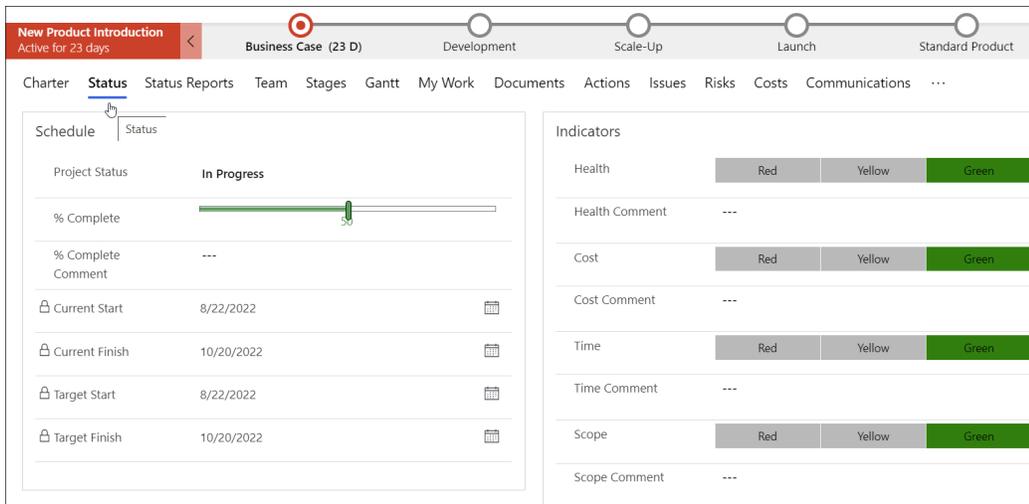


Project Status Reporting

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

Status

The Status tab displays current metrics and KPIs about the project.



The Schedule date values will automatically populate based on work item dates, and the values for Project Status, % Complete (Percent Complete), and other KPIs are manually set by the project manager.

The Health KPI can either be set manually by a user with appropriate privileges, or automatically by the system. If set automatically, the KPI color will match whatever is the "worst" color value among the other KPIs (Yellow is worse than Green and Red is worse than Yellow); any manual changes made to the KPI will not be saved permanently.

To toggle the automatic Health KPI setting on and off, in Project Settings use the Set Health Automatically switch.

Project Settings		Related
Create Teams Channel	<input type="checkbox"/>	No
Copy to New Content Template	<input type="checkbox"/>	No
Reset Target Dates in all Project Tasks	<input type="checkbox"/>	No
Set Health Automatically	<input type="checkbox"/>	No

Status Reports

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**.

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 Project 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.

Email Report to Sponsor	<input checked="" type="checkbox"/> Yes
Include Additional Email Recipients	<input checked="" type="checkbox"/> Yes
Additional Email Recipients	<input type="text"/>
Complete Status Report	<input checked="" type="checkbox"/> 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.

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.