

BrightWork 365 Starter Project Templates

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

BrightWork365 | Template Spectrum

TO MANAGE	LEVEL OF MANAGEMENT		
	LIGHT	STANDARD	STRUCTURED
New Project Requests	No Approval	2-Stage Approval	Multi-Stage Approval
Work	My Work	My Work + Actions	My Work + Actions + Resource Utilization Reports
Projects	Project Light	Project Standard	Project Structured
		Product Update	New Product Introduction
Programs and Portfolios	Program and Portfolio Management	Program and Portfolio Management + Risks & Issues	Program and Portfolio Management + Risks & Issues + Costs & Budget
Collaboration	Microsoft Teams for Communication		
	SharePoint Online for Document Management		
Automation and Integration	SIMPLE	Power Automate for Workflows	COMPLEX
	SIMPLE	Power BI for Reporting	COMPLEX
	SIMPLE	Power Apps for Custom Forms	COMPLEX

Project Management Introduction

Not having a standard way to plan and manage projects is a common challenge among project managers. This is why adopting a configurable template approach from project selection to project close is crucial for success.

BrightWork 365 ships with customizable templates to give organizations a very fast starting point. Different situations call for different levels of structure and management.

BrightWork 365 brings the best of the Microsoft 365 ecosystem together providing a single solution that allows full control over project approval and starts your projects quickly with out-of-the-box project templates.

Note BrightWork 365 comes with five starter project templates to help you get started managing projects quickly:

- The **Project Light** starter template is for managing projects that are at the low end of the complexity spectrum for projects that require small amounts of project management.
- The **Project Standard** starter template provides a semi-structured process that is useful for a

range of business departments to run their projects including sales, marketing, engineering, finance, etc. This template is in the middle of the complexity spectrum.

- The **Project Structured** starter template is for managing projects that are in the high end of the complexity spectrum.
- The **New Product Introduction** starter template relates to the submission of a new product idea and managing the delivery of the new product. This template is on the higher end of the project management process maturity scale.
- The **Product Update** starter template is typically used for projects related to updates of existing products or technologies, and for complex support issues.

Tip

- If you are unsure which project template would be the best fit for a particular initiative, consider the Project Standard template as a good compromise between using the lower project structure of the Project Light template, and the higher end of management complexity found in the Project Structured template.
- Different Tabs, Sections, and Columns are hidden in Project Starter Templates (depending on the specific template) via the [Form Configurator](#); the display options for these elements can be adjusted by users with appropriate permissions.

The screenshot shows the 'Project Light' Form Configurator interface. It has a top bar with 'Project Light - Saved' and 'Project Template'. Below this are tabs: 'Details', 'Form Configurator' (active), 'Projects', and 'Related'. The main area is a list of sections with expandable arrows and checkboxes:

Section	Checked
Charter	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Status Reports	<input type="checkbox"/>
Team	<input checked="" type="checkbox"/>
Stages	<input type="checkbox"/>
Gantt	<input checked="" type="checkbox"/>
My Work	<input checked="" type="checkbox"/>
Documents	<input checked="" type="checkbox"/>
Actions	<input type="checkbox"/>
Issues	<input type="checkbox"/>
Risks	<input type="checkbox"/>
Costs	<input type="checkbox"/>

Your browser does not support HTML5 video.

All Templates

Note

- Templates that are associated with a [Content Template](#) will be prepopulated with project data.
- User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.
- Only the current project manager, or a user with the BrightWork PMO Manager or System Administrator security role, are considered owners of the project and can change who is listed as the project manager.

The elements below are common to all Starter Project Templates:

Charter

Name	* Blue Yonder Solution Deployment (Pr...	Portfolio	* Contoso	Created On	11/18/2022
Project Reference	Proj-001016	Program	* Customer Success		7:55 PM
Project Manager	* Alan Morgan (Offline)			Source Request	Blue Yonder Solution Deployment
Project Sponsor	* Anne Wallace (Offline)			Teams Channel	https://teams.microsoft.com/_?tenant...
				Schedule Settings	Blue Yonder Solution Deployment (

Project Type	Other	Priority	3. Medium
Description	Deploy the solution for Blue Yonder	Objectives	Successful solution deployment
Exit Criteria	Iteration 1 solution successfully deployed	Overall Project Risk	Iteration 1 requirements not met within budget
Approval Requirements	All iteration 1 specifications met	Economic Impact	Medium level
Out of Scope	Iteration 2 requirements		

The Charter tab contains high level metadata about the project, including the project title and stakeholder information.

The following columns limit their user lookup values to the corresponding mapped BrightWork security role:

- Project Sponsor column mapped to BrightWork Team Member security role
- Project Manager column mapped to BrightWork Project Manager security role

The **Charter** tab also contains the mandatory columns **Program** and **Portfolio**. The values for these columns can later be changed in the **Project Settings** tab by a user with elevated privileges (see the **Project Settings** section below). All associated child items will be automatically adjusted to reflect these value changes.

