Programs

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

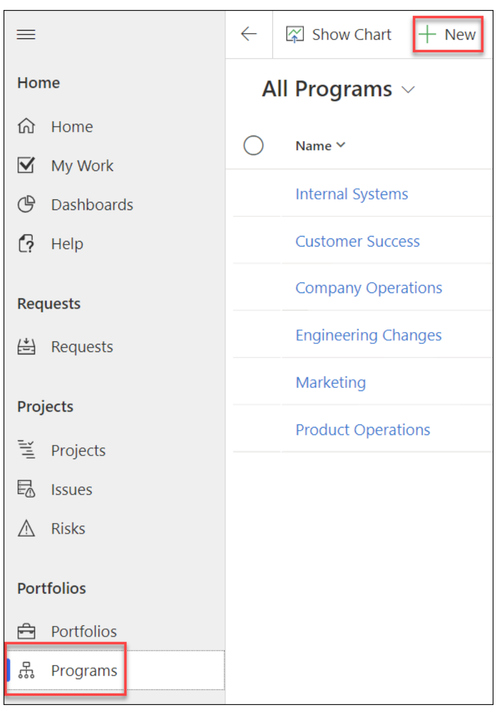
Project Management Context

Programs are the first child level under portfolios, with portfolios being the highest level in the BrightWork 365 hierarchy. It allows users to group related projects together in order to manage and report on them in a coordinated way. Your BrightWork 365 environment can have more than one portfolio.

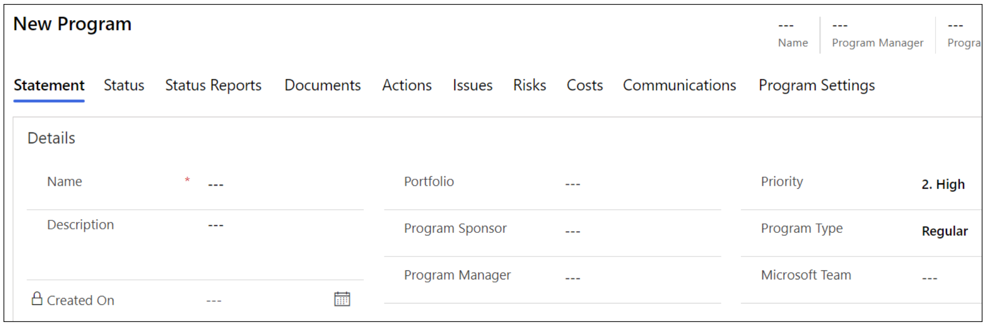
Getting instant visibility of programs and their underlying projects is key to delivering strategic goals on time. With BrightWork 365, you can view the status of programs in one place, understand how the underlying projects are performing, and take action quickly to keep them on track.

Creating Programs

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



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



Program Tabs

You can easily view all Projects, Documents, Issues, Risks, and Program Settings that are related to a selected Program by clicking into the associated tabs within the Program record.

Statement

You can view the Program Statement and all child Projects by clicking on the **Statement** tab.

The list of available users to choose from in the **Program Sponsor** and **Program 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

Programs 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.

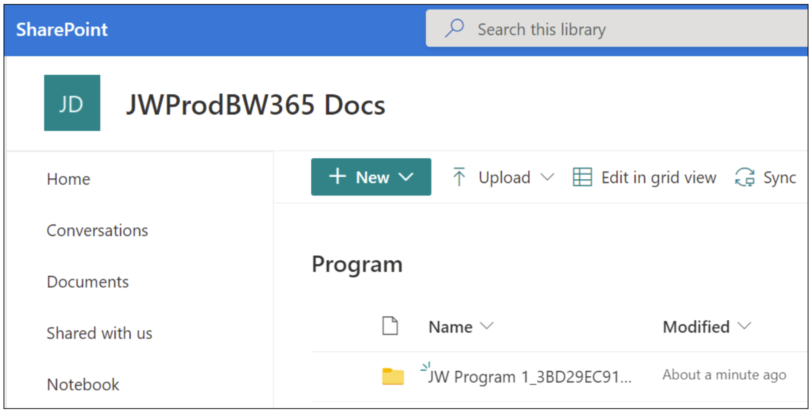
> **Note** When the Owning Business Unit is selected, the amount of time it takes for the value to propagate to all child records is related to the number of program child records. When the process is complete, an email notification will be automatically sent to the program manager and the user that made the selection.

