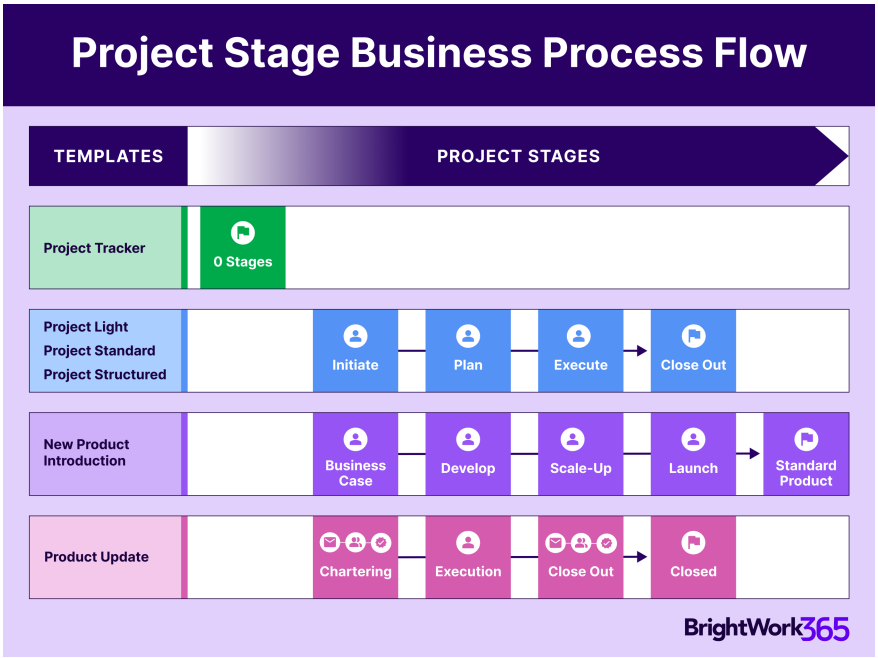
Project Stage Approval Process

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

Project Management Context

Most projects benefit greatly from having a control process in place to move them along from one stage to the next while they are in execution. Without any form of control, there is a good amount of risk that rework will need to be done for project stages that were previously considered complete. The control process, of which **Stages** are a major element, can be as simple as a single project manager deciding on their own when a stage's body of work has been completed in a satisfactory manner, or as complex as requiring a group of stakeholders deciding individually whether any additional work is necessary before a project can move forward to the next stage. BrightWork 365 affords the flexibility and functionality for project teams to use various levels of stage approval requirements along a spectrum of formality.

Project Stage Approval Process - In a Nutshell



Tip In-process approvals can be managed or viewed within:

- The BrightWork Approvals Module.
- The Project's Approval History section.
- Microsoft Teams, including canceling and reassigning In Progress approvals. See Approvals in

Microsoft Teams.

Here's a summary of the project stage approval process from start to finish as it operates out of the box:

1. (Optional) A user given the BrightWork Template Editor security role configures the default properties for Project Templates.
2. (Optional) A user given the BrightWork Approvals Coordinator security role (a user chosen in the Approvals Coordinator field and also given the BrightWork Approvals Coordinator security role) configures approval related properties for a specific project from the project's Approvals tab.
3.
    1. If approval is not required for a stage, the project can be moved to the stage by a user with the BrightWork Project Manager or BrightWork Stage Mover security role.
    2. If approval is required for a stage:
        1. The project cannot be moved to the stage manually. A user given the BrightWork Project Manager security role can activate the Send Stage for Approval button in the project's Settings and Actions > Actions tab, when it's time to move the project to the next stage.
        2. The stage Approvers make a decision (Accept, Reject), and the Project Manager, Approvals Coordinator, and Approvers receive an approval notification.
        3. If the Approvers accept the request, the project moves to the next stage. If the Approvers reject the request, the project stage does not change.

Project Stage Approval Process - Details

The default field values for the users chosen for approving the movement of the project from one stage to the next (e.g., from Initiate to Plan), the nominated **Approvals Coordinator**, the approval button labels, and any additional approval email text, are all configured in **Templates Area | Project Templates**. Many of these settings can be overridden in the **Approvals** tab of a project by the Approvals Coordinator.

Project stages can be moved backward by a user given the **BrightWork Project Manager** or **BrightWork Stage Mover** security role. Project stages can also be moved forward by one of these users unless the field **Approval Required** is set to **Yes** in the Approvals tab for the next stage, in which case stages can only progress forward via completed approvals by nominated Approvers.

If approval is required for a stage, the approval process will need to be started manually by the Project Manager by clicking the **Send Stage for Approval** button in the **Charter > Settings and Actions > Actions** tab. This field will only appear when there is a project stage ready to be sent for approval.



When a stage is sent for approval, some sections of the project will be 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.

While a stage is out for approval some areas of the project will be read-only and a message will display in the Charter tab until the approval process completes. The Business Process Flow will not be disabled, but users will be prevented from moving a stage forward or backward.



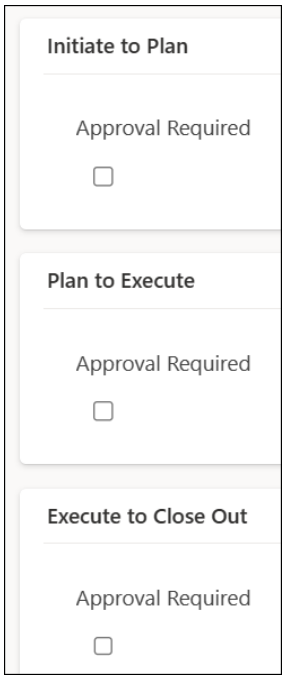
If the stage is *Approved*, the project will move to the next stage, relevant users will be notified, and the project will no longer be read-only.

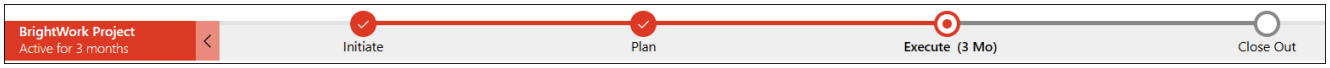
If the stage is *Rejected*, the project stage will not be changed, all listed users will be notified, and the project will no longer be read-only.

Tip

- Email approvals links take you to the BrightWork Approvals section of the Admin Area.
- Cancel approval: Everybody involved will get a notification.

The Business Process Flow in projects is used to control the number of stages and the stage names and can be configured in the Approvals tab of projects (the Approvals tab is only visible to users given the BrightWork Approvals Coordinator security role). The default settings are controlled by the configuration set in Templates Area > Project Templates; different project templates have different stages. 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.





The Approvals Coordinator and stage Approvers will be sent approval related notifications when the process for moving from one stage to the next is initiated. If any of the nominated Approver accounts is not enabled for any reason, the flow will be automatically canceled, and the Approvals Coordinator will be notified.

> **Note**
> - The approval emails come from the BrightWork 365 installation account's email.
> - If there are multiple Approvers, all of them must approve in order for the stage to be approved.

Permission Details

- Approval Coordinators can view Approvals for whichever business units they have the Approval Coordinator role. They cannot cancel approvals unless they are the Actual Approval Coordinator.
- Actual Approval Coordinators can see all of their BrightWork Approvals regardless of Business Unit.
- BrightWork PMO Managers can cancel any approval.
