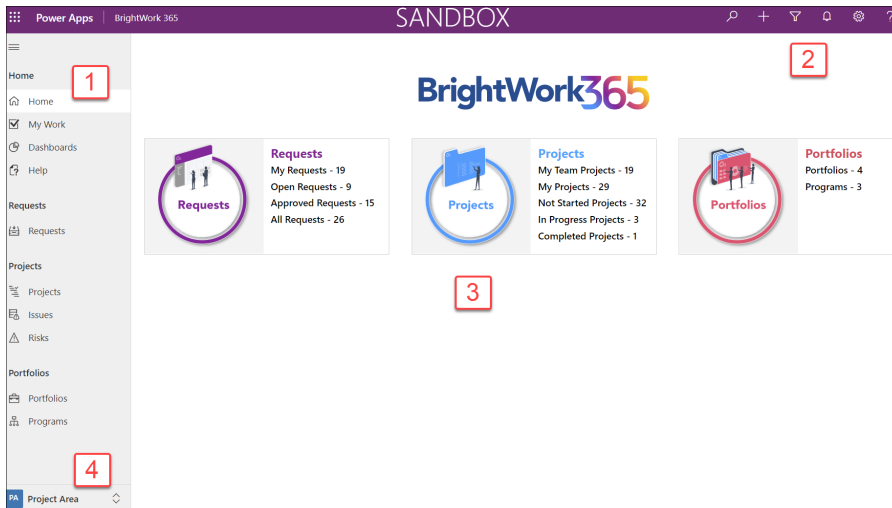


Navigating BrightWork 365

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



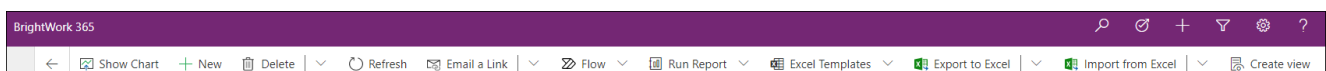
1) Main Navigation: The main navigation is used to enter the different areas and sub-areas within BrightWork 365. The navigation elements are lined up in the typical process flow of the project management lifecycle, from initial request, to managing the execution of a project, to reporting across projects.

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.

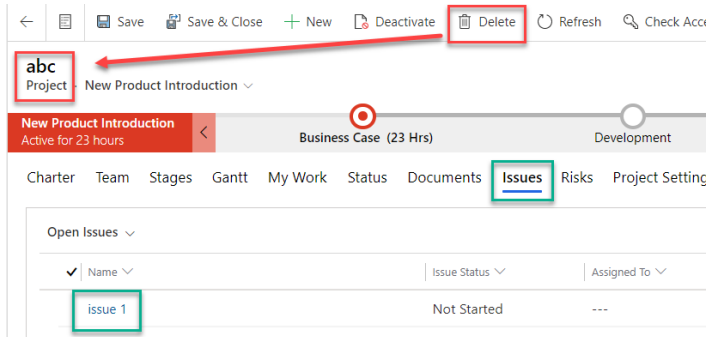
4) Area Switcher: Use this section to toggle between the Projects Area, Templates Area, and Admin Area. Access to the Templates Area and Admin Area is trimmed via BrightWork security roles. If a user has read access to any of the tables in an app area, then they have access to the app area.

Ribbon



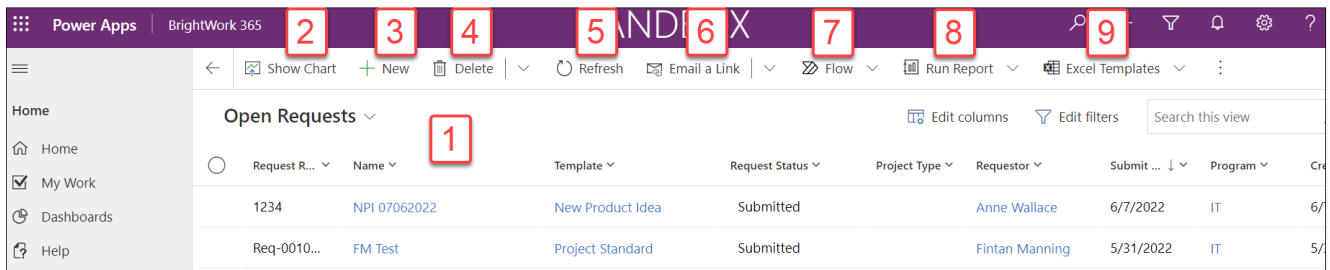
The Ribbon is activated when you click into a heading within one of the areas in the main navigation. Here you'll find options that relate to the entity that is noted directly below it -

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 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.

NPI Template
Project - New Product Introduction

Anne Wallace (Project Manager) | Default Program (Program) | Health | 6/25/2021 (Current Finish)

New Product Introduction (Active for 61 days) | Business Case (48 D) | Development | Scale-Up | Launch | BPF | Standard Product

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

Name	* NPI Template	Portfolio	* Default Portfolio	Project Number	---
Project Manager	* Anne Wallace	Program	* Default Program	Source Request	---
Project Sponsor	* Christine Chang			Teams Channel	---
Description	---	Objectives	---		
Exit Criteria	---	Out of Scope	---		
Approval Requirements	---	Economic Impact	---		
		Overall Project Risk	---		

Form

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**.

Home | My Work | Dashboards | Help | Requests | Projects | Issues

All Projects* ▾

☐ Name ▾

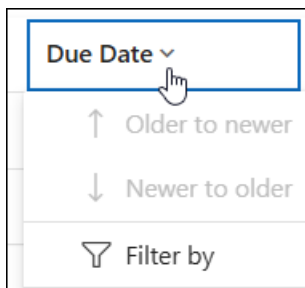
- Deploy Marketing Automation
- Widget Green Product Update
- AdventureWorks Office Move
- Fabrikam Solution Deployment
- Blue Yonder Solution Deployment
- Social Media Campaign
- Widget Blue Product

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.

Project ... ▾

- ↑ A to Z
- ↓ Z to A
- Filter by

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.

A screenshot of a "Request" form for "Product abc". The form is titled "Product abc" and "Request · New Product Idea". It shows a progress bar with four stages: Draft, Accept, Approve, and Create Project. The "Idea Details" section is active, showing fields for Reference, Title, Idea Description, Program, Target Customers, and Customer Need. The "Current State" section shows fields for Market Size, New Idea Advantage, Success Assumptions, Source of Idea, and Submit.

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.

A screenshot of a "Project Standard-9:25 AM" form. The form is titled "Project Standard-9:25 AM" and "Template". It shows a dropdown menu for "Template" with options "Template - Short" and "Template". The "Name" field is filled with "Project Standard-9:25 AM" and the "Description" field is empty.

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.