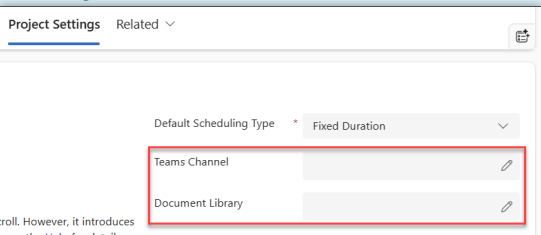


Document Management

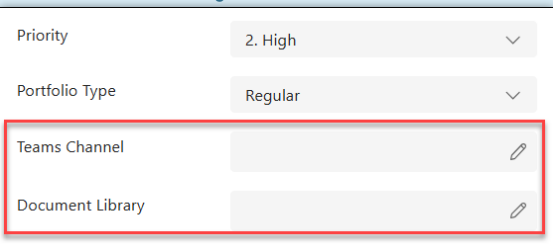
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

Note This article is for Projects, Programs, and Portfolios created in BrightWork 365 version 2025-2 and later, and if your organization has also configured the Application (client) ID and Directory (tenant) ID in Admin > Global Settings > Configuration during the installation process (also detailed in [Configure BrightWork 365 Graph Client App](#)). For all other scenarios, 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 > Schedule Settings > Project Settings, you will see the fields Teams Channel and Document Library.



How to tell 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.



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.

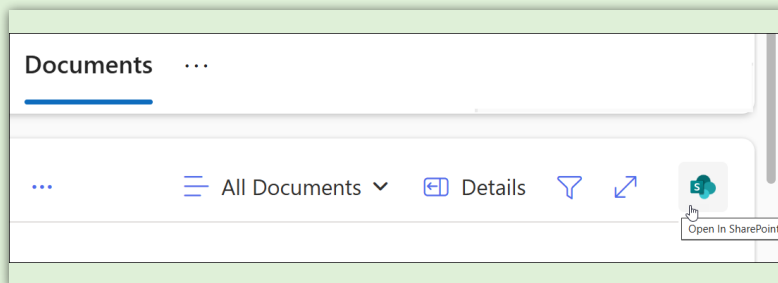
After the initial document management option is configured, this flexible system can handle changing the previous library choices, including between the two options, so that

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" error message on the screen.
- Users have the option to access the SharePoint library directly in SharePoint Online by clicking the 'Open in SharePoint' icon in the Documents tab.



Option 1: Assign an Existing SharePoint Library as the Document Library

Your browser does not support HTML5 video.

Your browser does not support HTML5 video.

Note

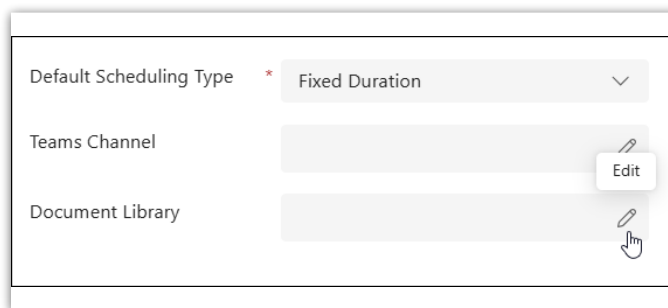
This process can only be done by the actual Project Manager of the project, or a BrightWork PMO Manager role holder.

Navigate to the Document Library Selector

1. **If Working in a Project:**

In the Charter tab or Project Settings tab, click **Schedule Settings**.

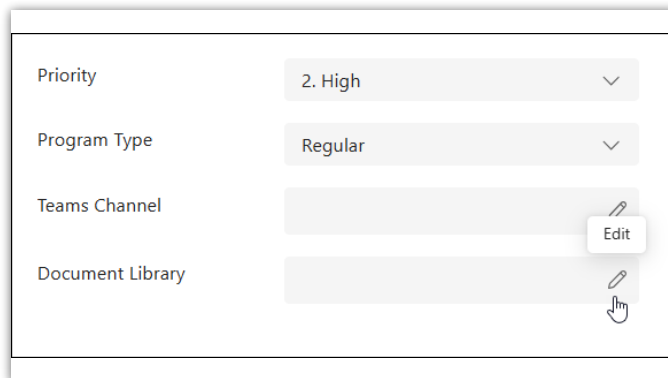
The Schedule Settings window will display. Click the **Project Settings** tab, and then the **Edit icon** in the Document Library field.