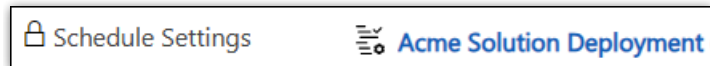
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Documents	Action	Issues	Risks	Costs	Project Settings
Name	* JW product update 826				Create Teams Channel	<input type="checkbox"/> No				Send Charter and Gantt for Approval	<input type="checkbox"/> No	
Type	Project				Copy to New Content Template	<input type="checkbox"/> Yes				Move to Close Out	<input type="checkbox"/> No	
Template	* Product Update				Reset Target Dates in all Project Tasks	<input type="checkbox"/> No				Send Close Out for Approval	<input type="checkbox"/> No	
Reference Type	Manual				Set Health Automatically	<input type="checkbox"/> No						
Project Creation Method	Project Area											
Portfolio	* Contoso Projects											
Program	* Marketing											

The following can be specified in [Project Templates](#) and will populate corresponding columns in the **Charter** and **Project Settings** tabs of new Projects:

- Content Template
- Portfolio

- Program
- Project Manager
- Project Sponsor
- Project Type

Schedule Settings



The Schedule Settings option on the Charter and Project Settings tabs provides project managers with a convenient method for viewing global calendar settings and configuring project-specific calendar settings for flexible scheduling. BrightWork Team Members can view the settings, and the project's specifically assigned Project Manager (not project managers generally), and users with the BrightWork PMO or the System Admin role, can edit the settings.

Calendar

Global Settings (read-only)

- **Working Week:** To enable project schedules to accurately reflect the organization's work practices, users with the BrightWork PMO Manager or the System Admin security role have the ability to set and update the global calendar settings (i.e., Working Week) for all projects using the Admin Area > Global Settings link. The Global Settings record is created with a default working week of Monday to Friday.
- Days that are configured to be not part of the Working Week will format differently in the Gantt chart.
- [Global Settings](#) are only editable in Admin Area > Global Settings, not from within a project.

Project Override Settings

- **Working Week:** To provide project managers with scheduling flexibility, they can optionally choose a different set of days to be configured as the project's Working Week. Any days that are not part of the Working Week will format differently in the Gantt chart for easy identification.

Note After changes are made to the Project Override Settings, you will need to refresh the entire project (Ctrl-F5), and then click into the Gantt tab, in order for the changes to be reflected in the Gantt.

Project Exception Days

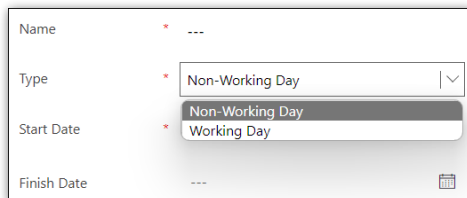
In the Project Exception Days tab, the project can be configured to add an extra day off or to ignore a global [Non-Working Day](#) (e.g., holiday). Project Exception Days will format differently in the Gantt chart.

Project Exception Days - Views (accessed via the drop-down menu):

- Project Exception Days
- Previous Project Exception Days
- All Project Exception Days

To add new Project Exception Days:

1. Click **+ New Project Exception Days**.
2. Fill out the Project Exception Days form.

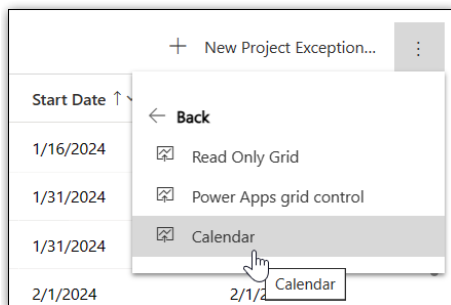


A screenshot of the 'New Project Exception Days' form. It includes fields for 'Name' (with a red asterisk and a dropdown arrow), 'Type' (with a red asterisk and a dropdown menu showing 'Non-Working Day' and 'Working Day'), 'Start Date' (with a red asterisk), and 'Finish Date' (with a red asterisk and a calendar icon). The 'Type' dropdown is currently open, showing 'Non-Working Day' as the selected option.

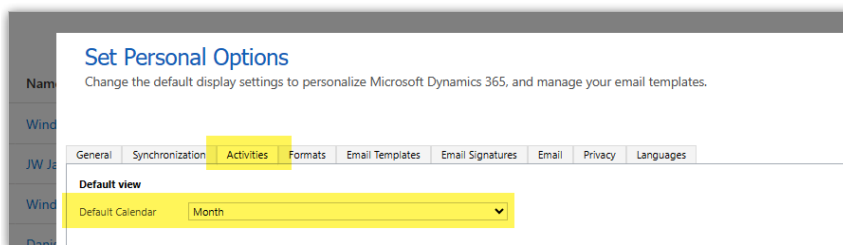
Note

- Project Exception Days affects all tasks in the project, including completed tasks. We strongly recommend not adding older historic Project Exception Days because of the impact on all tasks.
- Project Exception Days do not override the Working Week set within [Global Settings](#), they only override the solution-wide configured Non-Working Days (e.g., holidays).

The Project Exception Days can be displayed in a Calendar view.

