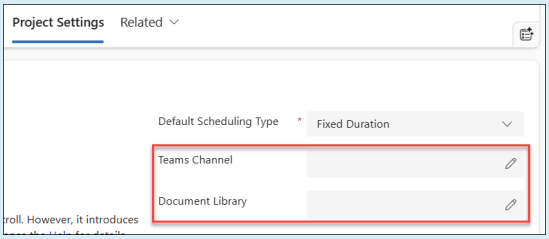
Document Management

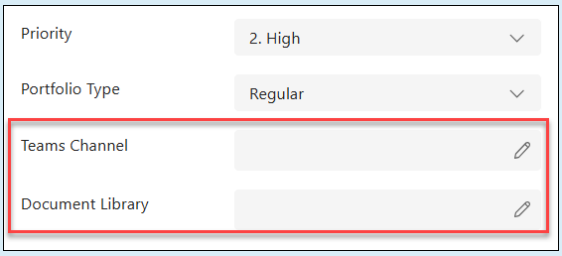
> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note This article is for Projects, Programs, and Portfolios created in BrightWork 365 version 2025-2 or later. For all other solution versions, see the older article version tabs at the top of this article.

How to check if a **Project was created in version 2025-2 or later:** In Charter > Settings and Actions > Settings, you will see the fields Teams Channel and Document Library.



How to check if a **Program or Portfolio was created in version 2025-2 or later:** In the Statement tab you will see the fields Teams Channel and Document Library.



Note After a browser refresh or extended period of inactivity, accessing document related pages will require user authentication.

Project Management Context

BrightWork 365 provides the actual Project Manager and a BrightWork PMO Manager with options regarding where to store and access documents for your Projects, Programs, and Portfolios: in your organization's SharePoint Online BrightWork 365 library, or in the SharePoint library that is associated with a selected Microsoft Teams Channel. The document related locations that are in scope for this feature are: the Documents tab in Projects, Programs, and Portfolios, and within Issues, Risks, Actions and Costs.

After the initial document management option is configured, this flexible system can handle changing the previous library choices, including between the two options, so that the project's central document and resource location can be updated and maintained as requirements change later on.

With the integration of these robust products, you have alternative methods for your team to stay connected, keep your projects organized, and for team collaboration. Providing various entry points for team members to work with the documents relevant to them will better ensure consistent and meaningful engagement throughout the execution of your projects.

Tip

- Deleting a Document Library or Changing the name of a Microsoft Team or Channel, will result in a "404 Not Found" error in document views.
- For Microsoft Edge browser: If the setting to "Block third-party cookies" is enabled, you will receive an error message when loading the Documents SharePoint interface, e.g., in the Documents tab of a Project or Program.
- The system respects SharePoint permissions, ensuring users only have access to authorized directories, files and folders, including those that are part of a Microsoft Team. If the user does not have access, they will see a "...refused to connect" or "Unauthorized" error message on the screen.
    - If the user does have access but still receives an access error message, this is likely because the user has never visited the SharePoint site in question; visiting the SharePoint site by clicking the SharePoint icon in the upper-right of the Documents tab and then refreshing the project, will resolve this issue.

Caution If your organization has not configured the Application (client) ID and Directory (tenant) ID during the installation process (also detailed in Configure BrightWork 365 Graph Client App), and if none of the document library connection options presented in this article are chosen, there will be no document management capability for projects, programs, or portfolios.

Permission Requirements

Only the following users can update the Document Library values for a portfolio:

- The Actual Portfolio Manager of the portfolio who also has the BrightWork Portfolio Manager security role.
- Users with the BrightWork PMO Manager security role

Only the following users can update the Document Library values for a program:

- The Actual Program Manager of the program who also has the BrightWork Program Manager

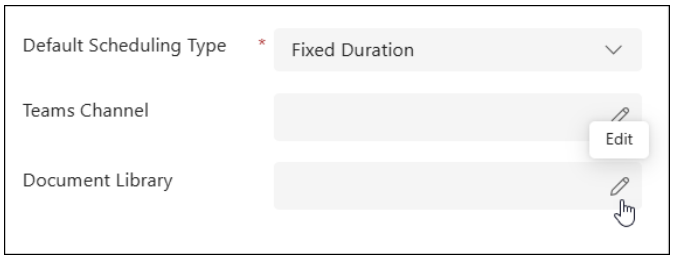
- The Actual Program Manager of the program who also has the BrightWork Program Manager security role.
- The Actual Portfolio Manager listed for the program who also has the BrightWork Portfolio Manager security role.
- Users with BrightWork PMO Manager security role.

