

# Configure Form, Request & Project Templates

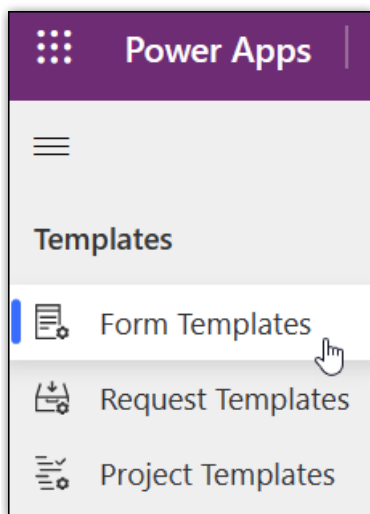
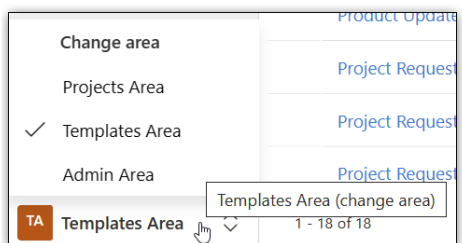
Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

## Note

- Users will need the BrightWork Template Editor security role to access the Templates Area and to configure templates.

## BrightWork 365 Form Templates

Form Templates can be accessed by clicking into **Templates Area > Form Templates**.



### Name

The name of the Form Template.

### Table

The table in which the Form is located.

### Templates Version

Version 1: Templates created in BrightWork 365 versions earlier than v1.6.

Version 2: Templates created in BrightWork 365 v1.6 and later.

## Form GUID

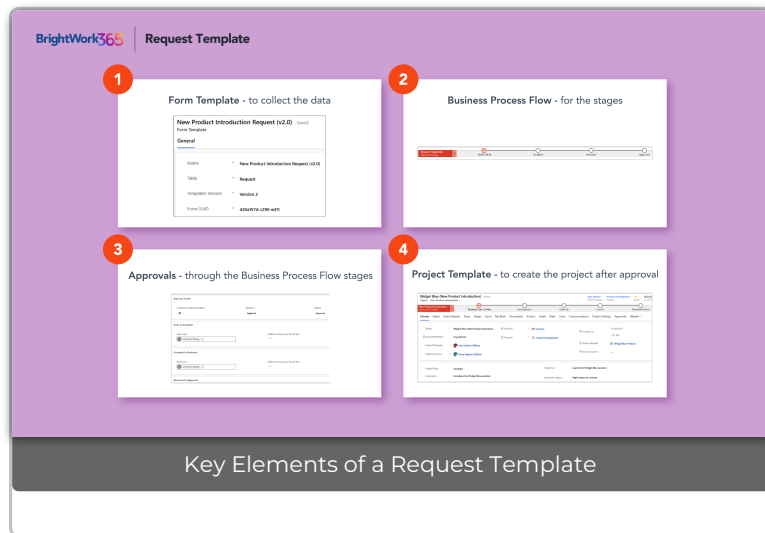
The GUID of the form, used mainly for customization reference purposes.

Changes made to the Form GUID will be immediately reflected in places the Form Template has been used.

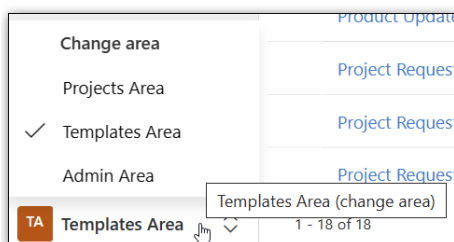
## Audit History Tab

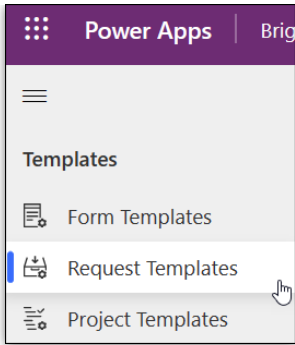
Tracks changes made to the Form Template, including who made the change, when the changes were made, old values and new values.

## BrightWork 365 Request Templates



**Request Templates** can be accessed by clicking into **Templates Area > Request Templates**.





### Caution

- The following configuration changes made to a Request Template will be immediately reflected in Requests that were previously created from the Template: Form Template, Business Process Flow (all requests that use it will be reset to the start), Reference Type, Approval Labels.
- Ensure there are values in the **Approvals Coordinator** field in both Request and Project templates, and in all of the **New Project Defaults** fields in Project Templates, otherwise script errors will be produced when new requests or projects are created.