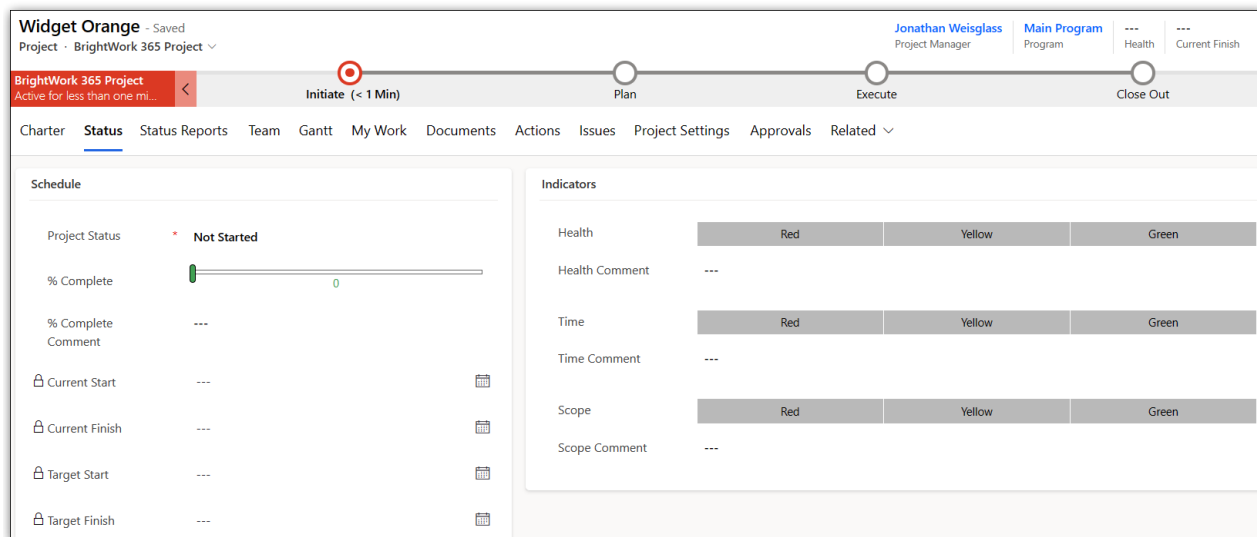


Users can set the Month display default in their Personalization Settings (BrightWork 365 app settings gear > Personalization Settings > Activities > Default view > Default Calendar).



Status

The **Status** tab allows the project manager to set current project metrics and KPIs.

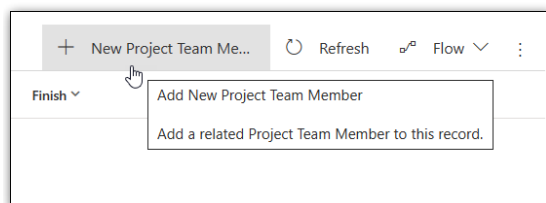


See the [Project Status Reporting](#) article for more information.

Team

The **Team** tab automatically populates with the names of work item assignees, and the earliest start dates and latest finish dates across all the work assigned to them.

To manually add a team member that has not yet been automatically added from being assigned a work item, click **+ New Project Team Member**.



Note

- To manually delete a Project Team Member from the **Team** tab in a project, you will first need to remove the user from all work assignments in the project.
- Dates may not update in the Teams tab until an update of some kind is made in the Gantt tab, which will trigger the date update.

Gantt

List of project tasks with a corresponding bar chart that represents the project schedule with task start and end dates. Visually depicts dependency relationships between the tasks as well as task status. See the [Task Management](#) article for more information.

Tip Users are given the option to access a French (Canada) version of Gantt through Personalization Settings > Formats tab.

Set Personal Options
Change the default display settings to personalize Microsoft Dynamics 365, and manage your email templates.

General Synchronization Activities **Formats** Email Templates Email Signatures Email Privacy Languages

Personal Standards and Formats
Select how Microsoft Dynamics 365 displays number, currency, time, and date formats. Select a format or click Customize to specify custom formats.

Current Format
French (Canada) [Customize...](#)

Format Preview

My Work

To view all work assigned to you within a project, click into the project's **My Work** tab. You can enter a specific piece of work by clicking on the Name of the assignment.

Charter Status Status Reports Team Stages Gantt **My Work**

3. My Work - Open ▾

System Views

2. My Work - All

3. My Work - Open

1. All Work

4. My Work - Completed

Type ▾	Assignment Sta... ▾	Due Date ▾
ge	In Progress	2/2/2023

Note

- Deleting a work item from My Work only deletes the assignment to the resource, not the underlying work item itself.
- If a work assignment has multiple assigned users and it is marked Complete by one of the assignees, an alert will be presented asking for confirmation of the status change.
- Parent tasks will be updated accordingly when its child tasks are set to Not Started or Complete in My Work.
- If an Issue, Cost or Action has a status of Cancelled or On Hold, then the user will not be able to mark the assignment as Complete/Not Started in My Work. They will need to manually go into the assignment and change the status.
- Filtering and sorting do not work on the Completed column in the My Work tab.

Documents

The Documents tab is where you can create new Microsoft Office documents and upload existing documents. These files are stored in your organization's SharePoint document library that is associated with BrightWork 365.

Caution

- By default, files deleted from the Documents tab will be permanently deleted from the SharePoint site associated with BrightWork 365 and cannot be restored from a recycle bin. Contact your Microsoft Support representative to discuss activating the associated SharePoint Recycle bin to be able to restore deleted documents.
- 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](#).

Project Settings

Only users with the **BrightWork Project Manager**, **BrightWork PMO Manager** or **BrightWork Program Manager** security role can access the **Project Settings** tab.

The **Project Settings** tab provides additional project information and gives the manager the ability to change the portfolio or program associated with the project, reset the target dates in all project tasks (baseline the schedule), and other administrative tasks.

