Project Status Reporting

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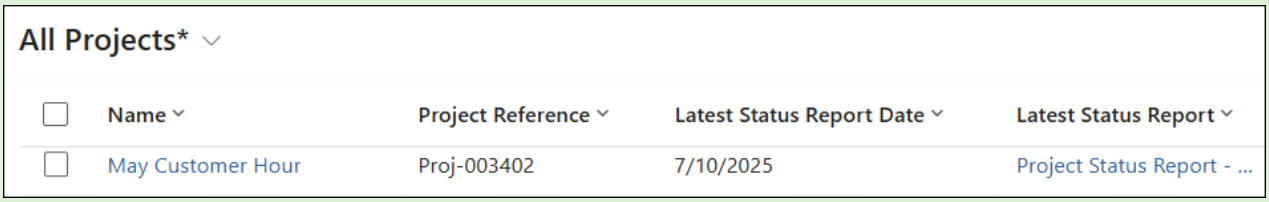
Project Management Context

Status reporting is an extremely efficient method for keeping multiple stakeholders informed about how projects are progressing. Crucial information such as a project's overall status and health, attributes your stakeholders are likely very interested in seeing, can easily be updated and distributed by the project manager. BrightWork 365 provides project managers with an intuitive interface for keeping metrics and qualitative information updated at their leisure, as well as creating status snapshots to keep a trail of how the project has performed over time.

Tip Quickly identify projects that have not been updated recently with the **Latest Status Report Date** field. Customers can optionally add this column and the **Latest Status Report** link column, by configuring the **Projects > All Projects** views.



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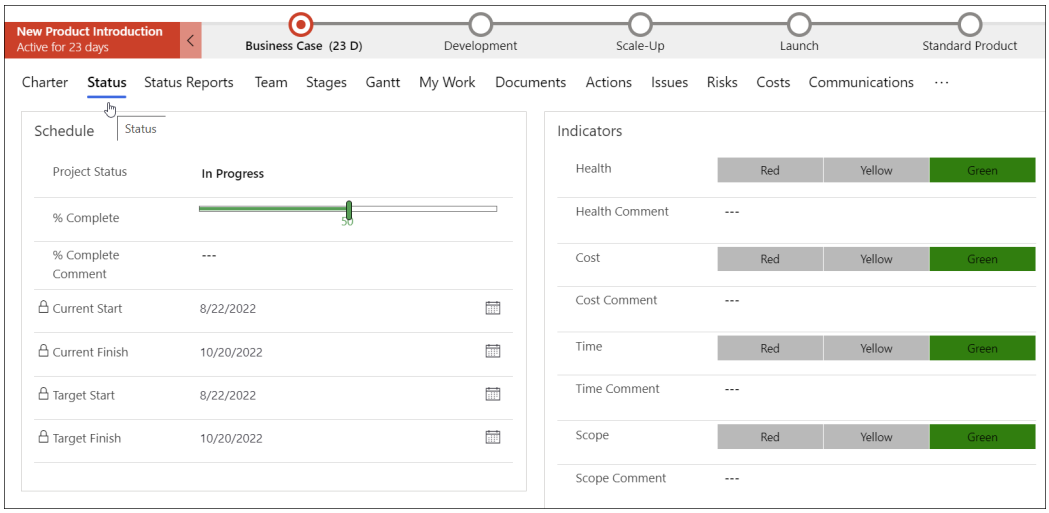
Status Tab

