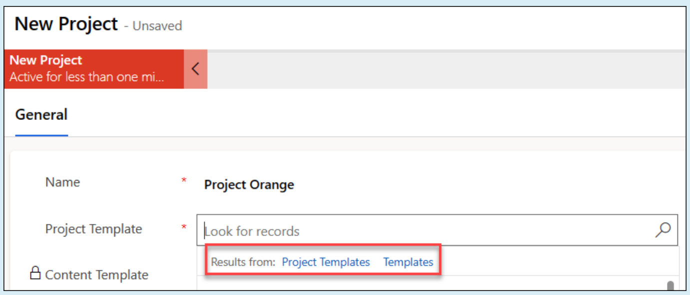
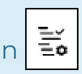
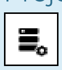
Create Projects

Note

- BrightWork 365 ships with 5 Starter Project Templates out of the box: Project Light, Project Standard, Project Structured, Product Update, and New Product Idea. For template details, see the Templates article.
- Customers that have upgraded from prior version of BrightWork 365 have the option to choose either a new version template included in a later version of BrightWork 365 from the **Project Templates** table, or one of the older version templates from the **Templates** table. To choose, click the search icon and click one of the options.

  The newer version Project Templates can be identified by icon  , and older version Project Templates by icon  .

Note Project titles must be unique, have a maximum of 50 characters, and should not contain any special characters including < > : * ? |

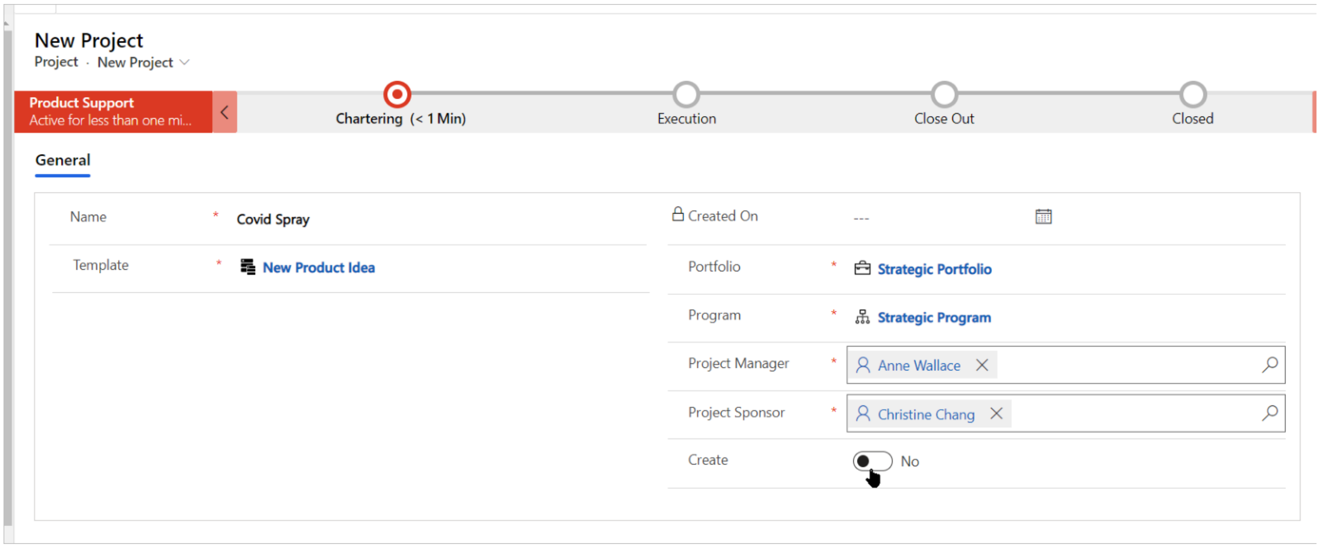
Method 1: Create Projects With a Request

The project management lifecycle will typically begin with BrightWork 365 Requests, where a Requester submits a new project request along with details needed for an approval decision. Through workflows, notifications and reports, the request process affords users an efficient method for starting the project management process. You can find detailed information about the formal request process in the Requests section of the Knowledge Base.

Method 2: Create Projects Without a Request

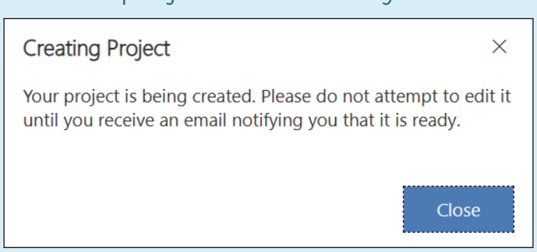
Some organizations will not need a formal request process for all of their projects and will therefore allow certain users to create projects directly in the Projects app section. Users with the BrightWork Project Manager or BrightWork PMO Manager security role will be able to create projects from a template using a simple interface skipping the formal request process.

If a user with the necessary security role clicks **+ New** in **Projects**, they will be presented with a project creation form. After filling in all necessary column values, set the **Create** switch to **Yes** to initiate the project creation process.



- If the Template selected is not associated with a Content Template (a template with predefined data), the project will be created instantly, and the form will transition to the Project form. When the project is ready to be used, the user that initiated the creation process will receive an email.
- If the Template selected is associated with a Content Template, the form will not transition to the Project form until the Create Project Flow has completed processing. The user that initiated the project creation process will receive an email when the flow has completed. The duration of the project creation process will depend on the number of child rows (Tasks, Issues, Risks, etc.) present in the Content Template. When the project is ready to be used, the user that initiated the creation process will receive an email.

Note After setting the Create switch to **Yes** to initiate the project creation process, click **Close** immediately in the 'Creating Project' dialog to avoid subsequently locking the created project in read-only mode.



Troubleshooting

Persistent 'Creating Project' Dialog & Project is Read-Only

To resolve this issue:

1. Click **Projects** in the main nav.
2. Create a view with the Create, Create Project Running, and Switch columns exposed.
3. For the affected project, use Excel Online to set these columns to No, No and Yes.
4. Open the affected project and click **Activate** on the Project toolbar.

Script Errors When Creating a Project

In the associated Project Template, ensure there are values in the **Approvals Coordinator** field and in all of the **New Project Defaults** fields.