Configuration option 1: Assign an existing SharePoint library to a Project, Program, or Portfolio

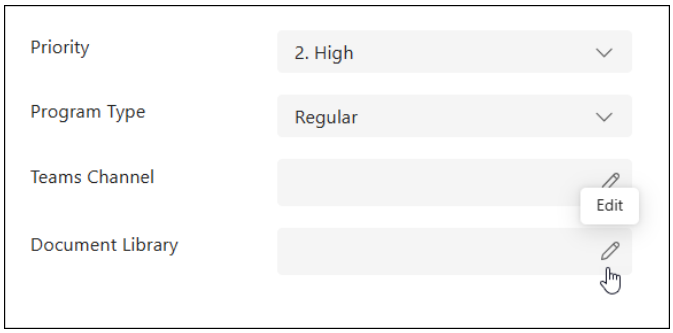
> **Note**
> - A project may have already inherited a SharePoint Document Library as its default document library from its parent program. Only Projects created after the Program's SharePoint Document Library has been configured will inherit the setting. Existing Projects will remain unchanged unless their Document Library configuration is manually updated. The inherited Document Management settings are saved in Project Settings.

Navigate to the Document Library Selector

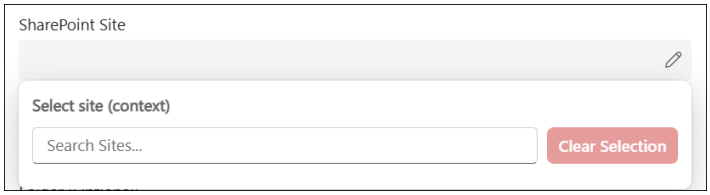
1. **If Working in a Project:**
   In the Charter tab click **Settings and Actions**.
   The Settings window will display. Click the **Edit icon** in the Document Library field.



   If Working in a Program or Portfolio:
   In the Statement tab, click the **Edit icon** in the Document Library field.



2. Search for the relevant SharePoint Site. You will need to start typing the name of the SharePoint Site or use the ***** wildcard in order to view existing sites to which you have access.



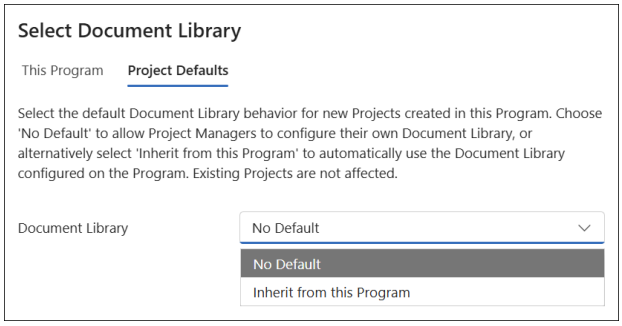
3. Search for the relevant Document Library. You will need to start typing the name of the Document Library or use the ***** wildcard in order to view existing libraries to which you have access.



4. (Optional) Select the relevant Folder.



5. Click **Confirm**.
6. (Optional for programs) Select the default Document Library behavior for new Projects created in this Program.



7. Review all Documents tabs within the Project, Program or Portfolio to ensure the new Documents view is displaying as expected.

Caution

- Deleting a SharePoint document library associated with BrightWork 365 will result in a 404 Not Found error in any document views using the document library.
- Linking a new folder will disconnect the current folder or Teams channel associated with this project.

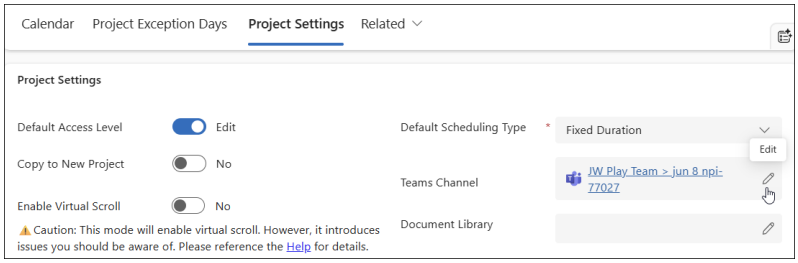
Configuration option 2: Assign an existing Microsoft Teams Channel library to a Project, Program, or Portfolio

Note

- This process can only be done by the actual Project Manager of the project, or a BrightWork PMO Manager security role holder.
- If a Teams Channel has not yet been associated with the Project, Program, or Portfolio, see Microsoft Teams for instructions.
- Project Note: A project may have already inherited a Microsoft Teams channel's Files tab as its default document library from its parent program. Only Projects created after the Program's Teams Channel has been configured will inherit the setting. Existing Projects will remain unchanged unless their Teams Channel is updated.
- Program Note: When Microsoft Teams options are configured for a program, you have the option to use its Teams Channel Files as the Default Document Library for child projects, or to not set any default (this is the initial setting). If the default option is set, new projects will use the selected program's Teams Channel's Files tab as their default document library. Documents added to the project will be stored and managed in this location.

