A Issue Reference	IS-001181									
🛆 Portfolio	合 Contoso Projects									
🛆 Program	쁆 Product Operations									
🛆 Project	Powdered Cream Cheese for Africa									
Escalation	Program   🗸									
	Select Project									
	Project Program									
	Portfolio									

### 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.

Manufactured Risk	d components	arrive late	
<b>Saravana Barathi</b> Logged By	Contoso Projects Portfolio	Product Operations Program	Powdered Cre Project
Risk			
🛆 Exposure	0		
Risk Status	Identifi	ed	
Risk Monitor			
Escalation	Project		~
Risk Manager Rating	nentSelec Project Progra Portfoli	m	

### 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.

#### **New Product Introduction**

The elements below are included in this template:

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

Vidget Indigo - Saved roject · New Product Introd			0			ject Manager	Main Program Program	Health Current Fin
tive for less than one mi	Business Case (< 1 Min	n) Devel	lopment	Scale-U	lp	Launch		Standard Product
harter Status Status	Reports Team Stages Ganti	t My Work Documents	Actions Issues	Risks Costs	Communications	Project Settings	Approvals	Related $\lor$
Name *	Widget Indigo	A Portfolio	* 🖻 Main Portfolio		☐ Created C	9 <u>,</u> )n	/13/2023	Ē
🛆 Project Reference	Proj-001019	🖰 Program	* 🖧 Main Program			g	:31 PM	
Project Manager *	Jonathan Weisglass (Available)				🔒 Source Re	quest	-	
Project Sponsor *	Jonathan Weisglass (Available)				A Teams Ch	annel	-	
Project Type	Strategic		Object	tives				
Description			Econo	mic Impact				
Priority			Out of	fScope				
Overall Project Risk			Exit Cr	iteria				
Approval Requirements								

#### Status

Charter Status	Status Reports Team	Stages Ga	antt My Work	Documents	Actions	Issues	Risks	Costs	Communications	Project Settings	Approvals	Related $ \smallsetminus $	
Schedule				Inc	licators								
Project Status	* Not Started				Health			F	Red	Yellow		Green	
% Complete	0	0		-	Health Comme	ent							
% Complete Comment					Cost			F	Red	Yellow		Green	
🔒 Current Start			I	titi (	Cost Comment	t							
🛆 Current Finish			I		Time Time Commen	t		F	Red	Yellow		Green	
🔒 Target Start			I	Ē									
A Target Finish			I		Scope Scope Comme	nt		F	Red	Yellow		Green	

See the Project Status Reporting article for more information.

#### **Status Reports**

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.

#### **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.

Task Information										
GENERAL	DEPENDENCY	RESOURCES	TASK DETAILS							
Task Type		ID								
Stage		▼ 1,83	29.00							

- The default sorting for the Stages list is by Current Start Older to Newer.
- 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.

BrightWork		<	Initiate (37 H	Hrs)		Plan
Charter	Status	Status Reports	Team Stages	Gantt	My Work	Documents A
Project	Stages	/				
0	Curre N	Name		Current	t Start ↑ ∽	Current I
	•	Initiate		6/13/2	022	6/14/20
		Plan		6/15/2	022	6/15/20
	0	Execute		6/16/2	.022	6/16/20

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

000	▼ Scale-Up	Scale-Up	16%
**	Scale-Up - Task-1	Scale-Up - Task-1	▶
**	Scale-Up - Deliverable-1	Scale-Up - Deliverable-1	<b>F</b>
**	Scale-Up - Deliverable-2	Scale-Up - Deliverable	-2

- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information.

Scale-Up Project Task · Project St	age $\vee$			Scale Name
Project Stage				
Name	* Scale-Up	Current Start	6/2/2021	i
A Progress	In Progress	🛆 Current Finish	6/4/2021	
A Project	* 🚊 JW Project 910	🖰 Target Start	6/2/2021	
Project Task Type	Stage	🖰 Target Finish	6/4/2021	
Description		% Complete	16	

### 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.

Delay in onboarding suppliers					
Not Started         Powdered Cream Cheese for Africa         Product Operation           Issue Status         Project         Program					
lssue					
Reference					
Name *	Delay in onboarding suppliers				
☐ Issue Reference	IS-001181				
A Portfolio	🖻 Contoso Projects				
🛆 Program	유 Product Operations				
☐ Project	Powdered Cream Cheese for Africa				
Escalation	Program   ~				
	Select Project				
	Program				
	Portfolio				

## **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.

Manufacture Risk	d components	arrive late	
<b>Saravana Barathi</b> Logged By	Contoso Projects Portfolio	Product Operations Program	Powdered Cro Project
Risk			
🛆 Exposure	0		
Risk Status	Identifie	ed	
Risk Monitor			
Escalation	Project		$ \sim$
Risk Manager Rating	mentSelec Project Program Portfoli	n	

## 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.

#### Product Update

The elements below are included in this template:

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

Vidget Yellow - roject · Product Upd	date $\vee$			Jonathan Weisglass Project Manager	Main Program             Program         Health         Current Fin
oduct Update tive for 1 minute	< Chartering (1 Mi	n)	Execution	Close Out	Closed
harter Status S	Status Reports Team Stages Gantt N	Ay Work Documents Actions	Issues Risks Costs Communicatio	ons Project Settings Approvals Related $\sim$	
Name	* Widget Yellow	Date Due		☐ A Created On 9/13/2023	🗐 9:35 PM
A Project Reference	Proj-001020	🔒 Portfolio	* 🖻 Main Portfolio	🛆 Source Request	
Project Manager	* Jonathan Weisglass (Available)	🔒 Program	* 🛱 Main Program	🛆 Teams Channel 🛛	
Project Sponsor	* 🕡 Jonathan Weisglass (Available)	Location			
Group Manager					
Project Type	Strategic		Priority		
Description			Objectives		
Exit Criteria			Out of Scope		
Approval Requirements			Economic Impact		
			Overall Project Risk		

## **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**.

=	$\leftarrow$ $\blacksquare$ Show Chart $+$ New $أ$ Delete
People	Local Business Owner Teams $\sim$
A Users	
<sup>4</sup> X <sup>4</sup> Dynamics Teams	
Accounts	
A Contacts	Senior Managers
Other	
📫 Microsoft Teams	
A Locations	

#### **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**.

=			$\leftarrow$	🕅 Sh	ow Cha	rt -	+ New
ഹ	Home		Act	tive	Locat	ions	5 ~
Ŀ	Recent	$\sim$					
Ż	Pinned	$\sim$	✓ N	lame	1 ~		
Sec	urity		В	ostor	n		
8	Users		D	ublin			
<sup>ቀ</sup> ድ <sup>ል</sup>	Teams						
Tem	nplates						
	Templates						
Ē	Forms						
Oth	er						
uji	Microsoft Team	าร					
ዱ	Locations						
			All	#	А	В	С
A	Admin	$\diamond$	1 - 2 of 2	2			

## Status

Charter Status S	status Reports Team Stages Ga	ntt My Work Documents Actio	ns Issues Risks Cos	ts Communications Project Se	ettings Approvals Related $\vee$	
Schedule			Indicators			
Project Status	* Not Started		Health	Red	Yellow	Green
% Complete	0		Health Comment			
% Complete Comment			Cost	Red	Yellow	Green
🖰 Current Start			Cost Comment			
🛆 Current Finish			Time	Red	Yellow	Green
🛆 Target Start		Ē	Time Comment			
🔒 Target Finish			Scope Scope Comment	Red	Yellow	Green

See the Project Status Reporting article for more information.

## **Status Reports**

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.

## **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.

Task Information						
GENERAL	DEPENDENCY	RESOURCES	TASK DETAILS			
Task Type Stage		ID ▼ 1,8	29.00			

- The default sorting for the Stages list is by Current Start Older to Newer.
- 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.

BrightWork		<	Initiate (37 F	Hrs)		Plan
Charter	Status	Status Reports	Team Stages	Gantt	My Work	Documents A
Project	Stages					
0	Curre N	∽ Name ∽		Current	Start ↑ ∽	Current I
	•	Initiate		6/13/20	022	6/14/20
		Plan		6/15/20	022	6/15/20
	0	Execute		6/16/20	022	6/16/20

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

0 0 0 0 0 0	▼ Scale-Up	Scale-Up 169	%
**	Scale-Up - Task-1	Scale-Up - Task-1	
**	Scale-Up - Deliverable-1	Scale-Up - Deliverable-1 🛶	٦
* * * * * *	Scale-Up - Deliverable-2	Scale-Up - Deliverable-2 🖵	•

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

Scale-Up Project Task · Project Sta	ge $\vee$			Scale- Name
Project Stage				
Name	* Scale-Up	🔒 Current Start	6/2/2021	
A Progress	In Progress	🛆 Current Finish	6/4/2021	
🛆 Project	* 🗮 JW Project 910	🛆 Target Start	6/2/2021	
Project Task Type	Stage	🛆 Target Finish	6/4/2021	Ē
Description		% Complete	16	

# 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.

Delay in onboarding suppliers					
Not StartedPowdered CreationIssue StatusProject	am Cheese for Africa Product Operations Program				
lssue					
Reference					
Name *	Delay in onboarding suppliers				
☐ Issue Reference	IS-001181				
A Portfolio	🖻 Contoso Projects				
🛆 Program	윪 Product Operations				
≙ Project	Powdered Cream Cheese for Africa				
Escalation	Program   ~				
	Select				
	Project Program				
	Portfolio				

## **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.

Manufactured components arrive late					
Saravana Barathi Cont Logged By Portfo	t <b>oso Projects</b> blio	Product Operations Program	Powdered Cre Project		
Risk					
🛆 Exposure	0				
Risk Status	Identifi	ed			
Risk Monitor					
Escalation	Project		~		
Risk Management Rating	Selec Project Progra Portfol	m			

## 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.

## **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.

New Project - Unsaved	
New Project Active for less than one mi	
General	
Name * Project Orange	
Project Template * Look for records	
Content Template	
The newer version Project Templates can be identified Templates by icon .	d by icon 🗾 , and older version Project

**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.

w Project ect · New Project uct Support e for less than one r	•	Execution	Close Out	Closed
eral				
Name	* Covid Spray	🛆 Created On	🛅	
Template	* 📱 New Product Idea	Portfolio	* 🖻 Strategic Portfolio	
		Program	* 🛱 Strategic Program	
		Project Manager	* Anne Wallace X	
		Project Sponsor	* A Christine Chang X	
		Create	No No	

- 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.

BrightWork Active for 1		<		Initiate	(1 Hrs)				)			Execute
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Documents	Actions	lssues	Risks	Costs	Communications
Project	out for Ap	proval										
								eas of this ly as the cu approval				

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.

Initiate to Plan
Approval Required
Plan to Execute
Approval Required
Execute to Close Out
Approval Required

BrightWork Project Active for 3 months	<	Initiate	Plan	Execute (3 Mo)	Close Out

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

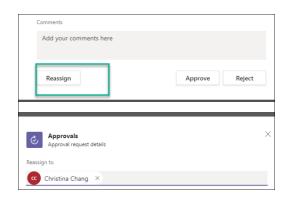
#### **Canceling In Progress Approvals**

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: <u>Proj-001611: Product Update with CT</u>
   Approval <u>Stage: Close Out to Closed</u>
   Approven: 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

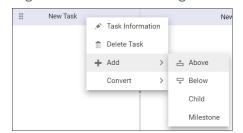
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Overview Demo	Extra Features				
	Your browser does not support HTML5 video				

harter	Status Status Reports Tear	n Stages	Gantt N	ly Work Docu	iments	Actions	Issues	Risks	Costs	Communicati	ons Pi	oject Sett
+ Add	d 🗊 Expand all 🗊 Collapse all	⊕ Zoom in	୍ Zoom d	ut 🛛 💱 Zoom to f	it 🕓 < F	Prev Time	() Next	Fime >	C Refresh	$\equiv$ Baseline	🖂 Pdf	🕮 Excel
	Task Name =	Feb, 22			Mar,	22						Apr, 22
	rask name ÷	8	13	20	27		6		13	20	27	
	<ul> <li>Project Summary</li> </ul>	Project Su				35%						
::	<ul> <li>Business Case</li> </ul>	Business		1	00%							
::	Business Case - Deliverable	Business	100%	Anne Wallace								
	Business Case Task- 1	Busines	s Case Task- 1	► 100% J	im Corbin							
	Business Case - Deliverable	Busin	ess Case - Deli	verable - 2 🕨	00%	Dan Bacon	, Éamonn M	AcGuinne	ess			
:	- Development			Developm	ient	20%						
	Development-Task-1			Development-Tas	ik-1 🕨	20%					Éamonn N	IcGuinness

## **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.

out	🕄 Zoon	n to fit 🔇	) < Prev Tim	ne 🕓 N	lext Time >		resh ≡ ∫m	Baseline	🕒 Pdf
		Jul, 22				Aug, 22	0	esh Gantt	
19	26	3	10	17	24	31	7	14	21
			31%						

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.

	Collapse all	⊡ Indent	⊡ Outdent	©, Zoom in	Q. Zoo	m out 🖸 Zooi	m to fit	() < Prev Time	③ Next Time >	C Refresh	= Baselin	e 🖂	Pdf	X) E
ik Name		Duration	Ŧ	Current Start	-	Current Fini	Ŧ	Target Start	⇒ Target Fini	sh <del></del>	Percent Co	Ju 1:	1, 22 3	19
Business Case	Task- 1	6 days		8/8/2022		8/15/2022		8/8/2022	8/15/202	2	0			
Business Case	- Deliverable - 2	22 days		8/16/2022		9/14/2022		8/16/2022	9/14/202	2	0			
Development		7 days		9/15/2022		9/23/2022		9/15/2022	9/23/202	2	0			
Development-T	ask-1	5 days		9/15/2022		9/21/2022		9/15/2022	9/21/202	2	0			
Development -	Deliverable - 1	ា day		9/22/2022		9/22/2022		9/22/2022	9/22/202	2	0			
Development -	Deliverable-2	1 day		9/23/2022		9/23/2022		9/23/2022	9/23/202	2	0	-		

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

New Task			New Ta
	💉 Task Informa	ition	
	🗂 Delete Task		
	🕂 Add	>	
	Convert	>	To Milestone

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.

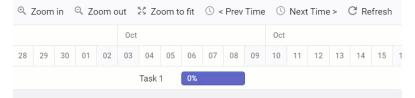
To clearly see which tasks are completed and which are not, strikethrough is applied for tasks on the grid and on the Gantt when % Complete is 100; the strikethrough is removed when % Complete is less than 100.



# **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.

Task Info	ormation			×
GENERAL	DEPENDENCY	RESOURCES	TASK DETAILS	
				🕂 Add 🛅 Deleti
ID	Name		Туре	Offset
			Finish-Start	▼ 0 days
	00001833-Busine	ss Case		
	00001834-Busine	ss Case		
	00001836-Busine	ss Case		
	00001839-Scale-0	Jp - Deliv		SAVE CANCEL

#### **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.

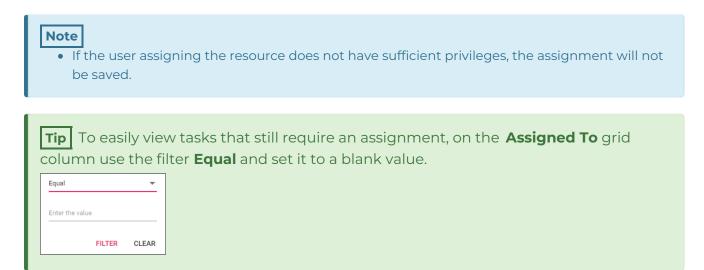
**Note** A successor milestone task that has a Finish-Start relationship with its predecessor will have a Start Date and Finish Date that is equal to the Finish Date of the predecessor.

**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.



#### 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.

Task Information										
GENERAL	DEPENDENCY	RESOURCES	TAS	DETAILS						
	Name		÷	Unit						
	Alex Hankin			25						
	Anne Wallace			50						

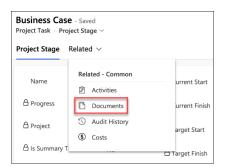
• When viewing the Resource Utilization Power BI reports, the Task Unit % for a resource that was entered in the Gantt or Assignment will be applied to the reports, which account for the variation of % utilization. For example, a Monday to Friday task (equal to 40 hours of work), with a Task Unit % of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

		$\bigcirc$	$\bigcirc$	$\bigcirc$
BrightWork Project Active for 81 days	< Initiate (81 D)	Plan	Execute	Close Out

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.

Initiate - Saved         Project Task - Project Stage ~         Initiate   Strategic Portfolio   Program         Project Stage         Related	Deliverable 1 - Saved       Project Task · Project Deliverable ∨       Deliverable 1     Strategic Portfolio       Name     Project Standard with area of service       Peliverable     Related
✓ Assignee ↑ ✓	No data available.
Deliverables     + New Project Task <ul> <li>Name ×</li> <li>Progress ×</li> <li>Target Start ×</li> <li>Target Finish ×</li> <li>Current Start 1 ×</li> <li< th=""><th>Documents     + New ∨ T Up       ✓     Name ∨       File Size ∨     File Type ∨       Author ∨</th></li<></ul>	Documents     + New ∨ T Up       ✓     Name ∨       File Size ∨     File Type ∨       Author ∨

**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.

lew Produ active for 7	<b>ict Introdu</b> months	iction	<	Bu	siness Case			Deve	lopment (7 N	10)
Charter	Status	Status	Reports	Tean	n Stages	Gantt	My V	Vork [	ocuments	Actions
<	+ Add	🖍 Edit	🗇 Delete	e ⊕	Expand all	Collaps	se all	Indent	🔄 🖻 Outden	t 🔍 Zoo
	Task Name			-	Feb, 22				Ma	ar, 22
	Task Name			-	8	13		20	27	7
	<ul> <li>Projec</li> </ul>	t Summar	у		Project Su.					35%
	▼ Busi	ness Case	9		Business				100%	
	Bus	siness Cas	se - Deliveral	ble	Business	100%	A	Anne Walla	се	
	Bus	siness Cas	se Task- 1		Busine	ess Case Tas	sk- 1 🔶	100%	Jim Corbin	ı
	Bus	siness Cas	se - Deliveral	ble	Bus	iness Case -	Delivera	ble - 2 🖵	100%	Dan Baco

**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.

Task Name =	Duration	Jul, 21			Aug, 21				
	Duration	11	18	25	1	8			
🕶 Project 🔓	75 days	P		18	8%				
▼ Business Case	51 days	В	29%						
Business Case - Deliverable	16 days	В		75%					
Business Case Task- 1	6 days		Busir	ness Case Ta	ask-1 🔶	50%			

## **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.

**	▼ Scale-Up
	Scale-Up - Task-1
	Scale-Up - Deliverable-1
	Scale-Up - Deliverable-2

## **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.

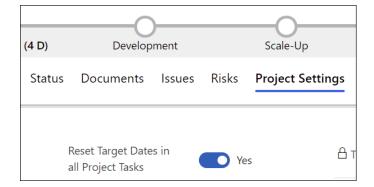
⊕ Zo	🔍 Zoom in 🔍 Zoom out 🔣 Zoom to fit 🕓 < Prev Time 🕓 Next Ti												ie >
23, 202	21					May 30, 2021						Jun	
24	25	26	27	28	29	30	31	1	2	3	4	5	б
a 100%													
à	100%												
ss Cas	e Task	-1	100%										

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.

+ Add	ollaps	e all	Ð	Zoom	in	Q Zo	oom o	out	\$\$ Zo	oom t	o fit	() <	< Pre
Task Name	Sep							Sep	D				
lask Nalle	05	06	07	08	09	10	11	12	13	14	15	16	17
✓ Initiate							Initiat	е	0%				
Get Budget Approval				Ge	et Bud	get Aj	oprova	al	0%				
Get Resource Approval	Get Resource Approval							al	0%				
	Plan						n	0%					
Gantt v1	Gantt v1							1	0%				
Update Budget	Update Budget							et	0%				
Gantt v2					G	antt v	2	0%					
► E													

## **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.

Business Case - Task 2	Business Case - Task 2 🔶	Dan Bacon
✓ Development	Deve	lopment 0%
Development - Task 1	Development	- Task 1 🔶 0% Jim Corbin
Development - Deliverable 1	Develop	ment - Deliverable 1 🔶 🕫 Jim Corbin
▼ Scale-Up		Scale-Up
Scale-Up - Task 1		Scale-Up - Task 1 🔶 👀 💦 Anne Wallace
Scale-Up - Task 2		Scale-Up - Task 2 🔶 🕅 🛛 Anne Wallace

# **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.

Charter	Status	Team	Gantt	My Wo	ork Documer	nts	Project Settings	Appro	vals Rela	ted $\vee$					
<	+ Add	⊡ Expa	nd all 🖻	l Collaps	e all 🔍 Zoom	in Q	, Zoom out 🛛 💱 Z	loom to fit	() < Prev	Time 🕓	Next Time >	C Refre	sh $\equiv$ Baseline	∿ Cri	tical Pa
	Task Name	е		Ŧ	Current Start	=	Current Finish	-	Duration	Ŧ	Percent Co	-	Assigned To	.02:	2023 2 Jan 20:
	✓ Initiate	9			11/14/2022		11/17/2022		4 days		12				
H	Iden	tify Stakeh	olders		11/14/2022		11/14/2022		1 day		50		Jim Corbin	or	pin
:	Draft	t Charter			11/15/2022		11/17/2022		3 days		0		Jim Corbin	Co	bin

- 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.

<	+ Add	■ Expand all	🗊 Collar
	Task Nam	e>	↑ <del>.</del>

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

+	Add  Expand all	Collapse all	Q Zoom in	ම, Zoom	out 🛛 💱 Zoom to fit	🕓 < Prev Time	🕓 Ne	ext Time > 📿 Refresh	$\equiv$ Baseline	🕒 PDF 🖾 Excel 📄
	Task Name	Ŧ	Current Start	÷	Current Fini ÷	Duration	Ŧ	Percent Co 👳	Assigned To	÷
::	<ul> <li>Initiate</li> </ul>		10/17/2022		11/16/2022	23 days		33		

- 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 <u>By</u> 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	
э	Item Order Decimal	Ρ
	1000000	J
	2000000	J
	3000000	J
	4000000	J
	500000	J
	600000	J
	700000	J
	800000	Ľ

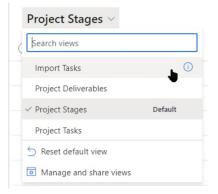
- 7. Enter the **Project, Program and Portfolio** names exactly as they appear in BrightWork 365. Each of these names must be unique in the environment if they are not unique, the import will fail.
- 8. Select all the rows that you added.

	A	В	с	D	E	F	G	н
1	Name	Project Task Type	Duration	Is Milestone	Item Order Decimal	Project	Program	Portfolio
	Project Summary 5101048	Task	1	No	1000000	JW Global Bank Upgrade	Customer Success	Contoso
	Initiate	Stage	1	No	2000000	JW Global Bank Upgrade	Customer Success	Contoso
	Initiate 1	Task	5	No	3000000	JW Global Bank Upgrade	Customer Success	Contoso
	Initiate 2	Task	4	No	4000000	JW Global Bank Upgrade	Customer Success	Contoso
	Initiate 3	Task	4	No	500000	JW Global Bank Upgrade	Customer Success	Contoso
	Plan	Stage	1	No	6000000	JW Global Bank Upgrade	Customer Success	Contoso
8	Plan 1	Task	3	No	700000	JW Global Bank Upgrade	Customer Success	Contoso
	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	1000000	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

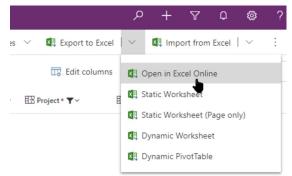
- 9. Right-click on the selected rows and click Copy.
- 10. Save the spreadsheet.
- 11. Click the **Stages** tab on a project and then click **See all records** on the three-dot menu.

Initi	ate (35 Mir	1)			Plan				Execute			Close Out	
n Stages	Gantt	My Work	Documents	Actions	Issues	Risks	Costs	Communications	Project Settings	Approvals	Relate	d $\sim$	
									+	New Project	īask (	⊖ Refresh 🖉 Flow	~
		c	Current Start 1 🗸			Curr	ent Finish	/	Target Start 🗸		1	Run Report	>
											¢⊞	Excel Templates	>
											1	Export Project Tasks	>
											<u>_</u> =	See all records	
											8	Show As	>

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.



Track Progress Cancel

- 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**

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Your browser does not support HTML5 video.

## **Status Tab**

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

New Product Introduction Active for 23 days	K Business Case (23 D)	Development	Scale-Up	Launch	Standard Product
Charter <b>Status</b> Sta	tus Reports Team Stages (	Gantt My Work Documents	Actions Issues	Risks Costs Co	mmunications …
Schedule Status		Ir	ndicators		
Project Status	In Progress		Health	Red	Yellow Green
% Complete	50		Health Comment		
% Complete Comment			Cost	Red	Yellow Green
🛆 Current Start	8/22/2022		Cost Comment		
🛆 Current Finish	10/20/2022		Time	Red	Yellow Green
🛆 Target Start	8/22/2022		Time Comment		
🖰 Target Finish	10/20/2022	Ē	Scope	Red	Yellow Green
			Scope Comment		

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.

Projec	t Settings Related	
	Create Teams Channel	No No
	Copy to New Content Template	No No
	Reset Target Dates in all Project Tasks	No
	Set Health Automatically	No

**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.

Email Report to Sponsor	Yes
Include Additional Email Recipients	Yes
Additional Email Recipients	
Complete Status Report	Yes

**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**

Ν	New Status Report - Unsaved							
Ge	General							
	Significant Challenges							
	Upcoming Focus							
	Email Report to Sponsor	No No						
	Include Additional Email Recipients	Yes						
	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

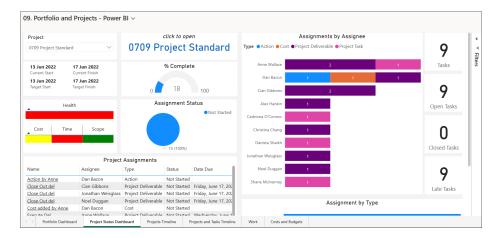
• You can only include additional users that are part of the BrightWork 365 environment.

- 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 Bl**

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.

Quick Create: Action		×
Name	*	
Action Type	Action	$ $ $\vee$
Action Requested	Select Action Assumption	
Assigned To	Decision Dependency	
Priority	Change Other	
Due Date		

## **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.

Budgets	
Approved Budget	\$100,000.00
Budget Assigned	\$10,000.00
Last updated:	3/1/2022 9:14 AM
	Recalculate

- 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 Items				
				+ New Cost :
✓ Name ∽	Cost Type $\smallsetminus$	Vendor $\checkmark$	Cost	Add New Cost
Third party analysis	Capex	Acme corp	In Pi	Add a related Cost to this record.

### **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.

Templates	All Accounts ~
Templates	✓ Account Name ∨
E Forms	Vendor ABC
People	International Corp
A Users	XYZ Corp
ትድት Dynamics Teams	ABC Corp
Accounts	Dan Vendor
	Acme Corp

- 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.

Communications	Project Settings Related
	+ 7 ፲≣ :
	窗 Activity
	Appointment     Email
	🛞 Phone Call
	👼 Note

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

Timeline	+_m7 I≣ :
$\wp$ Search timeline	Create a timeline record.
Enter a note	Appointment
	🖂 Email
	🕓 Phone Call
	👼 Note
	0neNote

# 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:

Communications	Project Settings Related
	+ ⊽ ፲≣ :
	ලි Activity
	🛗 Appointment
	🖾 Email
	🗞 Phone Call
	👼 Note
	🖬 OneNote 🔚

Or,

click on the .one file within the Documents tab:

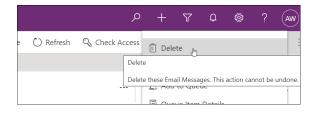
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Do	cuments
Docun	nents							
0	Name Y					File Siz	e∨	File Type 🌱
	💼 Proje	ct-Frozen Desserts f	or South A	America-Sta	atus	29,7	709	docx
	🖬 Visito	or Info.docx				278,8	392	docx
	Froze	en Desserts for South	n America.	onetoc2		4,6	532	onetoc2
$\bigcirc$	Froze	en Desserts for South	n America.	one		12,9	945	one

## **Communications Tab - User Actions**

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

S Phone Call from Anne Wallace	8, v <u>p</u> e İ
Call to vendor	Ŀ
Quick call to confirm all was on schedule.	

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**

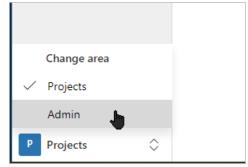
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf ®), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web,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

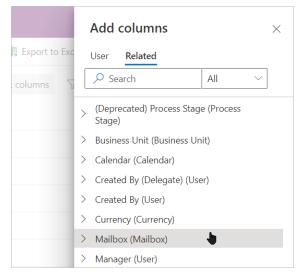
1. Click Projects in the bottom left of the page and click Admin.



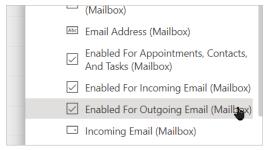
- 2. Click Users to load the BrightWork Users report.
- 3. Click Edit columns and then click Add columns.

		Edit columns: Users						
el Templates:	✓ ▲ Export to Exc	+ Add columns 🦻 Reset to default						
	Edit columns	Full Name						

4. Click Related and Select Mailbox.



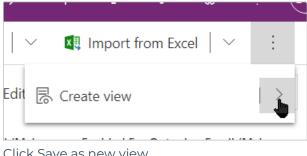
5. Add the three Enabled for... columns.



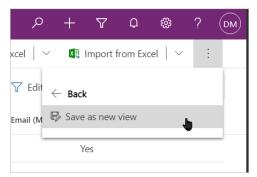
6. Scroll down to the bottom and click close.



- 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.

	No
Save as new view	×
The view is stored in	the list of saved views
Name	* BrightWork Users
Description	
	Save Cancel

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

activities.

$\leftarrow$	<b>X</b> 9	ihow Cł	nart	🖒 Refr	resh	🖾 Emai	l a Link	$\sim$	≫ Flow	, ~	💷 Run Report
D	riah	HMor	k He	ers $\sim$	My	/iews					
	ngn	LVVOI	K US	ers v	Brig	htWork Us	ers				
	$\bigcirc$	品	Full N	lame ↑ ∽	Syst	em Views			•		Enabled

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.

=	$\leftarrow$	😭 Show Cha		ew 🗍	Delete   ~	🕐 Re	
Templates	My Active Contacts						
Templates	~	Full Name ↑	~	Create	a new Conta	act record.	
F Forms		Alex Hankin					
People		Jane Smith					
A Users							
ትጽ <sup>ል</sup> Dynamics Teams							
Accounts							
A Contacts							
Other Microsoft Teams A Locations							
	All	#	A B	с	D	E F	
A Admin 🗘	1 - 2 of	2					

3. Fill in the relevant contact information.

New Contact	/		
ummary Details			
CONTACT INFORMATIC	N		
First Name *			
Last Name *			
Job Title			
Account Name			
Email			
Business Phone			
Mobile Phone			
Fax			
Preferred Method of Contact	Any		
Address 1: Street 1			
Address 1: Street 2			

# 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.

=	$\leftarrow$ 🖾 Show Chart $+$ New 🗊 Delete $ $ $\lor$ $\bigcirc$ Re								
Templates	My Active Accounts								
Templates	Create a new Account record. ✓ Account Name ↑ ✓								
Forms	Vendor ABC								
People	XYZ Corp								
A Users									
የድግ Dynamics Teams									
Accounts									
A Contacts									
Other									
📫 Microsoft Teams									
<u> </u> Locations									
	All # A B C D E F G								
A Admin 🗘	1 - 2 of 2								

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**.