Status & Status Reports

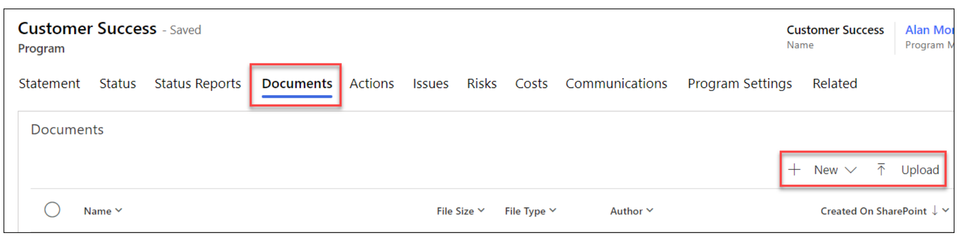
The Status tab allows the manager to set current project metrics and KPIs, and the Status Reports tab provides the manager with the ability to create snapshot status report. See the Status Reporting article for details.

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 Program exists in this library.



You can create new Microsoft Office documents or upload existing documents into this library through the **Documents** tab of a Program record.



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 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

Click on the Risks tab to view and create Program related Risks.

The list of available users to choose from in the **Risk Monitor** column is limited to those users given the **BrightWork Team Member** security 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 program.
> - Contingency Actions Assignee: Person responsible for implementing the actions required to mitigate any program impacts of a risk that has occurred.

Costs

See the Costs article for detailed information.

Communications

See the Communications article for detailed information.

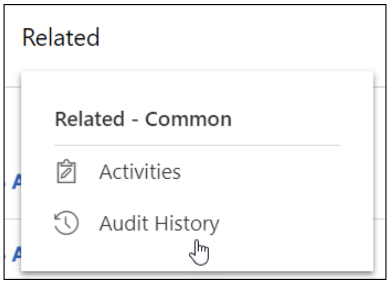
Program Settings

The Program Settings tab provides the ability to change the portfolio associated with the program, and to update the Microsoft Teams list to facilitate the creation of a Microsoft Teams Team for the program.

Only users with the BrightWork PMO Manager security role can view the Program Settings tab.

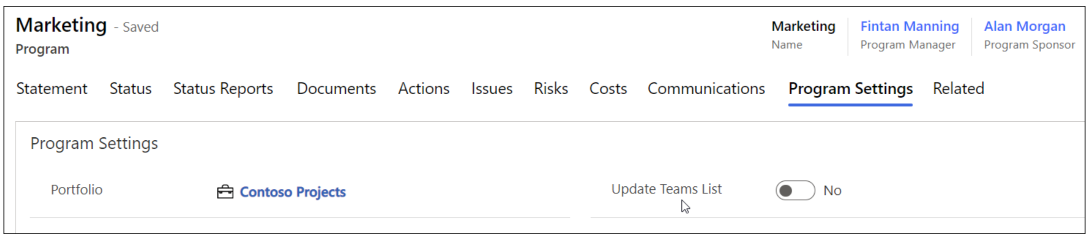
Related

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

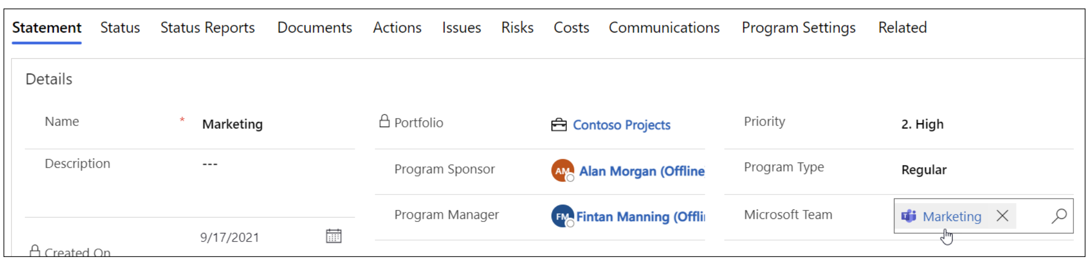


Program Settings & Microsoft Teams

You can update the Microsoft Teams list in the Program Settings screen:



and then choose the Microsoft Team in the Program's Statement screen:

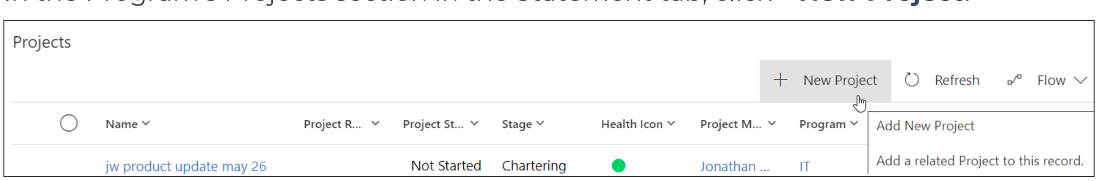


Note In order for the Teams list to update properly and include the program Team, the Team must have been created previously, and the Owner of the solution flow **Get list of Microsoft Teams** must have been added as a Member of the Team. See Microsoft Teams Admin Guide for more information.

Quick Create - New Project

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

1. In the Program's Projects section in the Statement tab, click **+ New Project**.



2. Fill in the short form, switch **Create** to **Yes**, and click **Save and Close**.