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



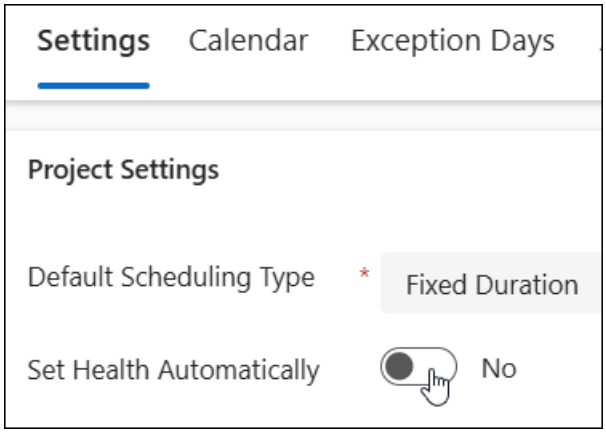
The Schedule date values will automatically populate based on work item dates, and the values for Project Status, % Complete (Percent Complete), and other KPIs are manually set by the project manager.

Health Key Performance Indicator (KPI)

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:

1. In the project's Charter tab, click the **Settings and Actions** link.
2. In the Settings tab, toggle the Set Health Automatically switch.
3.



> **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.

Email Report to Sponsor & Complete Status Report

If you would like an email to be sent to the Sponsor, you must check the box for **Email Report to Sponsor**.

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, unless Send On Behalf of mailbox permission has been configured, as noted later in this article.

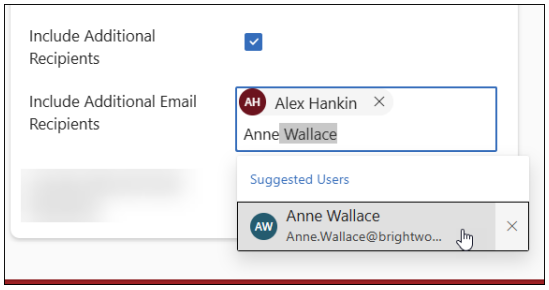
Email Report to Project Team

If you would like an email to be sent to the Project Team, you must check the box for **Email Report to Project Team**. Project team members with Access Level = Edit will be included as recipients.

Include Additional Recipients

A project's actual Project Manager can add a list of additional internal recipient names (not email addresses) during the Status Report creation stage. To do this, check the box for

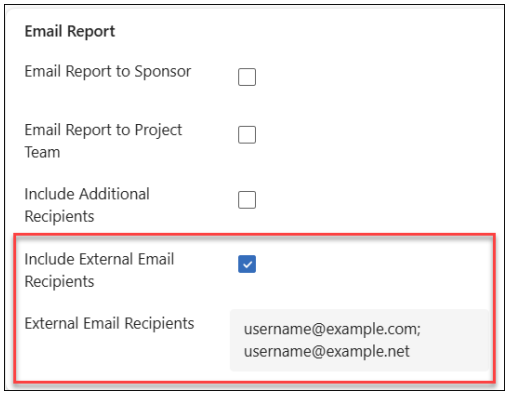
Include Additional Recipients, start typing the name in the Include Additional Email Recipients field, and choose the relevant suggested user.



Status reports can be shared with any user that has the BrightWork Team Member security role, regardless of their Project Access Level.

Include External Email Recipients

A project's actual Project Manager can add a list of external email addresses to receive the status report during the Status Report creation stage. To do this, check the box for **Include External Email Recipients** and enter the email addresses separated by semicolons (do not use carriage returns) in the External Email Recipients field.



Default List of Status Report Recipients

The actual Project Manager can add a default list of additional internal names and external email addresses to receive status reports for easy repeatable use. The list is saved so it does not have to be recreated with every status report. In addition, recipients can be added or deleted as needed prior to sending the status reports. Out of scope for these default status report recipient lists:

- Bulk Updates in Project Settings views
- Copy Project
- Content Templates

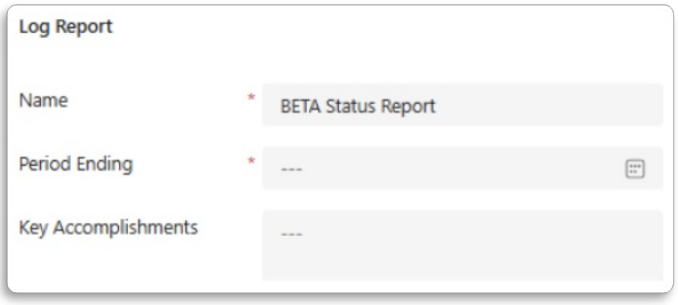
To create a default list of recipients to include with status report emails, see Settings and Actions.

