Portfolio & Program Status Reporting

Status Tab

The **Status** tab displays current metrics and KPIs.

The **Schedule** date values will automatically populate based on work item dates, and the values for the current overall Status, Health, Cost, and other metrics and KPIs are manually set by the manager.

Status Reports Tab

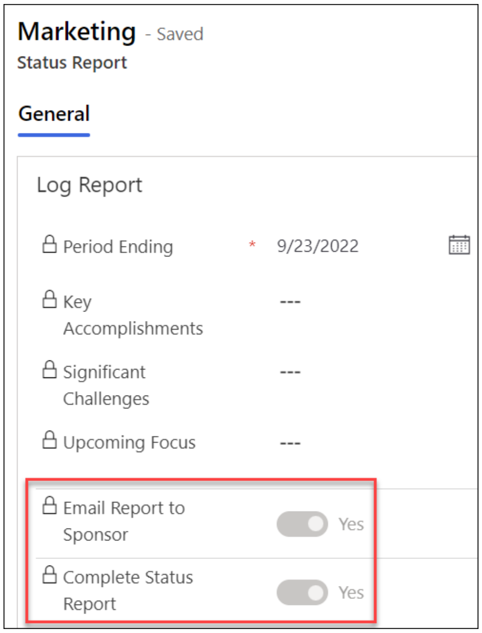
In the Status Reports tab a snapshot record of the current status information can be saved, and the history of previously created status reports can be viewed.

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 Portfolio or Program 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.



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