Microsoft Teams

Project Settings also allows the project manager options with regards to **Microsoft Teams**, e.g., they can create a [Microsoft Teams Channel](#) for the defaulted associated Microsoft Team (which is based on the project's parent program Microsoft Team setting), or they can connect to a different Microsoft Team if a Channel has not yet been created for the project.

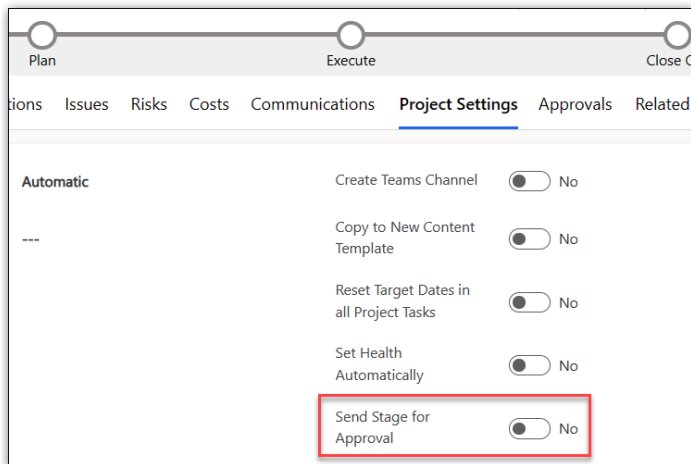
Gantt	My Work	Documents	Actions	Issues	Risks	Costs	Project Settings
Reference Type		Automatic		Create Teams Channel		<input checked="" type="checkbox"/> No	
Project Creation Method		Project Area		Copy to New Content Template		<input checked="" type="checkbox"/> No	
Microsoft Team		---		Reset Target Dates in all Project Tasks		<input checked="" type="checkbox"/> No	

Note

- If the project is later moved to a different program, the project's Microsoft Team Channel will not move to the new program's Microsoft Team.
- In newer versions of Microsoft Teams, Microsoft retired the ability to load websites inside the Teams client. These website links will open in a new browser tab instead.

Send Stage for Approval

If approval is required for a stage, the approval process will need to be started manually by the Project Manager by clicking the **Send Stage for Approval** button in the **Project Settings** tab. When a stage is sent for approval, some sections of the project will be made read-only, and a related message will display on the **Charter** tab. The Business Process Flow will not be disabled, but users will be prevented from moving a stage forward or backward.

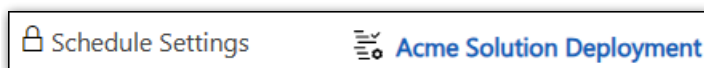


Approval History

The Approval History section of the Project Settings tab includes a history of the approval process for each stage of the Business Process Flow.

Approval History					
<input type="checkbox"/>	Name ▾	Stage ▾	Outcome ▾	Date ↑ ▾	Comment ▾
	Alex Hankin	Initiate to Plan	Reject	1/24/2023 4:24 PM	
	Alex Hankin	Initiate to Plan	Approve	1/24/2023 4:25 PM	
	Christina Chang	Plan to Execute	Approve	1/24/2023 4:26 PM	approved by christina
	Caitriona O'Connor	Execute to Close Out	Approve	1/24/2023 4:27 PM	

Schedule Settings



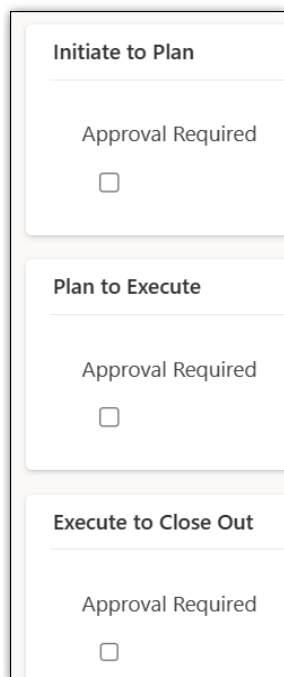
The Schedule Settings option on the Charter tab and Project Settings tab provides project managers with a convenient method for configuring project-specific calendar settings, overriding global calendar settings which will adjust the project schedule accordingly. For more information see the above [Schedule Settings](#) section.

Approvals

The Approvals tab is only visible to users given the **BrightWork Approvals Coordinator** security role.

Approvals Coordinator is a lookup and security role - the nominated user must be chosen in the **Approvals Coordinator** field and also be given the **BrightWork Approvals Coordinator** security role. The Approvals Coordinator will be notified of approval process progress.

Business Process Flow Stages are used to control the number of stages and the stage names in the Approval sections of the **Approvals** tab. The default settings are controlled by the configuration set in **Templates Area > Project Templates** by a user given the **BrightWork Template Editor** security role.



The screenshot displays a configuration interface for the Approvals tab, organized into three distinct stages, each with a title bar and a checkbox for 'Approval Required':

- Initiate to Plan**: The first stage, with an unchecked checkbox for 'Approval Required'.
- Plan to Execute**: The second stage, with an unchecked checkbox for 'Approval Required'.
- Execute to Close Out**: The third stage, with an unchecked checkbox for 'Approval Required'.

See the [Project Stage Approval Process](#) article for related information.

Related | Audit History

The Related tab contains the Audit History link that allows you to view changes that were made throughout the project.

