Portfolios

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

Project Management Context

Portfolios are the highest parent level within the BrightWork 365 hierarchy. Portfolios consist of child Programs and all of the Projects within the respective Programs. Your BrightWork 365 environment can have more than one Portfolio.

Getting instant visibility across Portfolios and Programs is key to delivering strategic goals on time. With BrightWork 365, you can view the status of Portfolios in one place, understand how the underlying Projects are performing, and take action quickly to keep them on track.

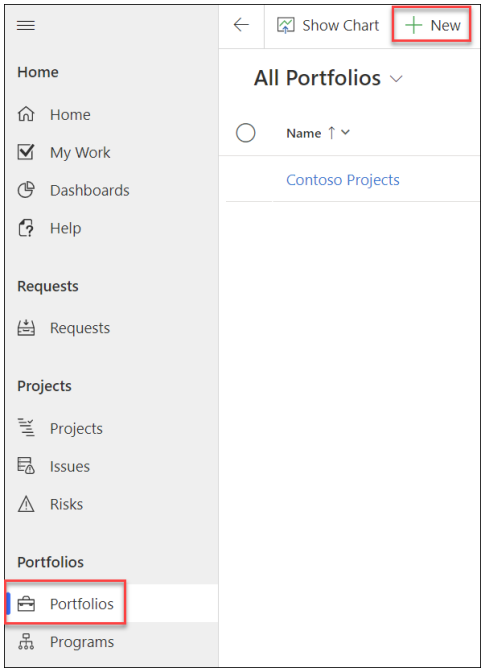
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> **Note**
> - In order to edit Statement and Status tab information, users require the BrightWork PMO Manager or BrightWork Portfolio Manager security role.
> - In order to change the Portfolio Manager field value in a portfolio, users require BrightWork Portfolio Manager security role combined with being the portfolio's current actual Portfolio Manager, or the BrightWork PMO Manager security role.
> - Only the following users can update the Microsoft Teams and 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 users with the BrightWork PMO Manager security role can create and delete portfolios.

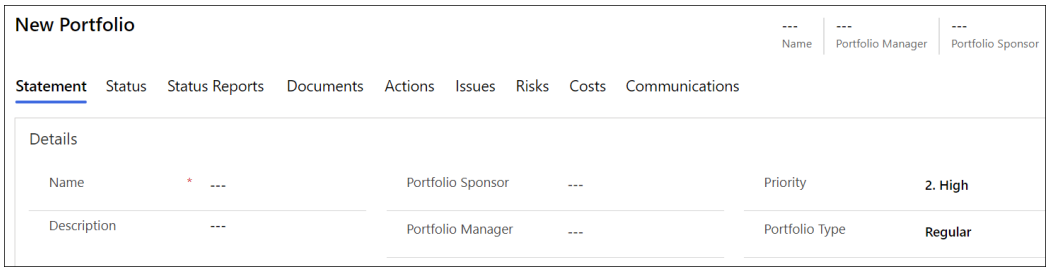
> **Note** Document Management Interface: A SharePoint interface will display throughout Portfolios created with release 2025-2 and later and if you're organization has opted into the Graph API settings, otherwise, the same document subgrid present on pre-2025-2 Portfolios will be displayed. See Document Management for details.

Create Portfolios

1. Click into the **Portfolios** page, and then click **+ New** at the top of the page.



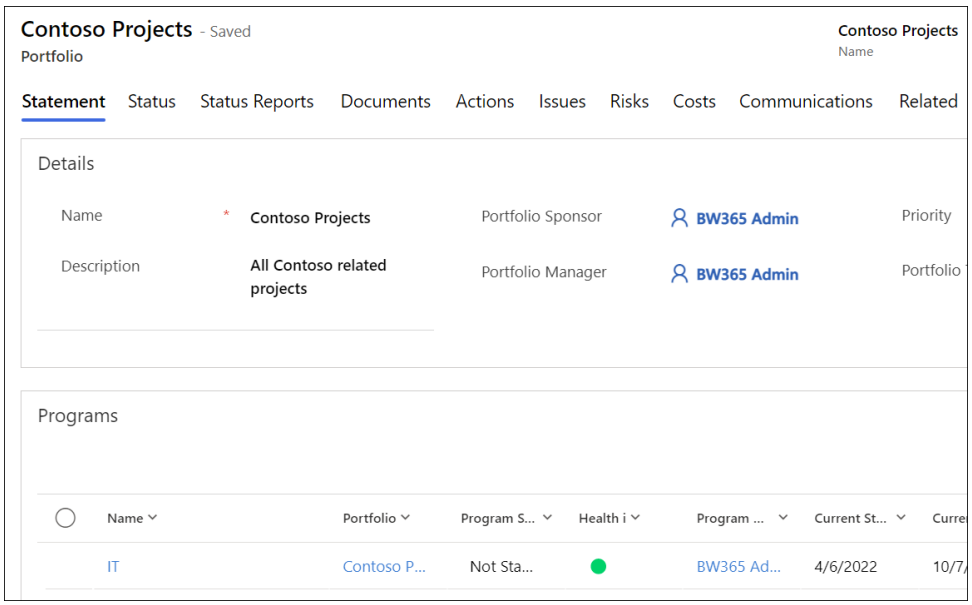
2. In the **Statement** screen, fill in all the required fields and click **Save**.