Charter	Team	Stages	Gantt	My Work	Status	Documents	Issues	Risks	Project Settings	Audit History	Related
Audi	t Histo	ry									
Filter o	n: All Field	ds		~							
₀∕ª FLO	w ¥										
	Changed D	ate   C	hanged By	Event	:	Changed Field	Old \	/alue	New Value		
1	2/15/2021	1:14 Do	onal McCa	rthy Updat	e /	Active Stage Text			Business Ca	ase	
1	2/15/2021	8:59 Do	onal McCa	rthy Updat	e l	Docs Full Locatio	n		https://bw3	865dev.share	

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

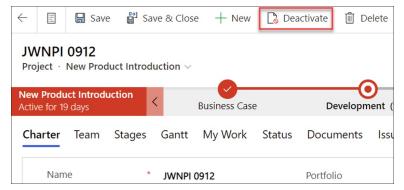
# Archive or Delete a Project

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

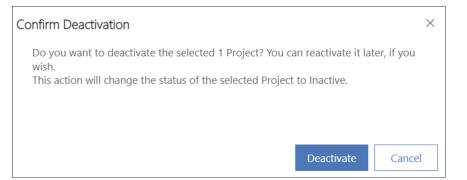
## **Archive a Project**

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.

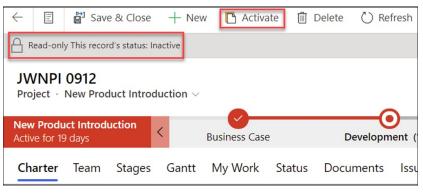
1. While in a project record click **Deactivate**.



2. Click Deactivate to confirm the deactivation request.



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



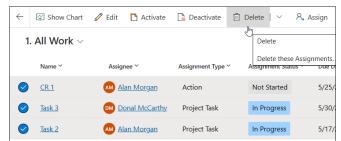
## **Delete a Project**

**Caution** Deleted projects are permanently removed and cannot be recovered.

#### **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):

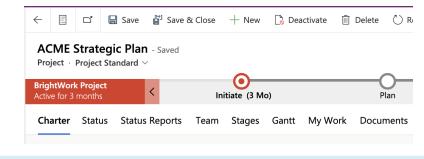
- 1. Click on **My Work** on the main nav.
- 2. Change the view to All Work.
- 3. Filter the **Project** column to the relevant project.
- 4. Select all the assignment rows and click **Delete** at the top of the screen.



### **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**

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

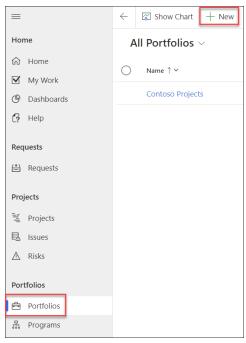
Your browser does not support HTML5 video.

# **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**.

New Portfo	lew Portfolio											
									Name	Portfolio Manager	Portfolio Sponsor	
Statement S	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications				
Details												
Name		*		Portfolio Sponsor				Priority		High		
Description	n			Portfo	lio Manage	er			Portfolio 1	Гуре Ве	egular	

# **Portfolio Tabs**

## Statement

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

Contoso Projects	S - Saved		<b>Conto:</b> Name	so Projects
Statement Status	Status Reports Documents	Actions Issues Risks	Costs Communications	Related
Details				
Name	* Contoso Projects	Portfolio Sponsor	R BW365 Admin	Priority
Description	All Contoso related projects	Portfolio Manager	오 BW365 Admin	Portfolio <sup>-</sup>
Programs				
○ Name ∽	Portfolio ~ Contoso P	Program S Y Health i Y	Program Y Current St BW365 Ad 4/6/2022	. ~ Currei 10/7/

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.

SharePoint	ho  Search this library	
JD JWProdBW	365 Docs	
Home	+ New $\checkmark$ $\overline{\uparrow}$ Upload $\lor$ $\boxplus$ E	dit in grid view 🛛 🔒 Sync
Conversations		
Documents	Portfolio	
Shared with us	$\square$ Name $\checkmark$	Modified $\vee$
Notebook	JW Portfolio 1_6C5C3CBC	1 27 minutes ago

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.

\$ Statement	Status	Status Reports	Documents	Actions	lssues	Risks	Costs	Communications	Related			
										$+$ New $\vee$	<b>⊼</b> ι	Jpload
0	Name 🗡			File Size	e 🗡 🛛 File	е Туре 🗡	Auth	or 🗸	Created On Shar	rePoint ↓ ∽		
	🛍 General	notes.docx		20,1	47 do	сх	Anne	Wallace	9/9/2022 4:44	PM		

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.

Re	elated									
	Related - Common									
4	Activities									
4	い Audit 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.

Programs								
							+ New	Program
0	Name 🗸	Portfolio 🗸	Program 🗡	Health i 🗸	Program 🗡	Current S 🗸	Current Fi Y	Program
	Product Operations	Contoso	In Progress	•	Ém Éamonn	9/6/2021	9/14/2022	Regular

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

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

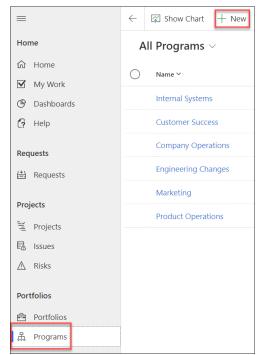
Your browser does not support HTML5 video.

## **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**.

New Prog	gram								 Name	 Program Manage	r Progra
Statement	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications	Program	Settings	
Details											
Name		*		Portfo	lio				Priority		2. High
Descrip	tion			Progra	am Sponsc	or			Program	Туре	Regular
0				Progra	am Manag	er			Microsoft	: Team	
Created Created	On		till and the second sec								

# **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.

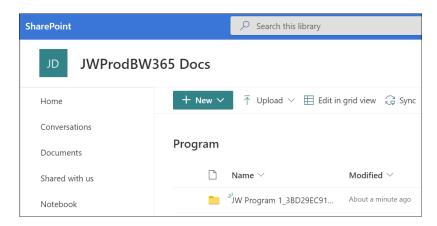
The list of available users to choose from in the **Program Sponsor** and **Program Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

### **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.

Customer Program	r Succe	55 - Saved							Customer Succe Name		s Alan Mor Program M
Statement	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications	Program Settings	Related	
Documer	nts								_		
									ŀ	+ New $\vee$	T Upload
<u>о</u> м	lame Ƴ				File	Size 🗡	File Type 🗸	Author 🜱		Created On S	SharePoint $\downarrow$ $\checkmark$

#### 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.

Re	Related				
	Related - Common				
A	Activities				
A	🕚 Audit History				

# **Program Settings & Microsoft Teams**

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

Marketing Program	<b>g</b> - Saved								Marketing Name	Fintan Ma Program M		Alan Morgan Program Sponsor
Statement	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications	Program	n Settings	Relate	ed
Program	Settings											
Portfolio	)	🖻 Contos	o Projects				Upd	ate Teams List &	No			

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

Stateme	nt Statu	is Status Report	ts D	ocuments	Actions	Issues	Risks	Costs	Communications	Program Settings	Related	
Details	5											
Nan	ie	* Market	ing		A Portfol	io		🖻 Cont	oso Projects	Priority	2. High	
Des	cription				Progra	m Sponso	r	Ala Ala	n Morgan (Offline	Program Type	Regular	
					Progra	m Manage	er	FM Fint	an Manning (Offli	Microsoft Team	🐗 Marketing 🗙	Q
A Crea	ted On	9/17/20	)21								Im	

**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.

Projects								
						+	New Proje	ct 🖔 Refresh $\omega^{lpha}$ Flow $\smallsetminus$
0	Name Y	Project R 🗡	Project St 🗸	Stage ∽	Health Icon 🗡	Project M 🗸	Program Y	Add New Project
	jw product update may 26		Not Started	Chartering	•	Jonathan	IT	Add a related Project to this record.

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

Quick Create: Projec	t	×
Name	*	
Template	*	
Project Manager	*	
Project Sponsor	*	
Create	No No	
have		
m		~~~

Save and Close $ $ $\vee$	Cancel

# **About Power Apps Dashboards**

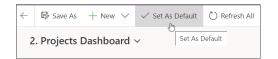
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

## 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.

	Power Apps	
=		
Hor	ne	
ഹ	Home	
$\checkmark$	My Work	
¢	Dashboards	
[?	Help	

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**.

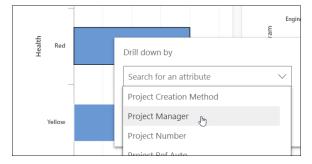


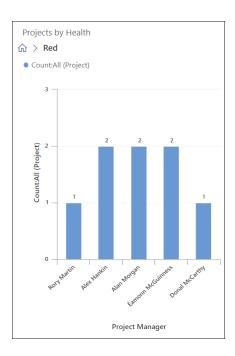
## **Using the Power Apps Dashboards**

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.

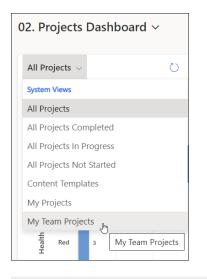




# **Chart Views**

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.

Marketing - Saved Status Report				
General				
Log Report				
A Period Ending	* 9/23/2022			
Accomplishment	 S			
A Significant Challenges				
A Upcoming Focus	;			
Email Report to Sponsor	Yes			
A Complete Status Report	Yes			

**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.

Quick Create: Action		×
Name	*	
Action Type	Action	$ $ $\vee$
Action Requested	Select Action Assumption	
Assigned To	Decision Dependency	
Priority	Change Other	
Due Date		

# **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.

Budgets	
Approved Budget	\$100,000.00
Budget Assigned	\$10,000.00
Last updated:	3/1/2022 9:14 AM
	Recalculate
	13

- 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.

Communications	Project Settings Related
	+ 7 ፲≣ :
	窗 Activity
	Appointment
	🖂 Email
	🐁 Phone Call
	👼 Note

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

Timeline	
$\wp$ Search timeline	ල් Create a timeline record.
🖉 Enter a note	🛅 Appointment
	🖂 Email
	📎 Phone Call
	👼 Note
	<b>頃</b> OneNote

# 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:

Communications	Project Settings Related
	+ ⊽ ፲≣ :
	ලි Activity
	🛗 Appointment
	🖾 Email
	🗞 Phone Call
	👼 Note
	🖬 OneNote 🔚

Or,

click on the .one file within the Documents tab:

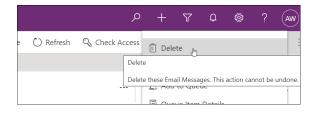
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Do	cuments
Docum	nents							
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$\bigcirc$	Froze	en Desserts for South	n America.	one 🖑		12,9	945	one

### **Communications Tab - User Actions**

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

September 2018 Phone Call from Anne Wallace	옷 🗸 🖪 📋
Call to vendor	Ð
Quick call to confirm all was on schedule.	

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**

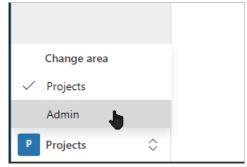
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf (\*), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web,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

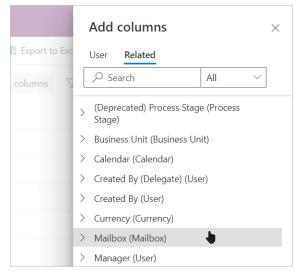
1. Click Projects in the bottom left of the page and click Admin.



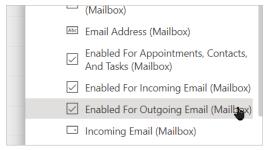
- 2. Click Users to load the BrightWork Users report.
- 3. Click Edit columns and then click Add columns.

		Edit columns: Users
el Templates:	✓ ▲ Export to Exc	+ Add columns 🦻 Reset to default
	Edit columns	Full Name

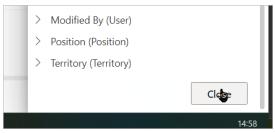
4. Click Related and Select Mailbox.



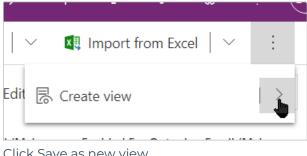
5. Add the three Enabled for... columns.



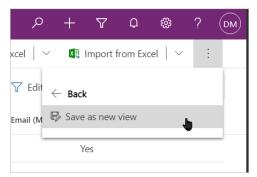
6. Scroll down to the bottom and click close.



- 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.

	No
Save as new view	×
The view is stored in	the list of saved views
Name	* BrightWork Users
Description	
	Save Cancel

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

activities.

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	$\bigcirc$	品	Full N	lame ↑ ∽	Syst	em Views			•		Enabled

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

# 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.

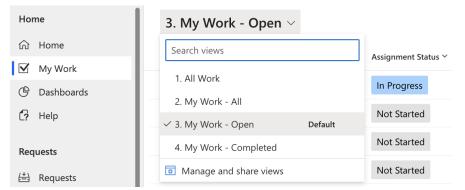
# My Work

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.

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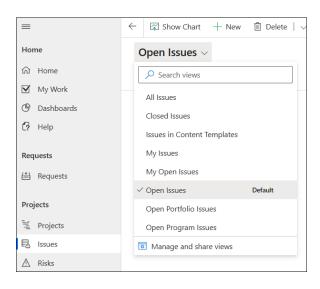
To view all work assigned to you as the logged in user across all projects, click into the **My Work** link on the Site Map. Users can choose from a variety of report views with use of the drop-down selector, and with the sorting and filter options.



- 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.

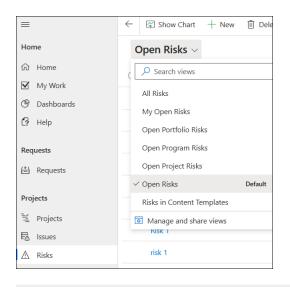
### Issues

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.

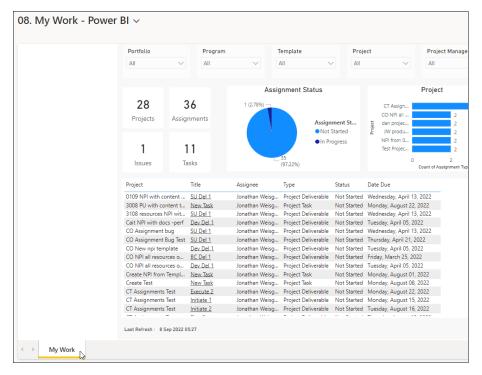


### Work Allocation Reports - Power BI

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.

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	Jim Corbin 2	9	2 6 4 3				Dynami	ics N
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Assignee	Adam Sheehan 3	2 (	5 3 2 4			Project	Frozen	Des:
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**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.

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പി	08. My Work - Power Bl
പി	09. Portfolio and Projects - Power BI
പി	10. Project Documents - Power BI

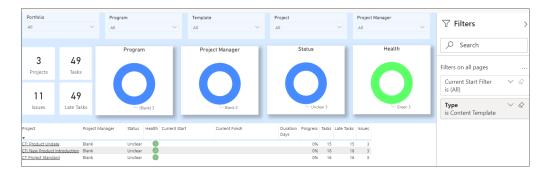
Additional Power BI reports can be added as desired through customization (contact your Customer Success Partner for more information).

### **Navigating Power BI Dashboards**

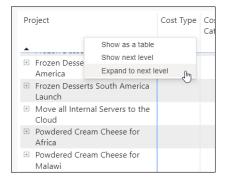
**Tip** You can improve Power BI readability by collapsing the Filters pane on the right side of the screen and the left nav.

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.



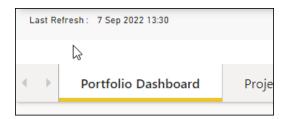
To collapse all report list groupings, right-click on the grouped column (e.g., **Project**) and click **Drill up**.

Project			Cost Type	9
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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:

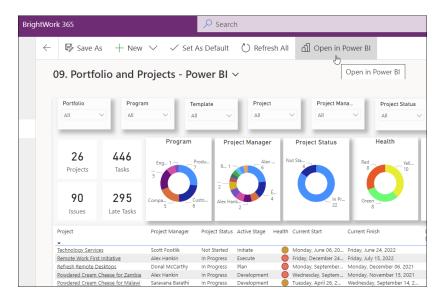


You can view the **Last Refresh** time of reports at the bottom of report pages. BrightWork does not force refreshes after data changes, the refreshes will occur on the schedule your administrator configures in your organization's Power BI admin settings.



# **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.

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Projects and Tasks Tim Work	57 Issues	2415 Late Tasks	Default 204		Alex Hankin167		Late 160			ireen 212	

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.

Your browser does not support HTML5 video.

# 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.

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ars = Hours Allocated Avail = Hou	rs Available A	Vloc = Pe	rcentage Allo	cated																Next 🗸	6	Weeks	~
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User	Hours	Avail	Alloc	Hours	Avail	Alloc	Hours	Avail	Alloc	Hours	Avail	Alloc	Hours	Avail	Alloc	Hours	Avail	Alloc	Hours Av	3 5/22/202	23 - 7/2,	2023	
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Vimal Shetty		40		8.0	40	20%		40			40			40			40		8.0 2		Dan Baco	24.0	_
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Total	132.0	600	22%	64.0	600	11%		600			600			600	1		600		196.0 36	Dani	ista Shaik	th 24.0	240
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# **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**

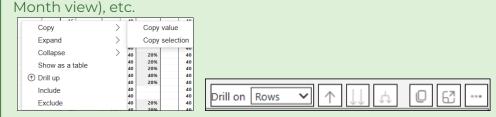
The main report window provides details about the chosen timeframe currently being analyzed including:

• All users with tasks assigned to them

- 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



### **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.

Your browser does not support HTML5 video.

### **Filters**

Filter the displayed data by available criteria.

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ilters on this page	
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Project is (All)	~ @
Project Status is (AII)	~ @
User is (All)	~ @

### **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 Bl**

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Year-Week									21	202						Hours 88.0	
Year-Week User	Hours		Alloc	Hours		Alloc			21	202							Avail

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.

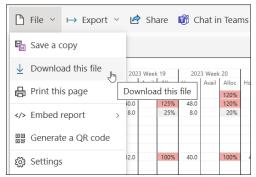
#### Note

- 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.

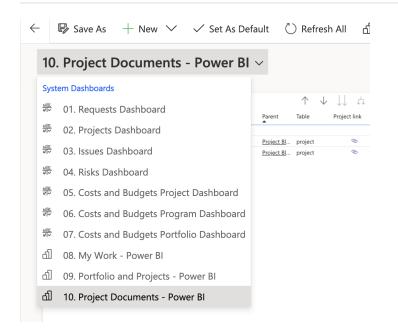
If value = 40 hours then **Green** will appear in the relevant cell.

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 Bl**

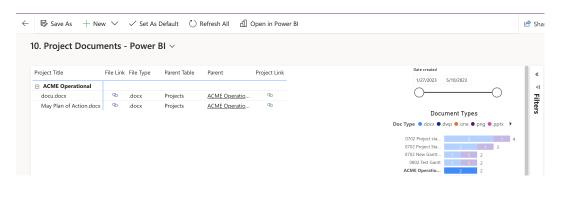


The **Project Documents** Power BI Dashboard displays documents from across your projects and includes links for easy access. The report includes documents from:

- 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.

BrightWork365	The complete project manage modern project teams, built o	
Request Management	Project Management	Portfolio Management
Project Request Process	Configurable Templates	Portfolio and Programs
Input Project 355 FREE Requests 365 FREE Capture, OL Deploy Project Project	Start Quickly with Included Best Practice Templates	Centralize Programs Into a Single Tool
Automated	Project Templates	ම්දීම Governance
Notifications	Gantt Chart	Visibility       Drill Down with       Data Driven Reports
in the second se	My Work	Image: State With Stakeholders
	Find, Do, Update Work Log Risks and Issues	
Power Apps Power Automate Power Bl	Dataverse SharePoint Office Teams On	eDrive Microsoft 365 + Power Platform

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											
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								
Putter	Project Light	Project Standard	Project Structured								
Projects		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 Communicatic	on								
Collaboration	Share	Point Online for Document Manag	gement								
	SIMPLE	Power Automate for Workflows	COMPLEX								
Automation and Integration	SIMPLE	Power BI for Reporting	COMPLEX								
J. Martin	SIMPLE	Power Apps for Custom Forms	COMPLEX								

# **BrightWork 365 Orientation Demos**



#### **Extended Demo**

# **Technologies Used**

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

BrightWork		Microsoft 365		Microsoft Power Platform
25 years experience		Microsoft Teams		Power Apps
Project templates	+	SharePoint Online	+	Power Bl
Proven processes		Azure Active Directory		Power Automate
Start-Evolve Framework		Microsoft Word, Excel, and OneNote		Microsoft Dataverse
Services and Support				

# **BrightWork 365**

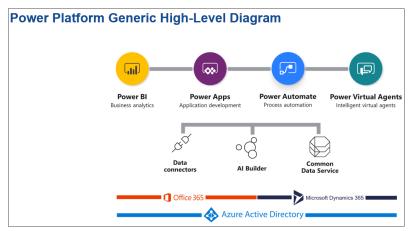
- BrightWork 365 ties together several powerful solutions including those in your organization's instance of Microsoft 365, allowing you to fully leverage your investment in this powerful platform.
- With over 25 years of experience and innovation with productivity solutions, BrightWork solutions let 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.

	Portfolio	Pregram		Template	Project			Project	Manager		T Filters	
<ul> <li>Home</li> <li>Home</li> </ul>	Al	× AI		м	V AI			All			P Search	
A Home		Progra		Project Manag		Status			Health		Filters on this page	
9 Help	26 412	Product Oper.	- Customer -	CHL1-	Alan Mor., Underway				ited		Type is Project	× 0
Requests	Projects Tasks	Mar		1			1					
🗄 Requests	90 365			2 2000	Ans Ha		Ownition	3				
Projects	Issues Late Task	Company	Internal Systems	Earnorn McGua	3		14		- Ge	ren 17		
% Projects			_							_		
B topes	Project	Project Manager	Status Health	Current Start	Current Finish	Duration 1	Process	Tasks Late Tas	in Issues			
A Risks		· · · · · · · · · · · · · · · · · · ·		Contraction prime in		Days						
Z My Work	Section PM State move	Alex Hankin	Unclear O				0%	0	0 0			
	Sarah Example	Alan Morgan	Late G	Monday, September 06,		15	0%		16 2			
ortfolios.	Rollout Virtual Phone System	Alan Morgan	Underway 🔴		Monday, December 26, 2022	403	10%	19	0 3			
	Remote Work First Initiative	Alex Hankin	Overdue 🔘	Monday, September 06,		123	6%		10 2			
3 Portfolios	Refresh Remote Desktoos	Donal McCarthy	Lite 🔘	Monday, September 06,		32	0%		15 2			
h Programs	Powdered Cream Cheese for Zam		Overdue 🧧	Friday, July 02, 2021	Monday, December 20, 2021	171	31%		18 3			
	Powdered Cream Cheese for Mali		Late 🔵	Friday, July 02, 2021	Monday, October 18, 2021	108	0%		19 3			
Dashboard	Powdered Cream Cheese for Afric		Overdue G	Friday, July 02, 2021	Wednesday, October 13, 2021	103	28%		80 3			
	Northwind Deployment	Earronn McGuinnes		Monday, September 06,		39	43%		8 06			
	Move Internal Servers to Cloud	Adam Sheehan		Monday, September 06,		39	0%		16 2			
	John C Example	Alan Morgan	Late 🔵		Tuesday, September 21, 2021	15	0%		15 3			
	Eropen Desserts South America Li		Overdue	Monday, September 06,		46	- N		16 5			
	Eropen Desserts for South Americ		Underway 🤤	Thursday, October 14, 2	Tuesday, May 31, 2022	229	30%	19	3 3			
	Erapen Desserts for Chile	Alan Morgan		Friday, July 02, 2021	Tuesday, December 21, 2021	172	21%		18 3			
	Eropen Desserts Africa Laurich	Jonathan Weisglass	Overdue 0		Thursday, September 30, 2021	24	10		16 5		y .	
	Fabrikam Deployment	Earronn McGuinnes	s Overdue	Monday, September 06,	Friday, October 01, 2021	25	55%	15	15 5			

### **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**

Hower Apps Brig	htWork 365		Sandbox		י + א	₽ ₽ ֎ ?
Home 1 Home 1 W Home			BrightW	/ork365		2
<ul> <li>⑦ Dashboards</li> <li>⑦ Help</li> <li>Requests</li> <li>☆ Requests</li> </ul>	Requests	Requests My Requests - 19 Open Requests - 9 Approved Requests - 15 All Requests - 26	Projects	Projects My Team Projects - 19 My Projects - 29 Not Started Projects - 32 In Progress Projects - 3 Completed Projects - 1	Portfolios	Portfolios Portfolios - 4 Programs - 3
Projects 髦 Projects 局 Issues 企 Risks			3			
Portfolios Portfolios Programs Project Area						

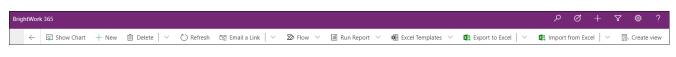
1) Site Map: The Site Map area is used to navigate to the different areas and sub-areas within BrightWork 365. They're lined up in the typical process flow of the project management lifecycle, from initial request, to managing the execution of a project, to reporting across projects.

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.

← 🗉 🛛	Save	😭 Sav	ve & Close	e 🕂 New	🗋 Dea	ctivate 📋 D	elete Č	) Refresh	🔍 Check Acce
abc Project Ne	ew Produ	uct Introd	uction $\vee$						$\sim$
New Product Active for 23 h		ction	<	Busine	ss Case (2	3 Hrs)		De	evelopment
Charter 1	leam	Stages	Gantt	My Work	Status	Documents	Issues	Risks	Project Setting
Open Iss	ues 🗸								
✓ Na	ame 🗸					Issue Status	$\sim$	Ass	igned To $\checkmark$
iss	sue 1					Not Start	ed		

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.

<b>E Power Apps</b> Brig	ghtWork i	365 2	3	4	<u>5</u> \N	DI <mark>6</mark> X	7 8	م	9 · 7	ф Ф	?
=	$\leftarrow$	😭 Show Chart	+ New	🗊 Delete 🗸 🗸	🕐 Refresh 🛛 🖓	🛿 Email a Link 🛛 🗸 🔊	Flow 🗸 💷 Run R	eport 🗸 🖼 Exc	el Templates $~~$	:	
Home	O	pen Reques	ts ~				🗔 Edit o	columns 🛛 🍸 Edit	filters Search	this view	
☆ Home ✓ My Work	0	Request R 🗡	Name 🗸	Ľ	Template ∽	Request Status ∨	✓ Project Type ✓	Requestor 🗸	Submit $\downarrow$ $\checkmark$	Program 🗸	Cre
Dashboards		1234	NPI 070620	)22	New Product Idea	a Submitted		Anne Wallace	6/7/2022	IT	6/
C? Help		Req-0010	FM Test		Project Standard	Submitted		Fintan Manning	5/31/2022	IT	5/:

- 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.

for 61 days		Business Case (48 D)		evelopmen		Up	Launch	BF	Standard Produc
ter Team Stag	yes ,	Gantt My Work Status Do	Portfolio	Risks ,	Project Settings		Project Number		
Project Manager	*	Anne Wallace	Program	*	品 Default Program		A Source Request		
Project Sponsor	×	A Christine Chang					A Teams Channel		
Description					Objectives				
Exit Criteria					Out of Scope				
Approval Requirements					Economic Impact		ł		Form
					Overall Project Risk				

# 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**.

=	$\leftarrow$ 🖾 Show Chart $+$ New 🛍 De
Home	All Projects* $\vee$
ŵ Home ダ My Work	Name ~
<ul> <li>My Work</li> <li>Dashboards</li> </ul>	Deploy Marketing Automation
C? Help	Widget Green Product Update
Requests	AdventureWorks Office Move
🖆 Requests	Fabrikam Solution Deployment
Projecto	Blue Yonder Solution Deployment
Projects	Social Media Campaign
E Issues	Widget Blue Product

# 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.

Product abc Request · New Product Idea >	, _			Product abc Name	Project Created Request Status	Jonathan Weisglass Requestor
Project Request Level 2 Completed in 26 minutes	Draft	Accept		Approve		Create Project
Idea Details Project Detai	ils History					
Idea Details						
Reference	4 Product abc		Current State	Prototype		
Title *	Product abc		Market Size	\$30,000,000.	00	
Idea Description	A widget that does great things		New Idea Advantage	Nobody doe	s it like this	
Program	윢 Program 1		Success Assumptions	Market analy	rsis is correct	
Target Customers	North America retail		Source of Idea	New product	t team	
Customer Need	They really need this		Submit	Yes		

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.

	Standard-9:25 Template - Short Template - Short Template	AM
Name	*	Project Standard-9:25 AM
Descr	iption	

### 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.

New Request - Unsaved Request · New Request ~

• 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**

Home			Duiodat\A					
යි Home	BrightWork365							
My Work								
🕑 Dashboards		Requests	6	Projects		Portfolios		
🖓 Help		19 - My Requests 9 - Open Requests		17 - My Team Projects	P	4 - Portfolios		
Requests	Requests	9 - Open Requests 15 - Approved Requests	Projects	28 - My Projects 31 - Not Started Projects	Portfolios	3 - Programs		
📇 Requests	$\bigcirc$	26 - All Requests	$\bigcirc$	3 - In Progress Projects 1 - Completed Projects	$\bigcirc$			
Projects								
当 Projects								
E Issues								
⚠ Risks								
Portfolios								
🖻 Portfolios								
品 Programs								
PA Project Area								

# 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

BrightWork365									
Request Management									
Project Request Process									
Input Project Requests <b>365</b> FREE									
Capture, Review, Approve New Requests									
Automated Notifications									
Monitor the Project Pipeline									
입다. 영화 Seamless Approval Workflows									
Microsoft 365 + Power Platform									

- 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

BrightWork365						
Project Managemen	t					
Configurable Templates						
Start Quickly Best Practice	with Included Templates					
Configure to						
Create Your C Project Temp						
Gantt Chart						
Ø   Plan Projects     Ø   Visually	Manage					
Track Progress	Tasks and Work					
My Work Reports						
(E)						
Find, Do,	Log Risks					
Update Work	and Issues					
Update Work	and Issues					

• 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

BrightWork365					
Portfolio Management					
Portfolio and Programs					
Centralize Programs into a Single Tool					
©©o Standardize ©∱™ Governance					
Visibility					
Drill Down with Data Driven Reports					
<ul> <li>allocate Resources</li> <li>allocate Resources</li> <li>allocate Resources</li> </ul>					
Share With Stakeholders					
Microsoft 365 + Power Platform					
Microsott 365 + Power Platform					

- 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.

