Actions

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

Project Management Context

Not all activity in a project rises to the level of a planned Gantt task. There is a lot of other work that needs to get done outside of the Gantt tab, all of which can be categorized as 'Actions'. The Actions tab provides users with the ability to create, edit and view details in relation to a general Action, a Resolution, an Approval, and Notes, all of which are necessary to help keep projects on track.

> **Note** When a user is assigned an action, the Assignment table of the app is updated. Assignments are displayed in the My Work series of views.

Actions

To access Actions, click on the **Actions** tab within a program, a portfolio, or a project created from one of the templates that contains this tab. Click **+ New Action** to create a new Action.

Clicking **+ New Action** brings up a Quick Create form with the most relevant fields. The form's **Action Type** field allows you to choose from several available types of actions.

Action Items

The Action tab within an individual Action item provides several sections to capture additional details about an Action.

Action

Fields include:

- Name: Provide a name for the action.
- Action Type: Choose either Action, Assumption, Decision, Dependency, Change, or Other.
- Action Requested: Enter the action requested.
- Assigned To: 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.
- Priority: Choose the priority level.
- Due Date: Choose the date the requested action is due.

Resolution

Fields include:

- Action Status: Choose from among the available Status choices.
- Progress Indicator: Choose from among the available schedule related choices.
- Action Taken: Describe any actions taken.
- Date Actioned: Choose the date the action was taken.

Approval

Fields include:

- Approver: Enter the name of the person responsible for approving the action. The list of available users to choose from in the **Approver** column is limited to those users given the **BrightWork Team Member** security role.
- Approval Date: Enter the date the approval was given.
- Resolution Rating: Choose a star rating for the resolution.
- Notes: A place to capture notes about the action.

Documents Tab

View, create, or upload documents associated with the action item. Documents will be saved in the project's SharePoint Online folder.

Related Tab

Click the **Related** tab to access the Audit History of the action item. The Audit History provides action item data change details including the change date, user who made the change, the changed field, and the old and new values.