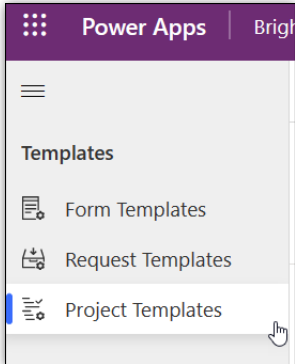
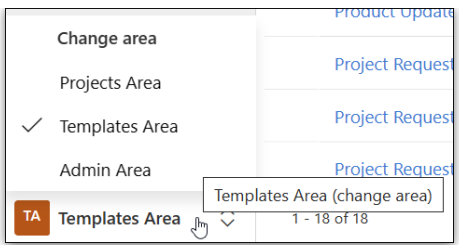
## BrightWork 365 Project Templates

The diagram, titled 'BrightWork365 Project Template', shows four key elements of a project template arranged in a 2x2 grid:

- 1 Form Template - to collect the data**: A screenshot of a 'New Product Introduction (v2.0)' form template. It shows fields for Name (New Product Introduction), Title (Project), Template Version (Version 2), and Form GUID (a38750ae-e490-e671-ae8f).
- 2 Business Process Flow - for the stages**: A screenshot of a Business Process Flow diagram with five stages: Business Case (PMO), Development, Testing, UAT, and Deployment.
- 3 New Project Defaults - default field values**: A screenshot of the 'New Project Defaults' configuration screen. It shows fields for Custom Template (Content Template from BrightWork Product 3.0 PM), Project Manager (Anna Malina O'Brien), Project Sponsor (Debbie Chang O'Brien), Project Type (Improvement), and Program (Product Development).
- 4 Approvals - through the Business Process Flow stages**: A screenshot of the 'Approval Labels' configuration screen. It shows 'Customize Approval Labels' (unchecked) and 'Business Case to Development' (checked) with 'Approval Required' (unchecked).

Key Elements of a Project Template

Project Templates can be accessed by clicking into **Templates Area > Project Templates**.



**Tip** See also [Form Configurator](#) which provides an easy method to hide or show Project Template form Tabs, Sections, and Columns.

**Caution**

- If a Project Template is deleted, projects that were previously created from the Template will lose their project forms giving the false impression that project data has been deleted. There is a process available to recreate the Template and return the project forms with the data to the affected projects. Contact BrightWork Support or your Customer Success Partner for details.
- The following configuration changes made to a Project Template will be immediately reflected in Projects that were previously created from the Template: Form Template, Business Process Flow (all projects that use it will be reset to the start), Reference Type, Approval Labels.

## Common Elements for Request Templates & Project Templates

### Details Tab

#### Name

The name given to the Request or Project by the submitter

#### Description

The description of the template.

## **Requests or Projects**

A count of Requests or Projects linked to the template. This enables users to gain valuable insights into the potential implications of their actions within the Templates Area.

## **Approvals Coordinator**

The Approvals Coordinator helps to keep the approval process moving along. The Approvals Coordinator field is a lookup field and security role. This user must be given the BrightWork Approvals Coordinator security role in addition to being selected as the Approvals Coordinator in the Template.

The Approvals Coordinator does not make approval decisions, the first and subsequent approvals are done by the Approvers. The Approvals Coordinator does not move the process from one stage to the next via the Business Process Flow; this must be done via approvals completed by the nominated Approvers.

The Approvals Coordinator will be notified of the approval process progress through notifications.

## **Form Template**

This is the Request or Project form that will load. Newer Request templates will only use Version 2 Form Templates.

## **Business Process Flow**

The Business Process Flow that will load on the Request or Project form.

## **Project Template**

The Project Template that will be used to create the project.

## **Available in Requests**

If set to Yes, the Template will be available in Requests.

## **Reference Type**

Choose Automatic or Manual reference numbering.

## **Create Copy**

Create a copy of the Request Template or Project Template. Upon copy completion the user will be brought directly into the template copy.

## Approval Labels

Approval labels can be configured at the individual template level, or globally through a business rule [configuration](#).

