

Programs

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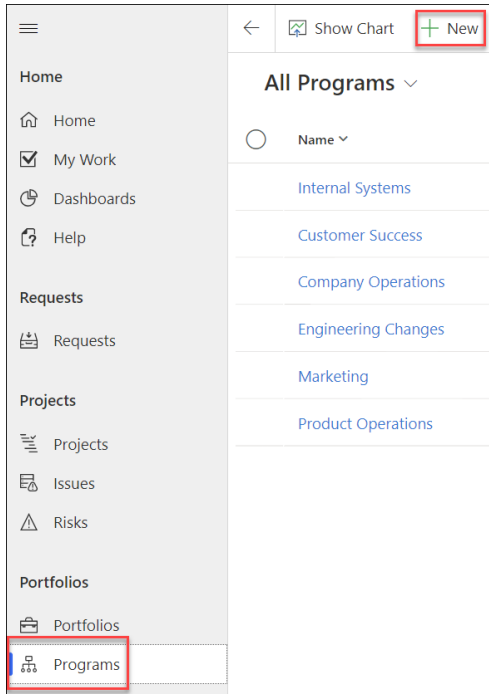
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Programs Introduction

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**.

The screenshot shows the 'New Program' form in the 'Statement' tab. The form has a header with 'New Program' and three dropdown menus for 'Name', 'Program Manager', and 'Program'. Below the header is a navigation bar with tabs: Statement (selected), Status, Status Reports, Documents, Actions, Issues, Risks, Costs, Communications, and Program Settings. The main form area is titled 'Details' and contains several fields:

Name	*	Portfolio	Priority	2. High
Description		Program Sponsor	Program Type	Regular
Created On		Program Manager	Microsoft Team	

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.

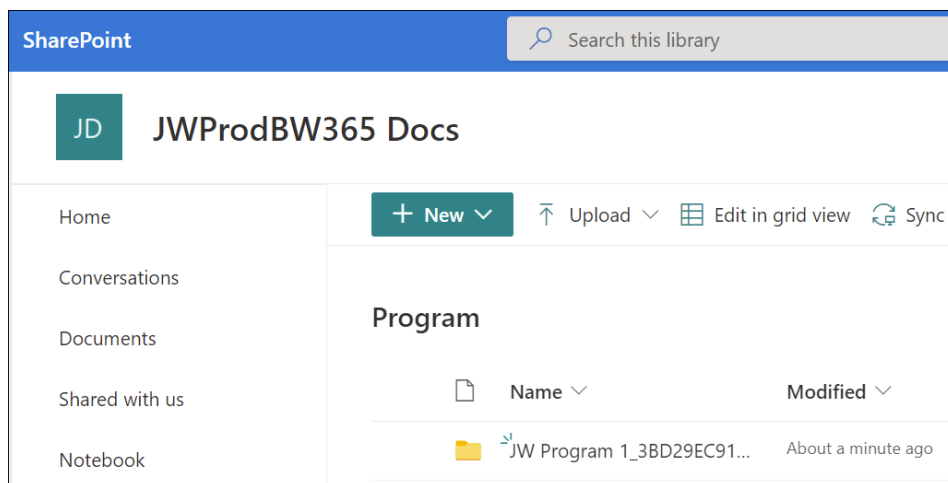
The list of available users to choose from in the **Program Sponsor** and **Program Manager** columns is limited to those users that have been added to the **Senior Managers** Dynamics Team found in the Admin Area.

Status & Status Reports

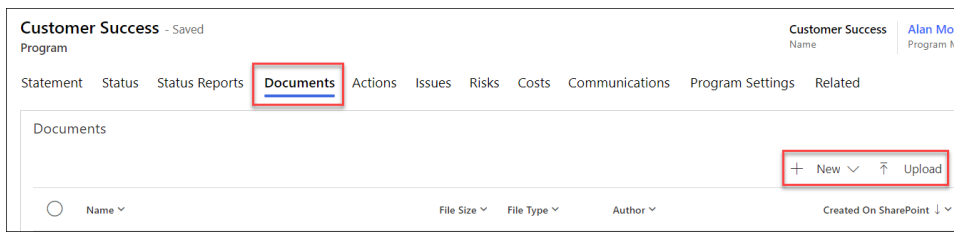
The Status tab allows the manager to set current project metrics and KPIs, and the Status Reports tab provides the manager with the ability to create snapshot status report. See the [Status Reporting](#) article for details.