Charter Status	Status Reports Tear	n Stages	Gantt	My Work	Documents	Action	lssues	Risks	Costs	Projec	t Settings
Name	* JW product u	pdate 826	Crea Cha	ate Teams nnel		No			d Charter a tt for Appr		
🖰 Туре	Project			y to New Con plate	tent	Yes	/	A Mov	e to Close	Out	
Template	* 📱 Product U	pdate		et Target Date roject Tasks	s in	No			d Close Ou roval	it for	
A Reference Type	Manual			Health		No					
A Project Creation Method	Project Area		Auto	omatically		140					
Portfolio	* 🖻 Contoso P	rojects									
Program	* 🖧 Marketing										

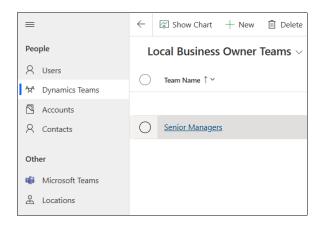
The following can be specified in Project Templates and will populate corresponding columns in the Charter and Project Settings tabs of new Projects:

- 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**.

=		← 🕅 Show Cha	art	+ New
ŵ	Home	Active Loca	tior	ns ∨
Ŀ	Recent 🗸			
\$	Pinned V	✓ Name ↑ ∨		
Sec	urity	Boston		
8	Users	Dublin		
^ዮ	Teams			
Tem	plates			
R.	Templates			
E	Forms			
Oth	er			
uji	Microsoft Teams			
ዱ	Locations			
		All # A	В	С
A	Admin 🗘	1 - 2 of 2		

### **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**.

+ Ne	ew Project Team Me Ů Refresh or Flow ∨ :
Finish Y	Add New Project Team Member
	Add a related Project Team Member to this record.

#### 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.

Task Information										
GENERAL	DEPENDENCY	RESOURCES	TASK DETAILS							
Task Type		ID								
Stage		▼ 1,8	29.00							

• 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.

BrightWork		<	Initiate (37 H	Hrs)		Plan
Charter	Status	Status Reports	Team Stages	Gantt	My Work	Documents A
Project S	Stages					
0	Curre 🗸	Name 🗸		Current	Start ↑ ∽	Current
	٠	Initiate		6/13/2	022	6/14/20
		Plan		6/15/2	022	6/15/20
	$\bigcirc$	Execute		6/16/2	022	6/16/20

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

**	▼ Scale-Up	Scale-Up	16%
**	Scale-Up - Task-1	Scale-Up - Task-1	
**	Scale-Up - Deliverable-1	Scale-Up - Deliverable-1	
**	Scale-Up - Deliverable-2	Scale-Up - Deliverable-	2

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

Scale-Up Project Task · Project St	age $\vee$			Scale Name
Project Stage				
Name	* Scale-Up	🖞 Current Start	6/2/2021	
A Progress	In Progress	🛆 Current Finish	6/4/2021	
A Project	* 🖹 JW Project 910	🛆 Target Start	6/2/2021	
Project Task Type	Stage	🛆 Target Finish	6/4/2021	
Description		% Complete	16	

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

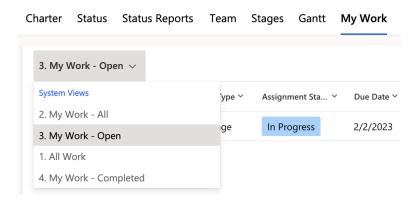
### Gantt

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.

Delay in onboarding suppliers								
Not Started         Powdered Cre           Issue Status         Project	eam Cheese for Africa Product Operations Program							
lssue								
Reference								
Name *	Delay in onboarding suppliers							
A Issue Reference	IS-001181							
A Portfolio	🖻 Contoso Projects							
🔒 Program	유 Product Operations							
A Project	Powdered Cream Cheese for Africa							
Escalation	Program							
	Select Project							
	Program							
	Portfolio							

### 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.

Manufactured compo	onents arrive late
Saravana BarathiContosoLogged ByPortfolio	Projects         Product Operations         Powdered Cre           Program         Project
Risk	
☐ Exposure	0
Risk Status	Identified
Risk Monitor	
Escalation	Project V
Risk Management Rating	Select Project Program Portfolio

#### 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.

Initiate to Plan
Approval Required
Plan to Execute
Approval Required
Execute to Close Out
Approval Required

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.

Risks	Project Settings	Related
		Related - Common
🖻 Co	ntoso Projects	<ul> <li>Audit History</li> <li>Documents</li> </ul>
윴 Cu	stomer Example	A Created On

# **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.

Gantt My Work	Documents Actions	Issues Risks Costs Project Settings
A Reference Type	Automatic	Create Teams Channel   No
A Project Creation Method	Project Area	Copy to New Content Template No
Microsoft Team		Reset Target Dates in all Project Tasks

**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.

-C Plar	)				Execute				Close C
tions	Issues	Risks	Costs	Commun	ications	Project Sett	ings	Approval	s Related
Auto	matic				Create	eams Channel		◯ No	
					Copy to Templat	New Content e		No	
					Reset Ta all Proje	rget Dates in ct Tasks		◯ No	
					Set Hea Automa			◯ No	
					Send St Approva	5			

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 Y	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

### **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.

Home	$\sim$	All Portfolios 🗸							T Y	Search th	is view	Q
Requests	$\sim$	✓ Name ↑ 🖂		Portfolio Status 🗸	Health i 🗸 🛛 Por	tfolio Mana 🗸	Current Start 🖂	Current Finish 🗸			Modified On V	
Projects	$\wedge$	JW Portfolio 1		Not Started	•		11/8/2021	11/17/2021	Regula	ar	11/17/2021	1
当 Projects 局 Issues A Risks ビ My Work												
Portfolios	^											
Porttolios		6										
표 Programs 훼 Dashboard												
		All y A B C	U E F	9 E I	J K L	M N	O P	q a s	1 0	v v	w x	Y
P Projects	٢	1 10(1										

#### Create a Program

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

-		$\leftarrow$ $\blacksquare$ Show Chart + New	v 📋 Delete   🗸	🕐 Refresh 🛛	🐯 Email a Link 🏢	- 🔊 Flow 🗸	🔟 Run Report	V 🛛 🕮 Excel T	emplates 🖂	:
Home	$\sim$	All Programs $\vee$						13	Search this	view 🔎
Requests	$\sim$	✓ Name ~	Portfolio 🗸	Program Status	✓ Healthi ✓	Program Man 🗸	Current Start 🗸	Current Finish 🗠	Program Type $\sim$	Modified 1 🗸
Projects	$\sim$	JW Program 1	JW Portfolio 1	Not Started	•		11/8/2021	11/17/2021	Regular	11/18/2021
😤 Projects										
🛱 Issues										
A Risks										
🗹 My Work										
Portfolios	~	Ν.								
Portfolios										
ភ្នំ Programs										
δ <u>i</u> ) Dashboard										
		<u>All</u> # A B C	D F F	б. н. т	1 K - 1	M N	0 P Q	R S T	u v	w x y
Projects	$\diamond$	1-1 of 1								

## **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

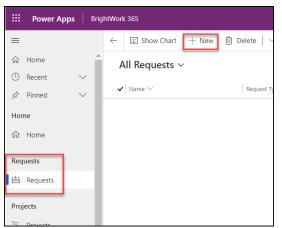
## Submit a New Project Request

**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.

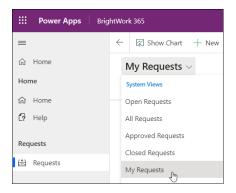
New Request	
Project Request 0 Stage Active for less than one mi	<
Select Request Type	
Title	*
A Request Template	

- 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.

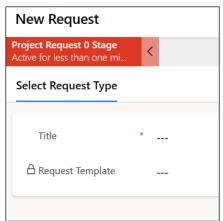
The BrightWork 365 project management process typically begins in **Requests**. Here you can choose from different project templates for an efficient and consistent way to create new projects.

To submit a new project request:

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

Brig	ghtWork 365
=	← 🖾 Show Chart 🕂 New 🛍 Delete   ∨
යි Home	All Requests ~
🕒 Recent 🗸 🗸	
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Home	
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Requests	
🖆 Requests	
Projects	
= Projecto	

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.

	ĺ	All Projects ~					
<ul> <li>Recent</li> <li>Pinned</li> </ul>	Č.	✓ Name ~	Project Status 🗸	Health Icon $\vee$	Project Manager $\checkmark$ Program $\checkmark$	Portfolio $\vee$	Project Type $\sim$
Home		Product abc	Not Started	•	Jonathan Weisglass Program 1	Portfolio 1	New Product Idea
⇔ Home							
Requests							
曲 Requests							
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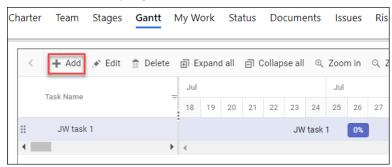
Product abc Project - New Product Introduction ~ New Product Introduction Kilve Sor 21 minutes	Business Case (21 Mir	4	Development	Scale-Up	Jonathan Weisglass Project Manager	Program 1 Health	7/26/2021 Current Fini Mard Product
Charter Team Stages Gantt				Project Settings	Los A		
Name Produc	t abc	Portfolio	* 🖻 Po	rtfolio 1	Project Number	4	
Project Manager * 🔒 Jon	athan Weisglass	Program	· 击 Pe	ogram 1	A Source Request	🔠 Product abc	
Project Sponsor * A Jan	athan Weisglass				A Teams Channel		
Project Type * New Pr	vduct idea			Objectives	-		
Description A widg	et that does great things			Dut of Scope			

#### 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

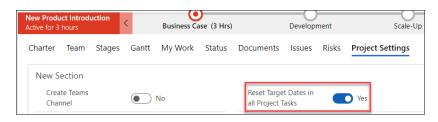
Click into the Gantt tab and update any tasks that were included as part of the template that the project was based on and add new tasks you and the team decide should be included in the project.



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

C	narter	Team	Stages	Gantt	My Work	Status	Documents	Issues	Risks	Project Settings		
	Projec	t Manage	er *	A lou	athan Weisgl	ass				Project Sponsor	*	R Jonathan
	Project	Team M	embers									
	✓ 1	eam Memb	er 🗸				$ $ Start $\downarrow$ $\vee$					Finish $\checkmark$
	J	onathan \	Weisglass				8/9/2021					8/12/2021

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.

Documents Is:	sues Risks	Project Settings					
				+	New $\checkmark$	Ť	Upload
File Size $\checkmark$	File Type $\smallsetminus$	Author $\checkmark$	Created On SharePo	đ	Word		
				₫ €	Excel PowerPo	int	
	No data av	ailable.		¢]	OneNote	e	

#### **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.

🖻 Portfolios			
All Portfolios ~			∑ Searc
$\checkmark$ Name $\uparrow$ $\checkmark$	Progress Status $\checkmark$ Health i $\checkmark$ Portfolio Ma	anager $\checkmark$   Current Start $\checkmark$   Current Finish $\checkmark$	Portfolio Type $\vee$
Portfolio 1	Not Started 🔵 Jonathan V	Weisglass. 8/9/2021 8/12/2021	Regular



All Programs ~						$\mathbb{V}$	Search
✓ Name ∨	Portfolio $\checkmark$	Program Status $\checkmark$ Health i $\checkmark$	Program Mana	$\sim$ Current Start $\sim$	Current Finish $\smallsetminus$	Program	туре 🗸
Program 1	Portfolio 1	In Progress		8/9/2021	8/12/2021	Regula	r

🗹 My Work					
My Work + $\sim$					Search this view
$oldsymbol{\checkmark}$ Created On $\downarrow$ $\lor$	Name $\vee$	Project $\checkmark$	Assignment Type $\smallsetminus$	Current Start $\vee$	Current Finish $\smallsetminus$
8/6/2021 3:06 PM	JW task 1	Product abc	Project Task	8/9/2021	8/12/2021

#### **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.

葪 Dashboard

Portfolio			Program			Template		Project				Project M	anager					
All	$\sim$		All		$\sim$	All	$\sim$	All		`		All			$\sim$	7 Filters		>
16	262	Busir	Program	n Systems a 5		Project Manag	l <b>er</b> amonn Mc	Overdue	Status		1	Yellow	Heal	h		Search Iters on all pages		]
Projects 91	Tasks					Chr 1 1 Ann	Ale 2				I					Current Start Filter is (All)	$\vee \Diamond$	
Issues	Late Tasks	Mark		ustomer Success		Saravana Bara2	Jim Corbin 2		└─ Lat	2 15	J	_		└─ Green 1	14	<b>Type</b> is Project	$\vee \diamond$	
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AdventureWorks De	<u>eployment</u>	Cai	triona O'Connor	Overdue (		Monday, September 06,	Tuesday, Septemi	per 21, 2021	15	39%	15	15	5					
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Branding Branding		Éar	nonn McGuinness	Late		Monday, September 06,	Tuesday, Septemi	per 21, 2021	15	0%	16	16	8					

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.

	Power Apps Brig	htWor	k 365
=		$\leftarrow$	🛱 Show Chart
ŵ	Home	1	All Projects $\sim$
Hor	ne		Project Refe ∨ I
ណ	Home	•	
6	Help		Proj-001153 J
			Proj-001152 /
Req	uests		SMF-2022
<b></b>	Requests		Proj-001150 s
Proj	iects		XYZ 123
1	Projects		Proj-XYZ
E2	Issues Projects		Proj-0010
$\wedge$	Risks		Proj-0010 I
	My Work		Proi-0010

# **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

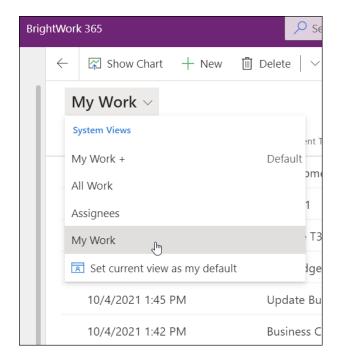
The My Work views, available from a link on the Projects Area navigation, are reports that display and link to all the work items owned by, or assigned to, the logged in user (i.e., you). For added convenience the view can display work items from multiple types of work in a single view.

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

Brig	ntWork 365
=	$\leftarrow$ 🖾 Show Chart $+$ New
<b>命</b> Home	My Work + $\vee$
Home	
命 Home	✓ Project ∨
Help	Frozen Desserts for South Am
	Continuous Professional Deve
Requests	Continuous Professional Deve
😫 Requests	Rollout Virtual Phone System.
Projects	Refresh Remote Desktops
Projects	Frozen Desserts for Chile
En Issues	Northwind Deployment
▲ Risks	Fabrikam Deployment
My Work	Blue Yonder Deployment
Portfolios	Frozen Desserts Africa Launch

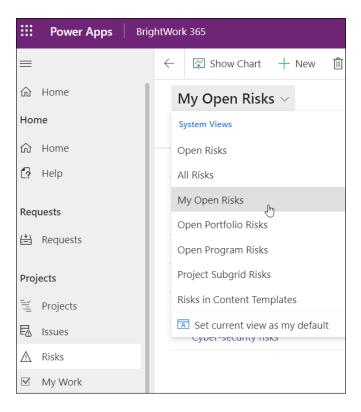
The initial view **My Work +** provides a link to the associated project site in addition to work related information.

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.



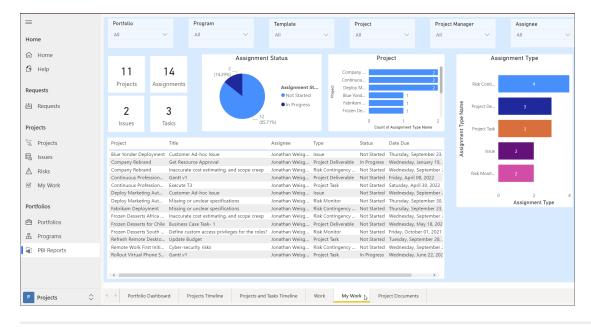
You can also choose to create your own personal view of work assigned to you to make these reports even more personally relevant.

## **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.

=			_						
	Assignme	nts by Assignee			Assignments by Pr	ojects		Portfolio	
Home	Assignment Type OAction Ocost	●Issue ●None ●Project ●Project ▶	Assignr	nent Type N 😑	Action  Cost Issue N	lone  Project .	● Project St 🕨	All	$\sim$
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_	Anne Wallace 1 4	5 1 2 3 4 2	C	ontinuous Professi	3 8 3 6	3 3 3			
🛃 Help	Éamonn McGuinness 2 1 3	7 11 3 1 3	R	ollout Virtual Phon	3 4 3 4 6	2			
	Dan Bacon 3 3	4 1 4 3 2 1	D	eploy Marketing A	3 4 3 3 3	3		Program	
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	Donal McCarthy 2 2 3	1 2 4 2		ozen Desserts Sou	3 4 3 3 3			Template	
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	Caitriona O'Connor 11 3 1	4 5	B	lue Yonder Deploy	3 2 3 3 3			All	~
Projects	ò	10 20 30			0 10	20	30 40		_
_			_						
lssues	Project	Title		Assignee	Туре	Status	Date Due		
∧ Risks	Project	The		Assignee	Type	Status	Date Due	Project	
▲ Risks					None			All	$\sim$
My Work	Rollout Virtual Phone System	Hire new PM		Adam Sheehan		Not Started			
	Frozen Desserts Africa Launch	Customer Ad-hoc Issue		Adam Sheehan		Not Started	22 1		
	Rollout Virtual Phone System	Project Manager has resigned		Adam Sheehan		Completed	Thursday, March		
Portfolios	Company Rebrand	Get Budget Approval			Project Deliverable		Friday, January 1-	Project Manager	
	Frozen Desserts for Argentina	Business Case Task- 1			Project Deliverable		Friday, Novembe	Project Manager	
🖻 Portfolios	Move all Internal Servers to Cloud	Get Resource Approval			Project Deliverable		Friday, June 24, 2	All	$\sim$
-	Powdered Cream Cheese for Zambia	Business Case - Deliverable - 2			Project Deliverable		Friday, October 1		
뷺 Programs	AdventureWorks Deployment	Execution		Adam Sheehan	5 5		Wednesday, May		
DD DD Damasta	Continuous Professional Development			Adam Sheehan	, ,		Thursday, May 12		
PBI Reports	Remote Work First Initiative	Execute		Adam Sheehan			Tuesday, June 21	Assignee	
	Frozen Desserts South America Launch	11		Adam Sheehan			Friday, October C		
	Refresh Remote Desktops	Update Budget		Adam Sheehan	Project Task	Not Started		All	$\sim$
	<								_
P Projects	Portfolio Dashboard P	rojects Timeline Projects and Tasks Timeli	e W	ork 📐 My Wor	rk Project Documen	ts			
Projects		- Josephere and table finite		18 10 100					



# 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.

oject Task				
Name	* Task One	🛆 Current Start	1/31/2022	
A Progress	In Progress	🛆 Current Finish	2/9/2022	
🖰 Project	* 🖹 jw123	🛆 Target Start		Ħ
🖰 Parent		A Target Finish		
🔒 Stage		% Complete	25	
Project Task Type	Task		25	

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.

Initia	ete (5 D)		Pla	in .		Execute	e			Close Out
Gantt	My Work	Status	Documents	Issues	Risks	Project Settings				
							+ 1	New Issue	Ż	Add Existing Issue
	Issue	Status 🗸	Assigned To N	Iss	ue Type 🗸	Escalation $\checkmark$			New Is a relat	ssue ed Issue to this record.

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.

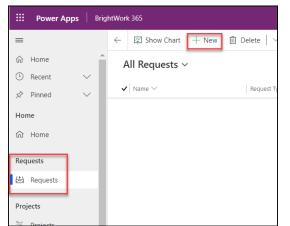
## Submit a New Project Request

**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.

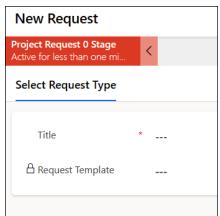
To submit a new project request:

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.

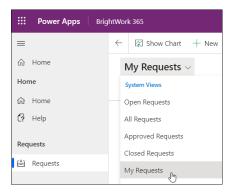


- 3. Fill in any blank fields in the Request Details and Project Details tabs.
- 4. Click Submit Request.

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.

All Projects ~		
My Views		Project Status $\smallsetminus$ Health Icon $\lor$
JW All Projects		
System Views		Not Started
		Not Started 😑
All Projects	Default	
All Projects Completed		Not Started 😑
All Projects In Progress	đ	f se In Progress
All Projects Not Started		

#### **Power BI Dashboards**

If your organization is licensed for Microsoft Power BI, there are a number of additional

## **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.

All Projects	/					to v	Search this vi	iew 🖌
✔ Project Refe ∨	Name $\checkmark$	Project Status $\checkmark$   Health Icon $\checkmark$	Project Man $\vee$	Program ∨	Portfolio 🗸	Template ∨	Created $\downarrow$ $\checkmark$	Modified On $\vee$
Proj-0010	Frozen Desserts for Chile	In Progress	Alan Morgan	Product Operat	Contoso Projec	I Product Operat	10/4/2021	11/30/202
Proj-001069	Rollout Virtual Phone Frozen D	Desserts for Chile	Adam Sheehan.	Internal System:	Contoso Projec	I Internal System	10/4/2021	1/28/2022
Proj-001067	Move all Internal Servers to Clou	Not Started	Adam Sheehan.	Internal System:	Contoso Projec	Internal System	10/1/2021	1/31/2022
Proj-001066	Refresh Remote Desktops	Not Started	Donal McCarthy	Internal System:	Contoso Projec	t Internal System	10/1/2021	11/30/202
Proj-001050	Northwind Deployment	In Progress	Éamonn McGuii	Customer Succe	Contoso Projec	Customer Succe	9/23/2021	1/11/2022

#### Issues

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

命 Home	Open Issues $\vee$
Home	
<b></b> Home	✓ Name ✓
Help	Project Manager has resigned
	Our Customer is unhappy with the de
Requests	Confusion over local market needs
📇 Requests	Budget not yet released
Projects	Limited engagement of stakeholders.
Projects	We have an issue
E Issues	Confusion over local market needs
A Risks Issues	Budget not yet released
Issues Report '	View in the Projects Area

	red Cre Product L		eese fo	r Malawi	- Saved			
Product U Active for 3		·	<	Charte	o ring (3 M	0)		Execut
Charter	Team	Stages	Gantt	My Work	Status	Documents	lssues	Risks
							ls	sues
~	Name $\vee$				Is	sue Status $ee$	Assigned T	īo 🗸
	Delay in o	onboarding	suppliers	5	Ν	lot Started		
	Beta cust	omers slow	with feed	dback	N	lot Started		
	Trademar	k registrati	on is prov	ving challengir	ig N	lot Started		
		lssu	es Tab	in the Pr	oject R	ecord		

#### **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.

命 Home	Open Risks $\vee$		
Home	System Views		Risk Status ∨
යි Home	Open Risks	Default ample	Identified
C? Help	All Risks	ample	laentinea
	My Open Risks	ample	e Identified
Requests	Open Portfolio Risks	nple	Identified
Requests	Open Program Risks	mple	Identified
Projects	Project Subgrid Risks	ple	Identified
Projects	Risks in Content Templates	ple	Identified
₽ <mark>8</mark> Issues		па слатріе	Identified
▲ Risks	Customer my pull sponsorship Ala	n & Kat Examp	ble Identified
My Wor Risks	Team Members leave due to bu Ala	n & Kat Examp	ble Identified
Portfolios	Customer my pull sponsorship Kat	Example	Identified

Risks can be easily logged from within project records.

BrightWor Active for 4			<	Initiat	• (4 Mo)		Plan	
Charter	Team	Stages	Gantt	My Work	Status	Documents	Issues Risks	Proj <sub>Risks</sub>
~	Name 🗸			Project ∨		Risk Status V		P
		arrive late				nt Identified	Project Project	(
	Quality E	ngineers no	ot available	e Northwine	d Deployme	nt Identified	Project	(

Materials arrive lat	e - Saved	SB Saravana Bara Logged By	thi Contoso Project Portfolio	S Customer Success Program	Northwin Project
isk Documents Re	lated				
Risk		Mitigation		Contingency	
Name	* Materials arrive late	Mitigation Actions Suggested		Contingency Actions Suggested	
🔒 Risk Reference	RK-001256				
Risk Description		Mitigation Actions Requested By Date	ā	Contingency Actions Requested By Date	
Consequence		Mitigation Actions		Contingency Actions Assignee	
Root Cause		Mitigation Actions Taken		Contingency Actions Taken	
Most Likely Impact Date		1			

### **Portfolio Reports**

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

All Portfolios $\vee$		T V	Search this view $\ensuremath{\mathcal{P}}$
$\checkmark$ Name $\uparrow$ $\checkmark$	$\Big  \ {\rm Portfolio} \ {\rm Status} \ \lor \ \Big  \ {\rm Health} \ {\rm i} \ \lor \ \Big  \ {\rm Portfolio} \ {\rm Mana} \ \ \lor \Big  \ {\rm Current} \ {\rm Start} \ \lor$	Current Finish $\checkmark$ Portfolio	o Type ∨ Modified On ∨
Contoso Projects	In Progress Christine Chang 7/2/2021	9/13/2022 Regula	ar 1/31/2022 11:

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.

යි Home	All Programs ~						
Home	My Views			Program Status 🗸	Health i 🗸	Program Man 🗸	Current Start 🗸
යි Home	All Programs	here!		Not Started	•		9/6/2021
C? Help	System Views	-					
Requests	All Programs	Proj	ects.	In Progress	•	Éamonn McGuinn	7/2/2021
	Inactive Programs	roj	ects.	In Progress	•	Adam Sheehan	7/2/2021
🖆 Requests	Seset default view	roj	ects.	In Progress	•	Alan Morgan	9/6/2021
Projects	Company Operations C	ontoso Proj	ects.	Not Started	0	Scott Footlik	9/6/2021
Projects	Marketing C	iontoso Proj	ects.	Not Started	•	Fintan Manning	9/6/2021
🗟 Issues	Accounts Recevable C	iontoso Proj	ects.	Not Started	•	Christine Chang	1/17/2022
▲ Risks							
I My Work							
Portfolios							
🖻 Portfolios							
ት Programs							
Dashboard Programs							

#### **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.

Portfolio All	~	Program	Template       All	<ul><li>✓ Project</li><li>✓ All</li></ul>	> Project M	Manager 🗸 🗸	√ Filters	>
<b>3</b> Projects	49 Tasks	Program	Project Mana	ager Status		Health	Search	
11 Issues	<b>49</b> Late Tasks	(Blank) 3	Blar	nk3	nclear 3	Green 3	Current Start Filter is (All) <b>Type</b> is Content Template	<ul><li>✓ ∅</li></ul>
roject , T: Product Updat T: New Product I T Project Standar	e Blank ntroduction Blank	Manager Status Health Unclear Unclear Unclear Unclear	Current Start Current	Days	ss Tasks Late Tasks Issues % 15 15 3 % 18 18 3 % 16 16 5		is content remplate	

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

Portfolio Dashboard	Projects Timeline	Projects and Tasks Timeline	Work	My Work	Project Documents

# 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

## **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.

Home	$\sim$	All Portfolios 🗸							T Y	Search th	is view	Q
Requests	$\sim$	✓ Name ↑ 🖂		Portfolio Status 🗸	Health i 🗸 🛛 Por	tfolio Mana 🗸	Current Start 🖂	Current Finish 🗸			Modified On V	
Projects	$\wedge$	JW Portfolio 1		Not Started	•		11/8/2021	11/17/2021	Regula	ar	11/17/2021	1
当 Projects 局 Issues A Risks ビ My Work												
Portfolios	^											
Porttolios		6										
표 Programs 훼 Dashboard												
		All y A B C	U E F	9 E I	J K L	M N	O P	q a s	1 0	v v	w x	Y
P Projects	٢	1 10(1										

#### Create a Program

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

-		$\leftarrow$ $\blacksquare$ Show Chart + New	v 📋 Delete   🗸	🕐 Refresh 🛛	🐯 Email a Link 🏢	- 🔊 Flow 🗸	🔟 Run Report	V 🛛 🕮 Excel T	emplates 🖂	:
Home	$\sim$	All Programs $\vee$						13	Search this	view 🔎
Requests	$\sim$	✓ Name ~	Portfolio 🗸	Program Status	✓ Healthi ✓	Program Man 🗸	Current Start 🗸	Current Finish 🗠	Program Type $\sim$	Modified 1 🗸
Projects	$\sim$	JW Program 1	JW Portfolio 1	Not Started	•		11/8/2021	11/17/2021	Regular	11/18/2021
😤 Projects										
🛱 Issues										
A Risks										
🗹 My Work										
Portfolios	~	Ν.								
Portfolios										
ភ្នំ Programs										
δ <u>i</u> ) Dashboard										
		<u>All</u> # A B C	D F F	б. н. т	1 K 1 1	M N	0 P Q	R S T	u v	w x y
Projects	$\diamond$	1-1 of 1								

## **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

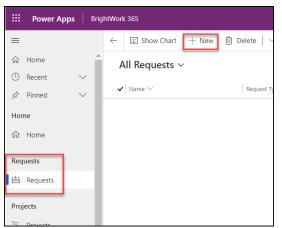
## Submit a New Project Request

**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.

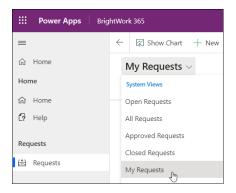
New Request	
Project Request 0 Stage Active for less than one mi	<
Select Request Type	
Title	*
A Request Template	

- 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.

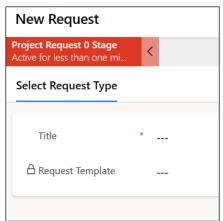
The BrightWork 365 project management process typically begins in **Requests**. Here you can choose from different project templates for an efficient and consistent way to create new projects.

To submit a new project request:

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

Brig	ghtWork 365
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🕒 Recent 🗸 🗸	
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Requests	
🖆 Requests	
Projects	

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.

<ul> <li>↔ Home</li> <li>③ Recent</li> </ul>	All Projects ~					
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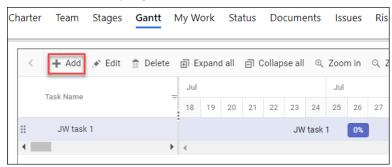
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Charter Team Stages Gantt	My Work Status	Documents	Issues Risks Projec	t Settings		
Name Produ	ct abc	Portfolio	• 🖻 Portfolio	1	Project Number	4
Project Manager * 🔒 Je	nathan Weisglass	Program	th Program	1	A Source Request	🖶 Product abc
Project Sponsor * 🔍 Ja	nathan Weisglass				A Teams Channel	
Project Type * New I	Yoduct Idea		Object	wis		
Description A wid	get that does great things		Out of	Scope		

#### 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

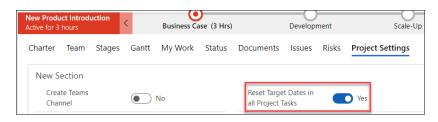
Click into the Gantt tab and update any tasks that were included as part of the template that the project was based on and add new tasks you and the team decide should be included in the project.



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

C	narter	Team	Stages	Gantt	My Work	Status	Documents	Issues	Risks	Project Settings		
	Projec	t Manage	er *	A lou	athan Weisgl	ass				Project Sponsor	*	R Jonathan
	Project	Team M	embers									
	✓ 1	eam Memb	er 🗸				$ $ Start $\downarrow$ $\vee$					Finish $\checkmark$
	J	onathan \	Weisglass				8/9/2021					8/12/2021

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.

Documents Is:	sues Risks	Project Settings					
				+	New $\checkmark$	Ť	Upload
File Size $\checkmark$	File Type $\smallsetminus$	Author $\checkmark$	Created On SharePo	đ	Word		
				₫ €	Excel PowerPo	int	
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#### **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.

