Portfolios

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

Your browser does not support HTML5 video.

Project Management Context

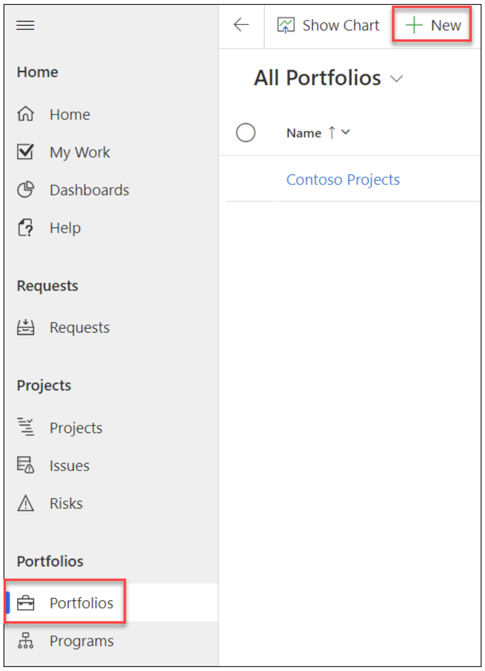
Portfolios are the highest parent level within the BrightWork 365 hierarchy. Portfolios consist of child Programs and all of the Projects within the respective Programs. Your BrightWork 365 environment can have more than one Portfolio.

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.

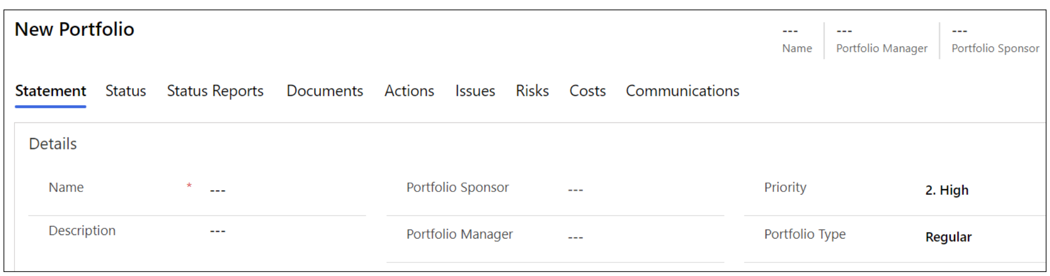
Note Document Management Interface: A SharePoint interface will display throughout Portfolios created with release 2025-2 and later and if you're organization has opted into the Graph API settings, otherwise, the same document subgrid present on pre-2025-2 Portfolios will be displayed. See Document Management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

Create Portfolios

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



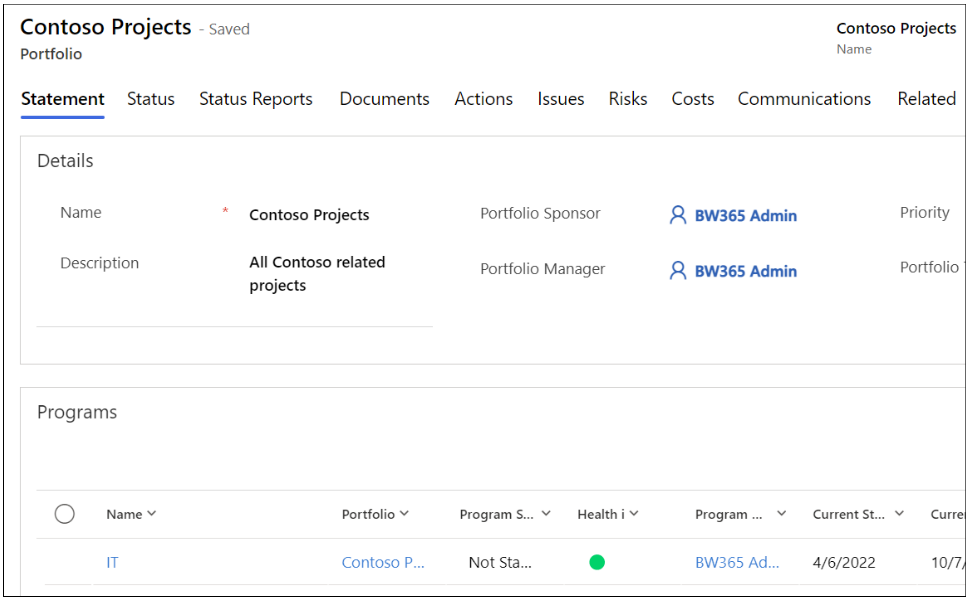
2. In the **Statement** screen, fill in all the required fields and click **Save**.



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 Sponsor** and **Portfolio Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

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

Portfolios play a critical role in the BrightWork 365 security and access model. 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.

