

# BrightWork 365 Starter Project Templates

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

**BrightWork365** | Template Spectrum

TEMPLATES	LEVEL OF MANAGEMENT			
	1	2	3	
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 Product Update	Project Structured New Product Introduction
		Programs And Portfolios	Dashboards and KPIs	Dashboards and KPIs Risks and Issues
Collaboration	Microsoft Teams for Communication			
	SharePoint Online for Document Management			
Automation And Integration	Power Automate for Workflows			
	Power BI for Reporting			
	Power Apps for Custom Forms			

## Project Management Context

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. The templates described in this article are part of a process spectrum ranging from light to more formally structured.

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

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 at the higher end of the complexity spectrum.
- The **New Product Introduction** starter template relates to the submission of a new product 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. It follows a gated approach with approvals required to move from the Charter stage into Execution, and to close out the project.

### **Tip** Decide the Project Management Process

- Your organization may have guidelines or templates for different project types, which will make this step simpler, as you will be selecting a pre-defined approach and then perhaps tailoring it.
- If you are unsure which project template would be the best fit for a particular initiative, think through how you intend to manage the project and how much project management rigor you will apply. BrightWork 365 can help alleviate any uncertainty that might remain regarding the template choice with the inclusion of the [Form Configurator](#) tool.
- With the Form Configurator you can begin with a middle-of-the-spectrum template such as Project Standard 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. The different Tabs, Sections, and Columns that are hidden in Project Starter Templates can be turned on or off via the Form Configurator, giving you great flexibility with regard to project management process.

The screenshot shows the 'Form Configurator' interface for the 'Project Light' template. It features a list of sections with expandable arrows and checkboxes to toggle their visibility. The sections and their current states are as follows:

Section	Checked
Charter	Yes
Status	Yes
Status Reports	No
Team	Yes
Stages	No
Gantt	Yes
My Work	Yes
Documents	Yes
Actions	No
Issues	No
Risks	No
Costs	No

Form Configurator Screen

## All Templates

**Tip** Templates that are associated with a [Content Template](#) will be prepopulated with

project data.

#### Note

- Document Management Interface: A SharePoint Online document interface will display throughout projects created with release 2025-2 or later, and if your organization has opted into the Graph API settings (typically done during the installation process). Otherwise, the same document subgrid present on pre-2025-2 Projects will be displayed. See [Document Management](#) for details.
- 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

The Charter tab contains high level metadata about the project, including the project title, stakeholder information, and a link to the associated [Microsoft Teams Channel](#), if one has been configured for the project.

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 fields can later be changed by a user with elevated privileges, and all associated child items will be automatically adjusted to reflect these value changes.

When a Portfolio/Program value is changed, a process will run in the background to reconcile [security access](#) with these changes. When all the associated security changes have been completed and the portfolio/program move is done, an email notification will automatically be sent to the project manager and the user that initiated the change. If there is a process failure, an email notification will automatically be sent to the user that initiated the change, and the Flow owner.

The following can be specified in [Project Templates](#) and will populate corresponding columns in new Projects:

- Content Template
- Portfolio

- Program
- Project Manager
- Project Sponsor
- Project Type

**Note** When the back arrow is clicked while on the Charter tab, the Project form will reload rather than load the view or record from which you opened the project record.

## Schedule Settings

 Schedule Settings  Acme Solution Deployment

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. See [Schedule Settings](#) for more information.

## Status

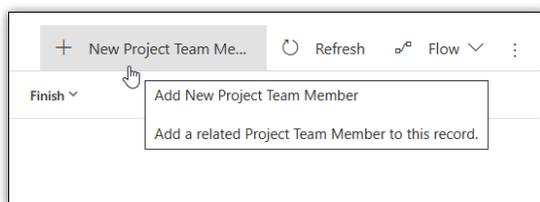
The **Status** tab allows the project manager to set current project metrics and KPIs.

See [Project Status Reporting](#) 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**.



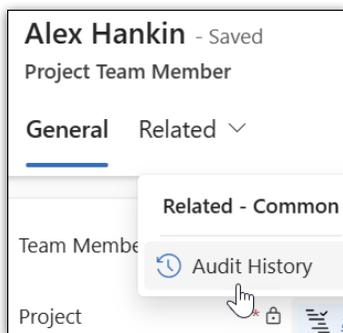
Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can add new team members to the Team tab directly.

