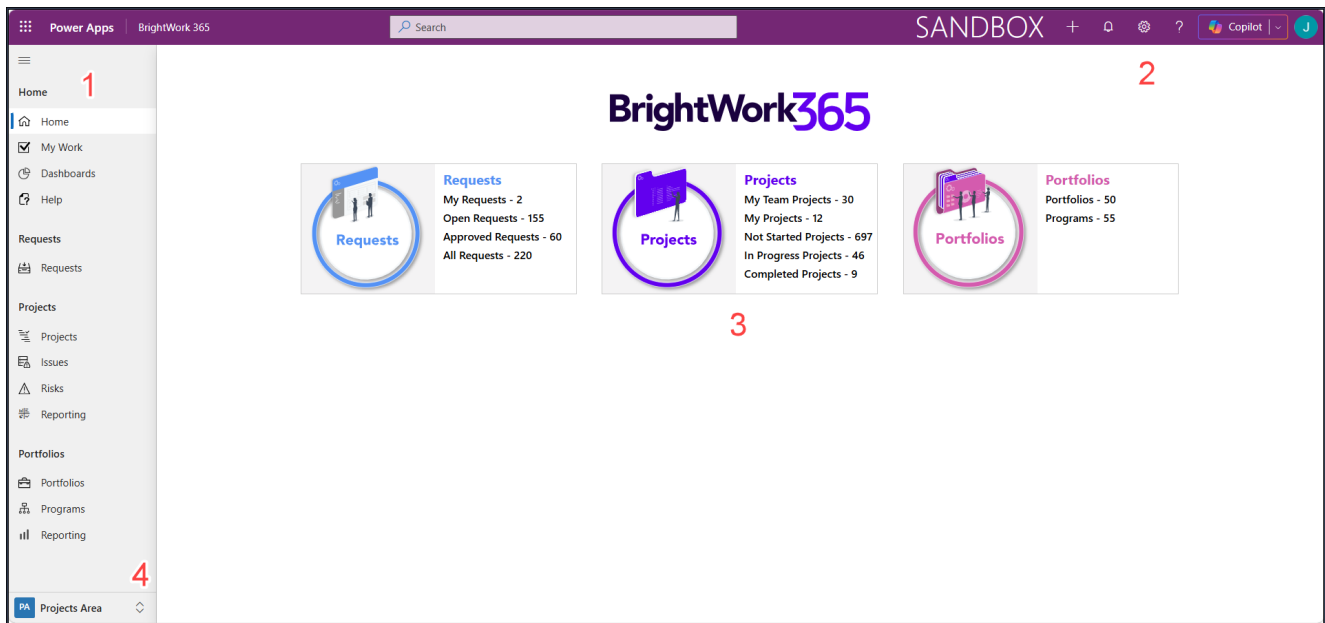


Navigating BrightWork 365

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

BrightWork 365 Home Screen



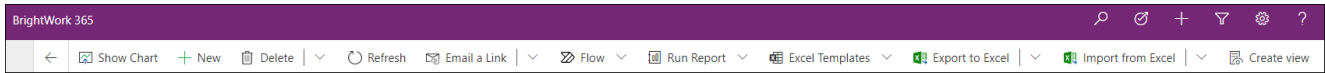
1) Main Navigation: The main navigation is used to enter the different areas and sub-areas within BrightWork 365. The navigation elements are lined up in the typical process flow of the project management lifecycle, from initial request, to managing the execution of a project, to reporting across projects.

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

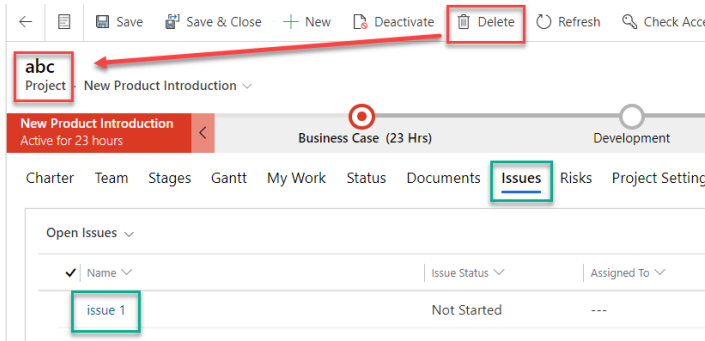
3) Home Page Summary Metrics: View important metric data and click into these home page tiles to enter the respective app sections.

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. If a user has read access to any of the tables in an app area, then they have access to the app area.

