

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 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

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 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. 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 checkboxes to toggle their visibility. The sections and their 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

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												

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 the **Charter** and **Project Settings** tabs of 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. BrightWork Team Members can view the settings, and the project's actual Project Manager (not project managers generally), and users with the BrightWork PMO or System Admin role can edit the settings. These settings have a direct effect on the Gantt.

Calendar

Global Settings (read-only)

Global Settings are only editable in Admin Area > Global Settings, not from within a project.

- 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.
- Day Start: The hour of the day that Gantt task work starts.
- Break Start: The start hour of the day that Gantt task work is not done.
- Break Finish: The finish hour of the day that Gantt task work is not done.
- Day Finish: The hour of the day that Gantt task work finishes.
- Work Day Duration: Automatically calculated based on the times entered above.

Project Override Settings

The Project Override Settings will initially populate from the Global Settings. The project's actual project manager or BrightWork PMO Manager can then change the field values for the project as required.

Note The default out of the box Global Settings for Working Week is Monday - Friday, and for Working Hours is Day Start 8 am, Break Start 12 pm, Break Finish 1 pm, and Day Finish 5 pm.

Working Week

The Working Week can be configured to something other than the default Monday - Friday.

Day Start

The solution-wide hour of the day that Gantt task work starts.

Break Start

The solution-wide start hour of the day that Gantt task work is not done.

Break Finish

The solution-wide finish hour of the day that Gantt task work is not done.

Day Finish

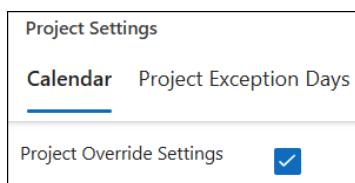
The solution-wide hour of the day that Gantt task work finishes.

Work Day Duration

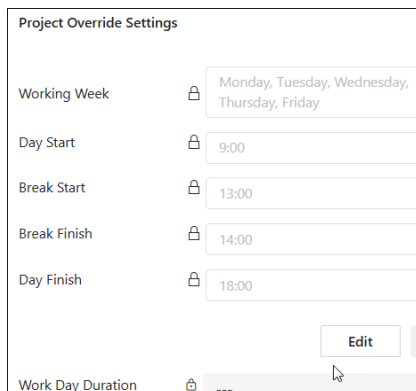
Automatically calculated based on the times entered in the fields above.

To configure Project Override Settings:

1. Go to the **Project Settings** tab within a project.
2. Click the **Schedule Settings** link.
3. Select the **Calendar** tab.
4. Check the box for Project Override Settings.



5. Click **Edit** at the bottom of the Project Override Settings section.



6. Select the project's Working Week and working hours.
7. Click **Save**.

Note After changes are made to the Project Override Settings, 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) which was initially applied to the project from [Global Settings](#). 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** (found in the overflow menu when not in full screen mode).
2. Fill out the Project Exception Days form.

Note

- Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can edit Project Exception Days.
- Project Exception Days affects all tasks in the project, including completed tasks. We strongly recommend not adding older historical 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).

Project Settings

- Default Access Level: See [Project Security Access](#)
- Virtual Scroll setting: See [Task Management](#)
- Default Scheduling Type: Choose between Fixed Duration, Fixed Work, and Fixed Unit as the default scheduling type for all new project tasks. See [Gantt Chart & Task Management](#) (Gantt Tabs > General > Scheduling Type).

Audit History

View a list of timestamped changes that were made to project settings.

Status

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

The screenshot shows the 'Status' tab in the BrightWork 365 Project interface. At the top, there is a navigation bar with the project name 'Widget Orange - Saved' and 'BrightWork 365 Project'. Below this is a progress bar with four stages: 'Initiate (< 1 Min)', 'Plan', 'Execute', and 'Close Out'. The 'Initiate' stage is currently active. The main content area is divided into two panels: 'Schedule' and 'Indicators'. The 'Schedule' panel shows 'Project Status' as 'Not Started', a progress bar at 0%, and various date fields for 'Current Start', 'Current Finish', 'Target Start', and 'Target Finish'. The 'Indicators' panel shows three rows of indicators: 'Health', 'Time', and 'Scope', each with 'Red', 'Yellow', and 'Green' status options and a 'Comment' field.

