

# 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:

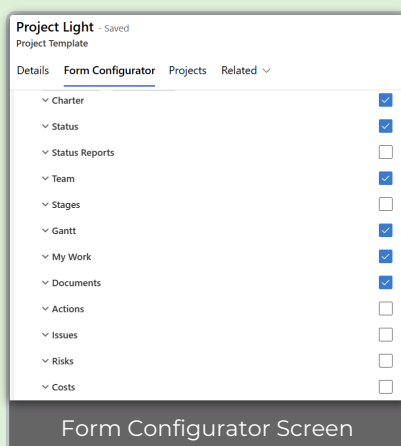
- The **Project Light** starter template is for managing projects that are at the low end of the

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

Section	Checkbox
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"/>

At the bottom of the screen is a dark grey bar with the text '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.

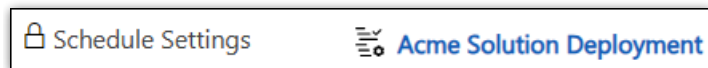
The following can be specified in [Project Templates](#) and will populate corresponding columns in new Projects:

- 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



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.

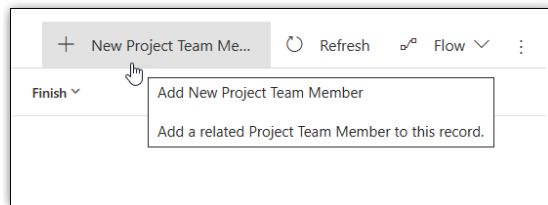
See [Project Status Reporting](#) for more information.

## 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**.

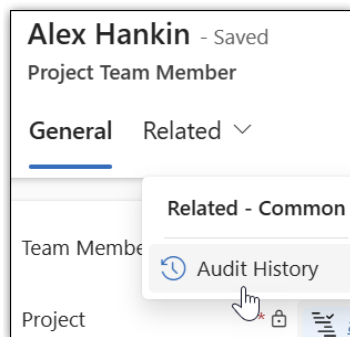


Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can add new team members to the Team tab directly.

**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.

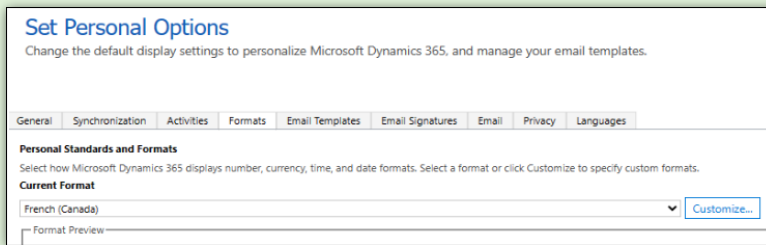
## Tasks

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

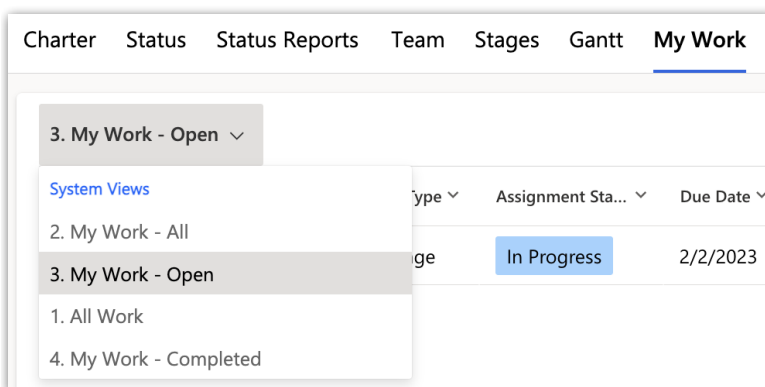
## Grid

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	<b>My Work</b>
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.

## 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 Lesson Learned item by clicking the **+ New Lesson Learned** button in the Lesson Learned subgrid on a project. This will load the quick create form for Lesson Learned in the side panel.