🖻 Portfolios		
All Portfolios ~		∑ Searc
$\checkmark$ Name $\uparrow$ $\checkmark$	$\label{eq:progress} \texttt{Status} \lor \qquad   \; \texttt{Health} \; \texttt{i} \lor    \; \texttt{Portfolio} \; \texttt{Manager} \lor    \; \texttt{Current} \; \texttt{Start} \lor \qquad   \; \texttt{Current} \; \texttt{Finish} \lor$	Portfolio Type $\vee$
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Program 1	Portfolio 1	In Progress		8/9/2021	8/12/2021	Regula	ar

🗹 My Work					
My Work + $\sim$					Search this view
$oldsymbol{\checkmark}$ Created On $\downarrow$ $\lor$	Name $\vee$	Project $\checkmark$	Assignment Type $\smallsetminus$	Current Start $\vee$	Current Finish $\smallsetminus$
8/6/2021 3:06 PM	JW task 1	Product abc	Project Task	8/9/2021	8/12/2021

#### **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.

葪 Dashboard

Portfolio			Program		Template		Project				Project Ma	anager				
All	~		All	`	All	$\sim$	All		~	/	All		~	/	√ Filters	>
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91	262	Mari	rot C		1 1 Ann					L					Current Start Filter is (All)	$\vee$
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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.

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1	Projects		Proj-XYZ
E2	Issues Projects		Proj-0010
$\wedge$	Risks		Proj-0010 I
	My Work		Proi-0010

# **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

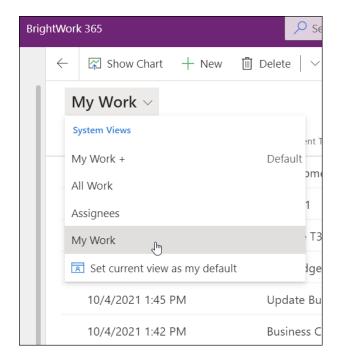
The My Work views, available from a link on the Projects Area navigation, are reports that display and link to all the work items owned by, or assigned to, the logged in user (i.e., you). For added convenience the view can display work items from multiple types of work in a single view.

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

<b>Brig</b> Power Apps Brig	htWork 365
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Home	
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	Continuous Professional Deve
Requests	Continuous Professional Deve
😫 Requests	Rollout Virtual Phone System.
Projects	Refresh Remote Desktops
Projects	Frozen Desserts for Chile
En Issues	Northwind Deployment
▲ Risks	Fabrikam Deployment
My Work	Blue Yonder Deployment
Portfolios	Frozen Desserts Africa Launch

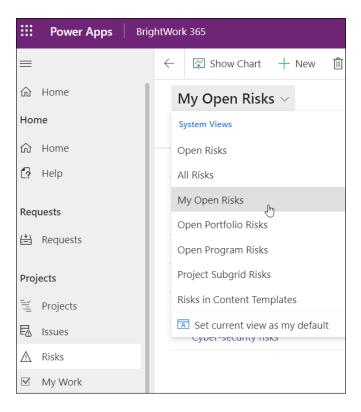
The initial view **My Work +** provides a link to the associated project site in addition to work related information.

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.

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Portfolios	Move all Internal Servers to Cloud Powdered Cream Cheese for Zambia	Get Resource Approval Business Case - Deliverable - 2		Adam Sheehan	Project Deliverable Project Deliverable	Not Started		All	~
뷺 Programs	AdventureWorks Deployment Continuous Professional Development	Execution		Adam Sheehan Adam Sheehan		Not Started	Wednesday, May Thursday, May 12		
बि) PBI Reports	Remote Work First Initiative Frozen Desserts South America Launch	Execute		Adam Sheehan Adam Sheehan	Project Stage		Tuesday, June 21	Assignee	
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≡	Portfolio	Program		Template		Project		Project	Manager	Assignee	
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A Risks	Company Rebrand Continuous Profession	Inaccurate cost estimat Gantt v1	ing, and scope creep	Jonathan Weisg			Wednesday, Sep Friday, April 08,		Risk Monit	2	
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P Projects 🗘	Portfolio Dashboa	rd Projects Timeli	ne Projects and	l Tasks Timeline	Work	My Work 🔉 Pro	ject Documents				

## **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.

oject Task				
Name	* Task One	🔒 Current Start	1/31/2022	
Progress	In Progress	🛆 Current Finish	2/9/2022	
🖰 Project	* 🖹 jw123	A Target Start		
🖰 Parent		A Target Finish		
🔒 Stage		% Complete	25	
Project Task Type	Task		25	

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.

Initia	Initiate (5 D)		Pla	Plan			Execute			Close Out	
Gantt	My Work	Status	Documents	Issues	Risks	Project Settings					
							+ 1	New Issue	Ż	Add Existing Issue	
	Issue	Status 🗸	Assigned To N	Iss	ue Type 🗸	Escalation $\checkmark$			New Is a relat	ssue ed Issue to this record.	

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.

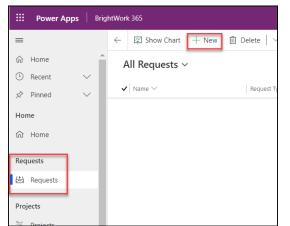
## Submit a New Project Request

**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.

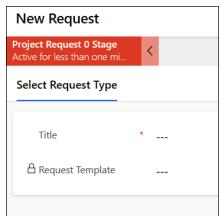
To submit a new project request:

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.

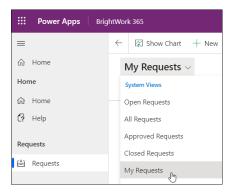


- 3. Fill in any blank fields in the Request Details and Project Details tabs.
- 4. Click Submit Request.

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.

All Projects $\vee$		
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System Views		Not Started
-	D ( )	Not Started 😑
All Projects	Default	•
All Projects Completed		Not Started (
All Projects In Progress	f	se In Progress
All Projects Not Started		

#### **Power BI Dashboards**

If your organization is licensed for Microsoft Power BI, there are a number of additional

## **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.

All Projects	/		<u> </u>			to v	Y Search this view		
✔ Project Refe ∨	Name $\checkmark$	Project Status $\checkmark$   Health Icon $\checkmark$	Project Man $\vee$	Program ∨	Portfolio 🗸	Template ∨	Created $\downarrow$ $\lor$	Modified On $\vee$	
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Proj-001069	Rollout Virtual Phone Frozen D	Desserts for Chile	Adam Sheehan.	Internal System:	Contoso Projec	I Internal System	10/4/2021	1/28/2022	
Proj-001067	Move all Internal Servers to Clou	Not Started	Adam Sheehan.	Internal System:	Contoso Projec	Internal System	10/1/2021	1/31/2022	
Proj-001066	Refresh Remote Desktops	Not Started	Donal McCarthy	Internal System:	Contoso Projec	t Internal System	10/1/2021	11/30/202	
Proj-001050	Northwind Deployment	In Progress	Éamonn McGuii	Customer Succe	Contoso Projec	Customer Succe	9/23/2021	1/11/2022	

#### Issues

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

命 Home	Open Issues ~
Home	
ি Home	✓ Name ✓
Help	Project Manager has resigned
	Our Customer is unhappy with the de
Requests	Confusion over local market needs
📇 Requests	Budget not yet released
Projects	Limited engagement of stakeholders.
Projects	We have an issue
E Issues	Confusion over local market needs
A Risks Issues	Budget not yet released
Issues Report	View in the Projects Area

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		lssu	es Tab	in the Pr	oject R	ecord		

#### **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.

命 Home	Open Risks $\vee$		
Home	System Views		Risk Status ∨
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C? Help	All Risks	ampie	
P	My Open Risks	ample	Identified
Requests	Open Portfolio Risks	nple	Identified
님 Requests	Open Program Risks	mple	Identified
Projects	Project Subgrid Risks	ple	Identified
Projects	Risks in Content Templates	ple	Identified
E Issues		па слаттрle	Identified
▲ Risks	Customer my pull sponsorship Ala	n & Kat Example	Identified
My Wor Risks	Team Members leave due to bue Ala	n & Kat Example	Identified
Portfolios	Customer my pull sponsorship Kat	Example	Identified

Risks can be easily logged from within project records.

BrightWor Active for 4			<	Initiat	• (4 Mo)		Plan	
Charter	Team	Stages	Gantt	My Work	Status	Documents	Issues Risks	Proj Risks
~	Name 🗸			Project ∨		Risk Status 🗸		P
		arrive late				ent Identified	Project Project	(
	Quality E	ngineers no	ot available	e Northwind	d Deployme	nt Identified	Project	(

Materials arrive late Risk	2 - Saved	SB Saravana Barathi Logged By	Contoso Project Portfolio	Customer Success Program	Northwin Project
Risk Documents Rel	lated	Mitigation		Contingency	
Name	* Materials arrive late	Mitigation Actions Suggested		Contingency Actions Suggested	
🔒 Risk Reference	RK-001256				
Risk Description		Mitigation Actions Requested By Date	Ē	Contingency Actions Requested By Date	
Consequence		Mitigation Actions		Contingency Actions Assignee	
Root Cause		Mitigation Actions Taken		Contingency Actions Taken	
Most Likely Impact Date	🛅				

### **Portfolio Reports**

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

✓ Name ↑ ✓       Portfolio Status ✓       Health i ✓       Portfolio Mana ✓       Current Start ✓       Current Finish ✓       Portfolio Type ✓       Modified On ✓         Contoso Projects       In Progress       ●       Christine Chang       7/2/2021       9/13/2022       Regular       1/31/2022 11:	All Portfolios $\sim$			t; V	Search this view ${\cal P}$
Contoso Projects In Progress Ochristine Chang 7/2/2021 9/13/2022 Regular 1/31/2022 11:	$\checkmark$ Name $\uparrow$ $\checkmark$	Portfolio Status $\checkmark$ Health i $\checkmark$	Portfolio Mana $$	Current Finish $\checkmark$ Portfoli	io Type $\checkmark$ Modified On $\checkmark$
	Contoso Projects	In Progress	Christine Chang 7/2/2021	9/13/2022 Regul	ar 1/31/2022 11:

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.

යි Home	All Programs ~						
Home	My Views			Program Status 🗸	Health i 🗸	Program Man 🗸	Current Start 🗸
යි Home	All Programs	100		Not Started			9/6/2021
C? Help	System Views	-					
Requests	All Programs	Proj	ects.	n Progress	•	Éamonn McGuinn	7/2/2021
	Inactive Programs	٢oj	ects.	n Progress	•	Adam Sheehan	7/2/2021
🖆 Requests	Seset default view	۲oj	ects.	n Progress	•	Alan Morgan	9/6/2021
Projects	Company Operations C	iontoso Proj	ects.	Not Started	0	Scott Footlik	9/6/2021
Projects	Marketing C	iontoso Proj	ects.	Not Started	•	Fintan Manning	9/6/2021
🗟 Issues	Accounts Recevable C	iontoso Proj	ects.	Not Started	•	Christine Chang	1/17/2022
▲ Risks							
My Work							
Portfolios							
🖻 Portfolios							
ት Programs							
Dashboard Programs							

#### **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.

Portfolio All		All	am	~	Template	~	Project All	~	Project M	lanager	~	√ Filters	>
			Program		Project Manager		Status			Health	-	,	
<b>3</b> Projects	<b>49</b> Tasks											Filters on all pages	
11	49											Current Start Filter is (All)	$\vee \Diamond$
Issues	Late Tasks		(Blank) 3	1.	L Blank 3		- Unclear 3		_	Green 3		<b>Type</b> is Content Template	$\lor \Diamond$
roject	Proj	ect Manager	Status Health	Current Start	Current Finish		Duration Progress Tas Days	ks Late Tasl	rs Issues				
T: Product Update			Unclear						15 3				
CT: New Product In CT Project Standari			Unclear O						18 3 16 5				

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

Portfolio Dashboard	Projects Timeline	Projects and Tasks Timeline	Work	My Work	Project Documents

# 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**

<sup>THE</sup> BrightWork ⊷ арргоасн →	START Get Immediate Standardization, Visibility and Control
Software	BrightWork365   MICROSOFT 345
Services	PROJECT MANAGEMENT SUCCESS STRATEGY     Support     Project Management Success Review

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 inscope '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.

0	2	3
Design	Deliver	Deploy
Using Best Practices	With Configurable Templates	With Training
Project Management Success	Configure Templates	• Roll Out Plan
Strategy	Review Templates	Go Live
Gather Requirements	<ul> <li>Adjust Templates</li> </ul>	Deployment Support
Prioritize Requirements		<ul> <li>Project Management Success</li> </ul>
Select Templates		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:

- 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: 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.

Status	Status Reports	Team	Stages	Gantt	My Work	Documents	Actions			
Task Name		Ŧ	Duration	25	1	8	15			
🔻 Desig	In		13 days	Desig	jn 0%					
▼ Req	uirements		7 days	Require.	0%					
Co	mplete handover		1 day	Comple.						
Un	iderstand the vision		5 days	Understa 🕨 0%						
Ca	pture value statemen	t	1 day	Captu	ire value state	ement				
▼ Evo	lve Plan		1 day		Evo	lve Plan				
Bu	ild Evolve Plan		1 day		Build Evolve Plan					
Pr	otect Evolve Plan		1 day	Protect Evolve Plan						
Ca	pture Evolve Plan		1 day		Capture Evo	lve Plan 📕				
Ev	olve Plan Complete		0 days	E	Evolve Plan C	omplete				
🔻 Ten	nplate Design		5 days		Templa	ate Design 🛛 🔍	6			

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 customerbw365-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.

Add a user		
Basics	Set up the basics	
Product licenses	To get started, fill out some basic information	about who you're adding as a user.
Optional settings	First name	Last name
   Finish	Brightwork	Developer
	Display name *	
	Brightwork Developer	
	Username	Domains
	britghworkdeveloper	@
	Automatically create a password	

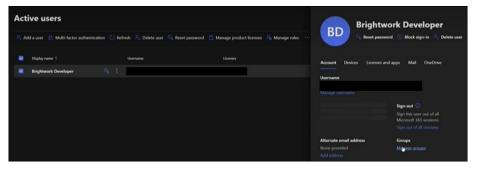
4. Click Next and assign Microsoft product licenses: Office 365 El or above and a Power Apps Premium/Power Apps per user plan. A Power Apps Premium/Power Apps per user plan is preferred but, if necessary, you can instead assign Power Apps per app plan for the development environment (done in the Power Platform admin center,

Add a user	
	Assign the licenses you'd like this user to have.
Basics	
Product licenses	Select location * Ireland
Optional settings	Licenses (2)*
Finish	Assign user a product license
	Microsoft Power Apps Plan 2 Trial 9942 of 10000 licenses available
	Microsoft Power Automate Free 9935 of 10000 licenses available
	Office 365 E1 You're out of licenses. If you turn this on, we'll try to buy an additional license for you.
	Office 365 E3 You're out of licenses and we can't automatically buy it for you. Go to subscriptions to buy one.
	Power Apps per user plan You're out of licenses. If you turn this on, we'll try to buy an additional license for you.
	Power BI (free) Unlimited licenses available
	Power BI Pro You're out of licenses. If you turn this on, we'll try to buy an additional license for you.
	Create user without product license (not recommended) It's critical that you assign a license to this user soon. Without a license, they won't have access to Microsoft 365.
	Back Next

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.

SharePoint	ho Search this library	
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Shared with us	$\square$ Name $\checkmark$	Modified $\vee$
Notebook	Acme JW NPI_3beef7ab17fbeb1194ef00224	5 days ago

# **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.

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	<b>ew Produ</b> tive for 26	i <b>ct Introdu</b> 6 days	ction <	Business	Ocase (26 E	<b>)</b> )	Develop	pment	Scal	e-Up		Lau	nch	Sta	ndard Product
C	Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Documents	Actions	Issues	Risks	Costs	Communicat	ons ·	
	Docum	nents											+ New	~ ↑	Upload :
		Name 🗡				File	Size ∽ File T	「ype∨ Auth	or Y		Cr	eated On S	5harePoint ↓ ∽		



• 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.

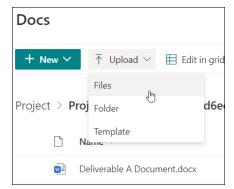
## Large Documents

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:

 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.

Do	cuments	Actions	Issues	Risks	Costs	Communications	Project \$	Settings	Related	
						+ New $\checkmark$ $\overline{\uparrow}$	Upload	🔓 D	ocument Location $ \smallsetminus $	:
e 🗸	File Type 🗡	A	uthor 🗡		Created On SharePoint $\downarrow$ $\checkmark$				Documents on Default	Site
									All Locations	

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.

Risks	Project Settings	Related
		Related - Common
🖻 Cor	ntoso Projects	Audit History 2
쁐 Cus	stomer Example	A Created On

# **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.**

Do	ocuments	Actions	Issues	Risks	Costs	Communications
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	Jonathan	weisglass		11/1/20	22 11:29	AM Documents on Default Sit

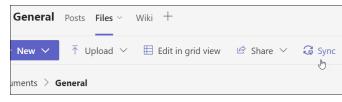
3. On the SharePoint Online page that opens click **Sync** to begin the desktop sync via Microsoft OneDrive.

>	Edit in grid view	🖄 Share	ං Copy link		
Pro	oduct Intro (Demo	)_283bd36		$\downarrow$	Sync Download Add shortcut to 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.

All Projects ~	
System Views	
All Projects	ᅯ
All Projects Completed	-127
All Projects In Progress	-12
All Projects Not Started	
NPI Projects in Progress	그
Projects	다
Support Projects in Progress	다
Templates	더
Templates and Projects	더

All Projects	~					$\mathbb{V}$	Search this
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Proj-0010	Frozen Desserts for South Ame	In Progress	0	Jonathan Weisgla	Product Operations	Conto	so Projects
Proj-0010	Powdered Cream Cheese for Za	In Progress	•	Alex Hankin	Product Operations	Conto	so Projects
Proj-0010	Powdered Cream Cheese for M	Not Started	•	Saravana Barathi	Product Operations	Conto	so Projects
Proj-0010	Frozen Desserts for Chile	In Progress	•	Alan Morgan	Product Operations	Conto	so Projects
Proj-001069	Rollout Virtual Phone System	In Progress	0	Jonathan Weisgla	Internal Systems	Conto	so Projects
Proj-001067	Move Internal Servers to Cloud	Not Started	•	Alex Hankin	Internal Systems	Conto	so Projects

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.

All Projects ~						Edit column	is 🛛 🍸 Edit fi
Name Y	Project R 🗡	Project St 🗡	Stage 🗡	Priority 🗸	Project Ty Y	ਮਤ Health Icon Ƴ	Project M 🗡

- 2. Edit the columns:
  - 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**.

Edit columns: Projects						
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Abc	Name	Add columns				
Abc	Project Reference					
-	Project Status					

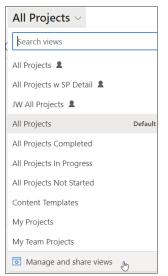
- 3. If the view is only meant to be temporary, the process is complete. If you would like to permanently save the view as a personal view:
  - 1. In the view selector drop-down click **Save as new view**.

All Projects* $\vee$	
Search views	
All Projects Completed	
All Projects In Progress	
All Projects Not Started	
All Projects*	Default
Content Templates	
My Projects	
My Team Projects	
Save as new view	
Manage and share views	

2. Fill in the fields and click **Save** to save the view as a personal view.

Save as new view		$\times$
The view is stored in the list Name *	of saved views	
Description -		
	Save	Cancel

- 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.

BrightWork 365						
	←		😭 Show Chart	🖉 Edit	🖪 Activate 🛛	
		A	ll Projects $\vee$	Ec	lit	
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			Proj-001067	Move a	ll Internal Servers to	
		~	Proj-001066	Refresh	Remote Desktops	
		~	Proj-001050	Northw	ind Deployment	
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## **Option 2: Open in Microsoft Excel Online**

Static Workshee Open in excel Online

Static Workshee Export grid data to online Excel

+ V & ? W Excel Templates V Export to Excel V II Import from Excel V : Open in Excel Online P

Click Open in Excel Online from the Excel menu.

Dynamic Worksheet

## **Item Activation Status**

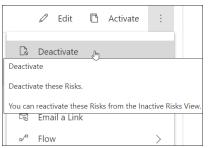
Items can be deactivated and activated throughout BrightWork 365. Deactivated records will be locked. Users with edit permission can activate a deactivated record.

## To deactivate an item:

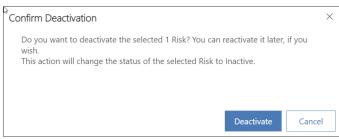
Current Finish V

3/16/2022

1. Select the item row and click Deactivate in the menu.



2. Confirm the deactivation.



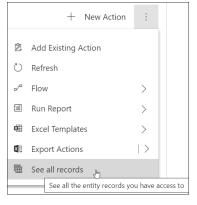
## To activate an item:

1. Select the deactivated item row and click Activate in the menu.

	🖉 Edit 🖪 Activate 🗄	
i	Activate	
	Activate these Risks.	
	Active records can be edited, assigned, shared, or viewed from the Active Risks	view
ľ		

Deactivated items may be removed from certain views. To find these items in order to activate them once again:

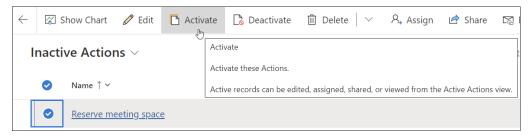
1. In the current view click **See all records** in the menu.



2. Change the resultant screen's view to the Inactive view.

Project Actions* $\sim$				
System Views				
Project Actions*				
All Actions				
Inactive Actions	շիդ			
Portfolio Actions	Inactive Actions			

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**.

	Power Apps	Brig	htWorl	k 365	
≡			$\leftarrow$	Show Chart	+ New
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(*) 	Requests			Proj-0010M30	Powdered
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Ea	Issues			Proi-001067	Move all Ir

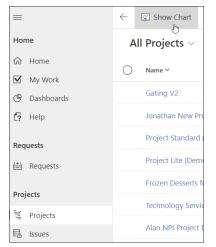
Click on the drop-down arrow to view the available System Chart options.

$\leftarrow$	🛱 Hide Chart 🕂 New 🛅 De					
А	All Projects $\vee$					
(a	) Projects by Health $ \smallsetminus $					
M	y Charts					
JV	V New Chart					
Sy	stem Charts					
(a	) Projects by Health System Charts					
(a	(a) Projects by Program					
(a	(a) Projects by Project Manager					
(a	(a) Projects by Status					
(a	(a) Projects by Template					
(b	(b) Cost Forecast by Project - Top 15					
(b	(b) Cost Forecast by Project Health					
(b	(b) Cost Forecast by Project Manager					
(C)	(c) Budget by Project - Top 15					
(C)	) Budget by Project Health					
(C)	(c) Budget by Project Manager					

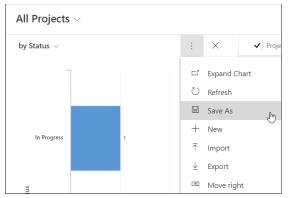
**Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

# **Configure a Personal Chart**

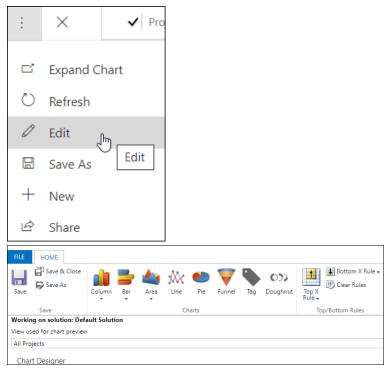
1. Click **Show Chart** at the top of a view's page.



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.



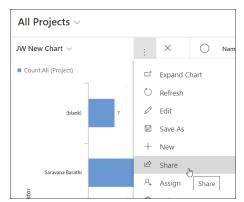
4. Save your changes.

## **Share a Personal Chart**

1. Select the personal chart in the chart drop-down.

All Projects $\vee$				
Projects by Healt	h ~			
My Charts				
JW New Chart				
System Charts	JW New Chart			
	by Project - Top			

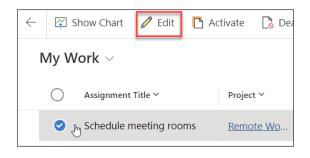
2. Click the ellipses next to the personal chart and click Share.



- 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.

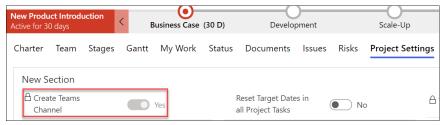
Note This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

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**

 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.

	Microsoft Teams		Q Search	
_ ctivity	Teams	Ŧ	Product abc Posts Files Wiki Charter ~ +	
<b>F</b> Chat	Your teams		If your site isn't loading correctly, click here	
	j jawbw365dev		<b>Power Apps</b> BrightWork 365	Q
ams	General		😑 🥢 🨓 Save 👹 Save & Close 🕂 New 🗋 Deactivate 🗎	Delete
 endar	BW 365 Projects		Home Product abc	
	General		Recent      Project · New Product Introduction	
alls	Product abc		Jonathan Weisglass         Program 1         ●         8/12/2021           ☆ Pinned         ✓         Project Manager         Program         Health         Current Finish	
les			Home New Product Introduction	
nes			Active for 30 days Business Case (30 D)	
			Charter Team Stages Gantt My Work Status Docu	ment
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			Projects Project Sponsor * & Jonathan Weisglass	
B			昂 Issues Portfolio * 合 Portfolio 1	
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**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**

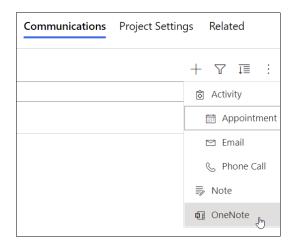
By opening table data in Microsoft Excel, you can quickly and easily view and edit data by using the Microsoft Power Apps Excel Add-in. For more information see this Microsoft Excel Table Data article.

## **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:

Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Do	cuments
Docun	nents							
0	Name ∽					File Siz	ze Y	File Type 🗡
	💼 Proje	ect-Frozen Desserts f	or South A	merica-Sta	atus	29,	709	docx
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## Search

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

## **Power Apps Search**

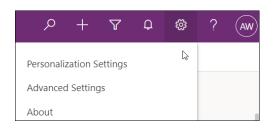
The Power Apps Search function finds records in a table that contain a string in one of their columns.

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**.

Set the time zone		
Time Zone	(GMT+00:00) Dublin, Edinburgh, Lisbon, London	~
	(GMT-12:00) International Date Line West	
Select a default o	(GMT-11:00) Coordinated Universal Time-11	
Select a default o	(GMT-10:00) Hawaii	
Currence	(GMT-10:00) Aleutian Islands	
Currency	(GMT-09:30) Marguesas Islands	
	(GMT-09:00) Alaska	

## **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.

All Projects ~						Edit column	s 🛛 🖓 Edit fi
○ Name ∽	Project R 🗡	Project St 🗡	Stage ∽	Priority 🗸	Project Ty Y	나 Health Icon Ƴ	Project M 🗡

- 2. Edit the columns:
  - Reorder or remove columns using the ellipses that appears when you hover over an existing column name and click **Apply**. Or,
    - 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**.

Ed	Edit columns: Projects							
+ 4	+ Add columns 🦻 Reset to default							
Abc	Name Add columns							
Abc	Project Reference							
-	Project Status							

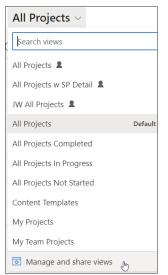
- 3. If the view is only meant to be temporary, the process is complete. If you would like to permanently save the view as a personal view:
  - 1. In the view selector drop-down click **Save as new view**.

All Projects* $\sim$	
Search views	
All Projects Completed	
All Projects In Progress	
All Projects Not Started	
All Projects*	Default
Content Templates	
My Projects	
My Team Projects	
Save as new view	
Manage and share views	

2. Fill in the fields and click **Save** to save the view as a personal view.

Save as new view		$\times$
The view is stored in the list Name * Description	of saved views	
	Save	Cancel

- 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**

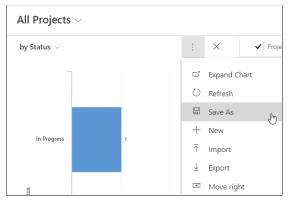
**Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

## **Configure a Personal Chart**

1. Click **Show Chart** at the top of a view's page.

=	← 🖾 Show Chart
Home	All Projects ~
ல் Home	○ Name ~
My Work	U Name -
🕑 Dashboards	Gating V2
C? Help	Jonathan New Pro
Requests	Project Standard (
🚔 Requests	Project Lite (Demo
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	Technology Servic
当 Projects	Alan NDI Droject F
lssues	Alan NPI Project [

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**.



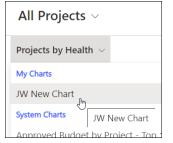
3. If you would like to make changes to your new personal chart, choose **Edit** in the menu and make necessary changes in the Chart Designer.

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Q	Refresh								
Ø	Edit		_						
	Save As	Edi	t						
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Ŕ	Share								
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	ave			Charts				То	p/Bottom Rules
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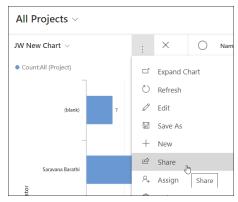
4. Save your changes.

## **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.** 

		Product Opdat
Ch	ange area	Project Reques
Pro	ojects Area	
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	Power Ap	ago
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Tom	plates	
Ten	iplates	
E.	Form Templa	ates
C¢.	ronn tempt	1.005 19
$(\stackrel{*}{=})$	Request Terr	plates
	Project Temp	olates

#### 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**

BrightWork365 Request Template	2
Form Template - to collect the data	Business Process Flow - for the stages
	Project Template - to create the project after approval
Key Elements of a F	NO CONTRACTOR CONTRACT

Your browser does not support HTML5 video.

**Request Templates** can be accessed by clicking into **Templates Area > Request Templates.** 

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Projects Area	Project Request
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e,	Request Templates	Ռո
	Project Templates	0

#### 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**

BrightWork365		
	2 Form Template - to collect the data New Product Introduction (v2.0): unit Temp interview Marcine inter	
3	A New Project Defaults - default field values	
	Key Elements of a Project Template	

Project Templates can be accessed by clicking into Templates Area > Project Templates.

		Product Opd
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	Projects Area	Project Requ
$\checkmark$	Templates Area	Project Requ
	Admin Area	Project Requ
		mplates Area (change area)
ТА	Templates Area	1 - 18 of 18
	Power Apps	Brigh
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= Ten	nplates	-
_	nplates Form Templates	
Ŀ		
Ŀ	Form Templates Request Templates	Jhy

#### 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.

Ten	nplates	
E.	Form Templates	
÷	Request Templates	
1	Project Templates	
Ten	nplates (Version 1)	
۳.	Templates	
	5 Templates	
ТА	Templates Area 🛛 🗘	

#### **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.

Business Projec Template · Template			
Details Projects	Content Templates		
Name	* Business Projects	Content Template	E CT Project Standard
Description	This template is for requesting and managing projects that support Contose	Projects	3
	to day business.	Last updated:	9/22/2021 9:15 PM
			Recalculate
		Content Templates -	0
		Last updated:	9/22/2021 9:15 PM
			Recalculate

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.

Request BPF	* 🖾 Project Request 1 Stage	A Request BPF GUID	ba059c9d-70b4-
Request Form	* E Project Request 1 Stage	A Request Form GUID	BFBA63C3-0400
Project BPF	* 🖾 BrightWork Project	A Project BPF GUID	d5c5c352-58ff-e
Project Form	* E Project Standard	A Project Form GUID	A36235B6-61FF

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.