> **Note**
>
> - 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

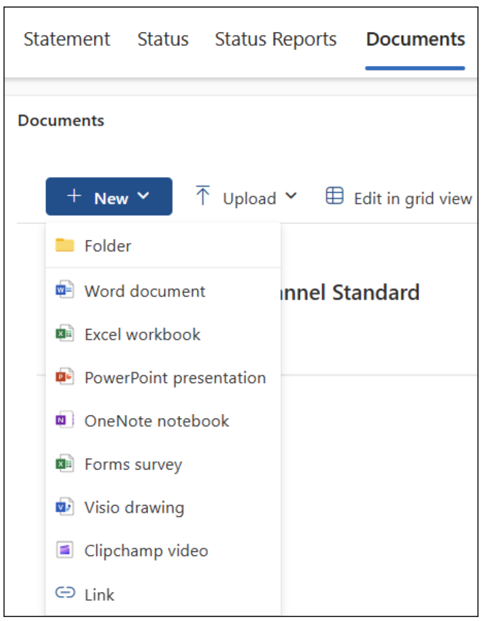
process is complete, an email notification will be automatically sent to the portfolio manager and the user that made the selection.

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.

Documents

The Documents tab is where you can create new documents and 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

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 Lesson Learned item by clicking the + New Lesson Learned button in the Lesson Learned subgrid on a project. This will load the quick create form for Lesson Learned in the side panel.

> **Tip** You may need to click the **Related** tab in order to expose the Lessons Learned tab.

The following columns are available in the Lessons Learned tab:

Name

Enter a descriptive and unique title that summarizes the key takeaway of this lesson learned.

Logged By

Select your name or the name of the team member primarily responsible for documenting this lesson.

Category

Select the area this lesson primarily relates to, such as 'Business,' 'Project,' 'Team,' or 'Other.'

Description

Clearly describe what happened and the specific lesson that was derived from it.

Lesson Reference

This is a unique identifier used for tracking and referencing this specific lesson in reports.

Date Logged

Select the date this lesson was formally entered.

Impact Outcome

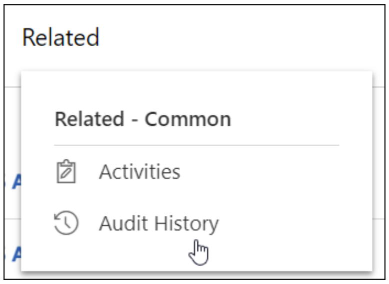
Select 'Positive' (Success), 'Negative' (Failure/Issue), or 'Neutral' (Observation) to classify the outcome.

Recommendation

The suggested change or action that should be taken.

Related

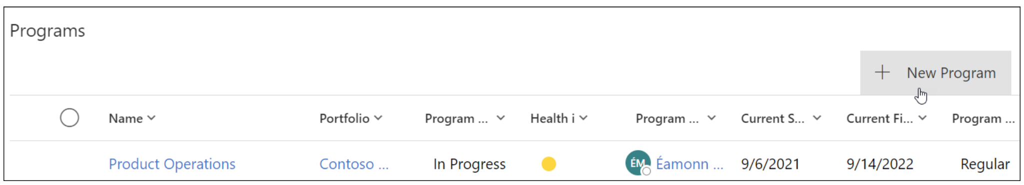
Click on Related > Audit History to view the audit change history.



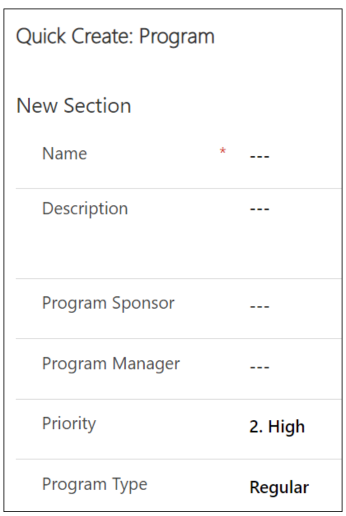
Quick Create - New Program from Portfolio Record

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**.

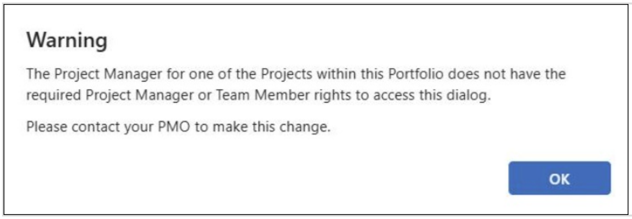


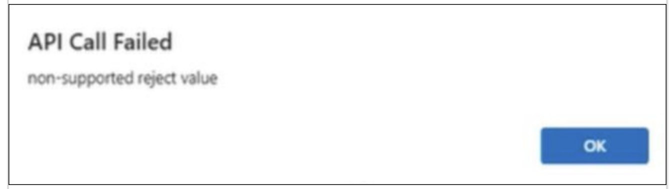
2. Fill in the form and click **Save and Close**.



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.