## Approval Timeout Behavior

The **Approval Timeout Behavior** setting for long running approvals alerts by email the Approvals Coordinator (a user chosen in the **Approvals Coordinator** field and also given the **BrightWork Approvals Coordinator** security role), and **Approvers #1**, that the 28-day approval time period limit was reached so that they may take necessary actions.

Within the **Details** Section of the relevant **Project Template**, the following **Approval Timeout Behavior** options are available:

- **Cancel and Notify**
- **Cancel, Restart and Notify**

## Per Stage Options

Business Process Flow Stages are used to control the quantity of Stages and the Stage names in the approval sections. Additional stages beyond what is included out of the box can be added through Business Process Flow customization for up to a total of 10 stages.

## Approvers

Any user with the BrightWork Team Member security role can be chosen as an Approver.

## Additional Approval Email Text

Appears in the approval email sent to approvers.

## Audit History Tab

Tracks changes made to the Templates, including who made the change, when the changes were made, old values and new values.

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## Elements of Request Templates Only

### Details Tab

## Auto-create Project

If Auto-create Project is set to **Yes**, an approved project will be created automatically at the conclusion of the approval process. If set to No, the Create Project button is displayed, and the Approvals Coordinator gets an email requesting that they set the Create Project button to Yes.

## Per Stage Options

### Approval Start

If Approval Start is Automatic, approval starts when the previous approval gets approved.

If Approval Start is Manual, the Approvals Coordinator gets notified that they have an approval to start when the previous approval gets approved, and the Start Approval button on the Approvals tab gets enabled.

## Requests Tab

- View Requests that are associated with the Request Template to easily view which Requests would be impacted by changes made to the associated form. The Requests Tab includes many essential columns such as Request Status, Requestor, Submit Date, and Project.
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## Elements of Project Templates Only

### Details Tab

#### Available in Projects

If Available in Projects is set to **Yes**, the Project Template will be available in Projects.

#### Approval Required

If approval is not required for the stage, the project can be moved to the stage by a user with the BrightWork Project Manager or BrightWork Stage Mover security role. If approval is required for the stage, the project cannot be moved to the stage manually.

If approval is required for a stage, the Project Manager can click the **Send Stage for Approval** button in the **Project Settings** tab to start the approval process. When a stage is sent for approval, the project is made read-only and a related message will display on the Charter tab. The Business Process Flow will not be disabled, but users will be prevented

from moving a stage forward or backward.

## New Project Defaults

The following can be specified and will populate corresponding columns in the forms of new Requests and Projects:

- Content Template
- Portfolio
- Program
- Project Manager
- Project Sponsor
- Project Type

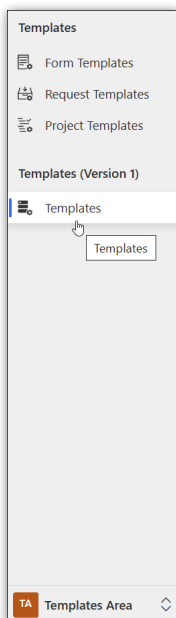
## Projects Tab

- View projects that are associated with the Project Template to easily view which projects would be impacted by changes made to the associated form. The Projects Tab includes many essential columns such as Project Status, Program, and Portfolio.

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## Templates (Version 1) - Templates from BrightWork 365 v1.5 and Earlier

Templates (Version 1) can be accessed by clicking into **Templates Area | Templates (Version 1) | Templates**.



## Details Tab



The Details screen displays template overview information. If the template is associated with a [Content Template](#), the Content Template will be noted. You can also view the number of Projects and Content Templates that use the selected template by clicking the calculate icon and then the **Recalculate** button.

The screenshot shows the 'Business Projects' details screen. At the top, there are tabs for 'Details', 'Projects', and 'Content Templates', with 'Details' selected. Below the tabs, the template name is 'Business Projects' and the associated Content Template is 'CT Project Standard'. The description reads: 'This template is for requesting and managing projects that support Contoso day to day business.' There are two summary rows: 'Projects' with a count of 3 and 'Content Templates' with a count of 0. Each row includes a 'Last updated' timestamp of '9/22/2021 9:15 PM' and a 'Recalculate' button. Red boxes and arrows highlight the calculate icons and the counts.

Further down the **Details** screen you can view the forms that are currently associated with the template, and by extension future projects that will be created from the template, as well as any projects that were previously created from the template.