Request Reference Type	Automated	Project Reference Type	Automated
Available in Requests and Projects	Yes 🍃	Create Copy	No No

# 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.

	ess Projects				
Details	Projects (	Content Templates			
~	Project Ref 🗸	Name $\checkmark$	Project Stat $\vee$	Health Icon $\vee$	Project Ma 🗸
	Proj-001042	Company Week 2022	Not Started	•	Donal McCarth
	Proj-001041	Modern Onboarding	Not Started	•	Anne Wallace
	Proj-001040	Remote First Initiative	Not Started	•	Alex Hankin

#### **Content Templates**

The **Content Templates** tab displays any content templates that use the selected template. See the Content Template article for more information.

Business Projects Template · Template ~				
Details Projects Content Templates				
~	Name ∨		Template $\checkmark$	

## **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.

Brig	htWork 365		ନ ବ +	Y	٢	?
	$\leftarrow  \hbox{$$\blacksquare$ Save & Close $$+$ New $$$ $$ $$Flow $$\vee$ $$}$					
	New Template					
~	Details Projects					
	Name *	Content Template	Look for Content Template			2
	Description	Projects	Projects			
		Last updated:	New Product Introduction (Template)			
			Support Request Template Support Request			
			+ New Project	@ C	hange \	/iew

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.

New Product Ide	ea		
Name Projects	* New Product Idea	Content Template	
Description	This template is for submitting new product ideas to a management team.	Projects Last updated:	9 8/27/
Request BPF	• 📴 Project Request 2 Stage	A Request BPF GUID	bdb!
Request Form	* Project Request 2 Stage	A Request Form GUID	2F63
Project BPF	* 🖸 New Product Introduction	A Project BPF GUID	Se5b
Project Form	New Product Introduction	A Project Form GUID	5800
Available in Projec	cts 💽 Yes	Available in Requests	
		Create Copy	

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.

Templates	Project Standard - Saved Project Template	
😫 Request Templates	Details Form Configurator Projects Related $\vee$	
₹ Project Templates		
Templates (Version 1)	Expand Ali     Collapse Ali     Charter     Status     Status Reports	<b>y</b> <b>y</b>
	∨ Team	$\checkmark$

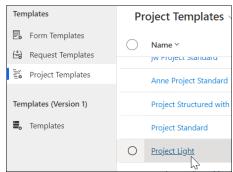
#### Note

- 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.

Templates	Project Light - Saved
🗐 Form Templates	Project Template
😩 Request Templates	Details Form Configurator Projects
Project Templates	Form Configurator

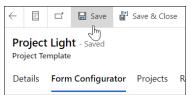
4. Check the box of any element you would like exposed and uncheck any element you would like hidden from projects that use the associated project template.

Details	Form Configurator	Projects	Related $\vee$	
^1	eam			~
	^ Тор		1	$\checkmark$
	Project Manager		1	~
	Project Sponsor		1	~
	^ Project Team Members		1	~
	Project Team Member	rs Subgrid	1	~
^ <u>s</u>	itages		(	
	^ Stages			$\checkmark$
	Project Stages Subgri	d		$\checkmark$
^ (	Gantt		1	~
	^ Gantt			$\checkmark$
	Tack Control			1

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.

Ż	Add Existing Status Re	÷
Ö	Refresh	
₀∕ª	Flow	>
100	Run Report	>
崛	Excel Templates	>
X	Export Status Reports	>

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.

rightWork Project ctive for 72 days		Initiate (72 D)				Plan				Execute			Clos	Se Out	
Charter Status Status Rep	orts Team S	stages Gantt	My Work	Documents	Actions	Issues	Risks	Costs	Communications	Project Settings	Approvals	Related $\sim$			
Name D	MC Project Standa	rd								🔒 Created On	5/31/	/2023	1	0:41 AM	
A Project Reference P	roj-001024									A Source Request					
Project Manager	Vimal Shetty									A Teams Channel					
Project Sponsor	Vimal Shetty														

### **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-thebox 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.

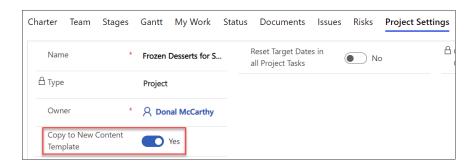
## **Create a Content Template**

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

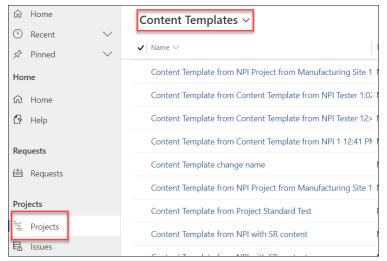
### **Create a Content Template from an Existing Project**

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

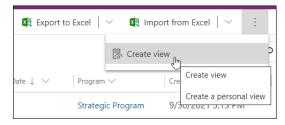
- Work assignments for Gantt Tasks, Issues, Risks, etc., are not copied over as part of the content template creation process. However, Gantt Task assignments can be manually added to content templates after they have been created.
- Gantt Chart task dependency offsets are not saved to content templates.
- 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.

<u>elect</u>			Edit the columns in the query results.				
r: Requests			Add or Remove co by this search.	lumns di	splayed	Use Saved View:	arget Customers-Temp
Show		٧	liew		Query	Debug	
Views	New	Jave	Edit Properties	Crear	📑 Details	XML	
Saved Results	New	Save	🛃 Edit Columns 📐	Clear	[ 🗄 Group OR	Download Fetch	
	<b>X</b>		Save As		[E Group AND		
ADVANCED FINI	D						

3. Choose the relevant Record Type and add the two columns required for the data transfer.

	t the columns to ad	d to this view.		
leco	rd Type	Request	~	
	Display Name 🔺	Name	Туре	
	Support Project Type	bw_supportprojecttype	Option Set	-
	Table	bw_table	Option Set	
	Target Customers	bw_target_customers	Multiple Lines of Text	
	Template	bw_template	Lookup	
$\Box$	Туре	bw_istemplate	Two Options	
$\checkmark$	xx_Target Customers	bw_targetcustomers	Single Line of Text	
	xx-del-Submit Request	bw_submitrequest	Two Options	
	xxSource Project	bw_sourceproject	Lookup	

- 4. Click OK and save and close the view.
- 5. Switch to your new personal view.
- 6. Click Open in Excel Online.

$\leftarrow$	중 Show Chart + New  ☐ Delete   ∨ ○ Refresh	Chart 🕂 New 🗊 Delete   🗸 🖒 Refresh 🖾 Email a Link   🗸 😰 Flow 🗸 🗐 Run Report 🗸 🖷 Excel Templates 🗸 💐 Export to Excel		~	Import from Excel │ ∽ :	
	Target Customers-Temp $\sim$					Dpen in Excel Online
	$arphi $ Name $\uparrow$ $\checkmark$	Created On $\checkmark$	xx_Target Customers $\lor$			itatic Workshee Open in Excel Online
	jwnpi	1/26/2022 9:10 AM	abc		<b>X</b> U <u>S</u>	Static Workshee Export grid data to online Excel.

- 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.

Your browser does not support HTML5 video.

## 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.

☆ Home + Create	Solutions	
Learn	More	×
	Customize your left navigation easy access.	items for
Solutions	I Tables	Ŕ
Tables	⊳⁄ª Flows	Ŕ
⊿ <sup>a</sup> Flows	👳 Chatbots	ᅻᅻ
···· More	() AI models	-17
Power Platform	Solutions	Ś
	图 Cards	뀩
	≣ Choices	다.
	♥ Connections	다

3. Click one of the eligible choices listed in the Caution note above.

Solutions	Power BI Mashup Paramet
	Priority
I Tables	Priority
⊿∕¤ Flows	Progress Indicator
i≣ Choices –⊐	Progress Status
··· More	Project Creation Method
	Project Task Type
Power Platform	Project Type
	Publish

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.

Edit cho	pice	
(i) This is a	global choice. Changes will be reflected whereve	er this choice is used.
Display na	me *	
Project Ty	/pe	
Choices		
Lab	el *	Value *
# 📕 S	itrategic	347,050,001
# 🗖 🖸	Dperational	267,030,000
# 📕 I	mprovement	267,030,001
# 📐 🖸	Dther	347,050,000
Ł	choice <sup>In</sup> o Edit choice	

5. Click Save.

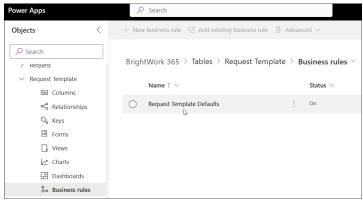
# **Configure Default Template Approval Labels**

#### 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.

ର୍ ବ୍ ସ୍	Components Properties
Set Default Value Approve	Set Default Value Display Name Approve Entity Request Template Default Value Approval Label Approve
Business Rule (Text View)	Value Approve
IF	l⊋.

- 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.

Power Apps	𝒫 Search	
Objects <	$+$ New business rule $\ rac{1}{\Box}$ Add existing business rule	$1$ Advanced $\sim$
Search     Prone Call     Portfolio     Process	BrightWork 365 $>$ Tables $>$ Project Temple Name $\uparrow$ $\sim$	ate → Business rules ← Status ←
<ul><li>&gt; Process</li><li>&gt; Program</li></ul>	Project Template Defaults	On
> Project	L3	
<ul> <li>&gt; Project Task</li> <li>&gt; Project Team Members</li> </ul>		
✓ Project Template		
Columns ☞ Relationships		
🔍 Keys		
Forms		
Charts		
Dashboards     Business rules		

- 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.

Condition New Condition	Set Default Value Approve	ج Set Default Value Reject	ه <b>ב</b>	Components Properties Set Default Value Display Name Approve Entity Project Template Default Value Value Value Value Value Value Value Value
8 E E	Business Rule (Text View)		8	Approve

- 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**

E All + Add column + Add subcomponents + Add required components  $\bigcirc$  Data  $\sim$ P Apps Chatbots Tables > Assignment E Choices Columns Relationships Business rules Views Forms Dashboards Ch ∎∕<sup>■</sup> Cloud flows ♥ Connection references Abc Custom controls Display name  $\uparrow$   $\checkmark$ Name V Data type V Processes ⊞ Lookup bw assignee Assignee R Security roles Assignment ··· bw\_assignme... 🖂 Unique ... Site maps ··· bw\_assignme... Are Text Assianment Title I Tables ≡ Choice Assignment Type ··· bw\_assignme... Web resources IE Lookup Created By createdby {} Code Created By (Delegate) ··· createdonbeh... 🖽 Lookup Data Date an... Created On ··· createdon Images Current Finish bw\_currentfini... 🗇 Date Only

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:

- 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/enus/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.
- 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.
  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

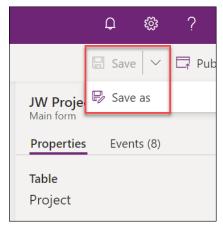
**Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

#### 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.



- 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-00987fl?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.

=	Components ×	New Dealerst
B	𝒫 Search	New Project Project
Abc	$\sim$ Popular	Charter Status
۲	🖆 1-column tab 🚛 ····	
JS	2-column tab	

10. Click on the new tab you just created and edit the tab's **Label** value and **Name** value.

Acme Tab		
Properties Eve	ents	
∧ Display opt	ions	
Label *		
Acme		
Name * (i)		
tab_acme1		

- 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**.

Form settings	Security roles for JW Project Standard form
Security roles	You can assign security roles to a form to accommo with the same data in different ways. Applying secur
Form order	need. Learn more
Fallback forms	O Everyone
Form access checker	• Specific security roles
	BrightWork Team Member
	BrightWork Template Editor

- 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.

$+$ New solution $ \mathscr{O} $ Edit	🗊 Delete	→ Export solution
Solutions		
Solutions Publishers	History	
Display name $^{\smallsetminus}$		
BrightWork 365		
🔮 🍃 JW BrightWork 36	5	

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.

Details Projects	
Name	* Project Standard-9:25 AM
Description	
Request BPF	* 💮 Project Request 2 Stage
Request Form	* F Project Request 2 Stage
Project BPF	* 🖾 BrightWork Project
Project Form	* 🗐 Project Standard

# Add a New Form Section

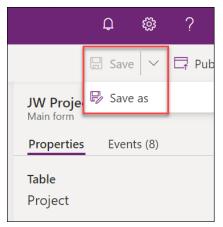
**Note** This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

#### 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-00987fl?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.

=	Components ×
₿	€ Search
Abc	$\vee$ Popular
	1-column tab
JS	🔟 2-column tab
品	□ 1-column section 🔐 😶
~	2-column section     1-column section

10. Click on the new section and edit the section's Label value and Name value.

Acme Section					
Properties					
<ul> <li>Display options</li> </ul>					
Label *					
Acme Section					
Name * (i)					
tab_acme1_section_3					

- 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**.

Form settings	Security roles for JW Project Standard form			
Security roles	You can assign security roles to a form to accommo with the same data in different ways. Applying secu- need. Learn more			
Form order				
Fallback forms				
Form access checker	<ul> <li>Specific security roles</li> <li>BrightWork Team Member</li> </ul>			
	BrightWork Template Editor			

- 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.

$+$ New solution $ \mathscr{O} $ Edit	🗊 Delete	→ Export solution
Solutions		
Solutions Publishers	History	
Display name $^{\smallsetminus}$		
BrightWork 365		
🔮 🍃 JW BrightWork 36	5	

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.

Details Projects	
Name	* Project Standard-9:25 AM
Description	
Request BPF	* 🔛 Project Request 2 Stage
Request Form	* 🖻 Project Request 2 Stage
Project BPF	* 🖾 BrightWork Project
Project Form	* 🗐 Project Standard

# **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**

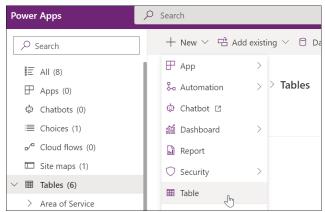
Tables are where BrightWork 365 data is stored. Tables have a list of 'sub-components':

- 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.

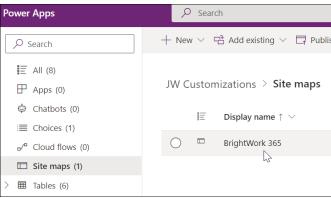
# Site Maps

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.

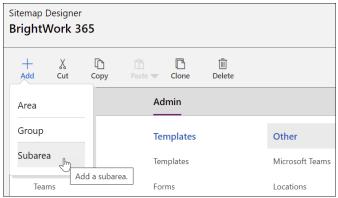
Unlike many solution customizations which will not merge with product upgrades to the same components, Site Map customizations will successfully merge with Site Map updates made in BrightWork 365 upgrades.

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.

Components	Properties
SUB AREA	View or edit properties of the selected component
∨ General	
Туре	
Select a type	~
Entity	
Select an entity	/ ~
URL	

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**.

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# **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.

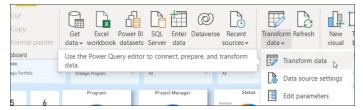
See our Product Installation article for initial Power BI set up instructions.

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

### 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.

All	Content Datasets + dataflows				
	Name				Туре
ah	JW2DevBW365	Ŕ	☆	÷	Report
₿	JW2DevBW365	$\bigcirc$	J.	:	Dataset
. du	JWBrightWork365Dev			Sched	ule refresh Report

- 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.

Securely embed this report in a				
Here's a link you can use to embed this content.				
https://app.powerbi.com/reportEmbed?report				
HTML you can paste into a website				

## 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.

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C? Help	≝≓ 1. Requests Dashboard
	। बेल् 2. Projects Dashboard
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🗟 Issues	6. Costs and Budgets Program Dashboard
∧ Risks	ाह त. Costs and Budgets Portfolio Dashboard
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Portfolios	Project Title Assignee
Portfolios	
윤 Programs	
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My Work	
🕒 Dashboards	

### 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.

$+$ New $\vee$ $rac{1}{2}$ Add existing $\vee$ $rac{1}{2}$ Publish all customizations					
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I Table		4-Column overview			
More	>	🖬 Power BI embedded 🖑			

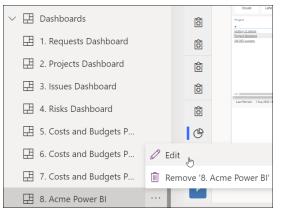
- 3. Enter a **Display** name.
- 4. Choose Type **Power BI report**, select the relevant Power BI Workspace and your custom Power BI report.
- 5. Click **Save**.
- 6. Publish the customization.
- 7. Return to the main customization screen of the unmanaged solution.
- 8. Click Add existing > App > Model-driven 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.

••••	Power Apps   BrightWork 365		, Р s	earch
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10. In the Artifacts section click on Dashboards.

Co	mpone	nts	Properties	
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- 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**

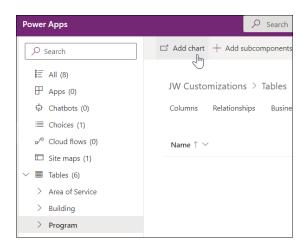
 Note
 This article is for BrightWork 365 Release February 2023 (v1.6) and newer.

 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.

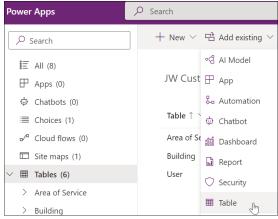
# Add a Choice Column Using a Table Lookup

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

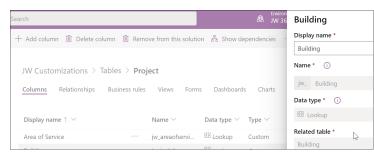
**Caution** Be sure to first read the Customization Notes article.

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. Ø Search **Power Apps** + New  $\vee$   $rac{1}{2}$  Add existing  $\vee$  bigcirc Data✓ Search 🕀 Арр IE AII (8) > Tables > & Automation Chatbot 🛛 🔅 Chatbots (0) i Choices (1) 🛍 Dashboard  $_{\Box}/^{\Box}$  Cloud flows (0) Report 🖾 Site maps (1) ◯ Security > ∨ ⊞ Tables (6) I Table Jm > Area of Service
  - 2. Add the existing out of the box **Project** table to the solution, if it's not already present.



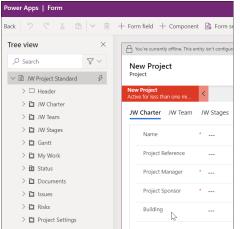
3. In the **Project** table add new Lookup column **Building** and configure it to do a lookup to the **Building** table. Save the modified table.



4. If in the Project table's Forms component you do not yet have acustom 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.

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> 🛅 Charter			Display Name
> 🛅 Team		Name * Portfolio *	Project Standard
> 🛅 Stages		A Project Reference Program •	Description

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.



- 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.

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> 🎛 Tables (6)	

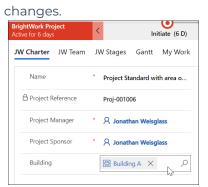
2. Choose the section Admin | Other and click + Add | Subarea.

Sitemap Designer BrightWork 365						
+ Add	∦ Cut	Copy Pas		Clone	Delete	
Area			Ad	lmin		
Group			Te	mplates		Other
Subarea			Ter	nplates		Microsoft Teams
Tear		Add a subarea.	For	ms		Locations

- 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 is configured to use your custom Project form.

JW Project Stanc Template · Template ·	ard Simple - Saved	
Details Projects	Content Templates	
Request Business Process Flow	* 🐼 Project Request 2 Stage	
Request Form	* F Project Request 2 Stage	
Project Business Process Flow	* 🖾 BrightWork Project	
Project Form	* JW Project Standard X	Ø

10. In the chosen project click into the **Building** column, choose a Building choice and save the



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.

UZ	ExternalConectionname	
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:

Program (Programs)		
Project Manager (Users)	systemusers( 🔘	Project Manag × )
Project Sponsor (Users)	systemusers( 🔘	Project Sponso × )
Template (Templates)		

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.

amic content 🔹	Add dynamic content from the apps and connectors used in this flow.	Hide
	Dynamic content Expression	
	$f_x$ if(empty())	
	ОК	
	Project Manager (Type)	^
	Project Manager (Value)	
	Project Sponsor (Type)	

- 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.

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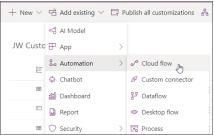
### Copy Data from Custom Request Columns to Custom Project Columns

Note

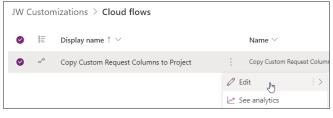
- This article is for BrightWork 365 Release February 2023 (v1.6) and newer.
- If working with Lookup columns and Power Automate Flows, see this article for important technical notes.

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.

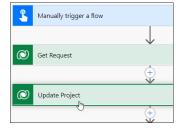
- 1. Load the unmanaged solution you use to add customizations.
- 2. If not done previously, add your new custom column to the Request and Project tables.
- 3. If not done previously, add your new custom column to your custom Request and Projectforms.
- 4. In the unmanaged solution choose **Add existing > Automation > Cloud flow**.



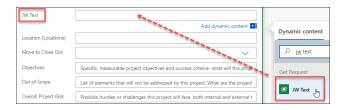
5. Choose the flow Copy Custom Request Columns to Project and click Edit.



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.

	Power Apps		
ŵ	Home		
	Learn		
₽	Apps		
+	Create		
Ø	Dataverse	$\sim$	
¢⁄۵	Flows		
ф	Chatbots	$\sim$	
Ø	AI Builder	$\sim$	
85	Cards (preview)	$\sim$	
	Solutions		

3. Click the 3 dot menu for the BrightWork 365 solution and click Settings.

Solutions	
Solutions Publishers History	
Display name $armidsimeq$	Name $\vee$
SrightWork 365	BrightWork365
Dynamics 365 App for Outlook	🖉 Edit
Dynamics 365 App for Outlook	🗓 Delete
Microsoft Flow Approvals	→ Export solution
Microsoft Flow Approvals Core Solution	器 Show dependencies
Power Apps Checker Base	Clone
Power Apps Checker	✓ Apply Upgrade
Contextual Help Base	A͡≱ Translations
Contextual Help	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. SeeControl 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.

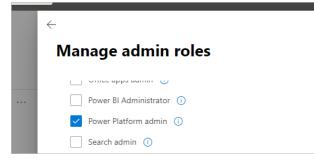
The Microsoft 365 account used to install BrightWork 365 must have the attributes listed below - licenses must not be removed from this user to ensure flows continue to function:

• 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.

Licer	ISES
	Microsoft Power Automate Free Common Data Service Flow Free
	Power Apps per user plan Power Automate for Power Apps per User Plan Common Data Service
	Power Apps per User Plan

• **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.

Role Name	Business Unit	
Help Page Consumer	bw365-dev	
Knowledge Manager	bw365-dev	
Service Reader	bw365-dev	
Service Writer	bw365-dev	
Solution Checker	bw365-dev	
System Administrator	bw365-dev	
System Customizer	bw365-dev	

- 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.

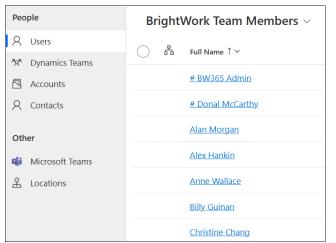
### End User BrightWork 365 License Requirements

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**.

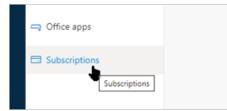
#### How to Check Your Microsoft 365 License Status

To check your Microsoft 365 licensing status.

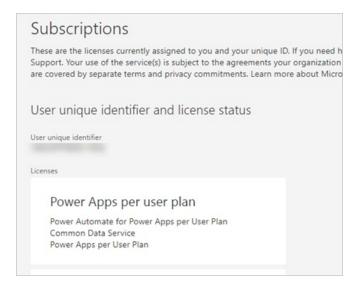
- 1. Log in to https://www.office.com.
- 2. Click **View account** on your profile menu.



3. Click **Subscriptions** on the nav.



 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 S.

#### BrightWork 365 Install Guide

### Importing Custom Solutions Supplied by BrightWork

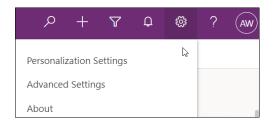
If you're organization worked with the BrightWork team to create a custom solution, then you will also need to read these additional import instructions.

# **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.

Set the time zon	e you are in	
Time Zone	(GMT+00:00) Dublin, Edinburgh, Lisbon, London	~
	(GMT-12:00) International Date Line West	
Select a default /	(GMT-11:00) Coordinated Universal Time-11	
Select a deladit v	(GMT-10:00) Hawaii	
Currency	(GMT-10:00) Aleutian Islands	
currency	(GMT-09:30) Marquesas Islands	
	(GMT-09:00) Alaska	

# **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**

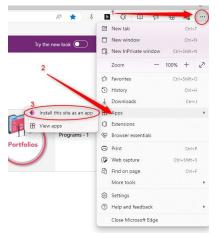
Confirm that users have been added to the Power Platform environment that contains the BrightWork 365 solution and have also been assigned relevant BrightWork 365 security roles; if this is not done, users will not be able to access BrightWork 365. See the BrightWork User Management and BrightWork Security Roles Details articles for more information.

# Add the BrightWork 365 App as a Desktop App

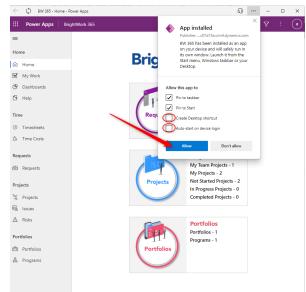
The BrightWork 365 app can be added as a desktop app via tools included with the Microsoft Edge and Google Chrome browsers.

### **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**.

BrightWork 365					
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.

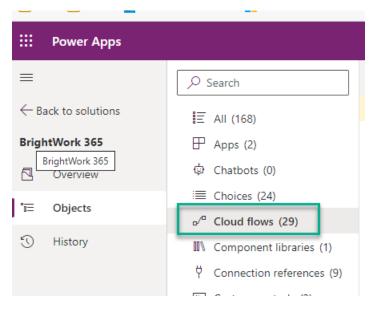
# **Post Upgrade Verification Checklist**

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**

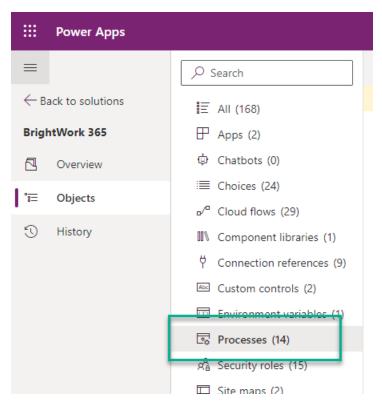
- 1. As an Admin user go to the Environment Solutions page.
- 2. Click on BrightWork 365.
- 3. Select Cloud Flows from the side panel



- 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.

Templates	New Product Introduction - Saved Project Template					
Request Templates	Details Related V					
E Project Templates	Details					
Templates (Version 1)						
Templates	Name * New Product Introduction	Available in Requests 🛛 🗹				
	Approvals * Coordinator Anne Wallace (Offline)	Available in Projects				
	Form Template * 🖪 New Product Introduction (v2.0)	Reference Type * Automatic				
	Business Process Business Process Business Process Business Process	Create Copy Oreate Copy - Create a copy of the template				

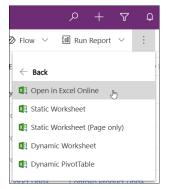
4. Edit the Request Template or Project Template you created to point to your custom form, and if applicable, to your custom Business Process Flow.

### Switch Older v1.5 Projects to the New Project Template

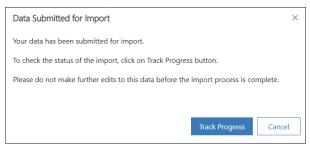
1. Click into the **Projects Area > Projects > All Projects** view.

Home	All Projects $\vee$
☆ Home	Name ~
My Work Dashboards	Acme Solution D
C? Help	JC Example
Requests	David Example
Requests	Frozen Desserts f
Projects	Jamie Example
Projects	Stacey Example
E Issues	Alan Example for

- 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.

Impor	Imports My Imports							
~	🛱 Show Chart 🛛 🖏 Delet	e   🗸 💍 Refresh	💧 Visualize this view	Export to Excel				
M	My Imports $\sim$							
$\bigcirc$	Import Name ~		Status	Reason ~				
$\bigcirc$	Excel Online - All Projects 3	/6/2023 8:28 AM	Con	npleted				

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.

+ New solution	← Import	Dpen AppSou
Solutions	•	

- 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.
- 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.
- 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.
- 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.
- 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 36	5 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	٧	v	v	v	v
BrightWork Request Submitter	Security Role	No	No	No	BrightWork 365	٧				
BrightWork Team Member (including Request Submit)	Security Role	No	No	Yes	BrightWork 365		v	v	٧	٧
BrightWork Project Manager	Security Role	No	Can see Project Settings	Yes	BrightWork 365			v	٧	٧
BrightWork Stage Mover	Security Role	No	No	No	BrightWork 365			√*	٧	٧
BrightWork PMO Manager	Security Role	No	No	No	BrightWork 365					٧
BrightWork Template Editor	Security Role	No	No	No	BrightWork 365					۷
BrightWork Approvals Coordinator	Security Role	No	Can see Approvals tab	Yes	BrightWork 365					٧
BrightWork Request Receiver	Security Role	Yes	No	Yes	BrightWork 365					۷

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.

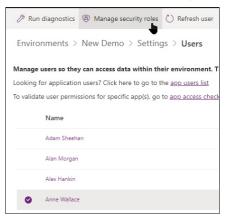
III Power Apps BrightWork 365						
=		← 🖾 Show Chart 🕐 Refresh 🖾 Email a Link   ∨				
Security	^	BrightWork Users $\vee$				
8 Users		✓ Full Name ↑ ✓				
ሳጵ <sup>e</sup> Teams		Jonathan Weisglass				
Templates $\checkmark$		Meghan Browne				
Other V						

### To assign security roles to users individually:

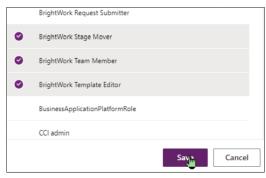
- 1. Login to your organization's Power Platform admin center and click the environment where you installed BrightWork 365.
- 2. Click See all under Users.



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.

People	BrightWork Users ~
A Users	Search views
්¤ Dynamics Teams	
Accounts	BrightWork Group Managers BrightWork NPI BPF Stage Mover
Other	BrightWork Portfolio Manager
Microsoft Teams     Locations	BrightWork Portfolio Sponsor BrightWork Program Manager
	BrightWork Program Sponsor BrightWork Project Managers BrightWork Project Sponsors

### **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:

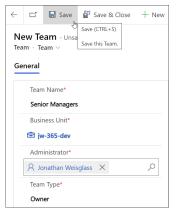
- 1. Login to the BrightWork App.
- 2. Switch to the **Admin** area.