**Tip** If you would like to add multiple users to the Team tab at once rather than individually, you can add a task to the Gantt, add all resources to the single task, wait for

the team members to be created in the Team tab, and then delete the task. Note that the task's Start & Finish dates will be present in the Team tab for these users.

**Note** Also see [Project Security & Access](#) for project security related info related to project team members.

You can audit various project team member related changes, including project access security related changes, by clicking on **username > Related > Audit History**.



**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.

## Tasks

The Tasks tab contains two sub-tabs, **Gantt** and **Grid**.

### 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. For additional information see [Tasks Gantt](#).

**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

## Grid

The Grid provides a quick and easy method for users to enter project tasks and manage their Work Breakdown Structure independently while synchronizing it with the Gantt.

For additional information see [Tasks Grid](#).

## 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 are not available on the Complete column. Sorting is not available on any calculated columns, i.e., Due Date.

## Documents

You can create new documents or upload existing documents in the **Documents** tab of a Project record.

See [Document Management](#) for details.

**Note** Document views will appear differently (not as a SharePoint subgrid) for projects created prior to BrightWork 365 version 2025-2.

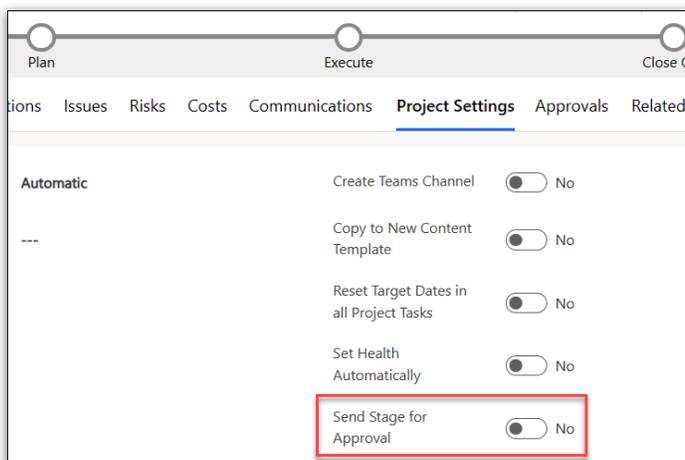
## Project Settings

Only a project's actual project manager and users with the **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 reset the target dates in all project tasks (baseline the schedule), and other administrative tasks.

### 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.

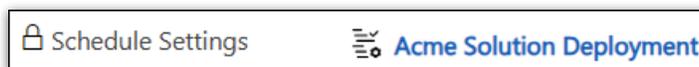


### Approval History

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 multiple project-specific options including calendar settings, overriding global calendar settings which will adjust the project schedule accordingly. See [Schedule Settings](#) for more information.

## 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.

**Initiate to Plan**

Approval Required

**Plan to Execute**

Approval Required

**Execute to Close Out**

Approval Required

See [Project Stage Approval Process](#) and [BrightWork Approvals](#) 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.

### Project Light

The elements below are included in the Project Light template:

## Business Process Flow & Tabs

BrightWork 365 Project  
Active for 5 months

⦿  
Initiate (5 Mo)

○  
Plan

○  
Execute

○  
Close Out

< >

Charter
Status
Tasks
My Work
Documents
Project Settings
Approvals
Related ▼
Form assist