Ribbon

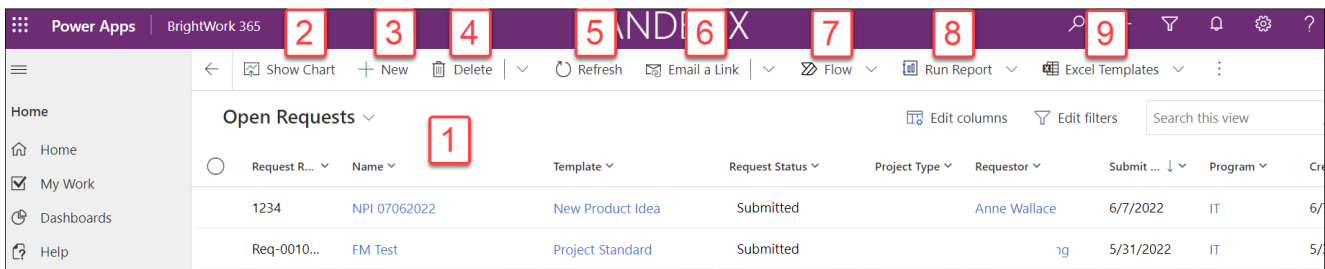


The Ribbon is activated when you click into a heading within one of the areas in the main navigation. Here you'll find options that relate to the entity that is noted directly below it - for example, the **Delete** option will delete the entire abc project as shown below, not the issue that is displayed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



Caution Deleted items, i.e., projects, portfolios, assignments, etc., are permanently removed and cannot be recovered unless the [environment Recycle Bin](#) has been enabled.

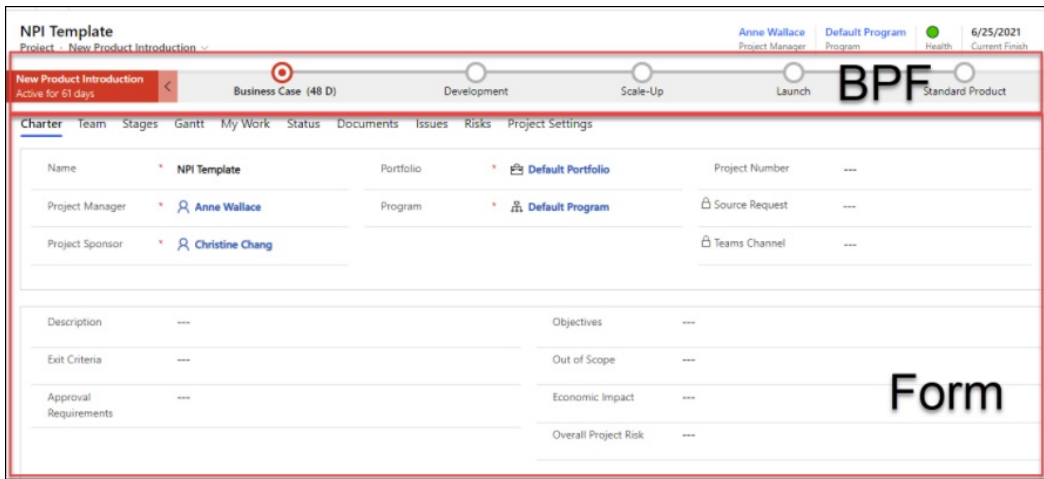
Most of the process areas share the same Ribbon options displayed across the top. An explanation of each of the major Ribbon elements follows below.



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

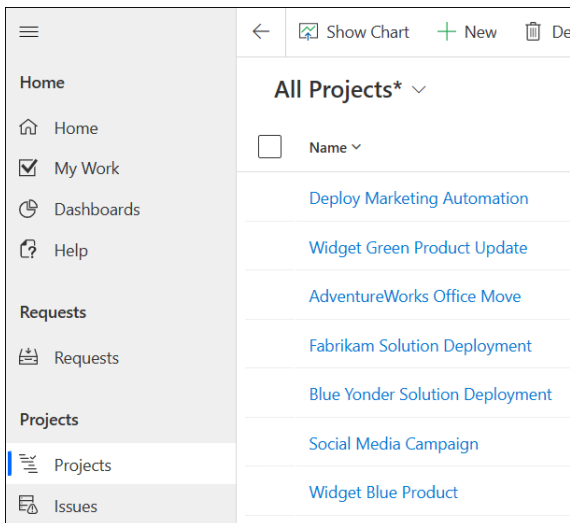
Business Process Flow

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.

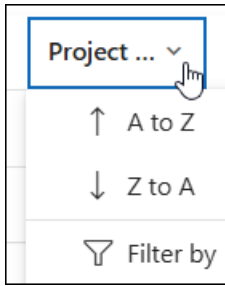


Views

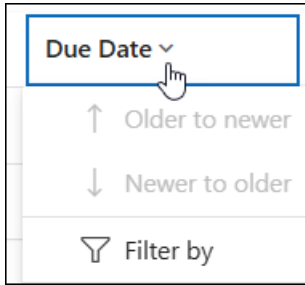
A view defines information that you want to track in the form of records, which typically include properties such as different types of work and work record details. BrightWork 365 views can be accessed via main navigation links such as **Requests** and **Projects**.



Click the column drop-down arrows to view the different view organization settings. For example, to sort and filter columns, click on the arrow adjacent to the column name and choose the desired sort or filter option.



Calculated columns, such as Due Date, cannot be sorted.



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 Requestor

Project Request Level 2
Completed in 26 minutes <

Draft | Accept | Approve | Create Project

Idea Details | Project Details | History

Idea Details		Current State	
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 does it like this
Program	Program 1	Success Assumptions	Market analysis is correct
Target Customers	North America retail	Source of Idea	New product team
Customer Need	They really need this	Submit	<input type="checkbox"/> 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.

Project Standard-9:25 AM

Template - Template - Short ▾

Details

Template - Short

Template

Name * Project Standard-9:25 AM

Description ---

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.