Ch	ange area	
Pro	ojects	
🗸 Ad	lmin	ſ.
A Ad	min	$\diamond$

3. Click **Dynamics Teams** and click + New.

≡	$\leftarrow$ $\swarrow$ Show Chart + New $\textcircled{1}$ Delete $\lor$ $\circlearrowright$
Templates	Local Business Owne
Templates	Create a new Team record.
Forms	
People	
A Users	
ትጽ Dynamics Teams	

- 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 36	5 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	٧	v	v	٧	٧
BrightWork Request Submitter	Security Role	No	No	No	BrightWork 365	٧				
BrightWork Team Member (including Request Submit)	Security Role	No	No	Yes	BrightWork 365		٧	٧	٧	٧
BrightWork Project Manager	Security Role	No	Can see Project Settings	Yes	BrightWork 365			v	٧	٧
BrightWork Stage Mover	Security Role	No	No	No	BrightWork 365			٧*	٧	٧
BrightWork PMO Manager	Security Role	No	No	No	BrightWork 365					٧
BrightWork Template Editor	Security Role	No	No	No	BrightWork 365					٧
BrightWork Approvals Coordinator	Security Role	No	Can see Approvals tab	Yes	BrightWork 365					٧
BrightWork Request Receiver	Security Role	Yes	No	Yes	BrightWork 365					٧

#### **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.

	Microsoft 365 admin center	♀ Search
=		Home 🗦 Guest users
ഹ	Home	Guest users
8	Users ^	
	Active users	Guests have access to Teams. Manage Teams settings
	Contacts	General nove access to realist manage realist sectings
1	Guest users	
	Deleted users	Add a guest user 🕐 Refresh
የድ	Teams & groups 🗸 🗸	Display name
8	Dilling	

- 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.

Groups and roles		
Groups	1 groups selected	
Roles	User	
Settings		
Block sign in	Yes No	
Usage location		$\sim$
Job info		
Job title		
Department		
Company name		

- 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.

# **Microsoft Teams Admin Guide**

# 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:

 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.

Program								Name	Program Manager	Program Sp
Statement	Status	Status Reports	Documents	Actions	lssues	Risks	Costs	Communication	ns Program Settings	Related
Details										
Name		* Test Progra	m	A Portfolio		* É	Contos	o Projects	Priority	2. High
Descriptio	on			Program Sp	onsor		W Anne V	Vallace (Offlir	Program Type	Regular
			<b>—</b>	Program M	anager	(	Caitrior	na O'Connor (	Microsoft Team	
Created C	Dn	8/9/2022								-

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**.

Program								Name	Program Manager
Statement	Status	Status Reports	Documents	Actions	lssues	Risks	Costs	Communications	Program Settings
Program S	ettings								
Portfolic	)	* 🖻 Contosc	Projects				Update 1		Yes

- 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.

Program						Name	Program Manager	Program Sponsor Health
Statement	Status	Status Reports	Documents	Actions Issues	Risks Costs	Communicatio	ns Program Settings	Related $\vee$
Descripti	ion			Program Sponsor	Ave Anne V	Vallace (Offlir	Program Type	Regular
				Program Manager	Caitrior	a O'Connor (	Microsoft Team	Look for Microsoft Te. 🔎
A Created	0-	8/9/2022					Microsoft Teams	
	Un	2:53 PM					Marketing 11/1/2022 9:11 PM	

- 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.

Environments >	Environment > Settings
Search for a setting	$\checkmark$
へ 😳 Product	V E
Behavior	Email
Features	$\sim$ 1
Languages 다	Docum
Privacy + Security	NZ F

4. Turn on the Teams option.

Collaboration
Show co-presence of colleagues on forms. <u>Learn more</u> □ <sup>*</sup> Off
End users can add and join Teams meetings from appointments in model-driven apps. <u>Learn more</u> ㄷ
On Con

5. The Teams meeting option will now be available on the BrightWork 365 Appointment form.

Quick Create: Appoin	tme	nt	×
Owner	*	2 Donal McCarthy	
Required Attendees			
Optional Attendees			
Subject	*		
Location			
Teams meeting		No No	

# **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:

Documents		
		+ New $\checkmark$ $$ Upload $\Box$ Document Location $\checkmark$ :
	The throttling limit has been exceeded by this operation.	

**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.

✓ EDIT LINKS
Request

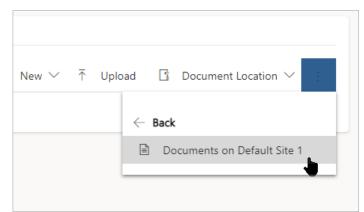
This view cannot be displayed because it exceeds the list view threshold (5000 items) enforced by the administrator. To view items, try selecting another view or creating a new view. If you do not have sufficient permissions to create views for this list, ask your administrator to modify the view so that it conforms to the list view threshold.

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.

Site contents	Ē	Portfolio		Document library	2	1/9/2023 9:04 AM
Recycle bin	Ē	Program		Document library	2	1/9/2023 9:57 AM
Edit	Ē	Project		Document library	4979	6/1/2023 8:43 AM
Lart	Ē	Project Task		Document library	2	3/21/2023 8:18 AM
	Ē	Projects Archive	:	Document library	1001	4/20/2023 2:34 AM
	F	Request		Document library	5106	6/1/2023 4:38 AM

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.

+ New ~		
List	Document library	0
Page	Document library	0
Document library	Document library	0
App Subsite	Document library	0
Subsite Issue	Document library	169

- 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.

mate $\smallsetminus$		$\equiv$ All Documents Archiver $\vee$	$\nabla$	()	2
		$\checkmark \equiv$ List			
		E Compact List			
$\sim$	Create	🗄 Tiles			
y -	create	All Documents			
	Februa	✓ All Documents Archiver			
	Februa	Create new view			
	Februa	Save view as			
	Februa	Set current view as default			
	Februa	Edit current view			
	Februa	Format current view			

#### 5. Add the **Created** column.

ct a	Display	Column Name	Position from Left
	<b>~</b>	Type (icon linked to document)	1 ¥
	<b>~</b>	Name (linked to document with edit menu)	2 💙
	<b>v</b>	Modified	з 🗸
		Modified By	4 🗸
		Created	5 🗸
		Anna Casadard Du	<i>c</i> <b>v</b>

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.

Sort Select up to two columns to determine the order in which the items in the view are displayed. Learn about sorting items.	First sort by the column:
	Created 🗸
	<ul> <li>Show items in ascending order</li> <li>(A, B, C, or 1, 2, 3)</li> </ul>
	$\bigcirc \overbrace{[\frac{3}{2}]}{1}$ Show items in descending order (C, B, A, or 3, 2, 1)

#### 7. Scroll down further, expand the item limit section, and enter **1000** in the field.

🗉 Item Limit	
Use an item limit to limit the amount of data that is returned to users of this view. You can either make this an absolute limit, or allow users to view all the items in the document library in batches of the specified size. Learn about managing large lists.	Number of items to display:
	Display items in batches of the specified size.
	O Limit the total number of items returned to the specified amount.

8. Click **OK** to save your changes to the view.

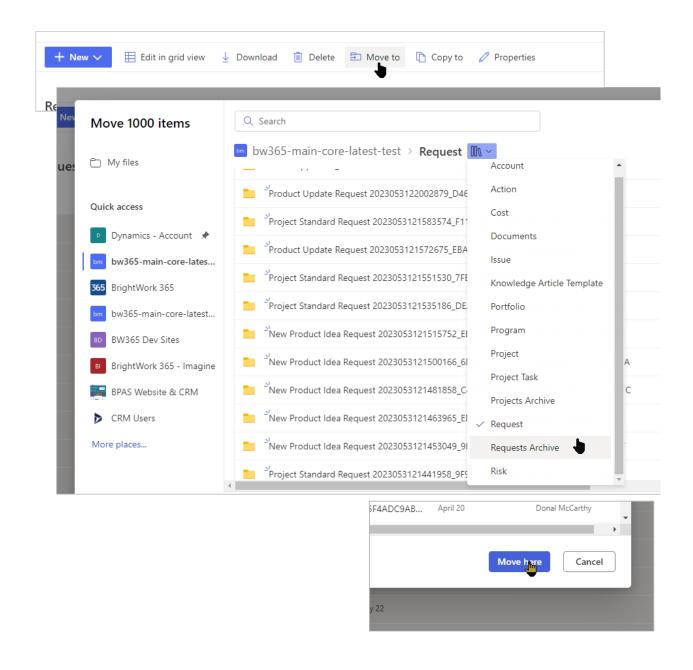
Delete	ок	Cancel
	R.	

#### **Move Documents to the Archive Library**

 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.

+ New ∨ 目 Edit in grid view	Downlo	ad [	🕽 Delete	o 🗈 Copy to 🖉	Properties		imes 1000 selected
Request 🔍 🗸							
🔗 🗋 Name 🗸			Modified $\vee$	Modified By $\vee$	Created $\uparrow{\smallsetminus}$	+ Add column	
Project Standard Request	6 5		February 21	Anne Wallace	February 21		
New Product Idea Reque	6 5		February 22	Jim Corbin	February 22		
New Product Idea Reque			February 22	Anne Wallace	February 22		

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

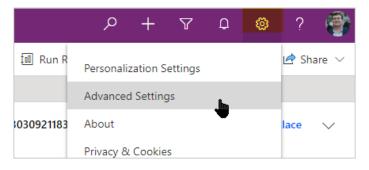
to another, a message like the below will display in affected records.

Documents	
+ New	v $\checkmark$ $\bar{\uparrow}$ Upload $\bar{I}$ Document Location $\checkmark$ :
Request 2023030914295122_AE806334845C40A495E87E4CD047E063" has been renamed or deleted from SharePoint. It was expected inside "https://brightwork1.sharepoint.com/sites/b	bw365-main-core-latest-test/bw_request" path. Restore the

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**.

	Dynamics 365	Settin	gs ~	Business Mar	nageme	nt		
Se	ettings							
Вι	isiness	Cust	omizati	on	Syste	em		
2	Business Manageme	·H·	Customiz	zations	20	Administration	$\sum_{\alpha}$	Email Co
Ĺ	Templates	+	Solutions	5	£	Security		Dynamio
Ň	Mobile Offline		Microsof	t AppSource	٩,	Data Management		
¢	Sync Error	€∎	Plug-In T	race Log		System Jobs		
		$\bigcirc$	Solutions	s History	C.	Document Manage		
						Auditing		

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**.

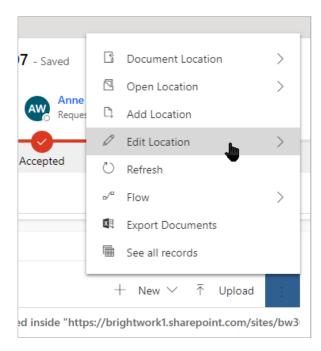
https://contoso.sharepoint.com/sites/contoso-proj/Archive/Forms/AllItems.aspx

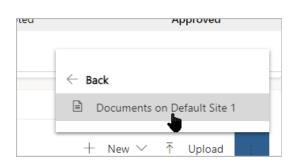
ign	tWorl	c 365			SA	<u>ANDE</u>	3OX		م
	←	ď	🖫 Save	🖨 Sa	ave & Close	+ New	Deactivate	🗓 Delete	🕐 Refres
			s <b>ts_Archi</b> t Location	ve - Sa	ved	Save & Close Save and clos	e this Document Loc	ation.	
	Ge	neral	Related	~					
		Nam	e	×	Requests_/	Archive		Owner	*
		Desc	ription						
	U	IRL Op	tions						
	u		nt Site or	×	🔀 Default	t Site			
	U	Parer	nt Site or	*	Default	t Site			
	u	Parer Loca Relat	nt Site or tion	*	_	t Site			

### **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.

Create a new SharePo 365	oint f	older or add an existing SharePoint folder as a document location in Microsoft Dynamics	;
Display Name	*	Documents on Default Site 1	
Specify the name of t record	the e	xisting SharePoint folder here to associate the folder with this Microsoft Dynamics 365	
Parent Site / Location	ו <b>*</b>	🖾 Requests_Archive 🗙	Q
Folder Name	*	New Product Idea Approval Request 2023031009372307_3F0E984DDB164EB9910326	0
			,
		Sav <mark>e</mark> Cano	el

The Documents subgrid will load correctly.

Docum	ents			
0	Name Y	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:

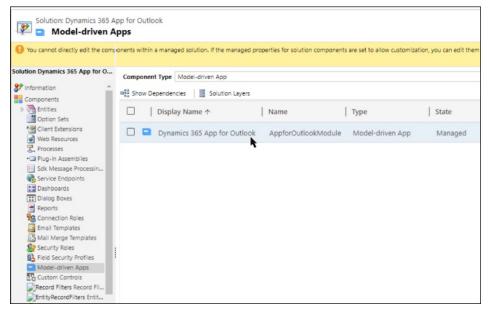
- 1. Navigate to https://make.powerapps.com/ and select the BrightWork 365 Environment.
- 2. Click the **Switch to classic** option.

		,O Search		
+ New solution	n ← Import solution	Dpen AppSource	Publish all customizations	
Solutions				Switch to classic

3. Open Dynamics 365 App for Outlook (the one with the highest version number).

All	Solutions *					
💕 New	X Delete	pendencies 🛛 🖶 Import 🕠 Export	Clone a Patch 🗄 Clone Solution	🐺 Apply Solution Upgrade 🛛 🗿	Import Translatio	ons 🛸 Expo
	Name	Display Name	Version	Installed On $\downarrow$	Package Typ	Publisher
	AppforOutlookAnchor	Dynamics 365 App for Outlook	1.2.28.0	4/3/2023	Managed	microsoftd
	AppforOutlookCDSSol	Dynamics 365 App for Outlook	1.2.310.0	4/3/2023	Managed	microsoftd
	ProjectForms	Project Forms	1.0.0.9	11/18/2022	Managed	BrightWork

4. Click Model-driven Apps and open Dynamics 365 App for Outlook.



5. Expand Entities, scroll down and select Project.

	🗟 Save 👹 Save And Clo	Last Saved on :4/3/2023 9:10 AM Published se 📋 Validate 1 Publish D Play	
? as Help			
<b>^</b>	Components	Properties	
	▼ ARTIFACTS		
	Entities Model and manage busi	ness Mata.	
All	O Da Hi	processstageparameter	
	Pro	Program     bw_program	
	All	Project     bw_project	
		Project Task	

#### 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.

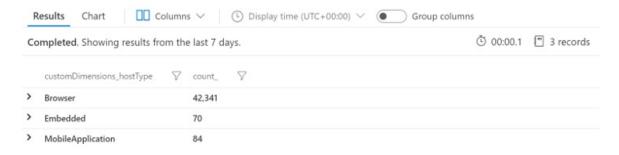
	Ģ	•	₽	Q	ø	ǹ	BA
		Dy	/nami	cs 36	5	꾸	×
~	Loc	ok for i	records	;		$\checkmark$	$\times$
€, ,	Lo	ook for	record	ls			<b>Q</b>
(€) → …	←AII		Sele	ct a recor	d type to	filter	
d 3/29/2023 5:17 PM		Accour	nts				
	<u>R</u> (	Contac	ts				
	ĔΡ	roject	S			•	

# **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**

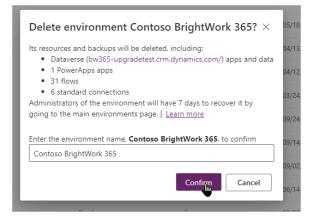
The easiest way to remove BrightWork 365 from your Power Platform tenant is to delete the environment into which BrightWork 365 is installed.

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.

Envir	onments			
	Environment	Туре	State	Region
0	Contoso BrightWork 365	··· Sandbox	Ready	United States
		Deselect Open	Ready	United States
		Settings	Ready	United States
		Resources >	Ready	Europe
		Convert to production	Ready	United States
		Backups >	Ready	United States
		Copy Reset	Ready	United States
		Delete	Ready	United States
		History	Ready	United States
		··· Production	Ready	United States

3. Enter the environment name and click Confirm.



### **Delete the BrightWork 365 Solution**

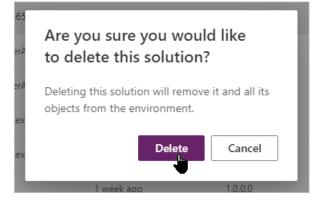
If you want to keep the environment, you can delete the BrightWork 365 solution from the environment. If you have a custom managed solution for BrightWork 365 on top of the main BrightWork 365 solution, you must delete the custom managed solution first.

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.

SrightWork 365	BrightWork365	1 week ago	1
Power Apps Checker Base	🖉 Edit	1 week ago	1
Power Apps Checker	🔟 Delete	1 week ago	1
Contextual Help Base	↦ Export solution	1 week ago	

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)

Your browser does not support HTML5 video.

# **Projects**

To learn more about how to manage Projects, click here.

Enhancements to **Projects** in this release include:

#### **New Starter Project Templates**

Your browser does not support HTML5 video.

• 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

Your browser does not support HTML5 video.

- 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.

**	Obtain permits	Obtain permits	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**

Your browser does not support HTML5 video.

• 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 Crid view on

- The My work ayout make each project is now the same as the My work one 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.

3. My Work - Open $\sim$
Name 🗸
Initiate 1
Plan 2

• The **Assignment Status** column is now color coded based on the values such as Not Started, In Progress, Completed and Cancelled.

Assignment Status 🗡
Not Started
Completed
Completed
Completed
Completed
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 of project 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.

# BrightWork365

20 - My Requests 293 - Open Requests 10 - Approved Requests 295 - All Requests

Requests

Projects 16 - My Projects Projects

8 - My Team Projects 15 - Not Started Projects 6 - In Progress Projects 1 - Completed Projects

Portfolios

9 - Portfolios

6 - Programs

Portfolio

### **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.

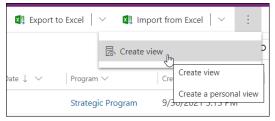
### New Multiline Text Request Column "Target Customers"

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.

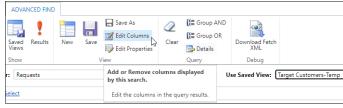
# How to Copy Data from Deprecated Single Line of Text Column "Target Customers" to the new Multiline Text Column

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**.

000	rd Type	Request			
eco	Татуре	Request		•	
	Display Name 🔺		Name	Туре	
	Support Project Type		bw_supportprojecttype	Option Set	
	Table		bw_table	Option Set	
	Target Customers		bw_target_customers	Multiple Lines of Text	
	Template		bw_template	Lookup	
	Туре		bw_istemplate	Two Options	
✓	xx_Target Customers		bw_targetcustomers	Single Line of Text	
	xx-del-Submit Request		bw_submitrequest	Two Options	
	xxSource Project		bw_sourceproject	Lookup	

- 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.

~	Show Chart + New	🗊 Delete   🗸 💍	) Refresh 🖸	溕 Email a Link 📔 🗸	$\boxtimes$ Flow $\ \lor$	📶 Run Report 🗸	🛍 Excel Templates 🛛 🗸	Export to Excel		🗱 Import from Excel 📔 🖂 🗄
	Target Customers-Tem	p ~								pen in Excel Online
	$\checkmark$ Name $\uparrow$ $\checkmark$			Created On	~		xx_Target Customers $\checkmark$			tatic Workshee Open in Excel Online
	jwnpi			1/26/2022	9:10 AM		abc		K S	tatic Workshee Export grid data to online Excel.

- 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.

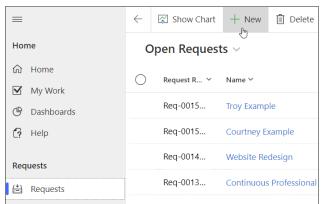
#### **Request a Project**

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 < > : \* ? |

	mi			
ect Request Typ	e			
Title		Four Day Week		
Template	•	Look for Template		
		Templates		
		New Product Idea This template is for submitting new product ideas to a management team. New Product Idea-1143 AM		
		New Product Idea-11:43 AM This template is for submitting new product ideas to a management team.		
		Project Standard This template is for managing projects the are in the middle of the complexity spectrum.		
		+ New Template       Change View		

**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.

Acme JW NPI equest · New Product Idea	1 🗸		Acme JW NPI Draft Meg Name Request Status Requ
oject Request Level 2 tive for less than one mi dea Details History	C Draft (< 1 Min)	Accept	Approve Create
Idea Details	Acme JW NPI	Current State	Prototype
Title	* Acme JW NPI	Market Size	\$7,000,000.00
Idea Description Program	Widgets that do amazing things 뀲 Business Projects	New Idea Advantage	
Target Customers	All of Acme's customer base	Source of Idea	Acme New Products division
Customer Need	Need new amazing widget	Submit	No

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.

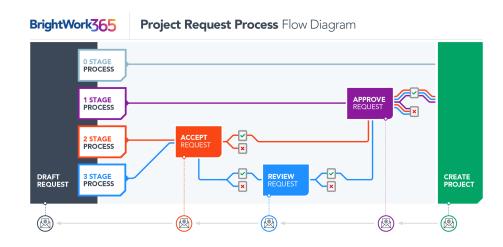
The notification's From address will be set as the owner of the associated workflow.

#### 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

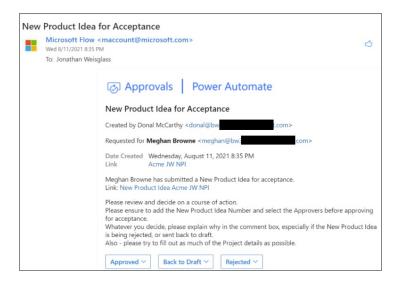
Successful completion (i.e. approval) of the last flow in a stage sequence triggers the **Create Project** flow. This flow is also triggered by the creation and submission of a 0 Stage request.

# **Receiver Review of the Project Request**

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

# **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.

DM	Donal McCarthy         ③         △         5         ·         ·           Thu 12/08/2021 02:54         To: Meghan Browne         ● <t< th=""></t<>										
	Dear Meghan,										
	The New Product Idea ' <u>Acme JW NPI</u> ' you submitted has been accepted and will shortly be sent for approval.										
	lf 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						
				Thank you for submitting this request, it is							

# **Approver Review and Project Creation**

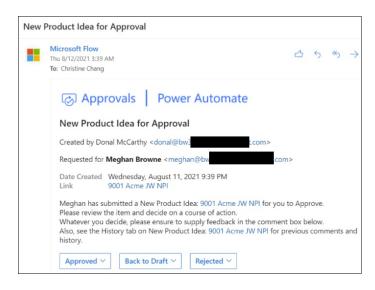
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

## **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**.

cme JW NPI equest · New Product	Idea $\vee$			Acme JW NPI Name	Accepted Request Status
oject Request Level 2 tive for 2 hours	< Oraf	t Ad	ccept (31 Min)	Approve	Cre
dea Details Project	* New Product Idea	Project Name	Acme JW NPI	A Project Created	
🗄 Submit Date	8/12/2021	Project Sponsor	8 Jonathan Weisglass	🖞 Project	
Idea Number	9001	Project Manager	Alex Hankin	Create Project	
Receiver	A Jonathan Wei	sglass Portfolio	Contoso Projects		
Approvers	× Christine Chan × Jonathan Weis		ភ្លិ Business Projects		
		Project Template	New Product Intr		
Send for Approval	No				

The Approver(s) will receive an email requesting an approval decision.



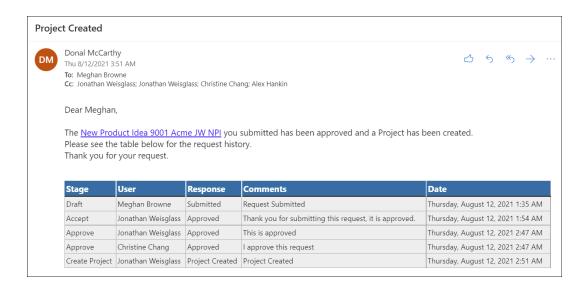
**Note** If there are multiple Approvers listed in the project request, all must approve the

#### 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.

cme JW NPI quest · New Product I	Idea 🗸				ect Created Meghan Brown Requestor
ject Request Level 2 npleted in 3 hours	< Draft	Accep	ot	Approve	Create Project
ea Details Project	Details History				
Request Type	* New Product Idea	Project Name	Acme JW NPI	Project Created	8/12/2021
Submit Date	8/12/2021	Project Sponsor	8 Jonathan Weisglass	Project	Acme JW NPI
Idea Number	9001	Project Manager	Alex Hankin	Create Project	Yes
Receiver	A Jonathan Weisglass	Portfolio	🖻 Contoso Projects		
Approvers	× Christine Chang	Program	品 Business Projects		
Approvers	× Jonathan Weisglass				

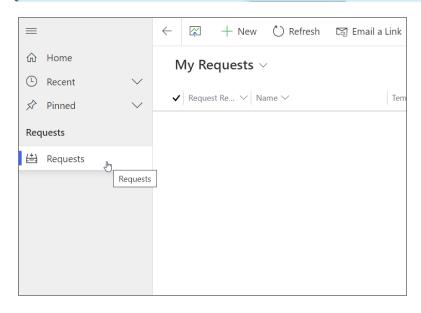


Acme JW NPI Project - New Product Introd	duction $\sim$				lex Hankin Business Program	rojects O 6/10/2021 Health Current Finish
lew Product Introduction ctive for less than one mi	< Business Case (< 1 M	tin) Develo	opment	Scale-Up	Launch	Standard Produ
Charter Team Stages	Gantt My Work Sta	tus Documents	Issues	Risks Project Setti	ngs	
Name	Acme JW NPI	Portfolio	• 6	Contoso Projects	Project Number	9001
Project Manager	Alex Hankin	Program	• #	Business Projects	A Source Request	Acme JW NPI
Project Sponsor	R Jonathan Weisglass				A Teams Channel	
Project Type	New Product Idea			Objectives	-	
Description	Widgets that do amazing t	hings		Out of Scope		
n is climite				Free control to be control		

**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

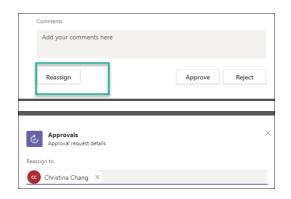
#### **Canceling In Progress Approvals**

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: <u>Proj-001611: Product Update with CT</u>
   Approval <u>Stage: Close Out to Closed</u>
   Approven: 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.

New Project - Unsaved		
New Project Active for less than one mi	<	
General		
Name	* Project Orange	
Project Template	Look for records	
🔒 Content Template	Results from: Project Templates Templates	
		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.

ew Project oject · New Project duct Support ve for less than one i	0	Execution	Close Out	Closed
eneral				
Name	* Covid Spray	🛆 Created On		
Template	* 📱 New Product Idea	Portfolio	* 🖻 Strategic Portfolio	
		Program	* 🛱 Strategic Program	
		Project Manager	* Anne Wallace X	
		Project Sponsor	* A Christine Chang $\times$	
		Create	No No	

- 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:
  - 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.

BrightWorl Active for 1		<		Initiate	(1 Hrs)				) 1			Execute
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Documents	Actions	lssues	Risks	Costs	Communications
Project	out for Ap	proval										
								eas of this ly as the cu ipproval				

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.

Initiate to Plan
Approval Required
Plan to Execute
Approval Required
Execute to Close Out
Approval Required

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.

Plan

Execute (3 Mo)

#### Note

BrightWork Project Active for 3 months

<

• The approval emails come from the BrightWork 365 installation account's email.

**I**nitiate

• If there are multiple Approvers, all of them must approve in order for the stage to be approved.

Close Out

# 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.					

narter	Status Status Reports Tean	n Stages	Gantt My	Work Docum	ents Actions	Issues	Risks Costs	Communicat	ions Pi	roject Sett
<b>+</b> A	.dd	🔍 Zoom in		💱 Zoom to fit	() < Prev Time	🕓 Next Tir	me > C Refresh	n = Baseline	🕒 Pdf	🕮 Excel
	Task Name =	Feb, 22			Mar, 22					Apr, 22
		8	13	20	27	6	13	20	27	
:	<ul> <li>Project Summary</li> </ul>	Project Su			35%					
:	Business Case	Business		100'	%					
:	Business Case - Deliverable	Business	100%	Anne Wallace						
:	Business Case Task- 1	Busines	s Case Task- 1	▶ 100% Jim	Corbin					
:	Business Case - Deliverable	Busine	ess Case - Deliver	rable - 2 🔰 100	% Dan Baco	on , Éamonn Mo	Guinness			
:	<ul> <li>Development</li> </ul>			Development	t 20	1%				
:	Development-Task-1		I	Development-Task-1	20%				Éamonn N	1cGuinness

## **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.

:	New Task		_	Nev
		💉 Task Informa	ation	
		📋 Delete Task		
		+ Add	>	📩 Above
		Convert	>	🖵 Below
				Child
				Milestone

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.

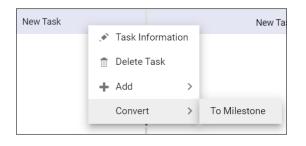
To edit an existing task either single-click next to the task name and then click **Edit** in the menu bar, or double-click in the row of the task in the Gantt section of the window. If the Gantt is not displaying updates you made to underlying data, click the **Refresh** button in the Gantt ribbon.

ut 🖌	<sub>≚</sub> ∠oon	n to fit 🕓	< PreV I In	ie 🕔 N	ext time :	Ret	resn = Մա	= baseline	🗁 Par
		Jul, 22				Aug, 22	Refr	esh Gantt	
19	26	3	10	17	24	31	7	14	21

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.

■ Expand all	Collapse all	📃 Indent	⊡ Outdent	☉ Zoom in	Q. Zoo	m out 🖸 Zoo	m to fit	() < Prev Time	() Next Time >	$\mathbb{C}$ Refresh	= Baselin	e 🖂	Pdf	X) E
k Name	7	Duration	17	Current Start	Ŧ	Current Fini		Target Start	⇒ Target Finis	sh <del></del>	Percent Co	Ju 1:	n, 22	19
Business Case	Task- 1	6 days		8/8/2022		8/15/2022		8/8/2022	8/15/2022		0			
Business Case	- Deliverable - 2	22 days		8/16/2022		9/14/2022		8/16/2022	9/14/2022		0			
Development		7 days		9/15/2022		9/23/2022		9/15/2022	9/23/2022		0			
Development-Ta	ask-1	5 days		9/15/2022		9/21/2022		9/15/2022	9/21/2022		0			
Development - I	Deliverable - 1	1 day		9/22/2022		9/22/2022		9/22/2022	9/22/2022		0			
Development - I	Deliverable-2	1 day		9/23/2022		9/23/2022		9/23/2022	9/23/2022		0	:		

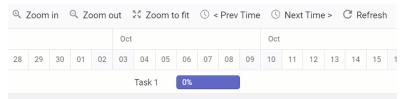
Additionally, with a right-click on an existing task you can access task-related options.



# **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

#### Dependency

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

Task Inf	ormation				×
GENERAL	DEPENDENCY				
				+ A	dd 🛅 Deleti
ID	Name		Туре		Offset
			Finish-Start	*	0 days
	00001833-Busine	ss Case			
	00001834-Busine	ss Case			
	00001836-Busine	ss Case			
	00001839-Scale-U	Jp - Deliv		SAVE	CANCEL

#### **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.

Equal		•
Enter the valu	e	
	FILTER	CLEAR

## **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.

	0	$\frown$	$\frown$	$\frown$
BrightWork Project Active for 81 days	Initiate (81 D)	Plan	Execute	Close Out

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**.

Business Case - Saved Project Task · Project Stage ~											
Project Stage Related V											
Name	Related - Common	unnent Start									
Name	Activities	urrent Start									
A Progress	Documents	urrent Finish									
A Project	① Audit History										
	S Costs	arget Start									
A Is Summary	т	🗀 Target Finish									

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.