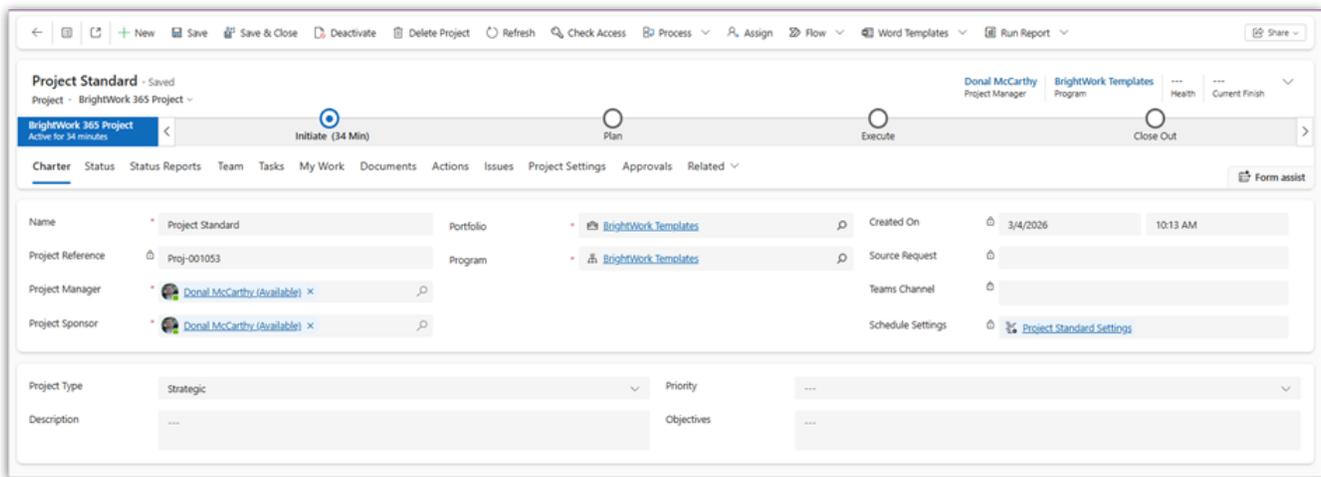
Name	* Implement new CRM Project (Project Lig...	Portfolio	* <a href="#">Innovate IT Services Portfolio</a>	Created On	🕒 9/25/2025 8:36 AM
Project Reference	🕒 Proj-001024	Program	* <a href="#">Internal Continuous Improvement Program (IIS)</a>	Source Request	🕒
Project Manager	* <a href="#">AM Alan Morgan (Available)</a> ✕ 🔍	Teams Channel	🕒	Schedule Settings	🕒 <a href="#">Implement new CRM Project (Project Light...</a>
Project Sponsor	* <a href="#">AM Alan Morgan (Available)</a> ✕ 🔍				

Project Type	Strategic	Priority	---
Description	---	Objectives	---

### Project Standard

The elements below are included in the Project Standard template:

## Business Process Flow & Tabs



## 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 [Project Status Reporting](#) for details.

## Actions

Log project actions, decisions, and changes. See [Actions](#) 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** | **Powdered Cream Cheese for Africa** | **Product Operations**  
Issue Status | Project | 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 the Project Structured template:

## Business Process Flow & Tabs

**Project Structured** - Saved  
Project - BrightWork 365 Project

Donal McCarthy Project Manager | BrightWork Templates Program | Health | Current Finish

BrightWork 365 Project Active for less than one minute

Initiate (< 1 Min) | Plan | Execute | Close Out

Charter | Status | Status Reports | Team | Stages | Tasks | My Work | Documents | Actions | Issues | Risks | Costs | Lessons Learned | Communications | Project Settings | Approvals | Related

Form assist

Name	* Project Structured	Portfolio	* BrightWork Templates	Created On	3/4/2026	10:13 AM
Project Reference	Proj-001054	Program	* BrightWork Templates	Source Request		
Project Manager	Donal McCarthy (Available)			Teams Channel		
Project Sponsor	Donal McCarthy (Available)			Schedule Settings		Project Structured Settings