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.
- Status related icons may fail to load in older versions of the Outlook desktop client.
- Images added from file to any available Rich Text Fields will not render in status report emails.

Custom Status Report Name

Users have the ability to add a custom name for a status report so that they can specify greater context to what the purpose of the specific report is. They can use this field to add any additional information that would be useful for the stakeholders or team members who are receiving it. The user can edit the Status name when they first open the form to add details to the report. The name of the report can be edited up until the point that the 'Complete Status Report' toggle option is clicked and the form is saved.



Send On Behalf Of Mailbox Permission Setting

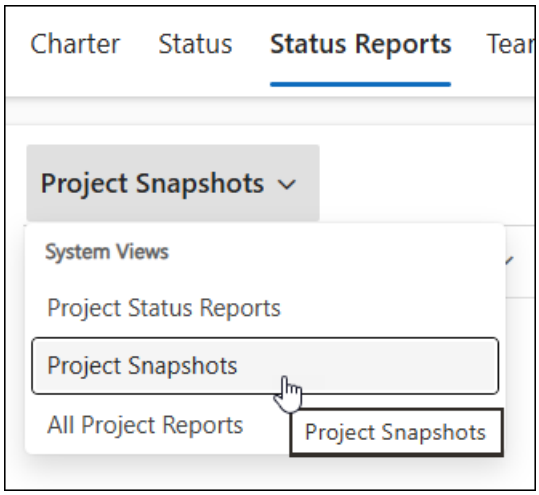
Out of the box, when a status report is emailed to Project Sponsors or other stakeholders, it will be sent from the account that was used to install BrightWork 365. This email sending account can be changed to the account of the user submitting the status report if that account has been given **Send 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.

Project Snapshots

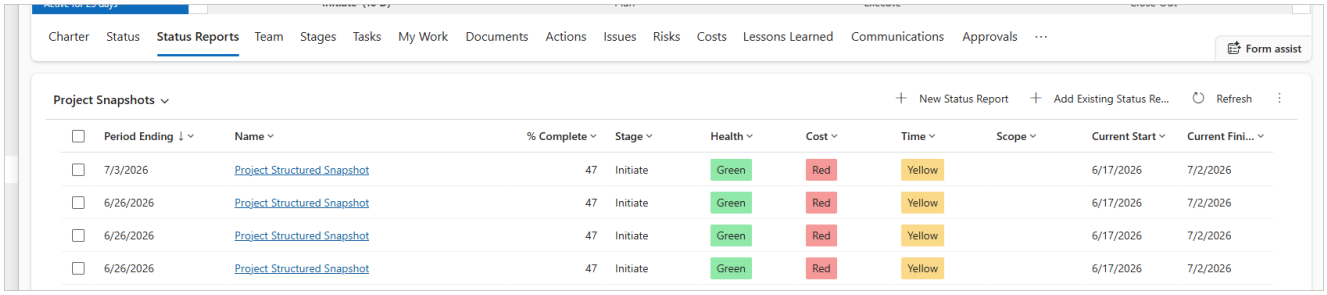
Project Snapshots report over the out of the box historical values of key data points from the Project Status Reports (e.g., Health, Time, Cost, Scope, % Complete, Start and Finish

Dates).

Turn the Project Snapshots option on to automatically include projects in a weekly snapshot taken every Sunday evening at 11:50 pm. When enabled, snapshot data is captured for all nominated active projects in the Status Report table. The Status Report table found in the Status Reports tab of projects includes a drop-down view to differentiate between Status Reports and Snapshot Reports.