Initiate - Saved	
Project Task · Project Stage ~	
Initiate         Strategic Portfolio         Strategic Program         Project Standard with area of service           Name         Portfolio         Program         Project	
Project Stage Related	
· •••••	
$\checkmark$   Assignee $\uparrow$ $\checkmark$	
No data available.	
	Deliverable 1 - Saved
	Project Task $\cdot$ Project Deliverable $\vee$
Deliverables	Deliverable 1 Name         Strategic Portfolio         Strategic Program         Project Standard with area of service         V           Project         Project         Project         Project         Project         V
+ New Project Task	Deliverable Related
✓ Name ∨ Progress ∨ Target Start ∨ Target Finish ∨ Current Start ↑ ∨ Current	
Deliverable 1 Not Started 12/13/2021 12/21/2021 12/13/2021 12/21	
Deliverable 1	_
	No data available.
	Documents

Name 🗸

**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.

+ New ∨ ⊼ Upload

File Size  $\smallsetminus$ 

∎

File Type 🗸

<b>lew Produ</b> Active for 7	not Introduction months	Business Case	Development (7 Mo)
Charter	Status Status Reports Te	am Stages Gant	tt My Work Documents Actions
<	🕇 Add 🖍 Edit 🛅 Delete 🤠	] Expand all 🗐 Colla	apse all 📃 Indent 😇 Outdent 🔍 Zoc
	Task Name =	Feb, 22	Mar, 22
		8 13	20 27
÷	<ul> <li>Project Summary</li> </ul>	Project Su	35%
÷	<ul> <li>Business Case</li> </ul>	Business	100%
	Business Case - Deliverable	Business 10	0% Anne Wallace
	Business Case Task- 1	Business Case T	Fask- 1 100% Jim Corbin
	Business Case - Deliverable	Business Case	e - Deliverable - 2 🔸 100% 🚽 Dan Bac

**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.

Task Name =	Duration	Jul, 21		Aug, 21			
Task Name ÷	Duration	11	18	25	1	8	
▼ Project	75 days	P		1	8%		
▼ Business Case	51 days	В			29%		
Business Case - Deliverable	16 days	В		75%			
Business Case Task- 1	6 days		Busir	ness Case T	ask-1 🛏	50%	

# **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.

 •••	▼ Scale-Up
 ::	Scale-Up - Task-1
 	Scale-Up - Deliverable-1
	Scale-Up - Deliverable-2

# **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.

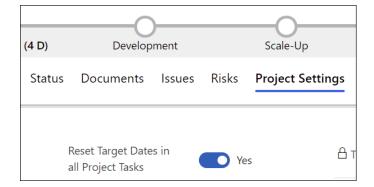
⊕, Zo	oom to	o fit	🕓 < F	Prev Ti	me	🕓 Ne	xt Tim	ne >					
23, 2021						May 30, 2021							Jur
24	25	26	27	28	29	30	31	1	2	3	4	5	6
à	a 100%												
a	100%												
ss Cas	e Task	-1	100%										

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.

+ Add	ollapse all 🔍 Zoom in 🔍 Zoom out				out	💱 Zoom to fit 🕓 < Pre							
Task Name	Sep	Sep Se							p:				
lask Nalle	05	06	07	08	09	10	11	12	13	14	15	16	17
✓ Initiate							Initiat	е	0%				
Get Budget Approval	Get Budget Approval								0%				
Get Resource Approval	Get Resource Approval							al	0%				
	Plan							n	0%				
Gantt v1		Gantt v1						1	0%				
Update Budget			Update Budget					et	0%				
Gantt v2	Gantt v2						2	0%					
► F													

# **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.

+	Add	Collapse all	୍ Zoom in ୍	Zoom out	💱 Zoom to fit	() < Prev Time	🕓 Ne	xt Time >	C Refresh	$\equiv$ Baseline	🕒 PDF	🖾 Excel 🗄
	Task Name	Ŧ	Current Start	⇒ Cur	rrent Fini 👳	Duration	1	Percent C	0 ÷	Assigned To		÷
=	<ul> <li>Initiate</li> </ul>		10/17/2022	11/	/16/2022	23 days		33				

- 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

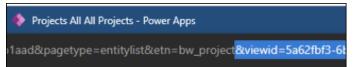
This import method will result in a flat task list in the specified order with durations, but without dependencies or parent-child relationships.

- 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.
- 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....

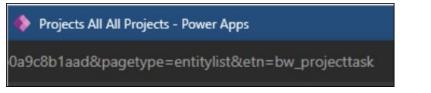
	E	
э	Item Order Decimal	Ρ
	1000000	J
	2000000	J
	3000000	J
	4000000	J
	500000	J
	600000	J
	700000	J
	200000	P

- 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.



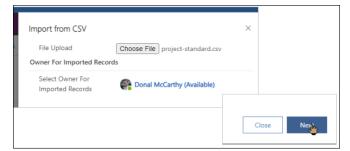
Type task and click Return on your keyboard – the end of the URL should now read
 =bw\_projecttask.



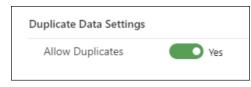
- 14. Bookmark the project tasks view that opens for future use.
- 15. Click Import from Excel > Import from CSV.

Excel Templates	$\sim$ 🔯 Export to Excel $\mid$ $\sim$ 🔯 Import from Excel $\mid$ $\sim$	
	📆 Edit colurr 🚺 Import from CSV	
✓ Project ✓	Pr Import from XML	

16. Select the CSV file you created earlier and click Next.



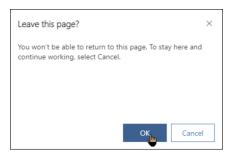
17. Set Allow Duplicates to Yes.



- 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.

~	🕄 Show Chart	$\ensuremath{\mathfrak{G}}$ Delete $ $ $\sim$	🕐 Refresh	💧 Visualize this view	😫 Export to Excel 📔 🗸					
	My Imports ~									
С	) Import Name ~				Status Reason ~	Successes Y	Partial Failures ~	Errors ~	Total Processed ~	cı
	project-standard	lesv			Completed	12	0	0	12	2,

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.

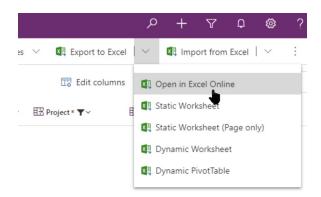
# **Post Import Hierarchy Build Option**

The below process provides a method to indent your imported tasks under a top-level Project Summary Task, and create dependencies between the tasks.

 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.
- In another empty column's cell enter the formula =text(CR,"0000000")&"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 Finishto-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.

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# **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.

ew Product Introduction tive for 23 days	< Business Case (23 D)	Development	Scale-Up	Launch	Standard Product
Charter <b>Status</b> Stat	tus Reports Team Stages Gantt	My Work Documents	Actions Issues	Risks Costs Communication	ns
Schedule Status		In	ndicators		
Project Status	In Progress		Health	Red Yellow	Green
% Complete	50		Health Comment		
% Complete Comment			Cost	Red Yellow	Green
🗄 Current Start	8/22/2022		Cost Comment		
🗄 Current Finish	10/20/2022		Time	Red Yellow	Green
🗄 Target Start	8/22/2022	Ē	Time Comment		
🔒 Target Finish	10/20/2022	Ē	Scope	Red Yellow	Green
			Scope Comment		

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.

Project Se	ettings Related	
	Create Teams Channel	No No
	Copy to New Content Template	No No
	Reset Target Dates in all Project Tasks	No No
-	Set Health Automatically	No No

# **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.

JW Deploy Product Status Report	<b>Jonathan We</b> Manager		
General			
Log Report		Details	
🖞 Period Ending	* 9/16/2022	🖰 Project	₹ JW
Accomplishments	Prototype has been developed.	≙ Stage	Busines
Significant Challenges	Raw material price increases.	🛆 Portfolio	Ê Cor
🖞 Upcoming Focus	Prototype testing.	🖰 Program	烯 Cus
Email Report to Sponsor	Yes	🖰 Name	* JW Dep
Complete Status Report	Yes		

**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.

Quick Create: Action		×
Name	*	
Action Type	Action	$ $ $\vee$
Action Requested	Select Action Assumption	
Assigned To	Decision Dependency	
Priority	Change Other	
Due Date		

# **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.

Budgets	
Approved Budget	\$100,000.00
Budget Assigned	\$10,000.00
Last updated:	3/1/2022 9:14 AM
	Recalculate

- 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 Items				
				+ New Cost :
✓ Name ∽	Cost Type $\smallsetminus$	Vendor $\checkmark$	Cost	Add New Cost
Third party analysis	Capex	Acme corp	In Pi	Add a related Cost to this record.

### **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.

Templates	All Accounts ~
Templates	✓ Account Name ∨
E Forms	Vendor ABC
People	International Corp
A Users	XYZ Corp
ትድት Dynamics Teams	ABC Corp
Accounts	Dan Vendor
	Acme Corp

- 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.

Communications	Project Settings	Related
	+	
	6	Activity
		🛗 Appointment
		🖻 Email
		🖉 Phone Call
	=	Note

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

Timeline	+, r I
	Create a timeline record.
🖉 Enter a note	Appointment
	🖂 Email
	🐁 Phone Call
	👼 Note
	n OneNote

# 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:

Communications	Project Settings Related
	+ 7 ī≣ :
	ලි Activity
	🛗 Appointment
	🖾 Email
	🗞 Phone Call
	👼 Note
	ជា OneNote

Or,

click on the .one file within the Documents tab:

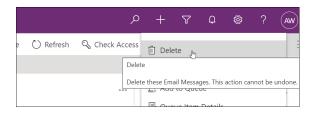
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Do	cuments
Docum	nents							
0	Name 🗡					File Siz	e ~	File Type 🗡
	💼 Proje	ct-Frozen Desserts f	or South A	America-Sta	atus	29,7	709	docx
	💼 Visito	r Info.docx				278,8	392	docx
	Froze	n Desserts for South	n America.	onetoc2		4,6	532	onetoc2
$\bigcirc$	Eroze	n Desserts for South	n America.	one		12,9	945	one

### **Communications Tab - User Actions**

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

😵 Phone Call from Anne Wallace	
Call to vendor	ŀ
Quick call to confirm all was on schedule.	

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**

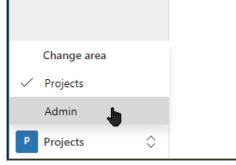
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf %), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web,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



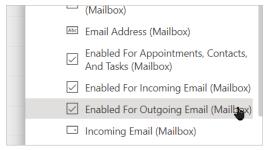
- 2. Click Users to load the BrightWork Users report.
- 3. Click Edit columns and then click Add columns.

		Edit columns: Users
el Templates	✓ I Export to Exc	+ Add columns 🦻 Reset to default
	Edit columns	Full Name

4. Click Related and Select Mailbox.

	Add columns							
। Export to Exc	User Related							
columns	🔎 Search 🛛 All 🗸 🗸							
	> (Deprecated) Process Stage (Process Stage)							
	> Business Unit (Business Unit)							
	> Calendar (Calendar)							
	> Created By (Delegate) (User)							
	> Created By (User)							
	> Currency (Currency)	> Currency (Currency)						
	> Mailbox (Mailbox)							
	> Manager (User)							

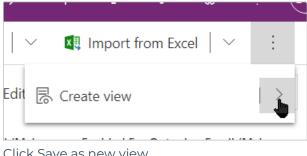
5. Add the three Enabled for... columns.



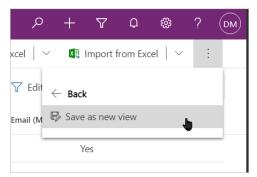
6. Scroll down to the bottom and click close.



- 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.

	No
Save as new view	×
The view is stored in	the list of saved views
Name	* BrightWork Users
Description	
	Save Cancel

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

activities.

$\leftarrow$	<b>X</b> 9	ihow Cł	nart	🖒 Refr	resh	🖾 Emai	l a Link	$\sim$	≫ Flow	$\sim$	💷 Run Report
D	riah	HMor	k He	ers $\sim$	My	/iews					
	ngn	LVVOI	K US	ers v	Brig	htWork Us	ers				
	$\bigcirc$	品	Full N	lame ↑ ∽	Syst	em Views			•		Enabled

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.

=	← 🛱 Show Chart + New 🗊 Delete   ∨ 🖒 Ref
Templates	My Active Contacts
Templates	✓   Full Name ↑ ∨
Forms	Alex Hankin
People	Jane Smith
A Users	
<sup>ሳ</sup> ጽ Dynamics Teams	
Accounts	_
A Contacts	
Other	
📫 Microsoft Teams	
备 Locations	
	All # A B C D E F
Admin 🗘	1 - 2 of 2

3. Fill in the relevant contact information.

New Contact     Contact · Contact ·	
ummary Details	
CONTACT INFORMATIC	N
First Name +	
Last Name *	
Job Title	
Account Name	
Email	
Business Phone	
Mobile Phone	
Fax	
Preferred Method of Contact	Any
Address 1: Street 1	
Address 1: Street 2	

### 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.

=	$\leftarrow$ 🖾 Show Chart $+$ New 🗊 Delete $ $ $\vee$ 🖒 Re
Templates	My Active Accounts New
Templates	✓ Account Name ↑ ✓
Forms	Vendor ABC
People	XYZ Corp
A Users	
የድ Dynamics Teams	
Accounts	
8 Contacts	
Other	
📫 Microsoft Teams	
😤 Locations	
	All # A B C D E F G
A Admin 🗘	1 - 2 of 2

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**.

Charter	Team	Stages	Gantt	My Work	Status	Documents	Issues	Risks	Project Settings	Audit History	Related ⊳
Audi	t Histo	ry									
Filter o	n: All Field	ls		~							
₀⁄¤ FLC	w *										
	Changed D	ate   C	Changed By	Event	.	Changed Field	Old	/alue	New Value		
	12/15/2021	1:14 Do	onal McCa	rthy Updat	e	Active Stage Text			Business Ca	ase	
	12/15/2021	8:59 Do	onal McCa	rthy Updat	e	Docs Full Locatio	n		https://bw3	865dev.share	

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.

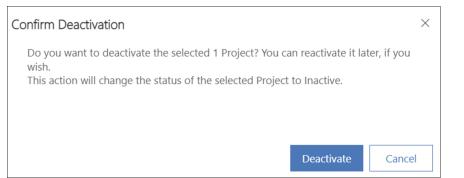
### **Archive a Project**

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.

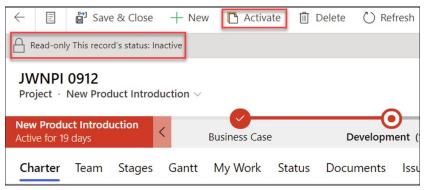
1. While in a project record click **Deactivate**.

$\leftarrow$		🔚 Save	e 🛱 Sa	ve & Close	e + New	🔓 Dea	ctivate 🔟 D	elete	
	JWNPI 0912 Project · New Product Introduction ~								
New Product Introduction         Susiness Case         Development						nent (			
Ch	arter	Team	Stages	Gantt	My Work	Status	Documents	lssu	
	Nam	e	*	JWNPI (	0912		Portfolio		

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



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

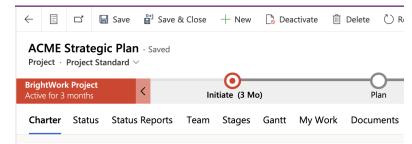


# **Delete a Project**

**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.

Charter Status	Status Reports Team Stages	Gantt My Work Documents Action Is	sues Risks Costs Project Settings
Name	* JW product update 826	Create Teams Channel No	Sound Charter and Gantt for Approval
🛆 Туре	Project	A Copy to New Content Template	A Move to Close Out
Template	* 📱 Product Update	Reset Target Dates in all Project Tasks	Approval
🔒 Reference Type	Manual	Set Health	
A Project Creation Method	Project Area	Automatically	
Portfolio	* 🖻 Contoso Projects		
Program	* 🛱 Marketing		

#### **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.

Delay in onboarding suppliers						
Not Started Powdered Creaters Issue Status Project	m Cheese for Africa Product Operations Program					
lssue						
Reference						
Name *	Delay in onboarding suppliers					
☐ Issue Reference	IS-001181					
A Portfolio	Contoso Projects					
🛆 Program	윢 Product Operations					
☐ Project	Powdered Cream Cheese for Africa					
Escalation	Program   ~					
	Select Project					
	Program Portfolio					

#### **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.

Manufactured components arrive late							
<b>Saravana Barathi</b> Logged By	Contoso Projects Portfolio	Product Operations Program	Powdered Cre Project				
Risk							
🛆 Exposure	0						
Risk Status	Identifie	ed					
Risk Monitor							
Escalation	Project		$ $ $\checkmark$				
Risk Managem Rating	entSelec Project Progran Portfoli	n					

#### 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.

Risks	Project Settings	Related
		Related - Common
🖻 Con	toso Projects	<ul> <li>Audit History</li> <li>Documents</li> </ul>
쁐 Cus	tomer Example	لس A Created On

# **Project Stages**

Each project template has its own project stage business process flow - details are noted within each template section of this article.

```
BrightWork365
                        Project Stage Business Process Flow
  TEMPLATE
                                    TAGE 0
 PROJECT
STANDARD
                  INITIATE
                                   PLAN
                                                    EXECUTE
                                                                     CLOSE OUT
                                   A
                  Ŕ
                                                   R
  TEMPLATE
 NEW PRODUCT
                  BUSINESS
                                                                                       STANDARD
                                   DEVELOPMENT
                                                     SCALE-UP
                                                                      AUNCH
                  R
                                   R
   .
                                                    R
  TEMPLATE
 PRODUCT
UPDATE
                  CHARTERING
                                   EXECUTION
                                                    CLOSE OUT
                                                                     CLOSED
                  R
                                                    Ï.
                                                       600
```

#### **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

=			$\leftarrow$	🕅 Sho	w Chart	+	- New
ഹ	Home		А	ctive l	ocati	ons	~
Ŀ	Recent	$\sim$					
\$	Pinned	$\sim$	~	Name ↑	$\sim$		
Sec	urity			Boston			
8	Users			Dublin			
°∕2°	Teams						
Tem	nplates						
5	Templates						
Ē	Forms						
Oth	er						
цį;	Microsoft Teams						
ዱ	Locations						
			All	#	А	В	С
Α	Admin	$\diamond$	1 - 2 (	of 2			

#### 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.

Task Information								
GENERAL	DEPENDENCY	RESOURCES	TASK DETAILS					
Task Type		ID						
Stage		▼ 1,829.00						

Charter	Status	Status Reports	Team	Stages	Gantt	My We
Project	Stages					
	Name 🗸			с	urrent Star	t↑Y
	Charterin	ng		9	/2/2022	
	Executio	n		9	/5/2022	
	Close Ou	ıt		9	/6/2022	
	Closed			9	/7/2022	

• The Stage date values are tied to the date values of the Stages in the Gantt.

Project	Stages			+ New Project Task	C Refresh
	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.

<b>cale-Up</b> roject Task ← Project Sta	ge 🗸			Scale Name
roject Stage				
Name	* Scale-Up	🖰 Current Start	6/2/2021	
A Progress	In Progress	🛆 Current Finish	6/4/2021	
A Project	* 🚆 JW Project 910	🛆 Target Start	6/2/2021	
Project Task Type	Stage	🛆 Target Finish	6/4/2021	
Description		% Complete	<b>–</b> ]	

#### **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.

provals History				
				Č) Refresh ₀⁄°
$\checkmark$ Name $\checkmark$	Stage 🗸	Request Outcome $\vee$	Date ↑ ∨	Comment $\checkmark$
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 Approva
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**

			$\bigcirc$	$\bigcirc$	$\bigcirc$
Product Support	1				
Active for less than one mi		Chartering (< 1 Min)	Execution	Close Out	Closed

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 Δnnroval is set to Ves in Droiect 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.

Project · Product U	pdate $\vee$			•
Product Update Active for 12 months	<	Chartering	Execu	ution (3 Mo)
Charter Status	Status Reports Tear	Completed	67 ×	Action Issues Risks
Name	* Fabrikam Dep	✓ Project Manager	* EnÉamonn McGuinn	
A Project Referen	ice	Se	tActive	Contoso Projects

The relevant BPF Stage approval request switches in the **Project Settings** tab will once again be set to **No**.

Product Update Active for 14 hours	< Charterin	g (14 Hrs)	Execution		Close Out	Close
Charter Status	Status Reports Team Stag	es Gantt My Work	Documents Action	Issues Risk	s Costs <b>Pro</b>	ject Settings
Name	* Product Update End t	Create Teams Channel	No No	-	end Charter and antt for Approval	No No
🛆 Туре	Project	Copy to New Con Template	tent 💽 No	Ам	ove to Close Out	No No
Template	* 📱 Product Update	Reset Target Date all Project Tasks	s in No		end Close Out for oproval	No No
A Project Creation	Manual	Set Health Automatically	No 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.

Chartering (4 Min)	Execution	Close Out	Closed
fork Status Documents	Issues Risks Project Settings	Send Charter and	
	Channel No Reset Target Dates in all Project Tasks No	Gantt for Approval	No
		Approval	No

### **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**

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

**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.

ct Support	•			
for less than one mi	< Chartering (< 1 Min)	Execution	Close Out	Closed
eral				
Name	* Covid Spray	🔒 Created On	🖬	
Template	* 📱 New Product Idea	Portfolio	* 🖻 Strategic Portfolio	
		Program	* 🖧 Strategic Program	
		Project Manager	* Anne Wallace X	
		Project Sponsor	* A Christine Chang X	
		Create	No No	

- 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**

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

arter	Status Status Reports Tear	m Stages	Gantt My	Work Docum	ents Actions	Issues Risks	s Costs	Communicati	ions P	roject Se
<b>+</b> Ad	dd 🗉 Expand all 🖃 Collapse all	⊕ Zoom in	୍ Zoom out	💱 Zoom to fit	() < Prev Time	() Next Time >	C Refresh	Baseline	🕒 Pdf	Exce
	Task Name =	Feb, 22			Mar, 22					Apr, 22
	Task Name 👳	8	13	20	27	6	13	20	27	
	<ul> <li>Project Summary</li> </ul>	Project Su			35%					
:	<ul> <li>Business Case</li> </ul>	Business		100	%					
:	Business Case - Deliverable	Business	100%	Anne Wallace						
:	Business Case Task- 1	Busines	s Case Task- 1	▶ 100% Jim	Corbin					
8	Business Case - Deliverable	Busin	ess Case - Deliver	able - 2 🕨 100	Dan Bacor	n , Éamonn McGuini	ness			
:	- Development			Development	t 209	%				
:	Development-Task-1			Development-Task-1	20%				Éamonn N	Cuinnos

### **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.

:	New Task				Nev
		💉 Task Informa	tion		
		🗂 Delete Task			_
		+ Add	>	📥 Above	
		Convert	>	🖵 Below	
				Child	
				Mileston	e

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.

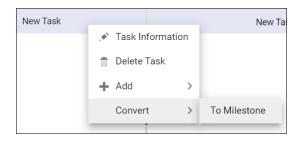
To edit an existing task either single-click next to the task name and then click **Edit** in the menu bar, or double-click in the row of the task in the Gantt section of the window. If the Gantt is not displaying updates you made to underlying data, click the **Refresh** button in the Gantt ribbon.

ut 🍹	🕻 Zoom	to fit 🕓	< Prev Tim	ie 🕓 N	ext Time >	C Ref	resh ≡	Baseline	🖹 Pdf
		Jul, 22				Aug, 22	Refre	esh Gantt	
19	26	3	10	17	24	31	7	14	21
			31%						

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.

	Collapse all	⊡ Indent	⊡ Outdent		Q. Zoo	m out 🖸 Zoo	n to fit	() < Prev Time	() Next Time >	$\mathbb{C}$ Refresh	= Baseline	- B	Pdf	X) E
ik Name	Ŧ	Duration	Ŧ	Current Start	Ŧ	Current Fini	Ŧ	Target Start	⇒ Target Finis	sh ÷	Percent Co	Jur 13	, 22	19
Business Case T	ask- 1	6 days		8/8/2022		8/15/2022		8/8/2022	8/15/2022	1	0			
Business Case -	Deliverable - 2	22 days		8/16/2022		9/14/2022		8/16/2022	9/14/2022	1	0			
Development		7 days		9/15/2022		9/23/2022		9/15/2022	9/23/2022	!	0			
Development-Tas	sk-1	5 days		9/15/2022		9/21/2022		9/15/2022	9/21/2022	1	0			
Development - De	eliverable - 1	1 day		9/22/2022		9/22/2022		9/22/2022	9/22/2022	1	0			
Development - De	eliverable-2	1 day		9/23/2022		9/23/2022		9/23/2022	9/23/2022		0	:		

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.

⊕ į	Zoom	in	Q Zo	oom o	out	53 Zo	om t	o fit	() <	Prev	Time	()	Next	Time	9 >	C Re	fresh	i
					Oct							Oct						
28	29	30	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	1
						Task	1	0%										

- 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).

41%	

• 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.

Task Information 🛛 🗙 🗙								
GENERAL	DEPENDENCY	RESOURCES	TASK DETAILS					
				🕂 Ado	d 🔳 Delet			
ID	Name		Туре	C	Offset			
		*	Finish-Start	• 0	days			
	00001833-Busine	ess Case						
	00001834-Busine	ess Case						
	00001836-Busine	ess Case						
	00001839-Scale-	Up - Deliv		SAVE	CANCEL			

#### **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

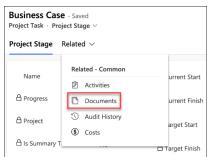
- If the user assigning the resource does not have sufficient privileges, the assignment will not be saved.
- The Resource **Unit** value will revert back to 100 if changed.

### **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.

		$\frown$	$\frown$	$\frown$
BrightWork Project				
Active for 81 days	Initiate (81 D)	Plan	Execute	Close Out

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.

Initiate - Saved         Project Task - Project Stage ~         Initiate Strategic Portfolio       Strategic Program         Project Stage Related	Deliverable 1 - Saved       Project Task · Project Deliverable ∨       Deliverable 1     Strategic Portfolio       Name     Project Standard with area of service       Deliverable 1     Related
No data available.	Do data available.
Deliverables       + New Project Task <ul> <li>Name ×</li> <li>Progress ×</li> <li>Target Start ×</li> <li>Target Finish ×</li> <li>Curren</li> </ul> Deliverable 1       Not Started       12/13/2021       12/13/2021       12/13/2021       12/13/2021	Documents       ✓     Name ∨       ✓     File Size ∨       File Type ∨     Author ∨
Deliverable 1	

**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.

lew Produ active for 7	<b>ict Introdu</b> months	iction	<	Bu	siness Case			Deve	lopment (7 N	10)
Charter	Status	Status	Reports	Tean	n Stages	Gantt	My V	Vork [	Ocuments	Actions
<	+ Add	🖍 Edit	🗇 Delete	e ⊕	Expand all	Collaps	se all	Indent	🔄 🖻 Outden	t 🔍 Zoo
	Task Name			-	Feb, 22				Ma	ar, 22
	Task Name			-	8	13		20	27	7
	<ul> <li>Projec</li> </ul>	t Summar	у		Project Su.					35%
	▼ Busi	ness Case	9		Business				100%	
	Bus	siness Cas	se - Deliveral	ble	Business	100%	A	Anne Walla	се	
	Bus	siness Cas	se Task- 1		Busine	ess Case Tas	sk- 1 🔶	100%	Jim Corbin	ı
	Bus	siness Cas	se - Deliveral	ble	Bus	iness Case -	Delivera	ble - 2 🖵	100%	Dan Baco

**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.

Task Name =	Duration	Jul, 21		Aug, 21		
	Duration	11	18	25	1	8
🕶 Project 🔓	75 days	P		18	8%	
▼ Business Case	51 days	В			29%	
Business Case - Deliverable	16 days	В		75%		
Business Case Task- 1	6 days		Busir	ness Case Ta	ask-1 🔶	50%

### **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.

0 0 0 0 0 0	🔻 Scale-Up
::	Scale-Up - Task-1
::	Scale-Up - Deliverable-1
•••	Scale-Up - Deliverable-2

# **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.

⊕, Zo	om in	Q	Zoom	out	₿ŝ Zo	oom to	o fit	🕓 < F	Prev Ti	me	🕓 Ne	xt Tim	e >
23, 2021				May	30, 20	21					Jun		
24	25	26	27	28	29	30	31	1	2	3	4	5	6
à		1	00%										
a	a 100%												
ss Cas	e Task	-1	100%										

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**.

(4 D)	Develop	ment		Scale-Up	
Status	Documents		Risks		5
	Reset Target Date all Project Tasks	es in	Ye:	5 É	Ът

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.

🕂 Add 🗊 Expand all 🖃 Co	ollaps	e all	⊕,	Zoom	in	⊂, Zo	oom o	out	23 Zo	oom t	o fit	() <	: Pre
								Sep	D				
Task Name	05	06	07	08	09	10	11	12	13	14	15	16	17
✓ Initiate							Initiat	е	0%				
Get Budget Approval				Ge	et Bud	get Ap	oprova	al	0%				
Get Resource Approval				Get	Resou	rce Ap	oprova	al	0%				
▼ Plan							Pla	n	0%				
Gantt v1						G	antt v	1	0%				
Update Budget					Up	odate	Budge	et	0%				
Gantt v2						G	antt v	2	0%				
E E	4												

# **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.

ew Product Introduction ctive for 23 days	< Business Case (2	23 D) Deve	lopment	Scale-Up	Launo	th Standard Product
Charter <b>Status</b> Statu	is Reports Team Stage	es Gantt My Work	k Documents	Actions Issues	Risks Costs	Communications
Schedule Status			In	dicators		
Project Status	In Progress			Health	Red	Yellow Green
% Complete		50		Health Comment		
% Complete Comment				Cost	Red	Yellow Green
🗄 Current Start	8/22/2022			Cost Comment		
🗄 Current Finish	10/20/2022			Time	Red	Yellow Green
🗄 Target Start	8/22/2022			Time Comment		
🗄 Target Finish	10/20/2022			Scope	Red	Yellow Green
				Scope Comment		

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.

Project	t Settings Related	
	Create Teams Channel	No No
	Copy to New Content Template	No No
	Reset Target Dates in all Project Tasks	No No
	Set Health Automatically	No No

### **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.

Email Report to Sponsor	Yes
Include Additional Email Recipients	Yes
Additional Email Recipients	
Complete Status Report	Yes

**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**

Ν	New Status Report - Unsaved				
Ge	eneral				
	Significant Challenges				
	Upcoming Focus				
	Email Report to Sponsor	No No			
	Include Additional Email Recipients	Yes			
	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

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.

Quick Create: Action		×
Name	*	
Action Type	Action	$ $ $\vee$
Action Requested	Select Action Assumption	
Assigned To	Decision Dependency	
Priority	Change Other	
Due Date		

# **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.

Budgets	
Approved Budget	\$100,000.00
Budget Assigned	\$10,000.00
Last updated:	3/1/2022 9:14 AM
	Recalculate

- 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 Items				
				+ New Cost :
✓ Name ∽	Cost Type $\smallsetminus$	Vendor $\checkmark$	Cost	Add New Cost
Third party analysis	Capex	Acme corp	In Pi	Add a related Cost to this record.

### **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.

Templates	All Accounts ~
Templates	✓ Account Name ∨
E Forms	Vendor ABC
People	International Corp
A Users	XYZ Corp
ትድት Dynamics Teams	ABC Corp
Accounts	Dan Vendor
	Acme Corp

- 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.