The screenshot shows the 'Schedule Settings' window with the 'Project Settings' tab selected. It contains three fields: 'Default Scheduling Type' with a dropdown menu set to 'Fixed Duration', 'Teams Channel' with a text input field, and 'Document Library' with a text input field. To the right of the 'Document Library' field is an 'Edit' button with a pencil icon. A mouse cursor is pointing at the 'Edit' button.

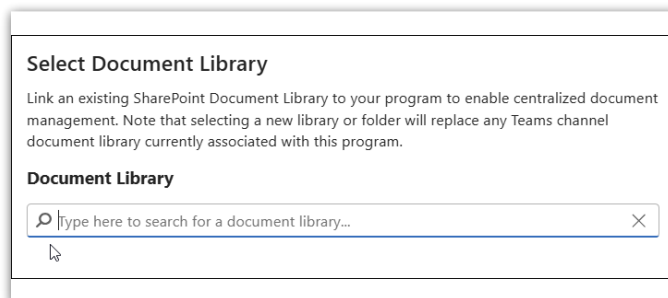
If Working in a Program or Portfolio:

In the Statement tab, click the **Edit icon** in the Document Library field.



The screenshot shows the 'Statement' tab window. It contains four fields: 'Priority' with a dropdown menu set to '2. High', 'Program Type' with a dropdown menu set to 'Regular', 'Teams Channel' with a text input field, and 'Document Library' with a text input field. To the right of the 'Document Library' field is an 'Edit' button with a pencil icon. A mouse cursor is pointing at the 'Edit' button.

2. 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.



The screenshot shows the 'Select Document Library' dialog box. It has a title bar, a subtitle 'Select Document Library', and a paragraph of text: 'Link an existing SharePoint Document Library to your program to enable centralized document management. Note that selecting a new library or folder will replace any Teams channel document library currently associated with this program.' Below the text is a section titled 'Document Library' with a search input field. The search field has a magnifying glass icon on the left and an 'X' icon on the right. The placeholder text is 'Type here to search for a document library...'. A mouse cursor is pointing at the search field.

3. Select the SharePoint Document Library and existing child folder and click **Confirm**.

Select Document Library



Link an existing SharePoint Document Library to your program to enable centralized document management. Note that selecting a new library or folder will replace any Teams channel document library currently associated with this program.

Document Library

BrightWork 365 > Documents > BrightWork 365

Confirm Cancel

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

Documents > Product Owner Tasks		
	Name	Modified
	Customer Hr March 2025.pptx	April 15
	Customer Hr May 2025.pptx	May 27

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.

Option 2: Assign an Existing Microsoft Teams Channel Library as the Document Library

Your browser does not support HTML5 video.

Your browser does not support HTML5 video.

Note

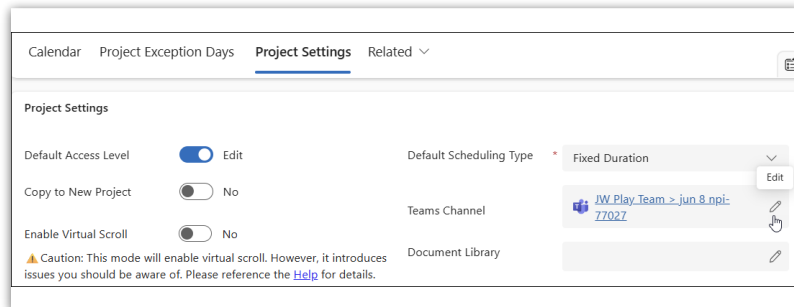
- This process can only be done by the actual Project Manager of the project, or a BrightWork PMO Manager security role holder.
- If a Teams Channel has not yet been associated with the Project, Program, or Portfolio, see [Microsoft Teams](#) for instructions.