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**.

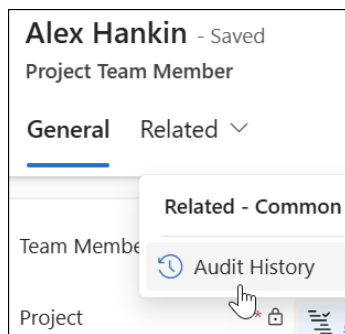
The screenshot shows a close-up of the 'Team' tab interface. At the top, there is a button labeled '+ New Project Team Me...' with a refresh icon and a 'Flow' dropdown menu. Below this, a dropdown menu is open, showing two options: 'Add New Project Team Member' and 'Add a related Project Team Member to this record.'

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 | BrightWork 365](#) 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.

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**

Type	Assignment Sta...	Due Date
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

The Documents tab is where you can create new Microsoft Office documents and upload existing documents. These files are stored in a document library project folder in your organization's BrightWork 365 SharePoint site. See [Document Management](#) for details.

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.
- For customers with custom forms: 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 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 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 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 been created for the project.

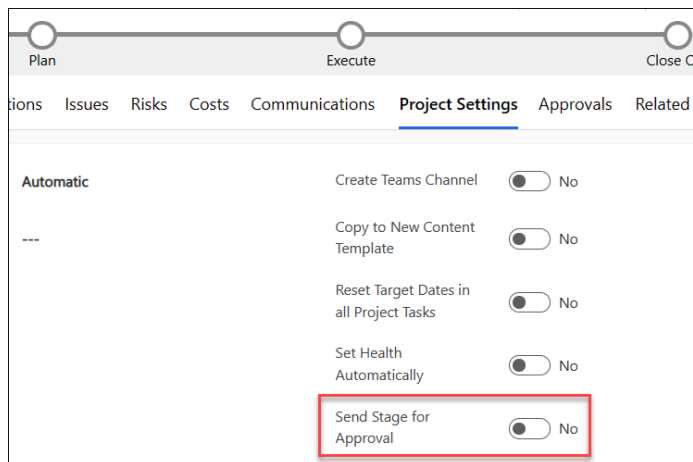
Gantt	My Work	Documents	Actions	Issues	Risks	Costs	Project Settings
 Reference Type	Automatic				Create Teams Channel	<input checked="" type="checkbox"/>	No
 Project Creation Method	Project Area				Copy to New Content Template	<input checked="" type="checkbox"/>	No
Microsoft Team	---				Reset Target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



Changing the Project's Associated Program or Portfolio

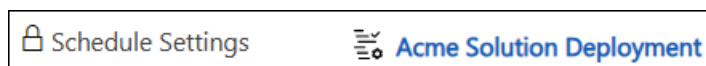
A project's program or portfolio can be changed in the **Project Settings** tab. The list of available choices will filter to what is available based on the chosen program or portfolio.

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.

Initiate to Plan
Approval Required <input type="checkbox"/>
Plan to Execute
Approval Required <input type="checkbox"/>
Execute to Close Out
Approval Required <input type="checkbox"/>

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		
	9/22/2023 5:02 ...	BW365 Admin	Update	Create	Yes	No		

Project Light

The elements below are included in the Project Light template:

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

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

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 included in the Project Standard template:

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

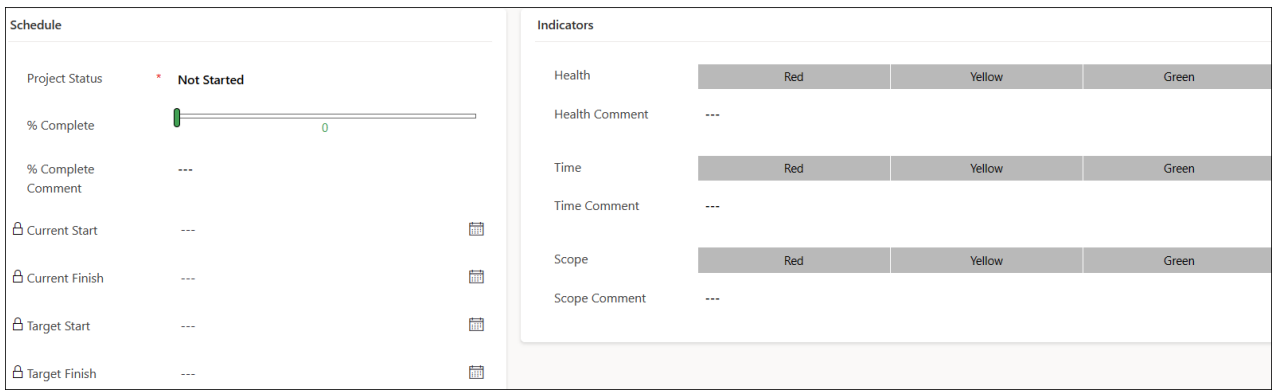
BrightWork 365 Project Active for less than one mi... <

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



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.

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 | **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

Project Structured

The elements below are included in the Project Structured 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 v

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

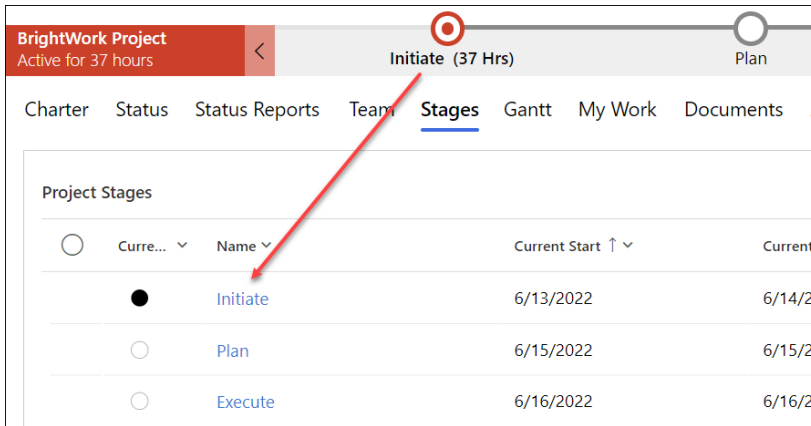
The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Status Reporting](#) for details.

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
Task Type	ID
Stage	▼ 1,829.00

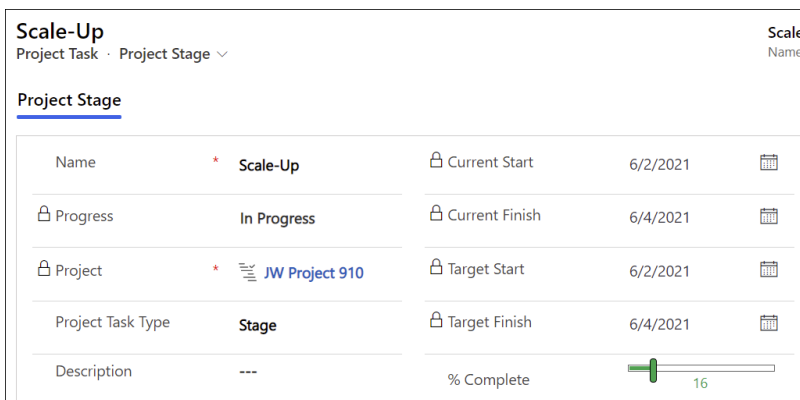
- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the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



- 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.



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 the 'Delay in onboarding suppliers' issue page. At the top, it displays the issue status as 'Not Started' and the project as 'Powdered Cream Cheese for Africa'. Below this, there is a section titled 'Reference' containing a table with the following data:

Name	
Issue Reference	IS-001181
Portfolio	Contoso Projects
Program	Product Operations
Project	Powdered Cream Cheese for Africa

Below the table, there is an 'Escalation' dropdown menu. The current selection is 'Program', and the dropdown list shows the following options: '--Select--', 'Project', 'Program', 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.

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 | v

Risk Management Rating

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.