Portfolio Tabs

Statement

You can easily view the Portfolio Statement with all child Programs listed in the bottom section by clicking on the **Statement** tab.



The list of available users to choose from in the Portfolio Manager field is limited to users who have the BrightWork Portfolio Manager security role.

The list of available users to choose from in the Portfolio Sponsor column is limited to those users that have been added to the Senior Managers Dynamics Team found in the Admin Area.

> **Note** Users can be assigned to a portfolio whose Owning Business Unit the user has no access to; in this instance, the user will not be able to view the portfolio when it is created.

Teams Channel

This field is only present in Portfolios created in BrightWork 365 version 2025-2 and later.

If configured, this field links to the Microsoft Teams Channel associated with the Portfolio. See Microsoft Teams for details.

Document Library

This field is only present in Portfolios created in BrightWork 365 version 2025-2 and later.

If configured, this field links to the Document Library associated with the Portfolio. See Document Management for details.

Owning Business Unit

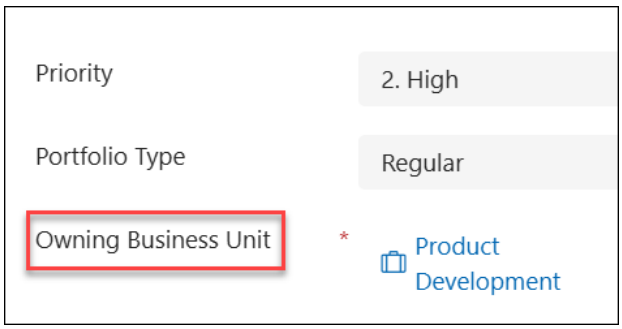
Select the Portfolio's Owning Business Unit in the Statement tab. The value chosen will

propagate throughout all child records of the portfolio, including its program, projects, and work items. See Portfolio Security & Access for information about the critical role Portfolios and their Owning Business Units play in the BrightWork 365 security model.

Note

- Only users with the BrightWork PMO Manager or System Administrator security role can configure a Portfolio's Owning Business Unit.
- A business unit can own as many portfolios as necessary.
- The Change Owning Business Unit dialog in Portfolios can take a few seconds to open, depending on the number of records (Programs and Projects) it has to check.
- When the Owning Business Unit is selected, the amount of time it takes for the value to propagate to all child records is related to the number of Portfolio child records. When the process is complete, an email notification will be automatically sent to the Portfolio Manager and the user that made the selection.

1. In the Portfolio's **Statement** tab, select the relevant Owning Business Unit in the **Owning Business Unit** field.



2. Read the warning message, choose the new Owning Business Unit, and click **Confirm** or **Cancel**.



Caution

- If the Owning Business Unit of a Portfolio is changed, the Owning Business Unit of all the child Program and Project related records will also be updated. This means that some users in the previous business unit may lose access to this portfolio and the other records. It also means that users in the new Business Unit will now be able to access records in this Business Unit.

- Concurrent usage is not supported, e.g., before moving a Portfolio's Owning Business Unit, the BrightWork PMO Manager should inform the team to exit any child Projects of the Portfolio.

Status & Status Reports

The **Status** tab allows the manager to set current project metrics and KPIs, and the **Status Reports** tab provides the manager with the ability to create snapshot status report. See Portfolio & Program Status Reporting for details.

Gantt

Gantt Tab: A portfolio Gantt view provides a centralized, real-time visualization of all active child programs and projects, making it easy for project leaders and stakeholders to gain instant clarity on overall progress, strategic alignment, and potential bottlenecks without digging through individual project files. This high-level visibility streamlines executive reporting, improves portfolio-wide resource allocation, and enables pro-active risk management across all initiatives.

See article Portfolio Gantt for details.

