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.

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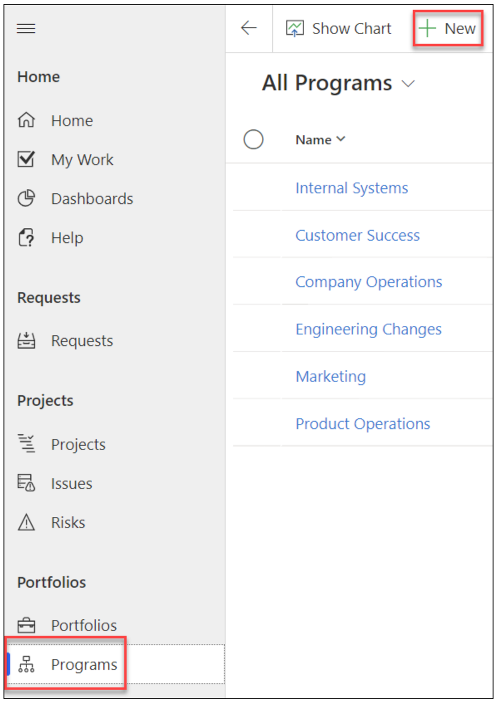
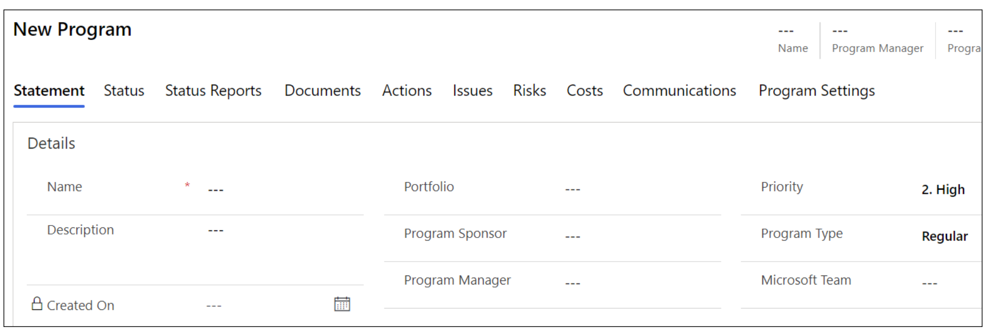
> **Note** Document Management Interface: A SharePoint interface will display throughout Programs created with release 2025-2 and later and if you're organization has opted into the Graph API settings, typically done during the installation process. Otherwise, the same document subgrid present on pre-2025-2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

Create 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.

Teams Channel

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

This field functions differently for Programs created prior to BrightWork 365 version 2025-2; see the older article version tabs at the top of this article for more information.

Document Library

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

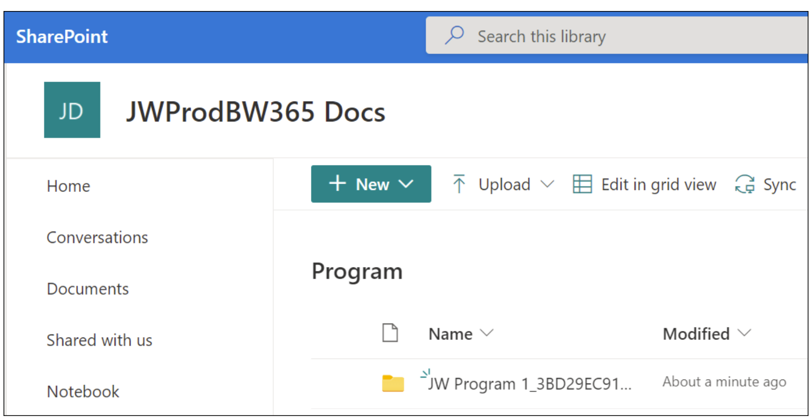
If configured for the Program, this field links to the Document Library for it. See Document Management for details.

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

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 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 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 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

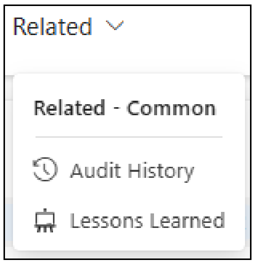
See the Communications article for detailed information.

Program Settings

The Program Settings tab is not present in Programs created in BrightWork 365 version 2025-2 and later. For Programs created in earlier versions of BrightWork 365, see the other article version tabs at the top of this article.

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.

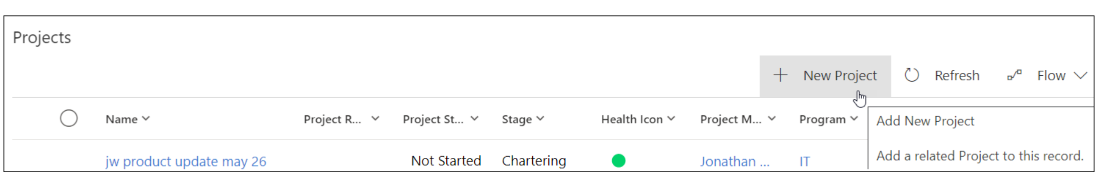
Audit History

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

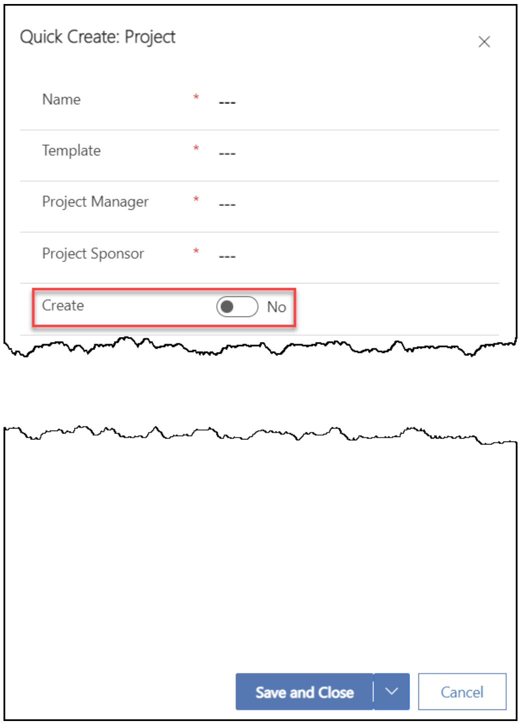
Quick Create - New Project

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**.


Quick Create: Project
Name
*

Template
*

Project Manager
*

Project Sponsor
*

Create
No
Save and Close
Cancel