New Product Introduction

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

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

The screenshot shows the top section of a project charter. At the top, there is a navigation bar with tabs for 'Business Case (< 1 Min)', 'Development', 'Scale-Up', 'Launch', and 'Standard Product'. Below this is a secondary navigation bar with tabs for 'Charter', 'Status', 'Status Reports', 'Team', 'Stages', 'Gantt', 'My Work', 'Documents', 'Actions', 'Issues', 'Risks', 'Costs', 'Communications', 'Project Settings', 'Approvals', and 'Related'. The main content area is divided into two sections. The first section contains key project information: Name (New Product Introduction), Project Reference (Proj-001009), Project Manager (Jonathan Weisglass), and Project Sponsor (Jonathan Weisglass). The second section contains project details: Project Type (Strategic), Description, Objectives, Approval Requirements, and Out of Scope.

Status

The screenshot shows the 'Status' section of the project charter. It is divided into two main panels: 'Schedule' and 'Indicators'. The 'Schedule' panel shows the project status as 'Not Started' with a progress bar at 0%. It also lists key dates: Current Start, Current Finish, Target Start, and Target Finish. The 'Indicators' panel shows a grid of status indicators for Health, Cost, Time, and Scope, each with a 'Red', 'Yellow', and 'Green' status bar.

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
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				
Charter	Status	Status Reports	Team	Stages	Gantt	My Work	Documents	A
Project Stages	Curre...	Name	Current Start	Current t				
	●	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		Scale-Name	
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

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 | **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

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 detail page for 'Manufactured components arrive late'. At the top, it says 'Risk' and 'Logged By Saravana Barathi'. Below that, there are four tabs: 'Contoso Projects Portfolio', 'Product Operations Program', and 'Powdered Cre Project'. The 'Risk' section is highlighted with a blue underline. Below this, there are several fields: 'Exposure' with a value of '0', 'Risk Status' with a value of 'Identified', and 'Risk Monitor' with a value of '---'. The 'Escalation' field is highlighted with a red box and has a dropdown menu open showing options: 'Project', '--Select--', 'Project', 'Program', and 'Portfolio'. The 'Program' option is currently selected and highlighted.

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:

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

The screenshot displays the 'Product Update' template interface. At the top, a progress bar shows four stages: 'Chartering (< 1 Min)' (active), 'Execution', 'Close Out', and 'Closed'. Below the progress bar is a navigation menu with tabs: Charter, Status, Status Reports, Team, Stages, Gantt, My Work, Documents, Actions, Issues, Risks, Costs, Communications, Project Settings, Approvals, and Related. The main content area is divided into two sections. The first section lists project details in a table-like format:

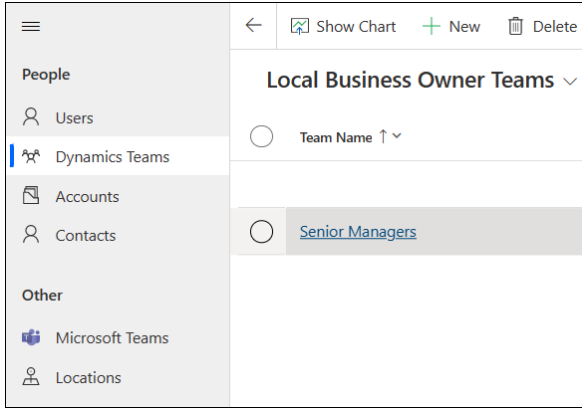
Name	* Product Update	Date Due	---	Created On	3/8/2024	1:28 PM
Project Reference	Proj-001010	Portfolio	* Portfolio A	Source Request	---	
Project Manager	* Jonathan Weisglass (Busy)	Program	* Program A	Teams Channel	---	
Project Sponsor	* Jonathan Weisglass (Busy)	Location	---	Schedule Settings	---	
Group Manager	---					

The second section lists project management attributes:

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

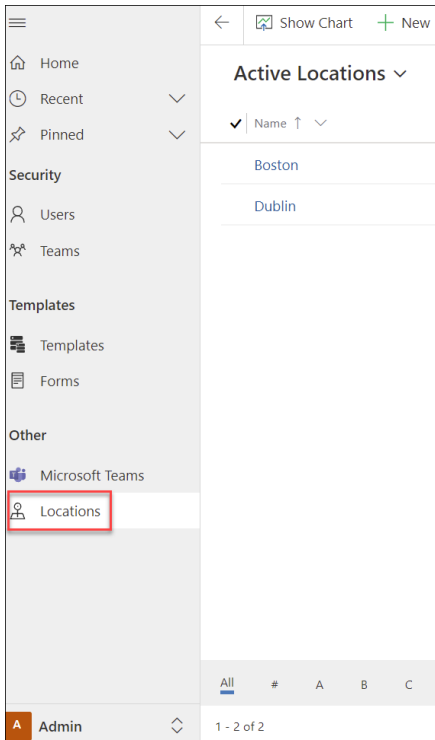
Group Manager Field

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**.



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

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

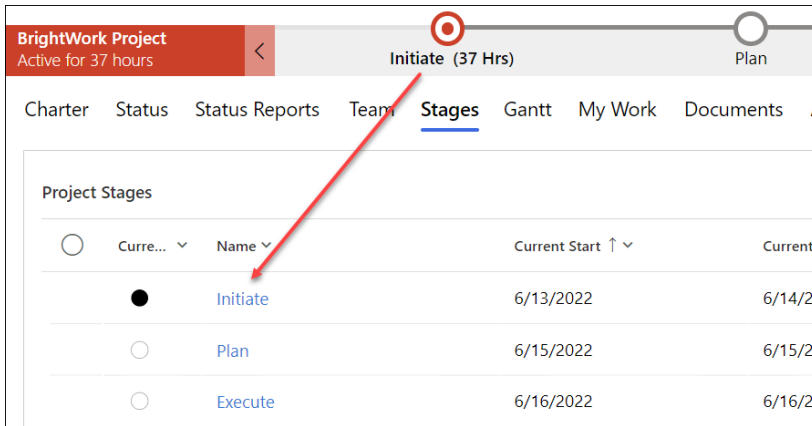
- Stages are automatically listed in the Stages tab after being created in the Gantt tab (a Gantt task can be set to be a Stage type task in Task Details). Manually adding stages from within the Stages section is not supported.

Task Information

GENERAL DEPENDENCY RESOURCES **TASK DETAILS**

Task Type	ID
Stage	▼ 1,829.00

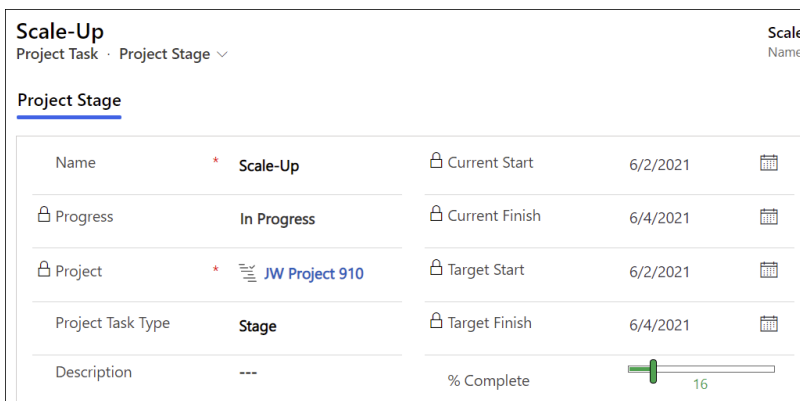
- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the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



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



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



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 the 'Delay in onboarding suppliers' issue page. At the top, the issue status is 'Not Started' and the project is 'Powdered Cream Cheese for Africa'. The program is 'Product Operations'. Below this, the 'Issue' section is expanded to show a 'Reference' table. The table lists the issue name, issue reference (IS-001181), portfolio (Contoso Projects), program (Product Operations), and project (Powdered Cream Cheese for Africa). At the bottom of the table, the 'Escalation' dropdown menu is open, showing options: Program, --Select--, Project, Program (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.

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 | ▾

 --Select--

Risk Management Project

Rating 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.