Charter
Status
Team
Gantt
My Work
Documents
Project Settings
Audit History
Related

Audit History

Filter on:
All Fields

FLOW

<input type="checkbox"/>	Changed Date	Changed By	Event	Changed Field	Old Value	New Value
<input type="checkbox"/>	9/22/2023 5:02 ...	BW365 Admin	Update	Create	Yes	No

Project Light

The elements below are also included in this template:

Header, Business Process Flow, Project Management Tabs and Charter Columns

BrightWork 365 Project

Active for less than one mi...

Initiate (< 1 Min)

Plan

Execute

Close Out

Charter

Status

Status Reports

Team

Gantt

My Work

Documents

Project Settings

Approvals

Related

Name

* Project Light

Portfolio

* Portfolio A

Created On

3/8/2024

Project Reference

Proj-001006

Program

* Program A

1:20 PM

Project Manager

* Jonathan Weisglass (Busy)

Source Request

Project Sponsor

* Jonathan Weisglass (Busy)

Teams Channel

Schedule Settings

Project Type

Strategic

Priority

Description

Status

Charter
Status
Team
Gantt
My Work
Documents
Project Settings
Approvals
Audit History
Related

Schedule

Project Status

Not Started

% Complete

0

% Complete

Comment

Current Start

Current Finish

Target Start

Target Finish

Indicators

Health

Red

Yellow

Green

Health Comment

See the [Project Status Reporting](#) article for more information.

Project Standard

The elements below are also included in this template:

Header, Business Process Flow, Project Management Tabs and Charter Columns

BrightWork 365 Project
Active for less than one mi...

Initiate (< 1 Min)

Plan

Execute

Close Out

Charter

Status

Status Reports

Team

Gantt

My Work

Documents

Actions

Issues

Project Settings

Approvals

Related

Name

* Project Standard

Portfolio

* Portfolio A

Created On

3/8/2024

Project Reference

Proj-001007

Program

* Program A

1:22 PM

Project Manager

* Jonathan Weisglass (Busy)

Source Request

Project Sponsor

* Jonathan Weisglass (Busy)

Teams Channel

Schedule Settings

Project Type

Strategic

Priority

Description

Objectives

Status

Schedule

Project Status

* Not Started

% Complete

0

% Complete

Comment

Current Start

Current Finish

Target Start

Target Finish

Indicators

Health

Red

Yellow

Green

Health Comment

Time

Red

Yellow

Green

Time Comment

Scope

Red

Yellow

Green

Scope Comment

See the [Project Status Reporting](#) article for more information.

Status Reports

The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Status Reporting](#) for details.

Stages

- Stages are automatically listed in the Stages tab after being created in the Gantt tab (a Gantt task can be set to be a Stage type task in Task Details). Manually adding stages from within the Stages section is not supported.

Task Information

GENERAL

DEPENDENCY

RESOURCES

TASK DETAILS

Task Type

ID

Stage

▼ 1,829.00

- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the top of the project.

BrightWork Project

Active for 37 hours

Initiate (37 Hrs)

Plan

Charter

Status

Status Reports

Team

Stages

Gantt

My Work

Documents

A

Project Stages

	Curre...	Name	Current Start	Current
	●	Initiate	6/13/2022	6/14/2022
	○	Plan	6/15/2022	6/15/2022
	○	Execute	6/16/2022	6/16/2022

- The **Current Stage** detail values are tied to the progression of tasks within that Stage in the Gantt.

Scale-Up	Scale-Up	16%
Scale-Up - Task-1	Scale-Up - Task-1	
Scale-Up - Deliverable-1	Scale-Up - Deliverable-1	
Scale-Up - Deliverable-2	Scale-Up - Deliverable-2	

- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information.

Scale-Up

Project Task · Project Stage

Scale-Up

Name

Project Stage

Name	Scale-Up	Current Start	6/2/2021
Progress	In Progress	Current Finish	6/4/2021
Project	JW Project 910	Target Start	6/2/2021
Project Task Type	Stage	Target Finish	6/4/2021
Description	---	% Complete	16

Actions

Log project actions, decisions, and changes. See the [Actions](#) article for details.

Issues

In the **Issues** section you can create a new issue by clicking **+ New Issue** (do not use the Add Existing Issue option).

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.

Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.

Delay in onboarding suppliers

Issue

Not Started

Issue Status

Powdered Cream Cheese for Africa

Project

Product Operations

Program

Issue

Reference

Name

*

Delay in onboarding suppliers

Issue Reference

IS-001181

Portfolio

Contoso Projects

Program

Product Operations

Project

Powdered Cream Cheese for Africa

Escalation

Program

--Select--

Project

Program

Portfolio

Project Structured

The elements below are included in this template:

Header, Business Process Flow, Project Management Tabs and Charter Columns

BrightWork 365 Project

Active for less than one mi...