Navigate to the Microsoft Teams Channel Selector

1. If Working in a Project:

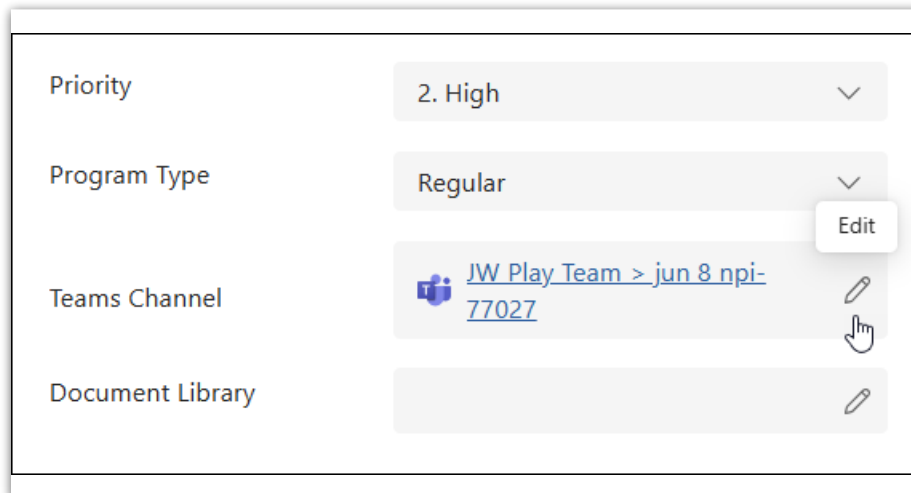
In the Charter tab or Project Settings tab, click **Schedule Settings**.

The Schedule Settings window will display. Click the **Project Settings** tab, and then 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.




- 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.

Select Teams Channel

Connect an existing Teams Channel to your project for seamless team communication. Only Teams Channels that you have access to will be shown in the menu below.

Teams Channel

 JW Play Team > jun 8 npi-77027 x




Create Project Charter tab within Teams Channel ☐

Use this Teams Channel's Files as the default Document Library ☒

Check the box above to set the Channel's Files tab as the default Document Library.

Confirm **Cancel**

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

Documents > Product Owner Tasks		
	Name ▾	Modified ⓘ ▾
	Customer Hr March 2025.pptx	April 15
	Customer Hr May 2025.pptx	May 27

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

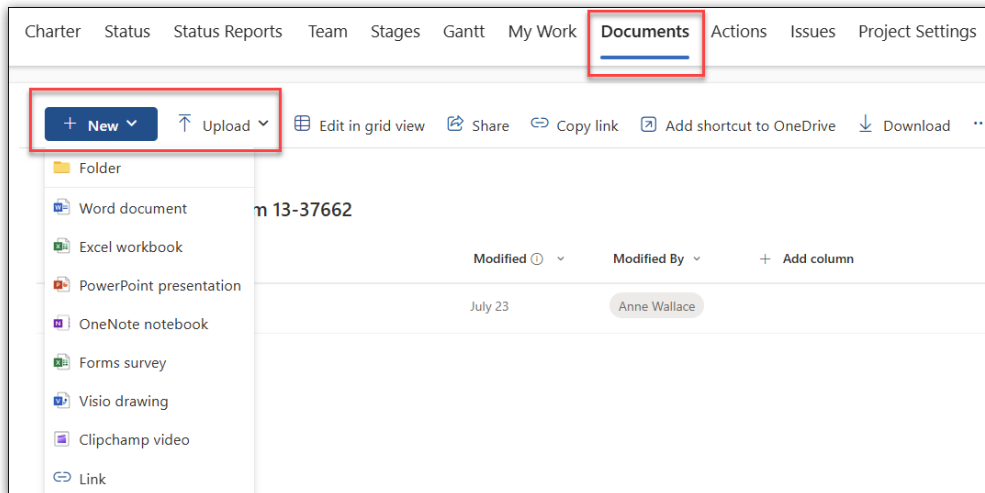
Disconnect Document Library

- Navigate to the document library selector and click the Edit icon as noted above.
- Disconnect the current document library.
- 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 any documents stored in your organization's BrightWork 365 SharePoint Online site that is associated with BrightWork 365. Documents can be created within BrightWork 365, uploaded within BrightWork 365, or otherwise saved in the associated SharePoint library.

