

BrightWork 365 Starter Project Templates

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

All Templates

Tip See our project template-related best practice [webinar](#) for additional information.

Note

- Only templates that are linked with a [Content Template](#) will be prepopulated with project data.
- User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.

Project Management Tabs

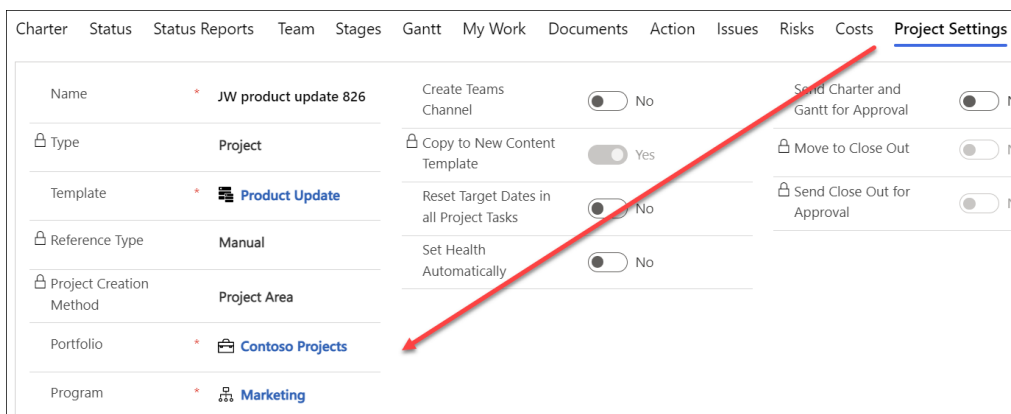
Charter

The Charter tab contains high level metadata about the project, including the project title and stakeholder information.

The following columns limit their user lookup values to the corresponding mapped BrightWork security role:

- Project Sponsor column to BrightWork Team Member security role
- Project Manager column to BrightWork Project Manager security role

The **Charter** tab also contains the mandatory columns **Program** and **Portfolio**. The values for these columns can later be changed in the **Project Settings** tab by a user with elevated privileges (see the **Project Settings** section below). All associated child items will be automatically adjusted to reflect these value changes.



Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Documents	Action	Issues	Risks	Costs	Project Settings
Name	* JW product update 826	Create Teams Channel	<input type="checkbox"/> No	Send Charter and Gantt for Approval	<input type="checkbox"/> No							
Type	Project	Copy to New Content Template	<input type="checkbox"/> Yes	Move to Close Out	<input type="checkbox"/> No							
Template	* Product Update	Reset Target Dates in all Project Tasks	<input type="checkbox"/> No	Send Close Out for Approval	<input type="checkbox"/> No							
Reference Type	Manual	Set Health Automatically	<input type="checkbox"/> No									
Project Creation Method	Project Area											
Portfolio	* Contoso Projects											
Program	* Marketing											

Status & Status Reports

The Status tab allows the project manager to set current project metrics and KPIs, and the Status Reports tab provides the project manager with the ability to create snapshot status reports of the project's current standing, and view a history of status reports. See [Status Reporting](#) for details.

Team

Automatically populates with the names of work item assignees, and the earliest start dates and latest finish dates across all the work assigned to them.

Note

- We do not support manually adding existing project team members from within the Team section. However, you can add a person to the Team without them being permanently assigned to a work item by assigning them temporarily to a work item, briefly waiting until they show up in the Team tab, and then unassigning them from the work item – they will stay in the Team.
- To remove a Team Member, a user with the Project Manager security role can remove the member from any assigned work, and then highlight the member's row in the grid and choose Delete Project Team Member in the section's top menu.
- Dates will not update in the Teams tab until an update of some kind is made in the Gantt tab, which will trigger the date update.

Gantt

List of project tasks with a corresponding bar chart that represents the project schedule with task start and end dates. Visually depicts dependency relationships between the tasks as well as task status. See also the [Task Management](#) article.

My Work

A list of all work of any type that is assigned to the logged in user.

Documents

Create new Microsoft Office documents and upload existing documents, and store these files in your organization's SharePoint document library that is associated with BrightWork 365.

Note 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](#).

Actions

Log project actions, decisions, and changes. See the [Actions](#) article for details.

Issues

In the **Issues** section you can create a new issue by clicking **+ New Issue** (do not use the Add Existing Issue option).

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.