Initiate (< 1 Min)

Plan

Execute

Close Out

Charter
Status
Status Reports
Team
Stages
Gantt
My Work
Documents
Actions
Issues
Risks
Costs
Communications
Project Settings
Approvals
Related

Name	* Project Structured	Portfolio	* Portfolio A	Created On	3/8/2024
Project Reference	Proj-001008	Program	* Program A		1:24 PM
Project Manager	* Jonathan Weisglass (Busy)			Source Request	---
Project Sponsor	* Jonathan Weisglass (Busy)			Teams Channel	---
				Schedule Settings	---

Project Type	Strategic	Priority	---
Description	---	Objectives	---
Exit Criteria	---	Overall Project Risk	---
Approval Requirements	---	Economic Impact	---
Out of Scope	---		

Status

Charter
Status
Status Reports
Team
Stages
Gantt
My Work
Documents
Actions
Issues
Risks
Costs
Communications
Project Settings
Approvals
Related

Schedule

Project Status
* Not Started

% Complete

0

% Complete Comment

Current Start

Current Finish

Target Start

Target Finish

Indicators

Health	Red	Yellow	Green
Health Comment	---		
Cost	Red	Yellow	Green
Cost Comment	---		
Time	Red	Yellow	Green
Time Comment	---		
Scope	Red	Yellow	Green
Scope Comment	---		

See the [Project Status Reporting](#) article for more information.

Status Reports

The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Status Reporting](#) for details.

Stages

- Stages are automatically listed in the Stages tab after being created in the Gantt tab (a Gantt task can be set to be a Stage type task in Task Details). Manually adding stages from within the Stages section is not supported.

Task Information	
GENERAL	DEPENDENCY
RESOURCES	TASK DETAILS
Task Type	ID
Stage	1,829.00

- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the top of the project.

BrightWork Project		Initiate (37 Hrs)		Plan
Active for 37 hours				
Charter	Status	Status Reports	Team	Stages
Project Stages				
	Curre...	Name	Current Start	Current
		Initiate	6/13/2022	6/14/20
		Plan	6/15/2022	6/15/20
		Execute	6/16/2022	6/16/20

- The **Current Stage** detail values are tied to the progression of tasks within that Stage in the Gantt.

Scale-Up	Scale-Up	16%
Scale-Up - Task-1	Scale-Up - Task-1	
Scale-Up - Deliverable-1	Scale-Up - Deliverable-1	
Scale-Up - Deliverable-2	Scale-Up - Deliverable-2	

- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information.

Scale-Up

Project Task · Project Stage

Scale-Up

Project Stage

Name	Scale-Up	Current Start	6/2/2021
Progress	In Progress	Current Finish	6/4/2021
Project	JW Project 910	Target Start	6/2/2021
Project Task Type	Stage	Target Finish	6/4/2021
Description	<div>% Complete</div> <div> <div></div> <div>16</div> </div>		

Actions

Log project actions, decisions, and changes. See the [Actions](#) article for details.

Issues

In the **Issues** section you can create a new issue by clicking **+ New Issue** (do not use the Add Existing Issue option).

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.

Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.

The screenshot shows a web form for an issue titled "Delay in onboarding suppliers". At the top, it indicates the issue status is "Not Started" and lists the project as "Powdered Cream Cheese for Africa" and the program as "Product Operations". Below this, the "Issue" section is expanded, showing a "Reference" table with fields for Name, Issue Reference, Portfolio, Program, and Project. At the bottom of this section, an "Escalation" dropdown menu is open, showing options: "--Select--", "Project", "Program" (which is highlighted), and "Portfolio".

Reference	
Name	* Delay in onboarding suppliers
Issue Reference	IS-001181
Portfolio	Contoso Projects
Program	Product Operations
Project	Powdered Cream Cheese for Africa
Escalation	Program

- Select--
- Project
- Program
- Portfolio

Risks

In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

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 can be added to the project's associated program or portfolio by clicking into the risk and choosing the relevant escalation location.

Manufactured components arrive late

Risk

Saravana Barathi | Contoso Projects | Product Operations | Powdered Cream

Logged By | Portfolio | Program | Project

Risk

Exposure	0
Risk Status	Identified
Risk Monitor	---
Escalation	<div>Project</div> <div> --Select-- Project Program Portfolio </div>
Risk Management Rating	

Header, Business Process Flow, Project Management Tabs and Charter Columns

New Product Introduction
Active for less than one mi...

<

Business Case (< 1 Min)

Development

Scale-Up

Launch

Standard Product

Charter

Status

Status Reports

Team

Stages

Gantt

My Work

Documents

Actions

Issues

Risks

Costs

Communications

Project Settings

Approvals

Related

>

Name

*

New Product Introduction

Portfolio

*

Portfolio A

Created On

3/8/2024

Project Reference

Proj-001009

Program

*

Program A

1:26 PM

Project Manager

*

Jonathan Weisglass

Source Request

Project Sponsor

*

Jonathan Weisglass

Teams Channel

Schedule Settings

Project Type

Strategic

Priority

Description

Overall Project Risk

Objectives

Exit Criteria

Approval Requirements

Economic Impact

Out of Scope

Status

Charter

Status

Status Reports

Team

Stages

Gantt

My Work

Documents

Actions

Issues

Risks

Costs

Communications

Project Settings

Approvals

Related

Schedule

Project Status

*

Not Started

% Complete

0

% Complete Comment

📅

Current Start

📅

Current Finish

📅

Target Start

📅

Target Finish

Indicators

Health

Red

Yellow

Green

Health Comment

Cost

Red

Yellow

Green

Cost Comment

Time

Red

Yellow

Green

Time Comment

Scope

Red

Yellow

Green

Scope Comment

See the [Project Status Reporting](#) article for more information.