Navigate to the Microsoft Teams Channel Selector

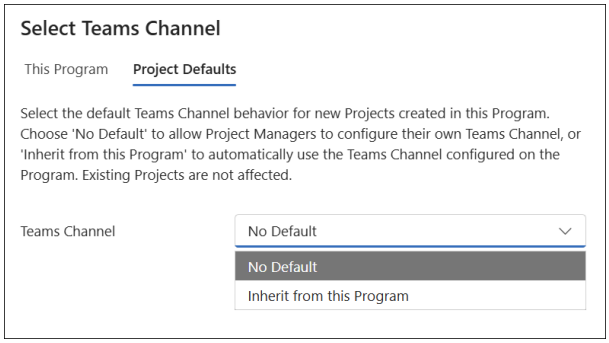
1. **If Working in a Project:**
   In the Charter tab click **Settings and Actions**.
   The Settings window will display. Click the **Edit icon** in the Teams Channel field.



   If Working in a Program or Portfolio:
   In the Statement tab, click the **Edit icon** in the Teams Channel field.



2. The Select Teams Channel dialog displays. Check the box for **Use this Teams Channel's Files as the default Document Library** and click **Confirm** to complete the process.
3. (Optional for programs) Select the default Teams Channel behavior for new Projects created in this Program.



4. Review all Documents tabs within the Project, Program or Portfolio to ensure the new Documents view is displaying as expected.

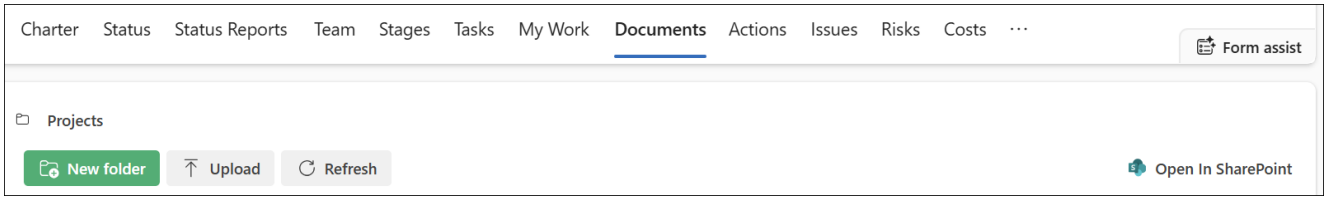
Tip If the Microsoft Teams Channel is private, you will need to add your team members to the Channel one by one.

Disconnect Document Library

1. Navigate to the document library selector and click the Edit icon as noted above.
2. Disconnect the current document library.
3. Connect to a different document library as noted above.

Note Changing the choice of document library will mean the existing files and folders, previously associated with certain Actions, Issues, Risks, Costs, etc., will no longer be conveniently accessible from within the record. However, you may still access them directly from the original library location.

Documents Tab



The Documents tab is where you can view documents stored in your organization's BrightWork 365 SharePoint Online site that is associated with BrightWork 365. Documents can be uploaded within BrightWork 365, or otherwise saved in the associated SharePoint library.

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.
- If your browser is set to block pop-ups, document library authentication will fail. Allow browser pop-ups and then do a browser refresh.
- For customers using custom BrightWork 365 forms: 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.

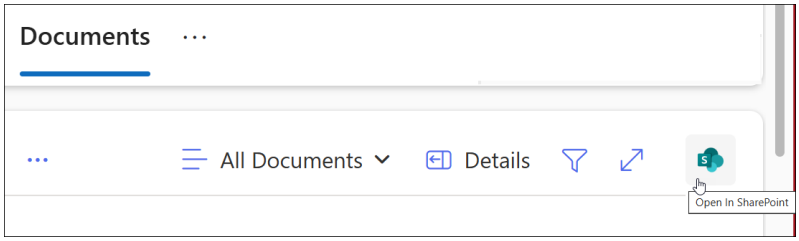
Folders

Click **+ New > Folder** to create a folder. You can also create folders inside of folders.

