Programs

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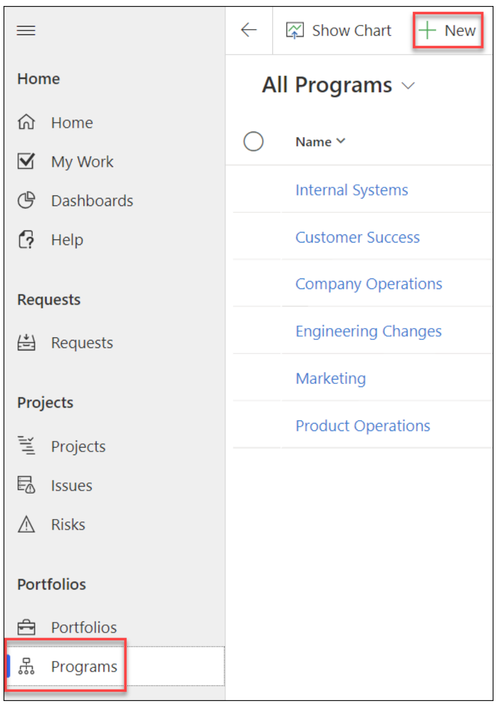
Programs Introduction

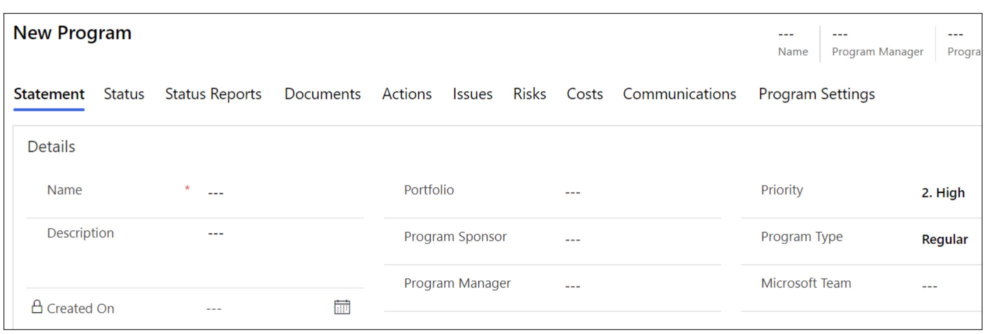
A Program is the first child level under a Portfolio. It allows users to group related projects together in order to manage and report on them in a coordinated way.

Creating Programs

1. Click into the **Programs** page and then click **+ New** at the top of the page.



2. In the **Statement** tab fill in all the required fields and click **Save**.



Program Tabs

You can easily view all Projects, Documents, Issues, Risks, and Program Settings that are related to a selected Program by clicking into the associated tabs within the Program record.

Statement

You can view the Program Statement and all child Projects by clicking on the **Statement** tab.

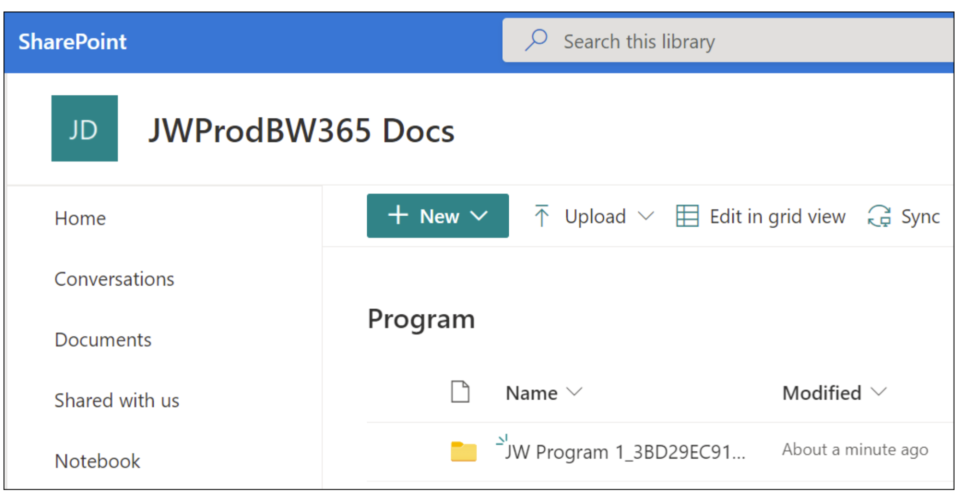
The list of available users to choose from in the **Program Sponsor** and **Program Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

Status & Status Reports

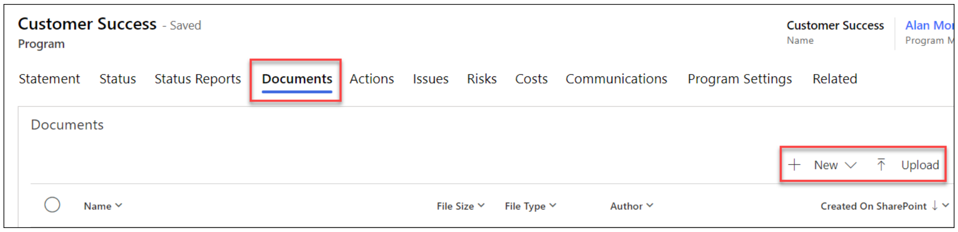
The Status tab allows the manager to set current project metrics and KPIs, and the Status Reports tab provides the manager with the ability to create snapshot status report. See the Status Reporting article for details.