Status Reports

The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Status Reporting](#) for details.

Stages

- Stages are automatically listed in the Stages tab after being created in the Gantt tab (a Gantt task can be set to be a Stage type task in Task Details). Manually adding stages from within the Stages section is not supported.

Task Information

GENERAL

DEPENDENCY

RESOURCES

TASK DETAILS

Task Type

ID

Stage

▼

1,829.00

- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the top of the project.

BrightWork Project

Active for 37 hours

Initiate (37 Hrs)

Plan

Charter

Status

Status Reports

Team

Stages

Gantt

My Work

Documents

A

Project Stages

	Curre...	Name	Current Start	Current
	●	Initiate	6/13/2022	6/14/2022
	○	Plan	6/15/2022	6/15/2022
	○	Execute	6/16/2022	6/16/2022

- The **Current Stage** detail values are tied to the progression of tasks within that Stage in the Gantt.

Scale-Up	Scale-Up	16%
Scale-Up - Task-1	Scale-Up - Task-1	
Scale-Up - Deliverable-1	Scale-Up - Deliverable-1	
Scale-Up - Deliverable-2	Scale-Up - Deliverable-2	

- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information.

Scale-Up

Project Task · Project Stage

Scale-Up

Name

Project Stage

Name	* Scale-Up	Current Start	6/2/2021	
Progress	In Progress	Current Finish	6/4/2021	
Project	* JW Project 910	Target Start	6/2/2021	
Project Task Type	Stage	Target Finish	6/4/2021	
Description	---	% Complete	16	

Actions

Log project actions, decisions, and changes. See the [Actions](#) article for details.

Issues

In the **Issues** section you can create a new issue by clicking **+ New Issue** (do not use the Add Existing Issue option).

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.

Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.

Delay in onboarding suppliers

Issue

Not Started

Issue Status

Powdered Cream Cheese for Africa

Project

Product Operations

Program

Issue

Reference

Name

*

Delay in onboarding suppliers

Issue Reference

IS-001181

Portfolio

Contoso Projects

Program

Product Operations

Project

Powdered Cream Cheese for Africa

Escalation

Program

--Select--

Project

Program

Portfolio

Risks

In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

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 can be added to the project's associated program or portfolio by clicking into the risk and choosing the relevant escalation location.

Manufactured components arrive late

Risk

Saravana Barathi

Logged By

Contoso Projects

Portfolio

Product Operations

Program

Powdered Cre

Project

Risk

Exposure

0

Risk Status

Identified

Risk Monitor

Escalation

Project

--Select--

Project

Program

Portfolio

Risk Management Rating

Risk Status Values

- Identified
- Mitigated
- Occurred
- Managed
- Closed

Assignment Status Values

- Not Started
- In Progress
- Completed

Costs

The Costs tab provides a comprehensive method for capturing and tracking project budgets and actual costs at the project and individual item levels. See the [Costs](#) article for details.

Communications

Initiate and save project related Emails and Appointments directly in the BrightWork 365 app and save these items as well as Phone Call details and Notes, within associated projects. See the [Communications](#) article for details.

Product Update

The elements below are included in this template:

Header, Business Process Flow, Project Management Tabs and Charter Columns

Product Update
Active for less than one mi...

Chartering (< 1 Min)

Execution

Close Out

Closed

Charter

Status

Status Reports

Team

Stages

Gantt

My Work

Documents

Actions

Issues

Risks

Costs

Communications

Project Settings

Approvals

Related

Name

Product Update

Date Due

Created On

3/8/2024

1:28 PM

Project Reference

Proj-001010

Portfolio

Portfolio A

Source Request

Project Manager

Jonathan Weisglass (Busy)

Program

Program A

Teams Channel

Project Sponsor

Jonathan Weisglass (Busy)

Location

Schedule Settings

Group Manager

Project Type

Strategic

Priority

Description

Objectives

Exit Criteria

Out of Scope

Approval Requirements

Economic Impact

Overall Project Risk

Group Manager Field

The list of users returned in the **Group Manager** drop-down field that is in the **Charter** tab of Product Update projects is limited to the users added to the **Senior Managers** Dynamics Team found in **Admin Area | Dynamics Teams**.