Request BPF	* <a href="#">Project Request 1 Stage</a>	Request BPF GUID	ba059c9d-70b4
Request Form	* <a href="#">Project Request 1 Stage</a>	Request Form GUID	BFBA63C3-0400
Project BPF	* <a href="#">BrightWork Project</a>	Project BPF GUID	d5c5c352-58ff-e
Project Form	* <a href="#">Project Standard</a>	Project Form GUID	A36235B6-61FF

The **Details** screen also allows you to choose if the template will be available to choose from in Requests, and in Projects for users who have the requisite permission to create projects without first submitting a request.

Request Reference Type	<input type="radio"/> Automated	Project Reference Type	<input type="radio"/> Automated
Available in Requests and Projects	<input checked="" type="checkbox"/> Yes	Create Copy	<input type="radio"/> No

The **Details** screen also allows configuration of the **Request Reference Type** and **Project Reference Type**:

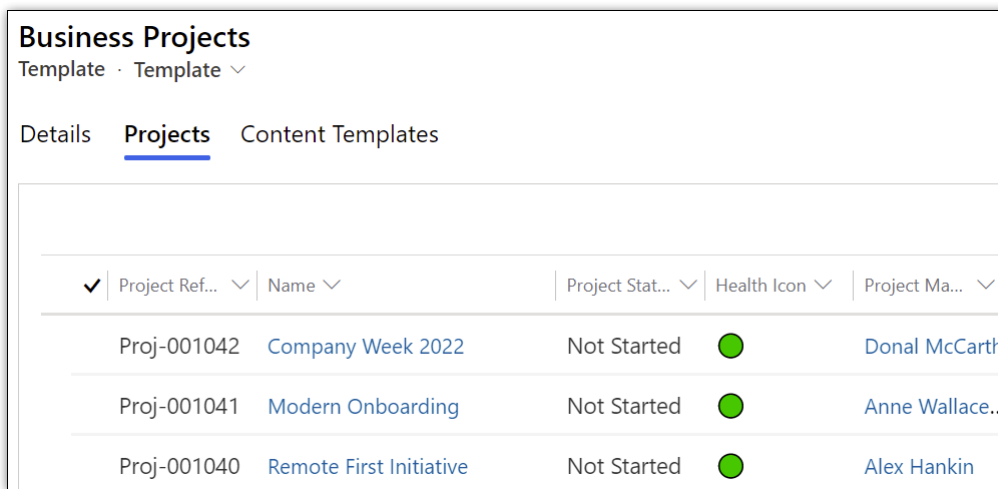
- If the **Reference Type** is set to **Manual**, the hidden Request Number and Project Number columns will appear on the forms. The text entered into this column takes the place of the standard autonumber column. When a project is created from a request, the Request Number is passed to the project's **Project Reference** column.
- If the **Reference Type** is set to **Automated**, the standard autonumber column is displayed. The

autonumber reference column takes the form of Req-001121 or Proj-001121.

- **Note:** The autonumber reference is always applied and incremented in a request or a project, regardless of the option selected in the Template. New Content Templates will also increment the number.
- If the **Reference Type** changes in the template, a flow will run to update the **Reference Type** in the Requests and Projects that were created from the template.
- If the template value changes in a request or a project, a workflow will run to update the **Reference Type** accordingly.

## Projects

The **Projects** tab provides information about the projects that were created from the selected template.



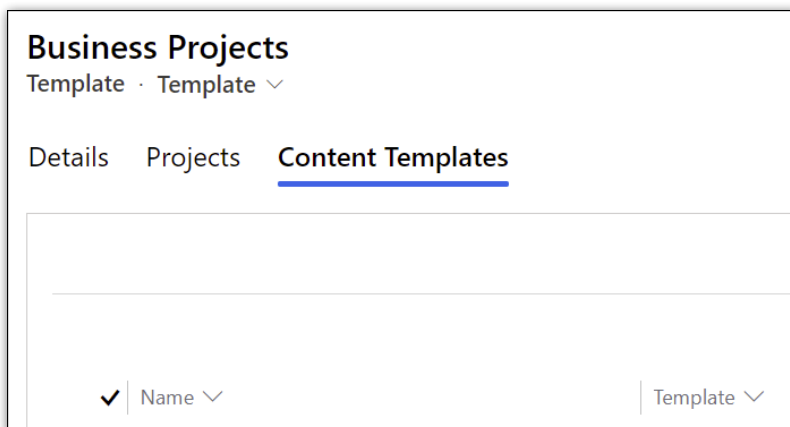
**Business Projects**  
Template · Template ▾

