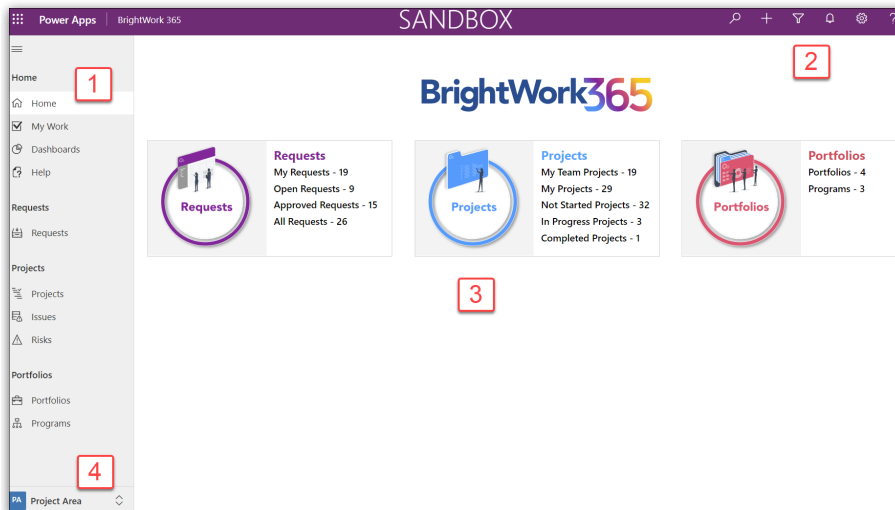


# Navigating BrightWork 365

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

## BrightWork 365 Home Screen



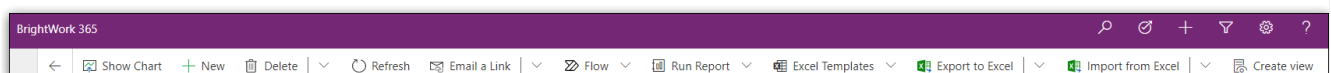
1) Site Map: The Site Map area is used to navigate to the different areas and sub-areas within BrightWork 365. They're lined up in the typical process flow of the project management lifecycle, from initial request, to managing the execution of a project, to reporting across projects.

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

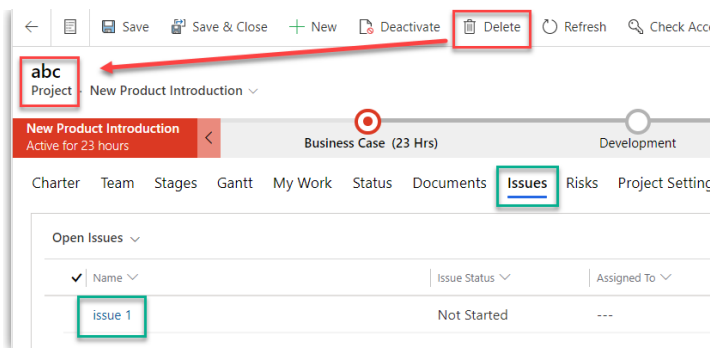
3) Home Page Summary Metrics: View important metric data and click into these home page tiles to enter the respective app sections.

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

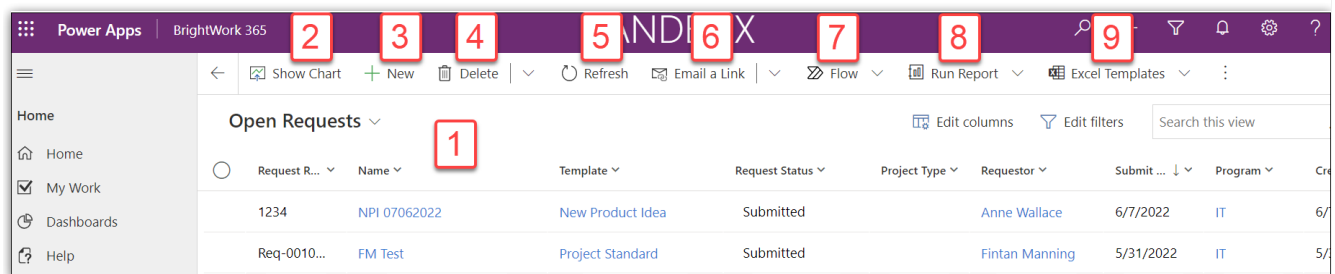
## Ribbon



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



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



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

## Business Process Flow

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

The screenshot shows a project charter form in BrightWork 365. At the top, it identifies the project as 'NPI Template' under 'New Product Introduction'. A progress bar shows stages: Business Case (48 D), Development, Scale-Up, and Launch. The project is managed by Anne Wallace, part of the Default Program, with a current finish date of 6/25/2021. The form includes fields for Name (NPI Template), Portfolio (Default Portfolio), Project Number, Project Manager (Anne Wallace), Program (Default Program), Project Sponsor (Christine Chang), Source Request, and Teams Channel. Below these are sections for Description, Objectives, Exit Criteria, Out of Scope, Approval Requirements, Economic Impact, and Overall Project Risk, each with a text input field. A large 'Form' watermark is visible on the right side.

## 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**.

The screenshot displays the 'All Projects' table in BrightWork 365. The left sidebar shows navigation options: Home, My Work, Dashboards, Help, Requests, and Projects (which is currently selected). The main area shows a list of projects under the heading 'All Projects\*'. Each project entry consists of a checkbox and the project name.

	Name
<input type="checkbox"/>	Deploy Marketing Automation
<input type="checkbox"/>	Widget Green Product Update
<input type="checkbox"/>	AdventureWorks Office Move
<input type="checkbox"/>	Fabrikam Solution Deployment
<input type="checkbox"/>	Blue Yonder Solution Deployment
<input type="checkbox"/>	Social Media Campaign
<input type="checkbox"/>	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 Details

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 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

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### 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.