People

Users

Dynamics Teams

Accounts

Contacts

Other

Microsoft Teams

Locations

←

Show Chart

+ New

Delete

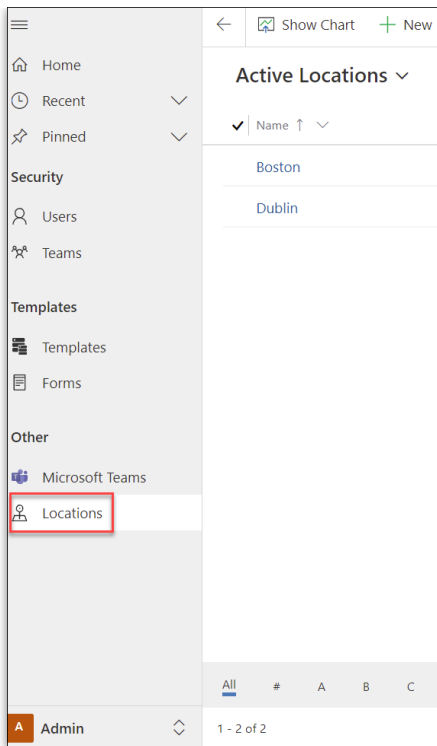
Local Business Owner Teams

Team Name

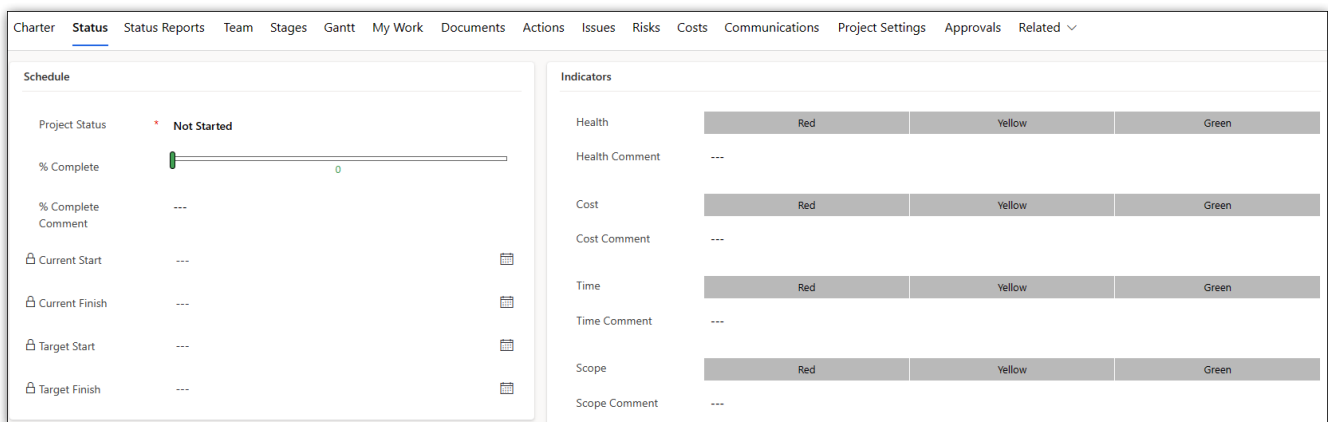
Senior Managers

Location Field

The **Location** drop-down menu choices that are found in the Charter tab of the Product Update template are configured in **Admin Area | Locations**.



Status



See the [Project Status Reporting](#) article for more information.

Status Reports

The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Status Reporting](#) for details.

Stages

- Stages are automatically listed in the Stages tab after being created in the Gantt tab (a Gantt task can be set to be a Stage type task in Task Details). Manually adding stages from within the Stages

section is not supported.

Task Information	
GENERAL	DEPENDENCY
RESOURCES	TASK DETAILS
Task Type	ID
Stage	1,829.00

- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the top of the project.

BrightWork Project		Initiate (37 Hrs)		Plan
Active for 37 hours				
Charter	Status	Status Reports	Team	Stages
Project Stages				
<input type="radio"/>	Current...	Name	Current Start	Current
<input checked="" type="radio"/>		Initiate	6/13/2022	6/14/2022
<input type="radio"/>		Plan	6/15/2022	6/15/2022
<input type="radio"/>		Execute	6/16/2022	6/16/2022

- The **Current Stage** detail values are tied to the progression of tasks within that Stage in the Gantt.

Scale-Up	Scale-Up	16%
Scale-Up - Task-1	Scale-Up - Task-1	
Scale-Up - Deliverable-1	Scale-Up - Deliverable-1	
Scale-Up - Deliverable-2	Scale-Up - Deliverable-2	

- Click on a stage link to view additional details about the stage including description and status information.

Scale-Up

Project Task · Project Stage

Project Stage

Name	Scale-Up	Current Start	6/2/2021
Progress	In Progress	Current Finish	6/4/2021
Project	JW Project 910	Target Start	6/2/2021
Project Task Type	Stage	Target Finish	6/4/2021
Description		% Complete	<div><div></div></div> 16

Actions

Log project actions, decisions, and changes. See the [Actions](#) article for details.

Issues

In the **Issues** section you can create a new issue by clicking **+ New Issue** (do not use the Add Existing Issue option).

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.

Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.

The screenshot shows a web form for an issue titled "Delay in onboarding suppliers". At the top, it indicates the issue status is "Not Started", the project is "Powdered Cream Cheese for Africa", and the program is "Product Operations". Below this, the "Issue" section is expanded, showing a "Reference" table with fields for Name, Issue Reference, Portfolio, Program, and Project. The "Escalation" field is highlighted with a red box, and its dropdown menu is open, showing options: "--Select--", "Project", "Program" (which is selected and highlighted), and "Portfolio".

Reference	
Name	* Delay in onboarding suppliers
Issue Reference	IS-001181
Portfolio	Contoso Projects
Program	Product Operations
Project	Powdered Cream Cheese for Africa
Escalation	Program

- Select--
- Project
- Program
- Portfolio

Risks

In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

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 can be added to the project's associated program or portfolio by clicking into the risk and choosing the relevant escalation location.

Manufactured components arrive late

Risk

Saravana Barathi

Contoso Projects

Product Operations

Powdered Cream

Logged By

Portfolio

Program

Project

Risk

Exposure	0
Risk Status	Identified
Risk Monitor	---
Escalation	<div>Project</div> <div> --Select-- Project Program Portfolio </div>
Risk Management Rating	