Delay in onboarding suppliers
Issue

Not Started | **Powdered Cream Cheese for Africa** | **Product Operations**
Issue Status | Project | Program

Issue

Reference

Name	* Delay in onboarding suppliers
Issue Reference	IS-001181
Portfolio	Contoso Projects
Program	Product Operations
Project	Powdered Cream Cheese for Africa
Escalation	Program v

--Select--
Project
Program
Portfolio

Risks

In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Risks can be added to the project's associated program or portfolio by clicking into the risk and choosing the relevant escalation location.

Manufactured components arrive late
Risk

Saravana Barathi | Contoso Projects | Product Operations | Powdered Cre

Logged By | Portfolio | Program | Project

Risk

Exposure	0
Risk Status	Identified
Risk Monitor	---
Escalation	Project
Risk Management Rating	--Select-- Project Program Portfolio

Costs

The Costs tab provides a comprehensive method for capturing and tracking project budgets and actual costs at the project and individual item levels. See the [Costs](#) article for details.

Communications

Initiate and save project related Emails and Appointments directly in the BrightWork 365 app and save these items as well as Phone Call details and Notes, within associated projects. See the [Communications](#) article for details.

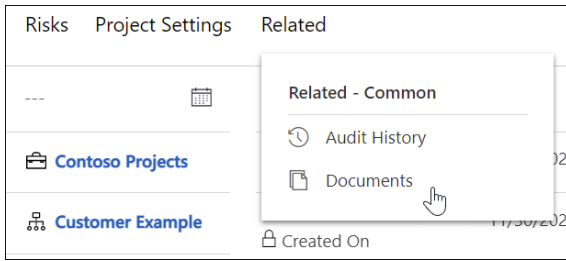
Project Settings

The Project Settings screen provides additional project information and gives the manager the ability to change the portfolio or program associated with the project, reset the baseline dates in all project tasks, and create a [Microsoft Teams Channel](#) for the Team associated with the project's related program (if the project is later moved to a different program, the project's Microsoft Team Channel will not move to the new program's Microsoft Team).

Only users with the **BrightWork Project Manager**, **BrightWork PMO Manager** or **BrightWork Program Manager** security role can access the Project Settings tab.

Related

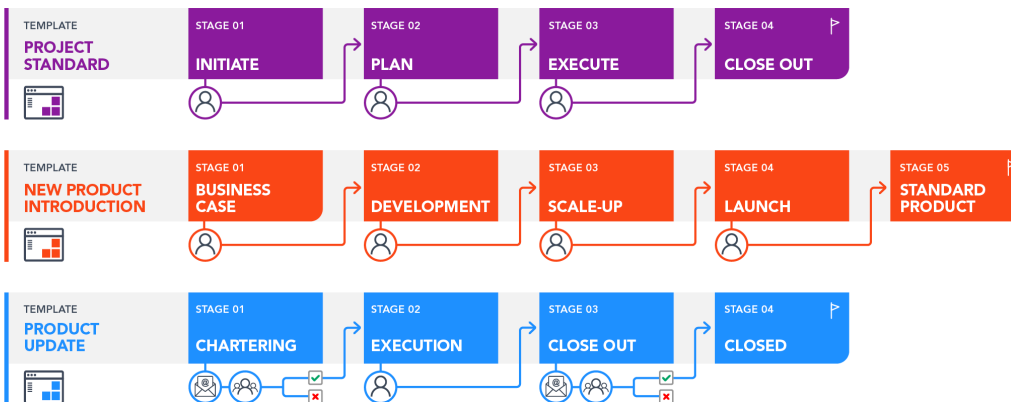
You can view [documents](#) related to entities within a project such as Issues or Risks, and project [audit history](#), by clicking on the **Related** tab.



Project Stages

Each project template has its own project stage business process flow - details are noted within each template section of this article.

BrightWork365 | Project Stage Business Process Flow



Project Standard

Template Overview

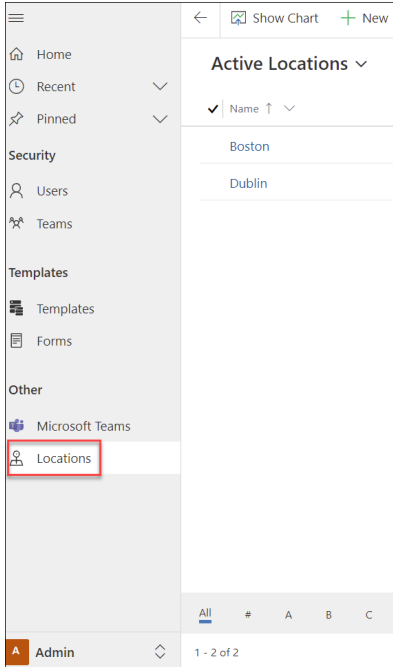
The Product Update template is used to request projects for complex support issues. It follows a gated approach with approvals required to move from the Charter stage into Execution, and to close out the project.