Documents

During the installation of BrightWork 365 a SharePoint site and accompanying document library were created for the environment. A folder for each Program exists in this library.



You can create new Microsoft Office documents or upload existing documents into this library through the **Documents** tab of a Program record.



> **Note** SharePoint has an indexing limit that is reached when a document library contains more than 5000 items. If you receive a message about the SharePoint throttling limit being exceeded, see this article.

Actions

See the Actions article for detailed information.

Issues

Click on the Issues link to view and create Portfolio related Issues.

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

Risks

Click on the Risks link to view and create Portfolio related Risks.

The list of available users to choose from in the **Risk Monitor** column is limited to those users given the **BrightWork Team Member** security role.

Costs

See the Costs article for detailed information.

Communications

See the Communications article for detailed information.

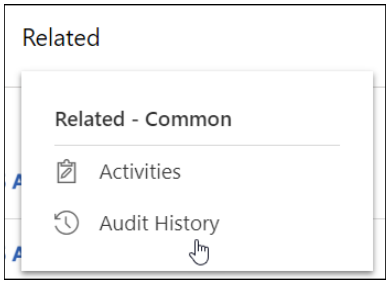
Program Settings

The Program Settings tab provides the ability to change the portfolio associated with the program, and to update the Microsoft Teams list to facilitate the creation of a Microsoft Teams Team for the program.

Only users with the BrightWork PMO Manager security role can view the Program Settings tab.

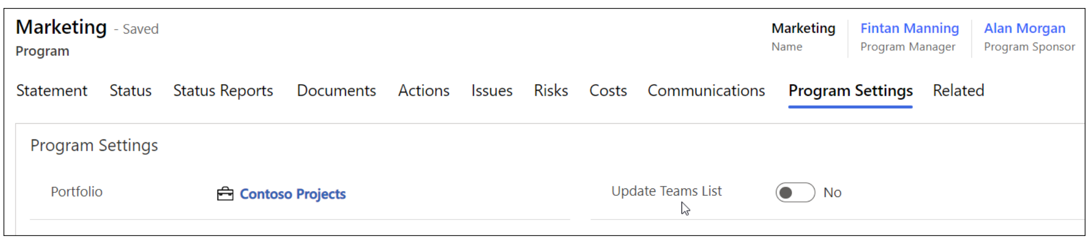
Related

Click on Related > Audit History to view the audit change history.

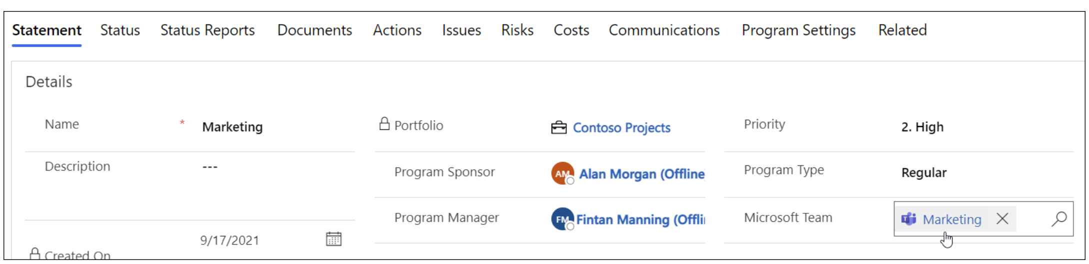


Program Settings & Microsoft Teams

You can update the Microsoft Teams list in the Program Settings screen:



and then choose the Microsoft Team in the Program's Statement screen:

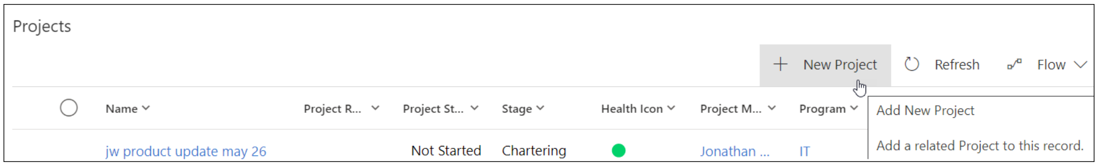


Note In order for the Teams list to update properly and include the program Team, the Team must have been created previously, and the Owner of the solution flow **Get list of Microsoft Teams** must have been added as a Member of the Team. See Microsoft Teams Admin Guide for more information.

Quick Create - New Project

Managers can quickly create a new Project from a Program record using Quick Create.

1. In the Program's Projects section in the Statement tab, click **+ New Project**.



2. Fill in the short form, switch **Create** to **Yes**, and click **Save and Close**.