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

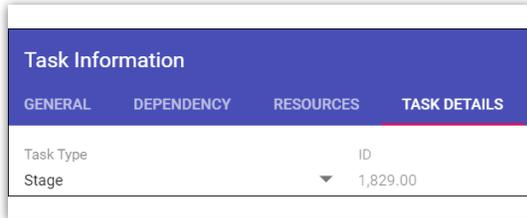
## Status Reports

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

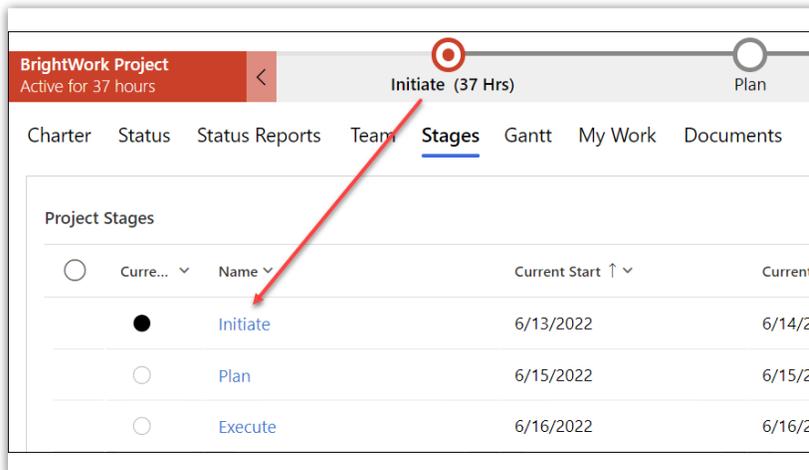
Project Status Reporting for details.

## 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.



- 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.



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



- 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, and to access the [document library associated with the project](#).

**Scale-Up**  
Project Task · Project Stage ▾ Scale-  
Name

**Project Stage**

Name	* <b>Scale-Up</b>	🔒 Current Start	6/2/2021	📅
🔒 Progress	<b>In Progress</b>	🔒 Current Finish	6/4/2021	📅
🔒 Project	* 📄 <b>JW Project 910</b>	🔒 Target Start	6/2/2021	📅
Project Task Type	<b>Stage</b>	🔒 Target Finish	6/4/2021	📅
Description	---	% Complete		

**Documents**

+ New ▾    ↑ Upload ▾    📄 Edit in grid view

Documents > **General**

📄 Name ▾

---

📄 Document-A.docx

---

📄 Document-B.docx    ...

## Actions

Log project actions, decisions, and changes. See [Actions](#) 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** | **Powdered Cream Cheese for Africa** | **Product Operations**  
Issue Status | Project | 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	<div style="border: 1px solid gray; padding: 2px;">           Program         </div> <ul style="list-style-type: none"> <li>--Select--</li> <li>Project</li> <li style="background-color: #f0f0f0;">Program</li> <li>Portfolio</li> </ul>

## 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.

### Tip

- Risk Monitor: Person assigned overall responsibility for tracking the progress of a risk throughout its lifecycle.
- Mitigation Actions Assignee: Person responsible for taking steps to reduce the probability or impact of a risk to a project.
- Contingency Actions Assignee: Person responsible for implementing the actions required to mitigate any project impacts of a risk that has occurred.

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 Cre  
 Logged By | Portfolio | Program | Project

**Risk**

Exposure	0
Risk Status	Identified
Risk Monitor	---
Escalation	Project
Risk Management Rating	--Select-- Project Program Portfolio

## Risk Status Values

- Identified
- Mitigated
- Occurred
- Managed
- Closed

## Assignment Status Values

- Not Started
- In Progress
- Completed

**Tip** Individual Mitigation Action Assignments and Contingency Action Assignments can be marked as Completed without the overall Risk Status being set to Closed.

See [Risks](#) for additional information.

## 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.

## Lessons Learned

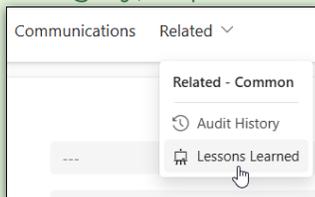
Lessons Learned are documented insights, successes, failures, and recommendations

captured from a project's experiences to improve future performance. They are a core component of project management and are typically collected during the Closing phase of (or iteratively throughout) the project.

Users add a new Lessons Learned item by clicking the **+ New Lesson Learned** button in the Lessons Learned tab of a project. This will load the quick create form for Lessons Learned in the side panel.

Project Managers can delete any Lessons Learned item in any project they have access to, and the BrightWork PMO Manager can delete any Lessons Learned item. Team Members can only delete Lessons Learned items they have added themselves.

**Tip** You can view Lessons Learned entries from across projects at the Program and Portfolio levels, where they can be grouped-by/sorted/filtered with attributes such as Category, Impact Outcome, and Project.