Use the folder breadcrumbs to navigate the folder hierarchy.



Open in SharePoint



Users have the option to access the library directly in SharePoint by clicking the **Open in**

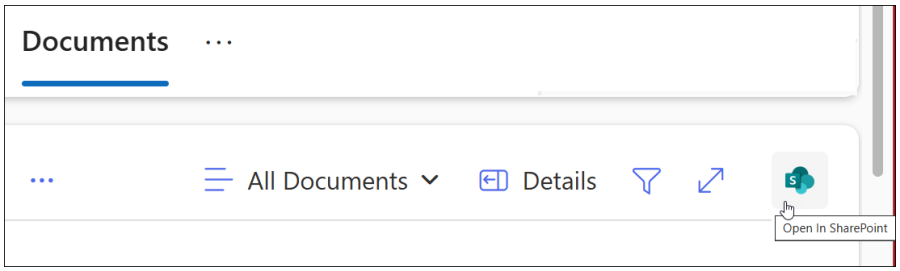
SharePoint icon in the Documents tab to perform actions such as:

- Move documents into folders
- Bulk upload lots of documents
- Sync the folder with your desktop OneDrive

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:

1. In the Documents tab, click the 'Open in SharePoint' icon to go to the associated SharePoint Online location.

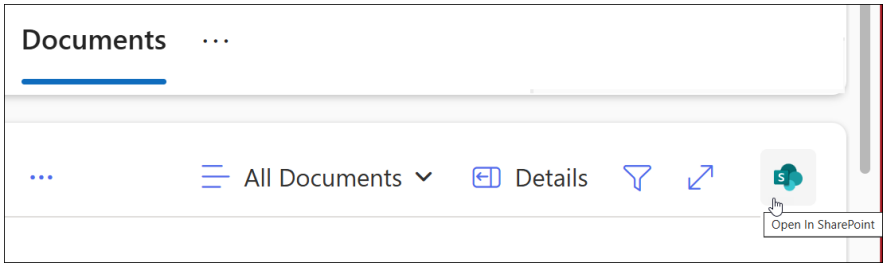


2. On the SharePoint site that opens, select **Upload > Files** to upload the file. The file will upload even if it is larger than 50 MB.

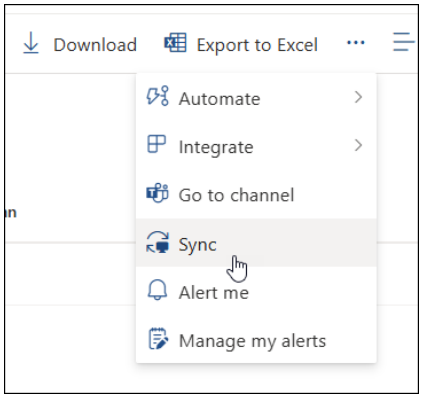
Desktop Sync

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 'Open in SharePoint' icon to go to the associated SharePoint Online location.



3. On the SharePoint page that opens, click **Sync** (you may need to first click the 3 dot ellipses) to begin the desktop sync via Microsoft OneDrive.



Troubleshooting

No Document Library displayed in a Documents tab or section

If you cannot see the configured Document Library in a Documents tab or section, and if you are not being prompted to login, then browser pop-ups may be disabled.

To enable browser pop-ups for a site, here are the steps (for Edge and Chrome):

1. First confirm this is the issue. Look for the pop-up icon to the right of the URL field in the browser, next to the Favorites icon .
2. Click on the icon and select the option to “Always allow pop-ups and redirects from” the site.
3. Select **Done** to confirm.

Document tab error "Missing Graph API IDs in Global Settings in the Admin Area" displays even though Graph API IDs are properly configured

This error message can display for non-Sys Admin users if Column Level Security has not been configured properly for the associated columns in Global Settings. For instructions to set Column Level Security, see section "Setup Graph API Read Column Security Profile" in the BrightWork365 Install Guide.pdf .

"Error:" message appears in a Documents tab or section

Check that you have access to the Document library.

Error in Documents tab while an approval is in progress

While an approval process is in progress, an error will be present in the Documents tab. After the approval process is completed, the Documents tab will display content as expected.

Cannot see any document library when in Private mode in Chrome or Edge

This is 3rd party browser behavior. Exit private mode to view document libraries.