

Portfolio & Program Status Reporting

Project Management Context

Status reporting is an extremely efficient method for keeping multiple stakeholders informed about how portfolios and programs are progressing. Crucial information such as overall status and health, attributes your stakeholders are likely very interested in seeing, can easily be updated and distributed by the project manager. BrightWork 365 provides managers with an intuitive interface for keeping metrics and qualitative information updated at their leisure, as well as creating status snapshots to keep a trail of how portfolios and programs have performed over time.

Status Tab

The **Status** tab displays current metrics and KPIs.

The **Schedule** date values will automatically populate based on work item dates, and the values for the current overall Status, Health, Cost, and other metrics and KPIs are manually set by the manager.

Status Reports Tab

In the Status Reports tab a snapshot record of the current status information can be saved, and the history of previously created status reports can be viewed.

Saved status reports will be added to the list of any previously created status reports. The status report data is stored within your Microsoft 365 Dataverse.

To create a new status report snapshot:

1. In the Status Reports tab click the ellipses and **+ New Status Report**.
2. Fill in all relevant columns.
3. To save the status report:
 1. To save a draft, click **Save** or **Save and Close** in the ribbon.
 2. To save a final version of the status report, set **Complete Status Report** to **Yes**.

Note After saving a draft status report, values that were initially automatically copied in from the Status tab (i.e., the "Status" value) will not be updated with any new values from the Status tab upon subsequent edits of the draft status report.

When you first set **Email Report to Sponsor** to **Yes**, and then set **Complete Status**

Report to Yes (in that order), an HTML report will be emailed to the Sponsor, the Portfolio or Program Manager, and the person that set the report to the completed status. The email will be sent from the account that was used to install BrightWork 365.

Marketing - Saved
Status Report

General

Log Report

🔒 Period Ending * 9/23/2022 📅

🔒 Key ---
Accomplishments

🔒 Significant ---
Challenges

🔒 Upcoming Focus ---

🔒 Email Report to Sponsor Yes

🔒 Complete Status Report Yes

Note Status related icons may fail to load in older versions of the Outlook desktop client.

Send On Behalf Of

Out of the box, when a status report is emailed to Project Sponsors or other stakeholders, it will be sent from the account that was used to install BrightWork 365. This email sending account can be changed to the account of the user submitting the status report if that account has been given **Send On Behalf of** mailbox permission, which can be configured by your organization's Microsoft 365 System Admin; for instructions see Microsoft article [Give mailbox permissions to another user](#).

Include Additional Email Recipients

New Status Report - Unsaved

General

Significant Challenges ---

Upcoming Focus ---

Email Report to Sponsor No

Include Additional Email Recipients Yes

Additional Email Recipients

When creating a new Status Report, BrightWork 365 provides the option to add additional users to a list that will receive the report, so that status reports can be distributed more widely.

If **Include Additional Email Recipients** is selected, the status report can be shared with any user that has the BrightWork Team Member security role regardless of the [portfolio security model](#) implemented.

Note

- You can only include additional users that are part of the BrightWork 365 environment.
- If you choose not to email the **Sponsor**, and also leave the **Additional Email Recipients** column empty, it will use the **Modified by** person's email for the **To** address.
- There is no imposed limit on the number of additional users that can be entered.