

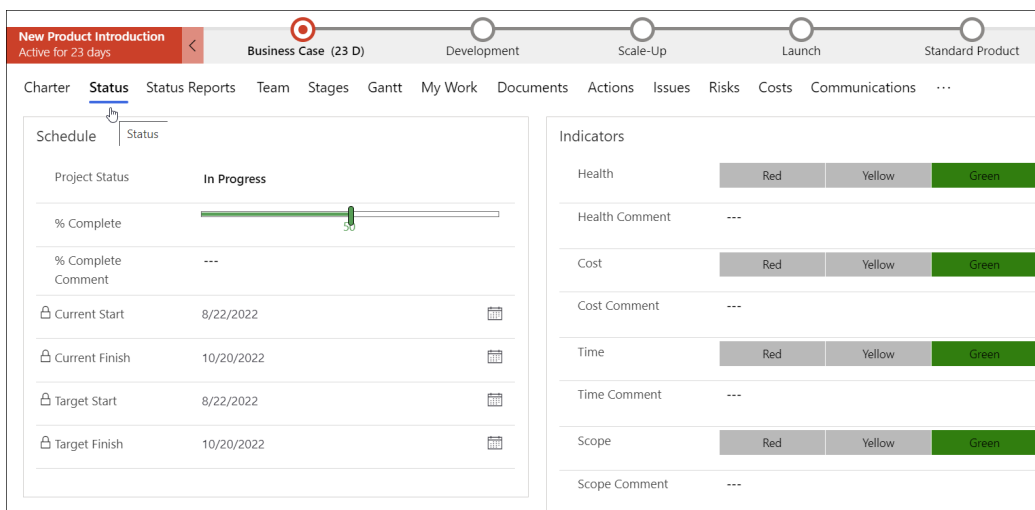
Project Status Reporting

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

Note For BrightWork 365 versions older than v1.6 see [Prior Release Articles](#).

Status Tab

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 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**.

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.

JW Deploy Product (demo) - Saved Jonathan We
Manager

Status Report

General

Log Report		Details	
Period Ending	* 9/16/2022	Project	JW
Key Accomplishments	Prototype has been developed.	Stage	Business
Significant Challenges	Raw material price increases.	Portfolio	Cor
Upcoming Focus	Prototype testing.	Program	Cus
Email Report to Sponsor	<input checked="" type="checkbox"/> Yes	Name	* JW Dep
Complete Status Report	<input checked="" type="checkbox"/> Yes		

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