Portfolio & Program Status Reporting

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

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.

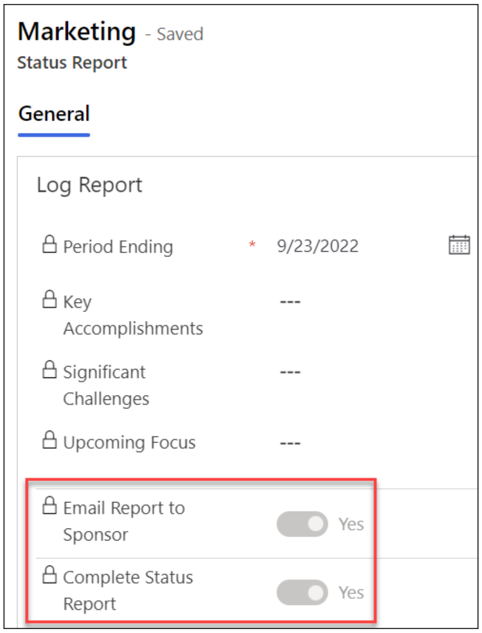
Saved status reports will be added to the list of any previously created status reports. The status report data is stored within your Microsoft 365 Dataverse.

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 an initial 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, unless **Send On Behalf of** mailbox permission has been configured, as noted later in this article.

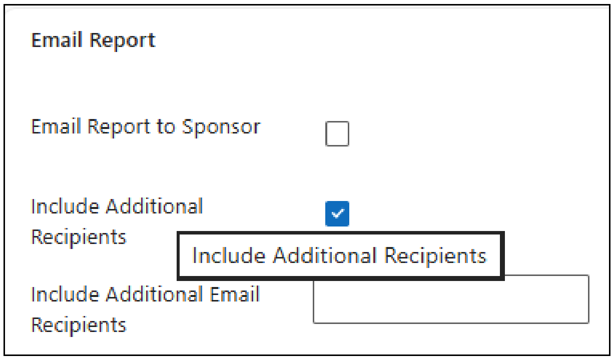


Note Status related icons may fail to load in older versions of the Outlook desktop client.

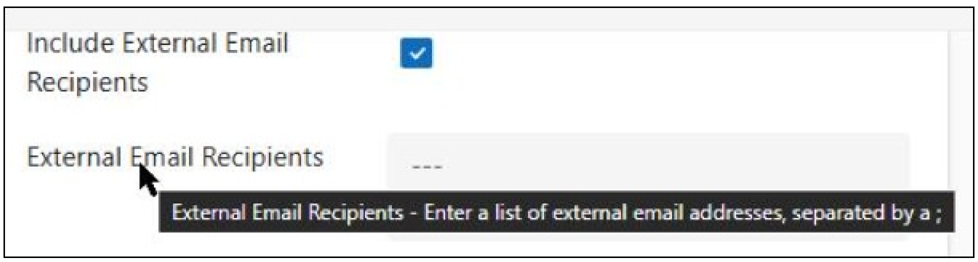
Include Additional Recipients

A list of additional internal and external users can be included on the form to receive a Project Status Report email.

If you would like an email to be sent to additional internal recipients, check the box for **Include Additional Recipients**, and add their email addresses into the field **Include Additional Email Recipients**. These additional recipients can be any user that has the BrightWork Team Member security role regardless of the Portfolio Security Model implemented.



If you would like to include external email recipients, check the box for **Include External Email Recipients**, and add their email addresses into the field **External Email Recipients**, separated by a semicolon (do not use carriage returns).

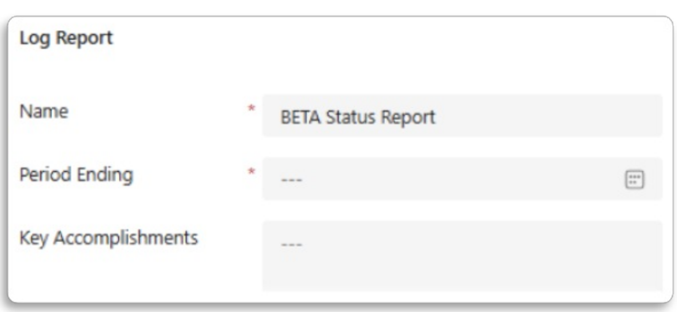


Note

- 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.

Custom Status Report Name

Users have the ability to add a custom name for a status report so that they can specify greater context to what the purpose of the specific report is. They can use this field to add any additional information that would be useful for the stakeholders or team members who are receiving it. The user can edit the Status name when they first open the form to add details to the report. The name of the report can be edited up until the point that the 'Complete Status Report' toggle option is clicked and the form is saved.



Printing Status Reports

See Printing.

Send On Behalf Of Mailbox Permission

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.