Project Management Tabs

Charter

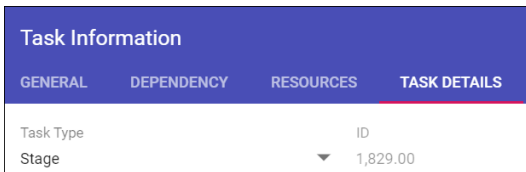
- The Charter contains high level metadata about the project, including project title, stakeholder information, parent Program & Portfolio, and Location.
 - The **Location** drop-down menu choices that are found in the Product Update template are

configured in **Admin Area | Locations**.



Stages

- Stages are automatically listed in the **Stages** tab after being created in the Gantt tab by setting the Task Type of a task to **Stage** in **Task Details**. We do not support manually adding stages from within the Stages section.



Charter	Status	Status Reports	Team	Stages	Gantt	My W
Project Stages						
<input type="checkbox"/>	Name			Current Start		
	Chartering			9/2/2022		
	Execution			9/5/2022		
	Close Out			9/6/2022		
	Closed			9/7/2022		

- The Stage date values are tied to the date values of the Stages in the Gantt.

Project Stages					+ New Project Task	Refresh
<input type="checkbox"/>	Name	Current Start	Current Finish	Target Start	Target Finish	
	Chartering	9/2/2022	9/2/2022	9/2/2022	9/9/2022	
	Execution	9/5/2022	9/5/2022	9/2/2022	9/6/2022	
	Close Out	9/6/2022	9/6/2022	9/2/2022	9/1/2022	
	Closed	9/7/2022	9/7/2022	9/2/2022	9/7/2022	

- Click on a stage link to view additional details about the stage including description and status information.

Scale-Up		Scale-Up		Scale-Up
Project Task · Project Stage ▾				Name
Project Stage				
Name	* Scale-Up	🔒 Current Start	6/2/2021	📅
🔒 Progress	In Progress	🔒 Current Finish	6/4/2021	📅
🔒 Project	* JW Project 910	🔒 Target Start	6/2/2021	📅
Project Task Type	Stage	🔒 Target Finish	6/4/2021	📅
Description	---	% Complete		

Project Settings

- The **Project Settings** screen provides additional project information and gives the Project Manager the ability to reset the baseline dates in all project tasks, and to create a [Microsoft Teams Channel](#) for the Team associated with the project's related Program.
- The **Project Settings** screen is also used for project stage approval purposes as detailed in the **Business Process Flow** section below.
- Approvals History: A history of project stages and the related approval request outcomes can be viewed in the Approvals History window.

Approvals History					Refresh
<input checked="" type="checkbox"/> Name ▾	Stage ▾	Request Outcome ▾	Date ↑ ▾	Comment ▾	
Jonathan Weisglass	Chartering	Submitted	8/17/2021 2:14 PM	Charter Submitted for Approval	
Anne Wallace	Chartering	Approved	8/17/2021 2:16 PM	---	
Christine Chang	Chartering	Approved	8/17/2021 2:20 PM	---	
Jonathan Weisglass	Chartering	Approved	8/17/2021 2:22 PM	---	
Anne Wallace	Close Out	Submitted	8/17/2021 6:06 PM	Project Close Out Submitted for Approval	
Christine Chang	Close Out	Approved	8/17/2021 6:07 PM	---	
Jonathan Weisglass	Close Out	Approved	8/17/2021 6:08 PM	---	
Anne Wallace	Close Out	Approved	8/17/2021 6:10 PM	---	