The following **columns** are available in the Lessons Learned tab:

## Name

Enter a descriptive and unique title that summarizes the key takeaway of this lesson learned.

## Logged By

Select your name or the name of the team member primarily responsible for documenting this lesson.

## Category

Select the area this lesson primarily relates to, such as 'Business,' 'Project,' 'Team,' or 'Other.'

## Description

Clearly describe what happened and the specific lesson that was derived from it.

## Lesson Reference

This is a unique identifier used for tracking and referencing this specific lesson in reports.

## Date Logged

Select the date this lesson was formally entered.

## Impact Outcome

Select 'Positive' (Success), 'Negative' (Failure/Issue), or 'Neutral' (Observation) to classify the outcome.

## Recommendation

The suggested change or action that should be taken.

## 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.

## New Product Introduction

The elements below are included in the New Product Introduction template:

## Business Process Flow & Tabs

**New Product Introduction - Saved**  
Project - New Product Introduction

Alex Hankin Project Manager | Contoso Program Program | Health | --- Current Finish

New Product Introduction (Active for 5 hours) | Business Case (5 Hrs) | Development | Scale-Up | Launch | Standard Product

Charter | Status | Status Reports | Team | Stages | Tasks | My Work | Documents | Actions | Issues | Risks | Costs | Communications | Project Settings | Approvals | Related | Form assist

Name	New Product Introduction	Portfolio	Contoso Portfolio	Created On	3/13/2026 5:50 PM
Project Reference	Proj-001011	Program	Contoso Program	Source Request	
Project Manager	Alex Hankin (Offline)			Teams Channel	
Project Sponsor	Anne Wallace (Offline)			Schedule Settings	New Product Introduction Settings

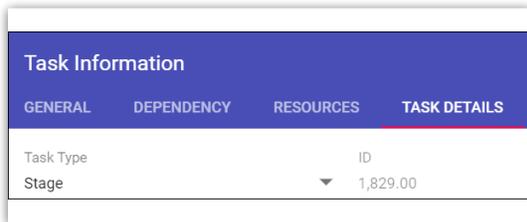
Project Type	Strategic	Priority	---
Description	---	Overall Project Risk	---
Objectives	---	Exit Criteria	---
Approval Requirements	---	Economic Impact	---
Out of Scope	---		

# Status Reports

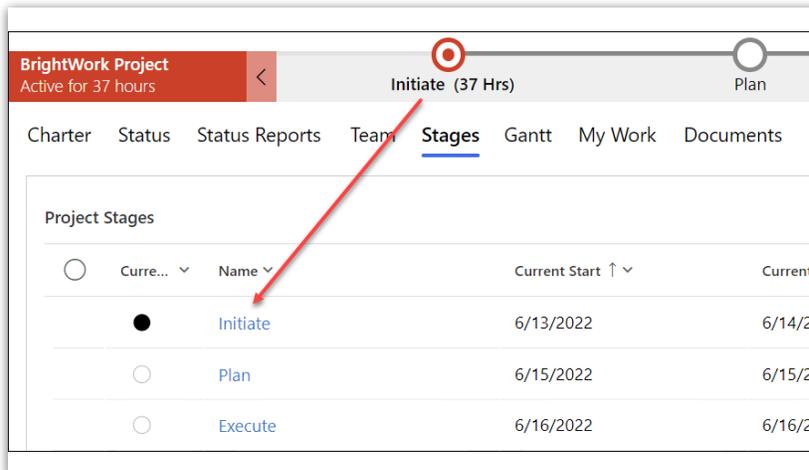
The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Project Status Reporting](#) for details.

## 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.



- 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.



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



- 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, and to access the [document library associated with the project](#).

**Scale-Up**  
Project Task · Project Stage ▾ Scale-  
Name

**Project Stage**

Name	* <b>Scale-Up</b>	🔒 Current Start	6/2/2021	📅
🔒 Progress	<b>In Progress</b>	🔒 Current Finish	6/4/2021	📅
🔒 Project	* 📄 <b>JW Project 910</b>	🔒 Target Start	6/2/2021	📅
Project Task Type	<b>Stage</b>	🔒 Target Finish	6/4/2021	📅
Description	---	% Complete		

**Documents**

+ New ▾    ↑ Upload ▾    📄 Edit in grid view

Documents > **General**

📄 Name ▾

---

📄 Document-A.docx

---

📄 Document-B.docx    ...