Communications	Project Settings Related
	+ 7 ⊒ :
	🛱 Activity
	🛗 Appointment
	🖂 Email
	🐁 Phone Call
	👼 Note

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

Timeline	+_m7 I≣ :
$\wp$ Search timeline	Create a timeline record.
Enter a note	Appointment
	🖂 Email
	🕓 Phone Call
	👼 Note
	0neNote

## 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:

Communications	Project Settings Related
	+ ⊽ ፲≣ :
	ලි Activity
	🛗 Appointment
	🖾 Email
	🗞 Phone Call
	👼 Note
	🖬 OneNote 🔚

Or,

click on the .one file within the Documents tab:

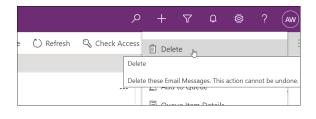
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Do	cuments
Docum	nents							
0	Name 🗸					File Siz	eΥ	File Type 🌱
	💼 Proje	ct-Frozen Desserts f	or South A	America-Sta	atus	29,7	709	docx
	Visito	or Info.docx				278,8	392	docx
	Froze	n Desserts for South	n America.	onetoc2		4,6	532	onetoc2
$\bigcirc$	Eroze	n Desserts for South	n America.	one 🖑		12,9	945	one

### **Communications Tab - User Actions**

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

😵 Phone Call from Anne Wallace	8, v 🗈 🗉 📋
Call to vendor	t -
Quick call to confirm all was on schedule.	

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**

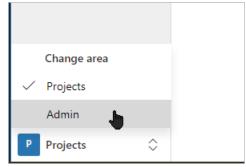
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf (\*), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web,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

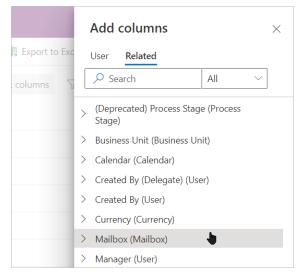
1. Click Projects in the bottom left of the page and click Admin.



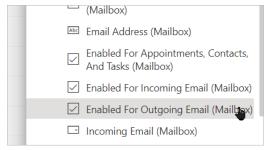
- 2. Click Users to load the BrightWork Users report.
- 3. Click Edit columns and then click Add columns.

		Edit columns: Users
el Templates	✓ ▲ Export to Exc	+ Add columns 🦻 Reset to default
	Edit columns	Full Name
	-*	

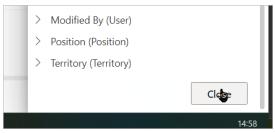
4. Click Related and Select Mailbox.



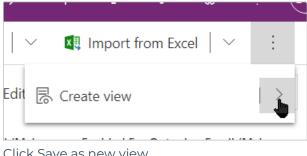
5. Add the three Enabled for... columns.



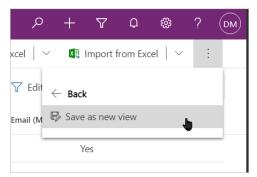
6. Scroll down to the bottom and click close.



- 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.

	No
Save as new view	×
The view is stored	d in the list of saved views
Name	* BrightWork Users
Description	
	Save
	No

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

activities.

$\leftarrow$	<b>X</b> 9	ihow Cł	nart	🖒 Refr	resh	🖾 Emai	l a Link	$\sim$	≫ Flow	$\sim$	💷 Run Report
D	riah	HMor	k He	ers $\sim$	My	/iews					
	ngn	LVVOI	K US	ers v	Brig	htWork Us	ers				
	$\bigcirc$	品	Full N	lame ↑ ∽	Syst	em Views			•		Enabled

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.

=	← [	😭 Show (	Chart	+ New	1	Delete	~	🖔 Re
Templates	Му	/ Active	e Cor	9	New			
Templates	✓ F	ull Name 1	~		Create	a new Co	ntact r	ecord.
Forms	-	Alex Hanki	n					
People	J	lane Smith						
A Users								
ትድቶ Dynamics Teams								
Accounts								
A Contacts								
Other								
📫 Microsoft Teams								
A Locations								
	All	#	A	в	с	D	E	F
A Admin 🗘	1 - 2 of	2						

3. Fill in the relevant contact information.

New Contact     Contact · Contact ·	
ummary Details	
CONTACT INFORMATIC	N
First Name +	
Last Name *	
Job Title	
Account Name	
Email	
Business Phone	
Mobile Phone	
Fax	
Preferred Method of Contact	Any
Address 1: Street 1	
Address 1: Street 2	

## 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.

=	$\leftarrow$ 🖾 Show Chart $+$ New 🗊 Delete $ $ $\vee$ 🖒 Re
Templates	My Active Accounts New
Templates	✓ Account Name ↑ ✓
Forms	Vendor ABC
People	XYZ Corp
A Users	
የድ Dynamics Teams	
Accounts	
8 Contacts	
Other	
📫 Microsoft Teams	
😤 Locations	
	All # A B C D E F G
A Admin 🗘	1 - 2 of 2

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**.

Charter	Team	Stages	Gantt	My Work	Status	Documents	Issues	Risks	Project Settings	Audit History	Related ⊳
Audi	t Histo	ry									
Filter o	n: All Field	ls		~							
₀⁄¤ FLC	w *										
	Changed D	ate   C	Changed By	Event	.	Changed Field	Old	/alue	New Value		
	12/15/2021	1:14 Do	onal McCa	rthy Updat	e	Active Stage Text			Business Ca	ase	
	12/15/2021	8:59 Do	onal McCa	rthy Updat	e	Docs Full Locatio	n		https://bw3	865dev.share	

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

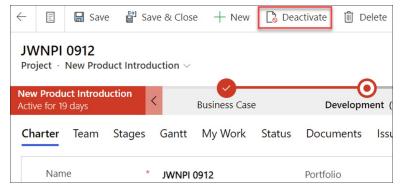
# **Archive Projects**

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

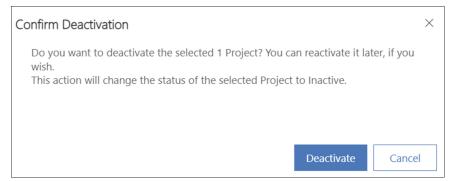
# **Archive a Project**

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.

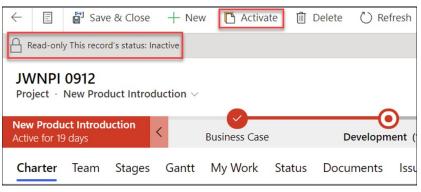
1. While in a project record click **Deactivate**.



2. Click Deactivate to confirm the deactivation request.



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



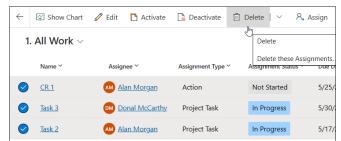
### **Delete a Project**

**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):

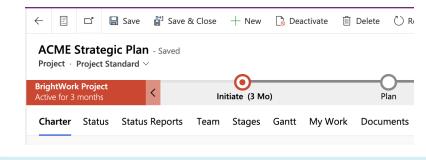
- 1. Click on **My Work** on the main nav.
- 2. Change the view to **All Work**.
- 3. Filter the **Project** column to the relevant project.
- 4. Select all the assignment rows and click **Delete** at the top of the screen.



### **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**

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

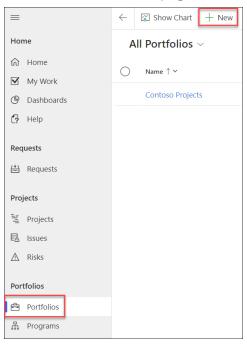
Your browser does not support HTML5 video.

## **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**.

New Portfolio										
								Name	Portfolio Manager	Portfolio Sponsor
Statement Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications			
Details										
Name	*		Portfo	lio Sponso	r			Priority	2.	High
Description								0.16.15.2		
Description			Portfo	lio Manag	er			Portfolio 1	ype Re	egular

# **Portfolio Tabs**

### Statement

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

Contoso I Portfolio	Projects	S - Saved							Contos Name	so Projects	
Statement	Status	Status Reports	Documents	Actions	lssues	Risks	Costs	Commu	nications	Related	
Details											
Name		* Contoso Pi	rojects	Portfolio	o Sponsor	r	R BW3	65 Admin		Priority	
Descript	tion	All Contos projects	o related	Portfolio	o Manage	iL	A BW3	65 Admin		Portfolio <sup>-</sup>	
Programs											
Trograms	,										
<u>О</u> N	lame 🗸		Portfolio 🗸	Program S	∨ Hea	alth i 🗸	Prog	ram 🗡	Current St	<ul> <li>✓ Currer</li> </ul>	
	Г		Contoso P	Not Sta	•		BWB	65 Ad	4/6/2022	10/7/	

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.

SharePoint	$\mathcal P$ Search this library	/
JD JWProdBW	365 Docs	
Home	+ New $\checkmark$ $\overline{\uparrow}$ Upload $\lor$ $\boxplus$ I	Edit in grid view 📿 Sync
Conversations		
Documents	Portfolio	
Shared with us	$ ho$ Name $\checkmark$	Modified $\vee$
Notebook	JW Portfolio 1_6C5C3CB	C1 27 minutes ago

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

5	Statement	Status	Status Reports	Documents	Actions	lssues	Risks	Costs	Communications	Related			
											+ New $\vee$	Ť	Upload
	0	Name 🗡			File Size	· ✓ File	е Туре 🗡	Auth	or Y	Created On Shar	rePoint ↓ ∽		
		💼 General	notes.docx		20,1	47 do	сх	Anne	Wallace	9/9/2022 4:44	PM		

**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.

R	elated	
	Relate	d - Common
A	Â	tivities
A	🕚 A	udit 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.

Programs								
							+ New	Program
0	Name 🗸	Portfolio ~	Program 🗡	Health i 🗸	Program 🗡	Current S 🗸	Current Fi 🗸	Program
	Product Operations	Contoso	In Progress	•	Éamonn	9/6/2021	9/14/2022	Regular

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

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

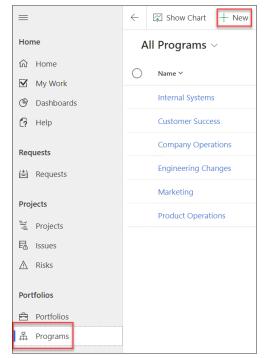
Your browser does not support HTML5 video.

### **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**.

New Prog	gram								Name	 Program Manage	r Progra
Statement	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications	Program	Settings	
Details											
Name		*		Portfo	lio				Priority		2. High
Descrip	tion			Progra	am Sponso	or			Program -	Гуре	Regular
				Progra	am Manag	er			Microsoft	Team	
🖰 Created	On										

## **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.

SharePoint	ho  Search this library	
JD JWProdBW3	65 Docs	
Home	+ New $\checkmark$ $\overline{\uparrow}$ Upload $\lor$ $\boxplus$ Ec	lit in grid view 🛛 🔒 Sync
Conversations		
Documents	Program	
Shared with us	$ ho$ Name $^{\checkmark}$	Modified $^{\smallsetminus}$
Notebook	JW Program 1_3BD29EC91	About a minute ago

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

Custome Program	r Succe	55 - Saved							-	ustomer Success	Alan Moi Program N
Statement	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications	Program Settings	Related	
Documer	nts								+	- New ∨ Ť	Upload
0	lame Ƴ				File	Size 🗸	File Type ~	Author ~	L	Created On SI	harePoint ↓ ∽

**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.

Re	Related								
	Related - Common								
A	Activities								
A	い Audit History								

## **Program Settings & Microsoft Teams**

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

Marketing Program	<b>g</b> - Saved								Marketing Name	<b>Fintan Ma</b> Program Ma	<u> </u>	Alan Morgan Program Sponsor
Statement	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications	Program	n Settings	Relate	ed
Program	Settings											
Portfolio	)	🖻 Contos	o Projects				Upd	ate Teams List 🍃	No No			

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

Statement	Status	Status Reports	Documents	Actions	Issues	Risks	Costs	Communications	Program Settings	Related
Details										
Name		* Marketing		🔒 Portfol	lio		🖻 Con	toso Projects	Priority	2. High
Descript	ion			Progra	m Sponsc	r	AM Ala	n Morgan (Offline	Program Type	Regular
				Progra	im Manag	er	FM Fint	an Manning (Offli	Microsoft Team	🏟 Marketing 🗙 🔎
A Created	05	9/17/2021								

**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.

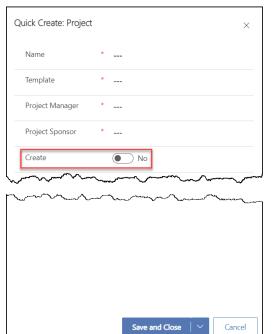
## **Quick Create - New Project**

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.

Projects								
						+	New Proje	ct Č Refresh ⊮ª Flow ∨
0	Name Y	Project R 🗡	Project St 🗸	Stage 🗸	Health Icon 🗸	Project M 🗡	Program ~	Add New Project
	jw product update may 26		Not Started	Chartering	•	Jonathan	п	Add a related Project to this record.

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.

	Marketing - Saved Status Report						
Gene	eral						
Log	g Report						
۵	Period Ending	*	9/23/2022	<u></u>			
	Key Accomplishments						
	Significant Challenges						
۵	Upcoming Focus						
	Email Report to Sponsor		Yes				
	Complete Status Report		Yes				

**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.

Quick Create: Action		×
Name	*	
Action Type	Action	$ $ $\checkmark$
Action Requested	Select Action Assumption	<b>b</b>
Assigned To	Decision Dependency	
Priority	Change Other	
Due Date		

# **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.

Budgets	
Approved Budget	\$100,000.00
Budget Assigned	\$10,000.00
Last updated:	3/1/2022 9:14 AM
	Recalculate

- 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.

Communications	Project Settings	Related
	+	Y I≣ :
	Ó	Activity
		Appointment
		🖻 Email
		Phone Call
	=	Note

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

Timeline	+_m7 I :
$\wp$ Search timeline	Create a timeline record.
Enter a note	Appointment
	🖻 Email
	🌜 Phone Call
	👼 Note
	🕼 OneNote

# 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:

Communications	Project Settings Related
	+ 7 ī≣ :
	ලි Activity
	🛗 Appointment
	🖾 Email
	🗞 Phone Call
	👼 Note
	ជា OneNote

Or,

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

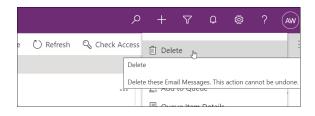
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Do	cuments
Docum	nents							
0	Name 🗡					File Siz	e ~	File Type 🗡
	💼 Proje	ct-Frozen Desserts f	or South A	America-Sta	atus	29,7	709	docx
	💼 Visito	r Info.docx				278,8	392	docx
	Froze	n Desserts for South	n America.	onetoc2		4,6	532	onetoc2
$\bigcirc$	Eroze	n Desserts for South	n America.	one		12,9	945	one

### **Communications Tab - User Actions**

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

😵 Phone Call from Anne Wallace	
Call to vendor	ŀ
Quick call to confirm all was on schedule.	

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**

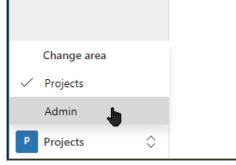
If the Dynamics 365 App for Outlook has been activated by your administrator (see the related admin instructions in our BrightWork 365 Install Guide.pdf %), you will have the ability to interact with and manage BrightWork 365 related emails and calendar items while using Outlook on the desktop, web,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



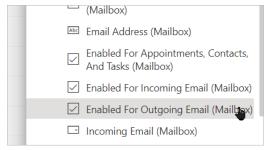
- 2. Click Users to load the BrightWork Users report.
- 3. Click Edit columns and then click Add columns.

		Edit columns: Users
el Templates	✓ I Export to Exc	+ Add columns 🦻 Reset to default
	Edit columns	Full Name

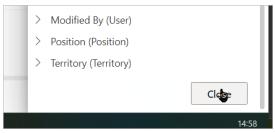
4. Click Related and Select Mailbox.

	Add columns	×
। Export to Exc	User Related	
columns	🔎 Search 🛛 All 🗸 🗸	
	> (Deprecated) Process Stage (Process Stage)	
	> Business Unit (Business Unit)	
	> Calendar (Calendar)	
	> Created By (Delegate) (User)	
	> Created By (User)	
	> Currency (Currency)	
	> Mailbox (Mailbox)	
	> Manager (User)	

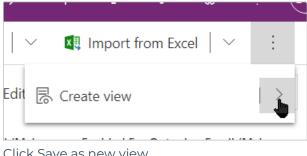
5. Add the three Enabled for... columns.



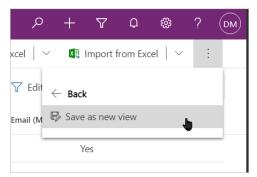
6. Scroll down to the bottom and click close.



- 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.

	No
Save as new view	×
The view is stored in	the list of saved views
Name	* BrightWork Users
Description	
	Save Cancel

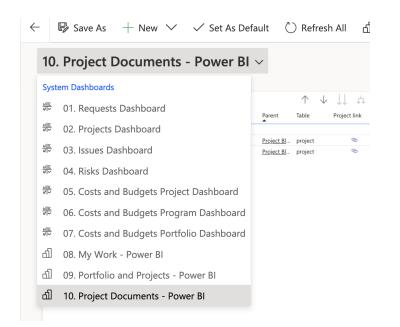
11. The new view is available to check if the user accounts are enabled for communication related

activities.

$\leftarrow$	<b>X</b> 9	ihow Cł	nart	🖒 Refr	resh	🖾 Emai	l a Link	$\sim$	≫ Flow	$\sim$	💷 Run Report
D	riah	HMor	k He	orc	My	/iews					
	BrightWork Users				Brig	htWork Us	ers				
	$\bigcirc$	品	Full N	lame ↑ ∽	Syst	em Views			•		Enabled

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

# **Project Documents Dashboard - Power Bl**



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.

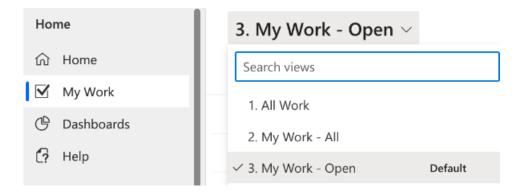
# My Work

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.

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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.

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Requests	Closed Issues	David Example
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	My Issues	Michael Example
Projects	My Open Issues	Michael Example
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# **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.

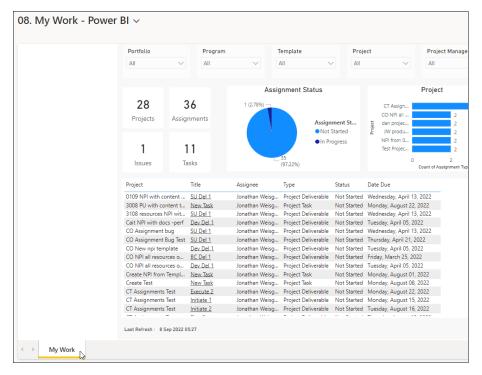
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### Work Allocation Reports - Power BI

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.

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**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

# **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

## **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.

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#### Create a Program

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

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## **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).

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ome			Template *	Look for Template
ਹੇ Home				Templates
Requests				Product Update This template is for requesting updates/modifications to existing products.
ties Requests				Project Standard This template is for requesting anc managing projects that have a reasonably mature amount of proj

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.

Brig	ghtWork 365
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C? Help	All Requests
Requests	Approved Requests
	Closed Requests
😫 Requests	My Requests

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).

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Template	*	Look for Template
		Templates
		Product Update This template is for requesting updates/modifications to existing products.
		Project Standard This template is for requesting and managing projects that have a reasonably mature amount of project management process applied.

### 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.

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Home	Product abc	Not Started	•	Jonathan Weisglass	Program 1	Portfolio 1	New Product Idea	Charter Tear	n Stages	Gantt My Work Status	Documents Issues	Risks Project Settings			
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Projects								Description		A widget that does great things		Out of Scope			

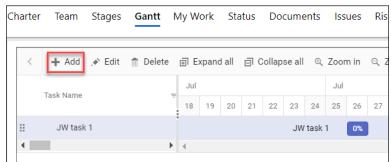
#### Charter

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.

Charter <b>Team</b> Stages	Gantt My Work	Status	Documents	Issues	Risks	Project Settings		
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Project Team Members								
$\checkmark$   Team Member $\smallsetminus$			$\mid$ Start $\downarrow$ $\checkmark$					Finish $\checkmark$
Jonathan Weisglass			8/9/2021					8/12/2021

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.

Documents Issues Risks Project Settings	
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	ح Excel
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#### **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.

Charter	Team	Stages	Gantt	My Work	Status	Documents	Issues	Risks	Project Settings
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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.

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$\checkmark$ Name $\uparrow$ $\checkmark$		Progress Status $\vee$	Health i $\smallsetminus$	Portfolio Manager $\vee$	Current Start $\smallsetminus$	Current Finish $\smallsetminus$	Portfolio	Type ∨
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8/6/2021 3:06 PM	JW task 1	Product abc	Project Task	8/9/2021	8/12/2021

For a detailed explanation of the Portfolios Area see Portfolios.

#### **Power BI Reports**

🛛 🗹 🛛 My Work

**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.

ᆒ Dashboard

Portfolio		Program			Template		Project				Project Ma	nager				
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			ogram	T	Project Mana			Status		ï		Health		1	✓ Search	
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#### 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.

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	My Work		Proi-0010

# **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

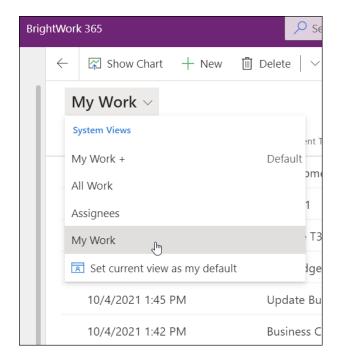
The My Work views, available from a link on the Projects Area navigation, are reports that display and link to all the work items owned by, or assigned to, the logged in user (i.e., you). For added convenience the view can display work items from multiple types of work in a single view.

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

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My Work	Blue Yonder Deployment
Portfolios	Frozen Desserts Africa Launch

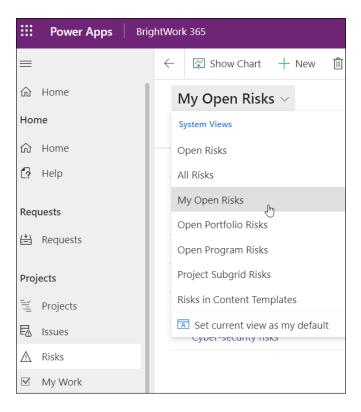
The initial view **My Work +** provides a link to the associated project site in addition to work related information.

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.

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## **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.

oject Task				
Name	* Task One	Current Start	1/31/2022	Ē
A Progress	In Progress	Current Finish	2/9/2022	
🖰 Project	* 🖹 jw123	🛆 Target Start		
🖰 Parent		A Target Finish		
🔒 Stage		% Complete	25	
Project Task Type	Task		25	

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.

Initia	ete (5 D)		Pla	) in		Execute	e			Close Out
Gantt	My Work	Status	Documents	Issues	Risks	Project Settings				
							+	New Issue	2	Add Existing Issue
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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.

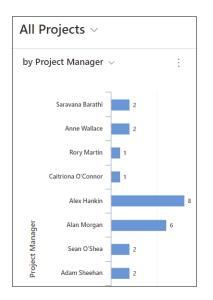
If you will be more directly involved in managing projects, we recommend that you complete the Project Manager training guide prior to using this guide.

## **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.

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~	Project Refe ∨	Name $\vee$	Project Status $\sim$   Health Icon $\sim$	Project Man 🗸	Program ∨	Portfolio 🗸	Template $\lor$	Created $\downarrow$ $\checkmark$	/ Modified On $\sim$	/
	Proj-0010	Frozen Desserts for Chile	In Progress	Alan Morgan	Product Operat	Contoso Projec	Product Operat	10/4/2021	11/30/202	
	Proj-001069	Rollout Virtual Phone Frozen D	esserts for Chile	Adam Sheehan.	Internal System	Contoso Projec	Internal System	10/4/2021	1/28/2022	
	Proj-001067	Move all Internal Servers to Clou	Not Started	Adam Sheehan.	Internal System	Contoso Projec	Internal System	10/1/2021	1/31/2022	
	Proj-001066	Refresh Remote Desktops	Not Started	Donal McCarthy	Internal System	Contoso Projec	Internal System	10/1/2021	11/30/202	
	Proj-001050	Northwind Deployment	In Progress	Éamonn McGui	Customer Succe	Contoso Projec	Customer Succe	9/23/2021	1/11/2022	

#### Issues

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

ம் Home	Open Issues ~							
Home	✓ Name ∨							
ഹ Home								
C? Help	Project Manager has resigned							
Requests	Our Customer is unhappy with the de							
(+) Requests	Confusion over local market needs							
	Budget not yet released							
Projects	Limited engagement of stakeholders.							
Projects	We have an issue							
E Issues	Confusion over local market needs							
A Risks Issues	Budget not yet released							
Issues Report \	/iew in the Projects Area							
Powdered Cream Chee Project · Product Update ~	Powdered Cream Cheese for Malawi - Saved Project · Product Update ~							
Product Update Active for 3 months	Chartering (3 Mo)	Execu						
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Beta customers slow w	vith feedback Not Started							
Trademark registration	is proving challenging Not Started							
Issues	s 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.

命 Home	Open Risks $\vee$		
Home	System Views		Risk Status 🗸
ഹ Home	Open Risks	Default	
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	My Open Risks	ample	Identified
Requests	Open Portfolio Risks	mple	Identified
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Projects	Project Subgrid Risks	ple	Identified
Projects	Risks in Content Templates	ple	Identified
E Issues	Seset default view	па слаттрle	Identified
▲ Risks	Customer my pull sponsorship Ala	n & Kat Example	Identified
My Wor Risks	Team Members leave due to bu- Alan & Kat Exam		Identified
Portfolios	Customer my pull sponsorship Kat	Example	Identified

Risks can be easily logged from within project records.

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~	Name 🗸			Project ∨		Risk Status 🚿	<ul> <li>Escalation</li> </ul>	Risks
	Borders o	lose due to	o Covid re	stri Northwin	d Deployme	ent Identified	Project	Co
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	Quality E	ngineers no	ot availabl	e Northwin	d Deployme	ent Identified	Project	Co

Risk		Mitigation		Contingency
Name	* Materials arrive late	Mitigation Actions Suggested		Contingency Actions Suggested
A Risk Reference	RK-001256			
Risk Description		Mitigation Actions Requested By Date	-	Contingency Actions Requested By Date
Consequence		Mitigation Actions Assignee		Contingency Actions
Root Cause		Mitigation Actions Taken		Contingency Actions Taken
Most Likely Impact Date		MINUT F		MINUT I

# **Portfolio Reports**

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

✓       Name ↑ ∨       Portfolio Status ∨       Health i ∨       Portfolio Mana       ∨       Current Start ∨       Current Finish ∨       Portfolio Type ∨       Modified On ∨	All Portfolios ~		T, V	Search this view
	$\checkmark$ Name $\uparrow$ $\checkmark$	$\Big  \ {\rm Portfolio} \ {\rm Status} \ \lor \ \Big  \ {\rm Health} \ {\rm i} \ \lor \ \Big  \ {\rm Portfolio} \ {\rm Mana} \ \ \lor \Big  \ {\rm Current} \ {\rm Start} \ \lor$	Current Finish $\checkmark$ Portfol	io Type $\checkmark$ Modified On $\checkmark$
Contoso Projects In Progress Ochristine Chang 7/2/2021 9/13/2022 Regular 1/31/2022 11	Contoso Projects	In Progress Ochristine Chang 7/2/2021	9/13/2022 Regu	lar 1/31/2022 11:

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.

ப் Home	All Programs ~					
Home	My Views		Program Status 🗸	Health i 🗸	Program Man 🗸	Current Start 🗸
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🕜 Help	System Views					
Requests	All Programs	Default	ts. In Progress	•	Éamonn McGuinn	7/2/2021
	Inactive Programs	rojec	ts. In Progress	•	Adam Sheehan	7/2/2021
😩 Requests	S Reset default view	rojec	ts. In Progress	•	Alan Morgan	9/6/2021
Projects	Company Operations	Contoso Projec	ts. Not Started	0	Scott Footlik	9/6/2021
Projects	Marketing	Contoso Projec	ts. Not Started	•	Fintan Manning	9/6/2021
E Issues	Accounts Recevable	Contoso Projec	ts. Not Started	•	Christine Chang	1/17/2022
▲ Risks						
My Work						
Portfolios						
🖻 Portfolios						
유 Programs						
Dashboard Programs						

#### **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.

Portfolio			Program		Template		Project				Project	Manager			
All		~	All	$\sim$	All	$\sim$	All			~	All		$\sim$	√ Filters	)
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T Project Standari	d B	lank	Unclear 🔵					0%	16	16	5				

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

Portfolio Dashboard Projects Timeline Projects and Tasks Timeline	Work	My Work	Project Documents	
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## **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.

Brig	← 🖾 Show Chart + New My Requests → System Views						
=	← 🖾 Show Chart + Ne My Requests ~						
습 Home	My Requests $\sim$						
Home	System Views						
命 Home	Open Requests						
🗘 Help	All Requests						
Requests	Approved Requests						
	Closed Requests						
Requests	My Requests						

#### **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.

<u>ul =</u> & ~	07. Costs and Budgets Portfolio Dashl
പി	08. My Work - Power Bl
പി	09. Portfolio and Projects - Power BI

创 10. Project Documents - Power BI

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

# **Navigating Power BI Dashboards**

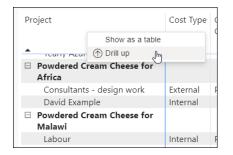
The Power BI dashboards include detailed interactive reports related to various elements of the system including Portfolios, Programs, Templates, Projects, and Project Managers. The reports can be filtered to further narrow down the returned results either by using **Ctrl-Click** to choose several chart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

Portfolio			Program		Template		Project				Project	Manager			S =:!.	
All		~	All	$\sim$	All	~	All			$\sim$	All		$\sim$		√ Filters	2
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3	49		Program		Project Manager			Status				neatti		Ŀ		
Projects	Tasks													L	Filters on all pages	
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T: Product Updat	e Bl	ank	Unclear				,-	0%	15	15	2					
T: New Product I		ank	Unclear					0%	18	18						
T Project Standar		ank	Unclear 🔵					0%	16	16						

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

Pr	oject		Cost Type	Co Ca
		Show as a table		
	Frozen Desse			
	America	Expand to next le	evel Jm	
+	Frozen Desse Launch	rts South America	0	
+	Move all Inter Cloud	rnal Servers to the		
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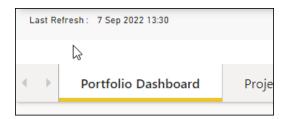
To collapse all report list groupings, right-click on the grouped column (e.g., **Project**) and click **Drill up**.



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:

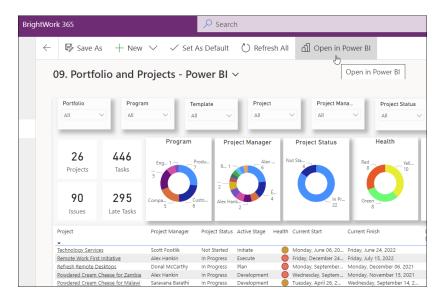
Portfolio Dashboard	Projects Timeline	Proiects and Tasks Timeline	Work	Cost and Budgets
				cost and budgets

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.

Pages	🗋 File 🗅	✓ → Exp	ort \vee 🖻 Share	Û	Chat in Teams	🖗 Ge	t insights 🛛 …			5	Г
	Portfolio		Program		Template	-	Project	· · ·	Project Manager		
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Projects and Tasks Tim Work	57 Issues	2415 Late Tasks	Default 204		Alex Hankin167		Late 160			ireen 212	

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

# **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**