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

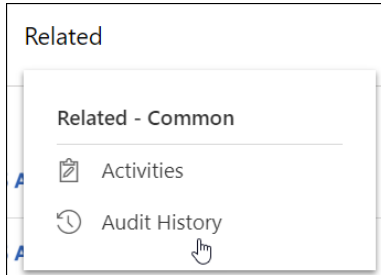
The Program Settings tab provides the ability to change the portfolio associated with the program, and to update the Microsoft Teams list to facilitate the creation of a Microsoft Teams Team for the program.

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

tab.

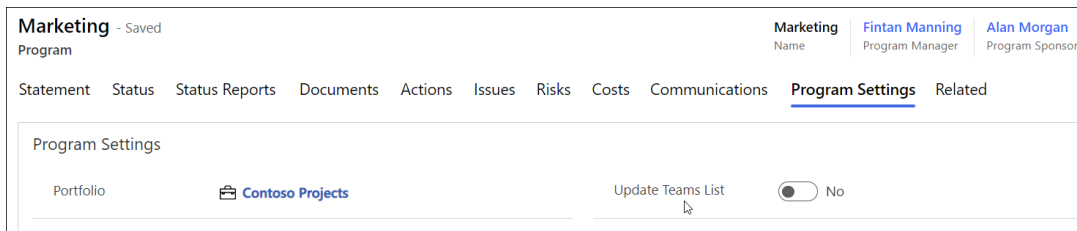
Related

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

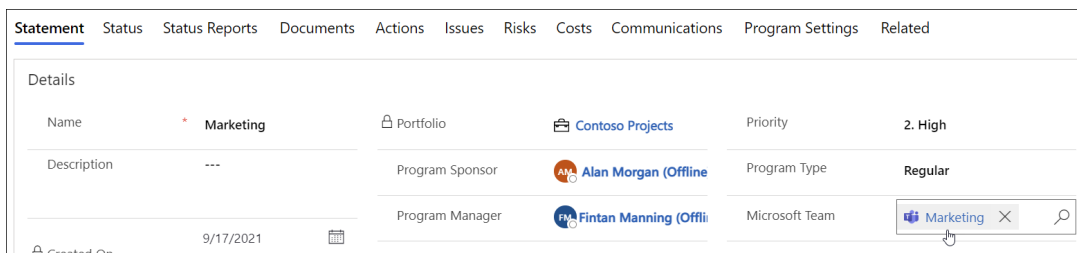


Program Settings & Microsoft Teams

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



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

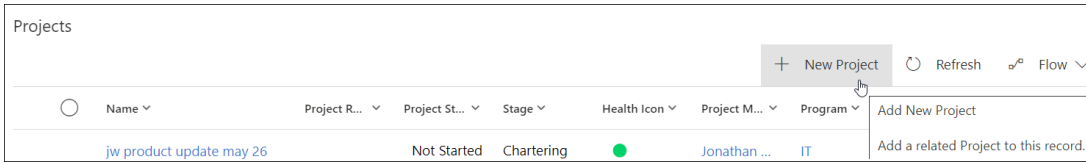


Note In order for the Teams list to update properly and include the program Team, the Team must have been created previously, and the Owner of the solution flow **Get list of Microsoft Teams** must have been added as a Member of the Team. See [Microsoft Teams Admin Guide](#) for more information.

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**.

The screenshot shows a 'Quick Create: Project' form with the following fields: Name, Template, Project Manager, and Project Sponsor. Each field has a red asterisk and a dashed line indicating it is required. At the bottom of the form, there is a 'Create' toggle switch which is currently set to 'No'. Below the form, there are two buttons: 'Save and Close' and 'Cancel'.