

# Portfolios

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

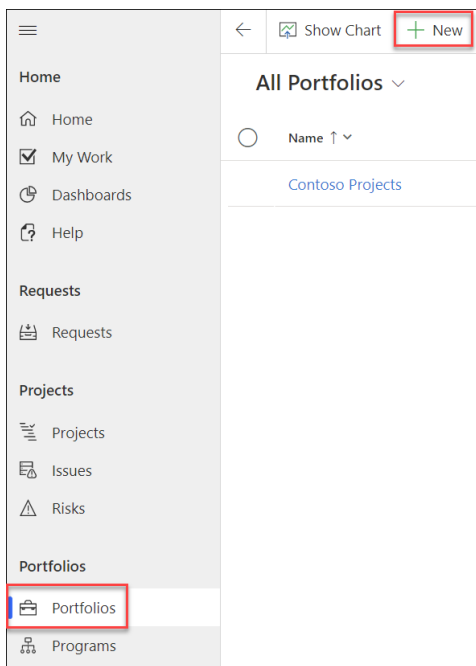
## Project Management Context

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.

## Creating 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**.

**New Portfolio**

--- | --- | ---  
Name | Portfolio Manager | Portfolio Sponsor

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Statement
Status
Status Reports
Documents
Actions
Issues
Risks
Costs
Communications

**Details**

Name	* ---	Portfolio Sponsor	---	Priority	<b>2. High</b>
Description	---	Portfolio Manager	---	Portfolio Type	<b>Regular</b>

## Portfolio Tabs

### Statement

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

**Contoso Projects** - Saved
**Contoso Projects**  
Name

---

Statement
Status
Status Reports
Documents
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Issues
Risks
Costs
Communications
Related

**Details**

Name	* <b>Contoso Projects</b>	Portfolio Sponsor	<b>BW365 Admin</b>	Priority	
Description	<b>All Contoso related projects</b>	Portfolio Manager	<b>BW365 Admin</b>	Portfolio	

**Programs**

<input type="radio"/>	Name ▾	Portfolio ▾	Program S... ▾	Health i ▾	Program ... ▾	Current St... ▾	Curre
<input type="radio"/>	IT	Contoso P...	Not Sta...	<span style="color: green; font-weight: bold;">●</span>	BW365 Ad...	4/6/2022	10/7,

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.

### 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

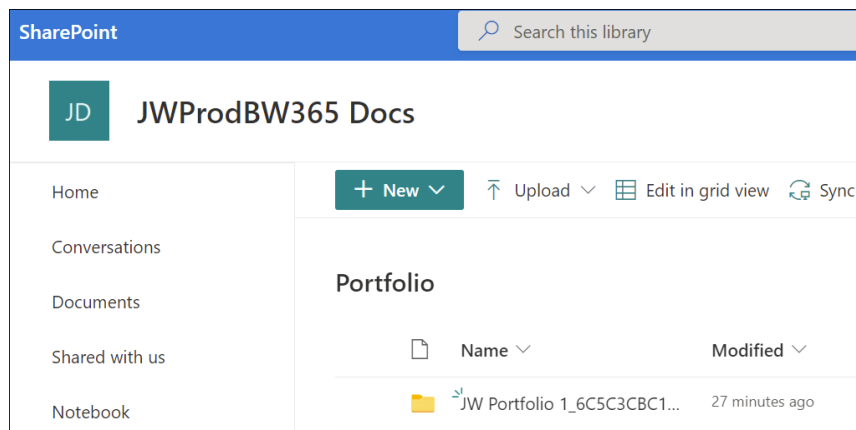
- The Change Owning Business Unit dialog in Portfolios can take a few seconds to open, depending on the number of records (Programs and Projects) it has to check.
- When the Owning Business Unit is selected, the amount of time it takes for the value to propagate to all child records is related to the 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

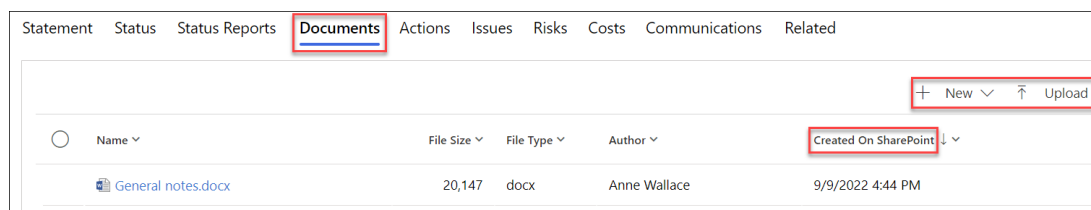
The **Status** tab allows the manager to set current project metrics and KPIs, and the **Status Reports** tab provides the manager with the ability to create snapshot status report. See the [Status Reporting](#) article for details.

## Documents

During the [installation](#) of BrightWork 365 a SharePoint site and accompanying document library were created for the BrightWork 365 environment. A folder for each Portfolio exists in this library.



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



### 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 this [article](#).

## 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

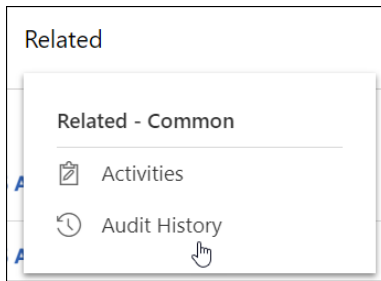
See the [Costs](#) article for detailed information.

## Communications

See the [Communications](#) article for detailed information.

## Related

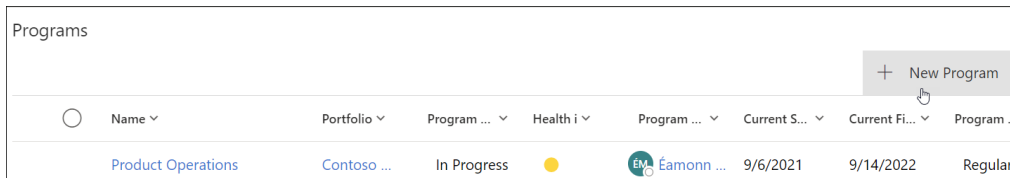
Click on Related > Audit History to view the audit change history.



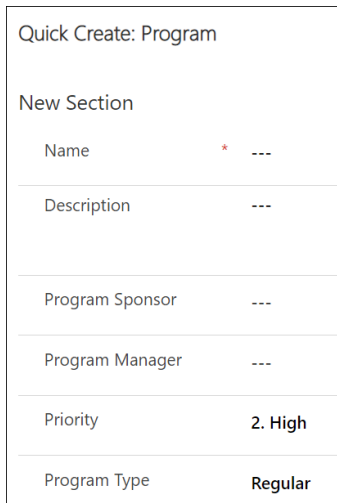
## Quick Create - New Program from Portfolio Record

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**.

A screenshot of the 'Quick Create: Program' form. The form has a title 'Quick Create: Program' and a section 'New Section'. The form contains several fields: 'Name' with a red asterisk and a dropdown arrow, 'Description' with a dropdown arrow, 'Program Sponsor' with a dropdown arrow, 'Program Manager' with a dropdown arrow, 'Priority' with the value '2. High', and 'Program Type' with the value 'Regular'.

## Troubleshooting

### Warning message when changing a Portfolio's business unit

<p><b>Warning</b></p> <p>The Project Manager for one of the Projects within this Portfolio does not have the required Project Manager or Team Member rights to access this dialog.</p> <p>Please contact your PMO to make this change.</p> <p><a href="#">OK</a></p>	<p><b>API Call Failed</b></p> <p>non-supported reject value</p> <p><a href="#">OK</a></p>

## 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.