Details **Projects** Content Templates

✓   Project Ref... ▾   Name ▾	Project Stat... ▾   Health Icon ▾	Project Ma... ▾
Proj-001042   Company Week 2022	Not Started   ●	Donal McCarth
Proj-001041   Modern Onboarding	Not Started   ●	Anne Wallace...
Proj-001040   Remote First Initiative	Not Started   ●	Alex Hankin

## Content Templates

The **Content Templates** tab displays any content templates that use the selected template. See the [Content Template](#) article for more information.



**Business Projects**  
Template · Template ▾

Details Projects **Content Templates**

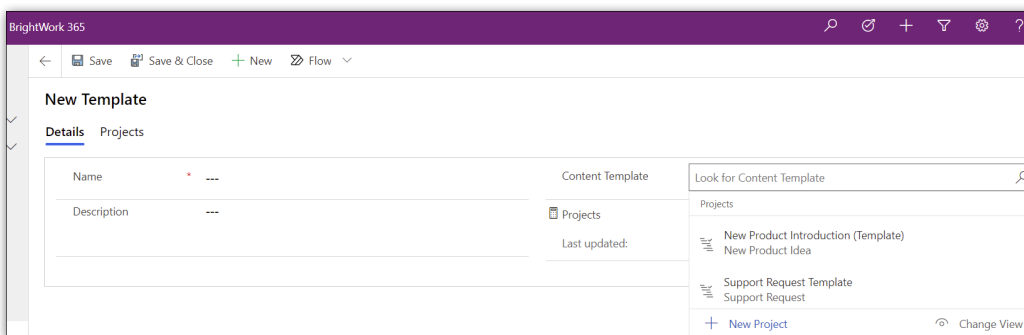
✓   Name ▾	Template ▾
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# Create a Template from Scratch

**Note** Only users with the BrightWork PMO Manager or BrightWork Template Editor security role can create templates.

1. Use the Area switcher at the bottom left of the Nav to switch into the **Templates Area**, and then click into either **Request Templates** or **Project Templates**.
2. Click **+ New** and fill out the New Template form.

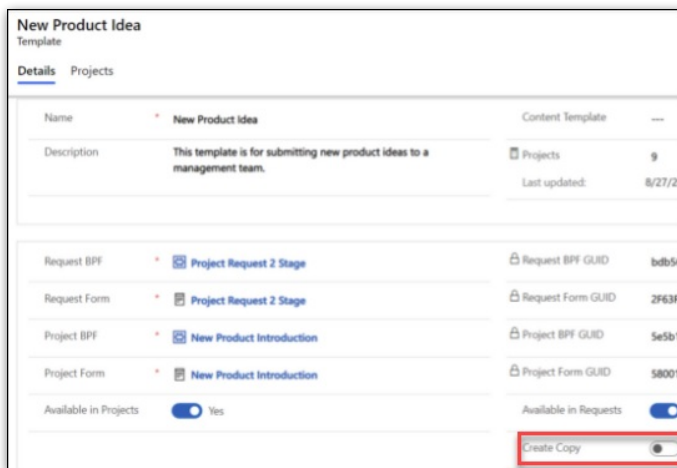
The **Content Template** lookup field in the New Project Template form provides the option to associate an existing **Content Template** to the new project template. If this option is chosen, any projects created from the template will include the content from the referenced content template. See the [Content Template](#) article for more information.



3. **Save & Close** the form to finalize the new template.

# Create a Template from a Copy of Another Template

1. Use the Area switcher at the bottom of the screen to switch into the **Templates Area**.
2. Click into an existing template and click the Create Copy button.



3. The Create Copy button triggers the Copy Template flow. This creates an exact copy of the template with the time of creation added to the template name to keep the template name unique.

# Troubleshooting

## Unable to Delete a Template

- On occasion Microsoft Power Apps may present an error when you initiate the deletion of a template. The fix is to wait for the Microsoft weekend database clean up jobs to run in Microsoft Dynamics.
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