Documents

The Documents tab is where you can upload existing documents. These files are stored in your organization's SharePoint Online document library that is associated with BrightWork 365.

See Document Management for additional details.

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 with custom 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 Managing the SharePoint Throttling Limit.

Actions

See the Actions article for detailed information.

Issues

Click on the Issues link to view and create Portfolio related Issues.

The Assigned To lookup column is limited to users given the BrightWork Team Member role.

Risks

Click on the Risks link to view and create Portfolio related Risks.

The Risk Monitor lookup column is limited to users given the BrightWork Team Member role.

> **Tip**
>
> - Risk Monitor: Person assigned overall responsibility for tracking the progress of a risk throughout its lifecycle.
> - Mitigation Actions Assignee: Person responsible for taking steps to reduce the probability or impact of a risk to a portfolio.
> - Contingency Actions Assignee: Person responsible for implementing the actions required to mitigate any portfolio impacts of a risk that has occurred.

Costs

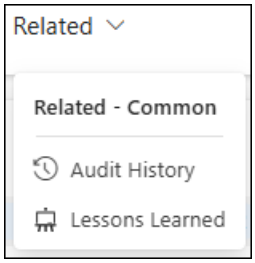
See the Costs article for detailed information.

Communications

See the Communications article for detailed information.

Lessons Learned

Click **Related tab > Lessons Learned** to view the Lessons Learned tab.



At the Program and Portfolio levels you can view Lessons Learned entries from across projects, where they can be grouped-by/sorted/filtered with attributes such as Category, Impact Outcome, and Project.

Lessons Learned are documented insights, successes, failures, and recommendations captured from a project's experiences to improve future performance. They are a core component of project management and are typically collected during the Closing phase of (or iteratively throughout) the project.

Users add a new Lessons Learned item at the project level by clicking the + New Lesson Learned button in the Lessons Learned tab. This will load the quick create form for Lessons Learned in the side panel.

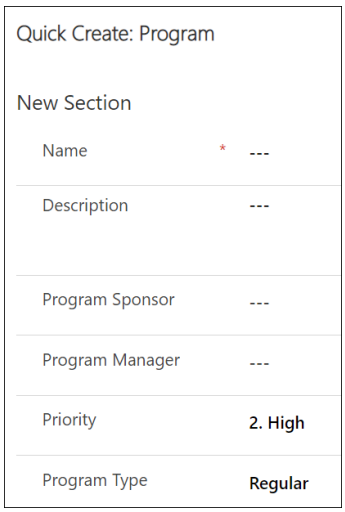
Audit History

Click **Related tab > Audit History** to view the audit history.

Quick Create - New Program from Portfolio Record

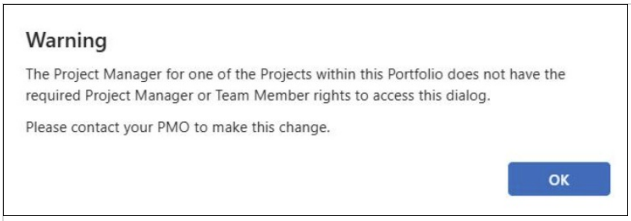
Managers can quickly create a new Program from a Portfolio record using Quick Create.

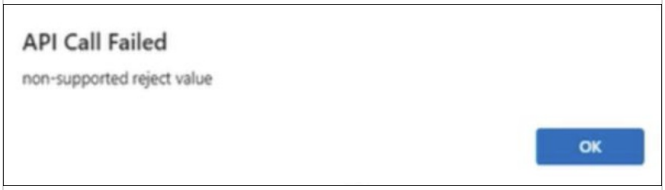
1. In the Portfolio's Programs section in the Statement tab, click **+ New Program**.
2. Fill in the form and click **Save and Close**.



Troubleshooting

Warning message when changing a Portfolio's business unit





Issue

The attempt to change the Portfolio's business unit is exposing the fact that at least one Project Manager of a Project in the associated Portfolio is missing either the BrightWork Team Member and/or BrightWork Project Manager Power Platform security role.

Resolution

Add the missing security role to the relevant Project Manager account. One method for finding and fixing the affected Project Manager account is as follows (the System Administrator role for the BrightWork 365 environment is required):

1. Click the Projects link on the main nav.
2. Filter the view by the relevant portfolio name.
3. On a second browser tab, navigate to Environments | Power Platform admin center.
4. Select the BrightWork 365 environment.
5. Select Settings > Users.
6. Ensure that each of the accounts listed in the Project Manager column on the other tab's view has the BrightWork Project Manager and BrightWork Team Member security roles.