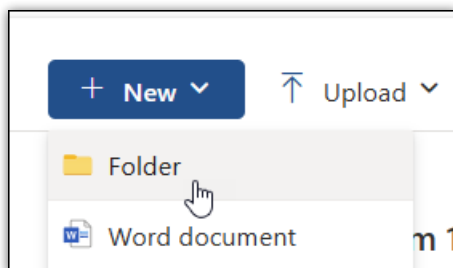


Caution

- 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.
- 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.

Documents > 1705 team

Work in SharePoint

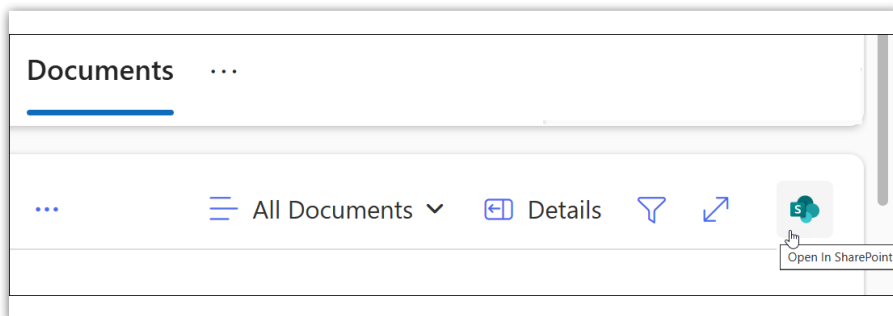
Using the SharePoint icon, you can open the folder associated with the project (or other record) in SharePoint Online and do things like:

- Move documents into folders
- Bulk upload lots of documents
- Sync the folder with your One Drive

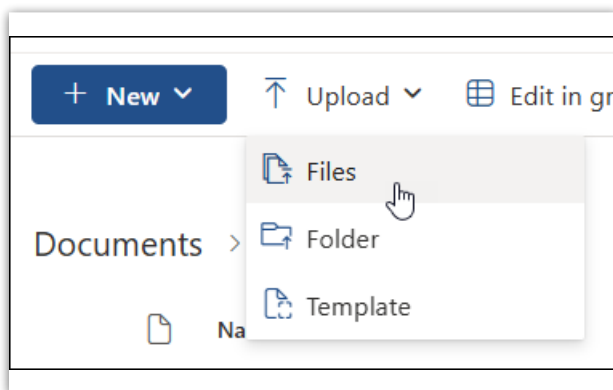
Large Documents

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.



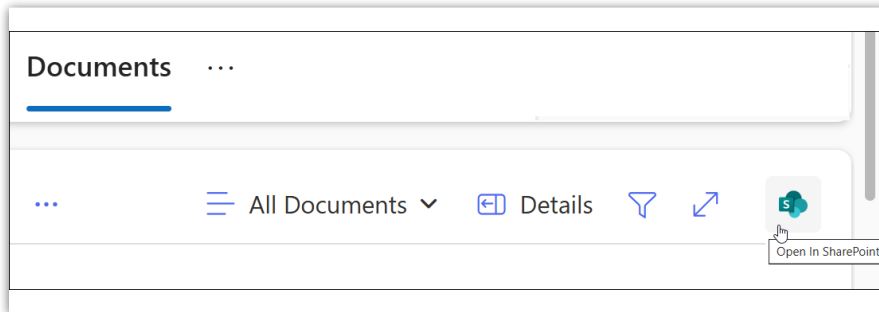
2. On the SharePoint site that opens, select **Upload > Files** to upload the file. The file will upload even if it is larger than 50 MB.



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.