All Snapshot Reports for the associated project are displayed in the Snapshot Reports view on the Status Report tab. Clicking on a snapshot in the view opens it in the Snapshot form in the Status Report table.



Enable Project Snapshots

This feature needs to first be enabled for the BrightWork 365 solution by a user with the BrightWork PMO Manager security role via Admin Area > Global Settings > Settings tab.

Toggling the Enable Project Snapshots button in Global Settings to On causes the Include in Snapshot button to appear at the Project level in Charter > Settings and Actions > Settings > Project Configure Options, where you have the option to turn it on or keep it turned off for a Project. Toggling the Enable Project Snapshots button in Global Settings to Off causes the button for Project Snapshots to not appear at the Project level.

Changes to the setting are applied immediately.

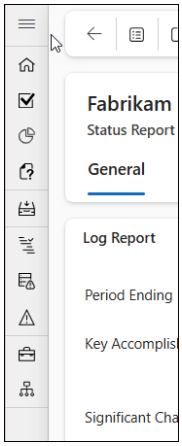
The Take Project Snapshot flow runs at 11:50 pm on Sundays.

- Data Captured and surfaced:
  - Health
  - Time
  - Cost
  - Scope
  - % Complete
  - Current start
  - Current Finish
  - Target Start
  - Target Finish
  - Project Duration
- Data Captured and not surfaced:
  - Actual to Date
  - Approved Budget
  - Budget Assigned
  - Budget Remaining
  - Budget Variance
  - Cost to Complete
  - Current Forecast
- Data captured adheres to form configuration settings for the related project. If a project tab is hidden, the associated data is not included.

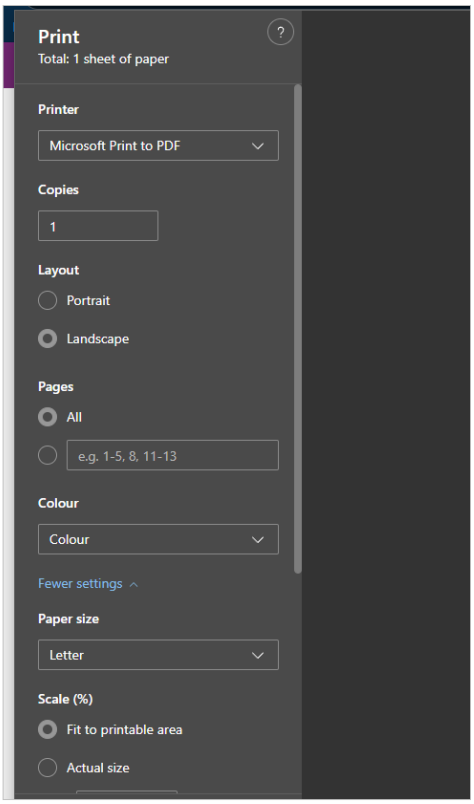
> **Note**
> - If the project snapshot flow (Take Project Snapshot) fails to capture a snapshot for a particular project, it will send an email to the flow owner (typically this is the person who installed BrightWork 365). The email will list the projects that it could not create a snapshot for, provide a link to them, it will list the flow supplied reason for the failure, and it will provide a link to the flow run so that a System Admin can investigate.
> - Custom key indicators can be included in snapshot reports - contact your Customer Success Partner for additional information.

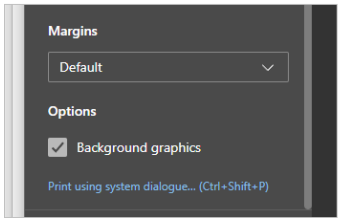
Printing Status Reports

1. Create your status report.
2. Collapse the left navigation.



3. Click Ctrl-P on your keyboard, select Microsoft Print to PDF as the printer, and set up as below:





4. Print to paper or share as an attachment.

Project Status Dashboard - Power BI

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

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

Report components include:

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