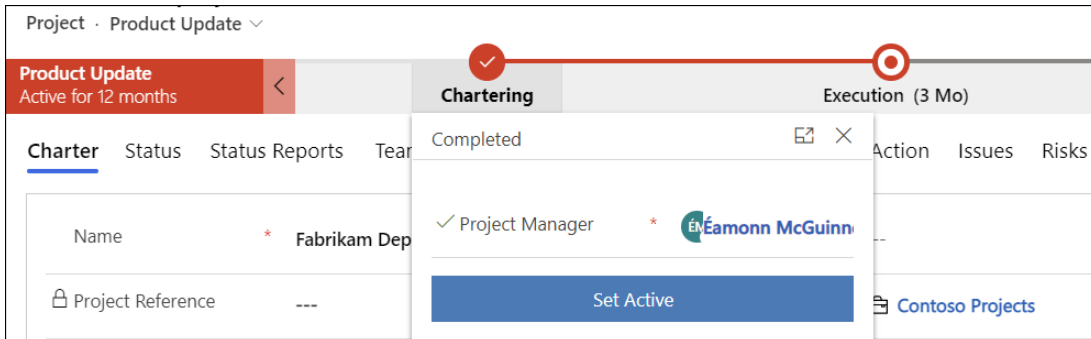
Business Process Flow



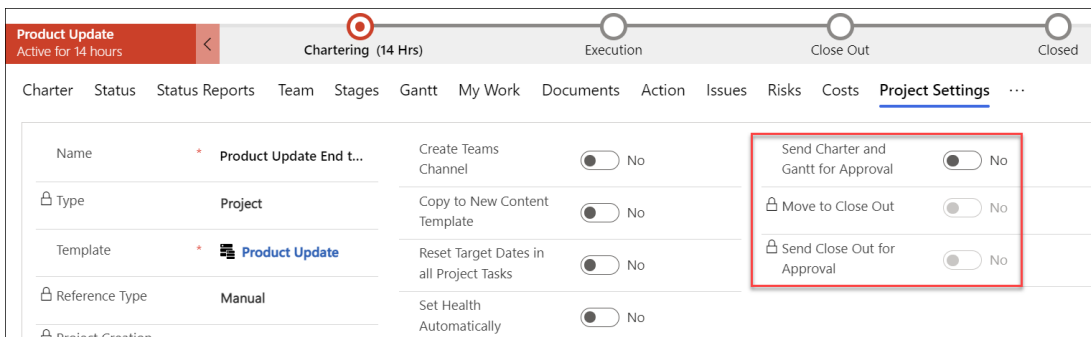
The Business Process Flow (BPF) in the Product Update template has several predefined stages. In the BPF, the progression from one stage to the next is tied to the status of the BPF Stage approval requests triggered in the **Project Settings** tab.

- When **Send Charter and Gantt for Approval** is set to **Yes** in **Project Settings**, notifications will be

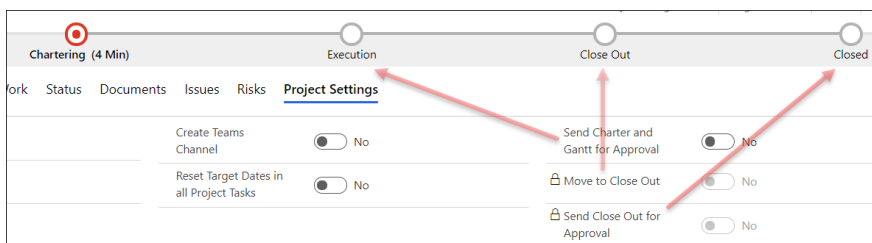
- When **Send Charter and Gantt for Approval** is set to **Yes** in **Project Settings**, notifications will be sent to the Project Manager, Project Sponsor, and Group Manager seeking approval. After all these users have submitted their approval, the BPF will automatically progress to **Execution**.
 - The BPF can be set back to **Chartering** from any other stage if a user with proper permissions clicks on the BPF **Chartering** stage and then clicks the **Set Active** button.







The relevant BPF Stage approval request switches in the **Project Settings** tab will once again be set to **No**.



- Once the project is in Execution, the **Move to Close Out** option will become active and can be set to **Yes** in **Project Settings** at the appropriate time; the BPF will then automatically progress to **Close Out**. Refresh the page to enable the setting **Send Close Out for Approval** which will be used at a later time.
- When you're ready to fully close the project, in **Project Settings** set **Send Close Out for Approval** to **Yes**. Notifications will be sent to the Project Manager, Project Sponsor, and Group Manager, and after they all submit their approvals the BPF will automatically progress to the Closed stage, Percent Complete will be set to 100% and Project Status to Completed, and the project will change to a read-only state.



Default Product Update Template Forms

Request Business Process Flow	*	 Project Request 2 Stage
Request Form	*	 Product Update Request
Project Business Process Flow	*	 Product Update
Project Form	*	 Product Update