## Actions

Log project actions, decisions, and changes. See [Actions](#) 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** | **Powdered Cream Cheese for Africa** | **Product Operations**  
Issue Status | Project | 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   v --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.

### Tip

- Risk Monitor: Person assigned overall responsibility for tracking the progress of a risk throughout its lifecycle.
- Mitigation Actions Assignee: Person responsible for taking steps to reduce the probability or impact of a risk to a project.
- Contingency Actions Assignee: Person responsible for implementing the actions required to mitigate any project impacts of a risk that has occurred.

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 Cre

Logged By | Portfolio | Program | Project

**Risk**

Exposure	0
Risk Status	Identified
Risk Monitor	---
Escalation	Project
Risk Management Rating	--Select-- Project Program Portfolio

## Risk Status Values

- Identified
- Mitigated
- Occurred
- Managed
- Closed

## Assignment Status Values

- Not Started
- In Progress
- Completed

**Tip** Individual Mitigation Action Assignments and Contingency Action Assignments can be marked as Completed without the overall Risk Status being set to Closed.

See [Risks](#) for additional information.

## 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 the Product Update template:

## Business Process Flow & Tabs

The screenshot shows the 'Product Update' project form in Dynamics 365. The form is titled 'Product Update - Saved' and is currently in the 'Chartering (24 Hrs)' phase. The top navigation bar includes options like '+ New', 'Save', 'Save & Close', 'Deactivate', 'Delete Project', 'Refresh', 'Check Access', 'Process', 'Assign', 'Flow', 'Word Templates', and 'Run Report'. The main content area is divided into several sections: 'Charter' (selected), 'Status', 'Status Reports', 'Team', 'Stages', 'Tasks', 'My Work', 'Documents', 'Actions', 'Issues', 'Risks', 'Costs', 'Lessons Learned', 'Communications', 'Project Settings', 'Approvals', and 'Related'. The 'Charter' section contains fields for Name, Project Reference, Project Manager, Project Sponsor, and Group Manager. The 'Project Manager' and 'Project Sponsor' fields are populated with 'Donal McCarthy (Available)'. The 'Group Manager' field is empty. Below these fields are sections for Project Type, Description, Exit Criteria, Approval Requirements, and Overall Project Risk.

## Group Manager Field

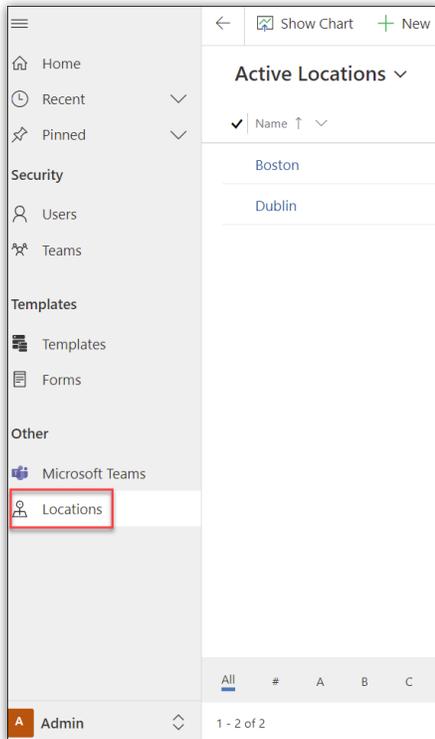
The list of users returned in the **Group Manager** drop-down field that is in the **Charter** tab of Product Update projects is limited to the users added to the **Senior Managers** Dynamics Team found in **Admin Area | Dynamics Teams**.

The screenshot shows the 'People' list in Dynamics 365. The list is filtered to show 'Local Business Owner Teams'. The 'Senior Managers' team is highlighted. The list includes columns for 'Team Name' and 'Users'. The 'Senior Managers' team is the only one listed.

## 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**.

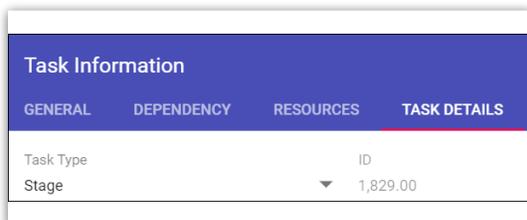


## Status Reports

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 [Project 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.



- 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

Current Stage	Name	Current Start	Current Finish
●	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 16%

Scale-Up - Task-1

Scale-Up - Deliverable-1

Scale-Up - Deliverable-2

- Click on a stage link to view additional details about the stage including description and status information, and to access the [document library associated with the project](#).

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	16

Documents

+ New Upload Edit in grid view

Documents > General

Name
Document-A.docx
Document-B.docx

# Actions

Log project actions, decisions, and changes. See [Actions](#) 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 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, there is a section for "Reference" with the following details:

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

At the bottom of the form, there is an "Escalation" dropdown menu. The current selection is "Program", and the dropdown list is open, showing the following options: "--Select--", "Project", "Program" (highlighted), and "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.

## Tip

- Risk Monitor: Person assigned overall responsibility for tracking the progress of a risk

throughout its lifecycle.

- Mitigation Actions Assignee: Person responsible for taking steps to reduce the probability or impact of a risk to a project.
- Contingency Actions Assignee: Person responsible for implementing the actions required to mitigate any project impacts of a risk that has occurred.

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

The screenshot shows a risk management interface for a risk titled "Manufactured components arrive late". The interface includes a header with the user name "Saravana Barathi" and the logged-in by information. Below the header, there are tabs for "Contoso Projects", "Product Operations", and "Powdered Cre". The main content area shows the risk details: "Exposure" is 0, "Risk Status" is "Identified", and "Risk Monitor" is "---". The "Escalation" field is highlighted with a red box, and a dropdown menu is open, showing the following options: "Project", "--Select--", "Project", "Program", and "Portfolio".

## Risk Status Values

- Identified
- Mitigated
- Occurred
- Managed
- Closed

## Assignment Status Values

- Not Started
- In Progress
- Completed

**Tip** Individual Mitigation Action Assignments and Contingency Action Assignments can be marked as Completed without the overall Risk Status being set to Closed.

See [Risks](#) for additional information.

## 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.

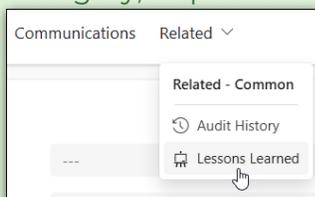
## Lessons Learned

Lessons Learned are documented insights, successes, failures, and recommendations captured from a project's experiences to improve future performance. They are a core component of project management and are typically collected during the Closing phase of (or iteratively throughout) the project.

Users add a new Lessons Learned item by clicking the **+ New Lesson Learned** button in the Lessons Learned tab of a project. This will load the quick create form for Lessons Learned in the side panel.

Project Managers can delete any Lessons Learned item in any project they have access to, and the BrightWork PMO Manager can delete any Lessons Learned item. Team Members can only delete Lessons Learned items they have added themselves.

**Tip** You can view Lessons Learned entries from across projects at the Program and Portfolio levels, where they can be grouped-by/sorted/filtered with attributes such as Category, Impact Outcome, and Project.



The following **columns** are available in the Lessons Learned tab:

### Name

Enter a descriptive and unique title that summarizes the key takeaway of this lesson learned.

### Logged By

Select your name or the name of the team member primarily responsible for documenting this lesson.

### Category

Select the area this lesson primarily relates to, such as 'Business,' 'Project,' 'Team,' or 'Other.'

## **Description**

Clearly describe what happened and the specific lesson that was derived from it.

## **Lesson Reference**

This is a unique identifier used for tracking and referencing this specific lesson in reports.

## **Date Logged**

Select the date this lesson was formally entered.

## **Impact Outcome**

Select 'Positive' (Success), 'Negative' (Failure/Issue), or 'Neutral' (Observation) to classify the outcome.

## **Recommendation**

The suggested change or action that should be taken.

## **Communications**

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