Project Managers can delete any item in any project they have access to, and the BrightWork PMO Manager can delete any lesson learned. Team Members can only delete lessons learned that they added themselves.

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.

## 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.

---



Plan Execute Close

Issues Risks Costs Communications **Project Settings** Approvals Related

Automatic

Create Teams Channel ☒ No

Copy to New Content Template ☒ No

Reset Target Dates in all Project Tasks ☒ No

Set Health Automatically ☒ No

**Send Stage for Approval** ☒ No

## 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

**Schedule Settings** **Acme Solution Deployment**

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.

Charter	Status	Team	Gantt	My Work	Documents	Project Settings	<b>Audit History</b>	Related ▾
Audit History								
Filter on: All Fields ▾								
o/p 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...

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 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

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 [Project Status Reporting](#) 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 [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

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 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

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 [Project Status Reporting](#) 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 [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.

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

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

Scale-Up

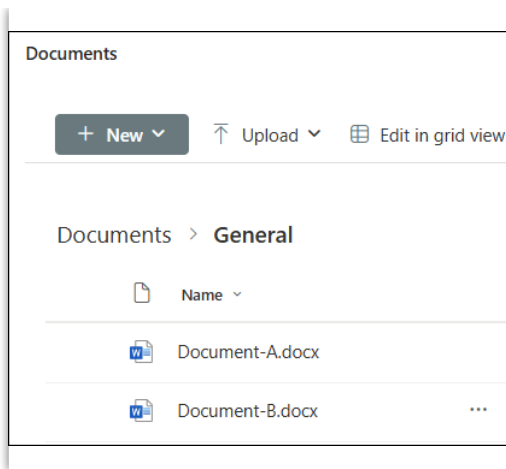
Project Task · Project Stage

Scale-

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 [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

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.

## 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

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

**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

---

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

Indicators

Project Status

\* Not Started

% Complete

0

% Complete Comment

---

Current Start

---

Current Finish

---

Target Start

---

Target Finish

---

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 [Project Status Reporting](#) 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 [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.

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

○

Cur...

▼

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

Scale-Up

Project Task · Project Stage

Scale-

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

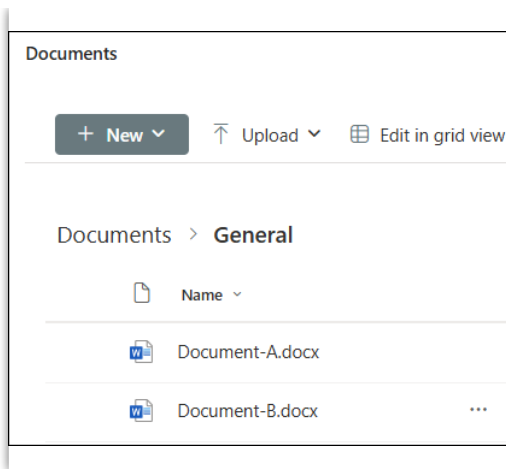
📅

Description

---

% Complete

16



## Actions

Log project actions, decisions, and changes. See [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

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.

## 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

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

**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

**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 ▾

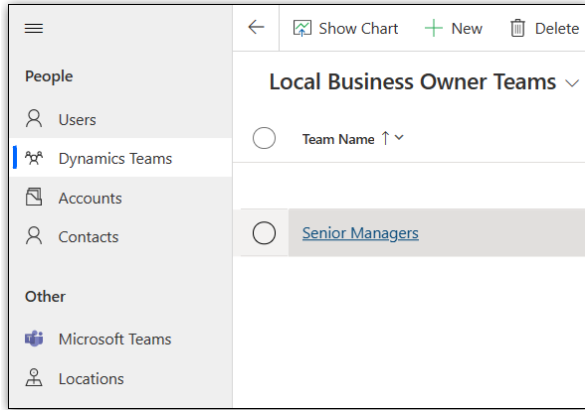
Name	* <b>Product Update</b>	Date Due	---	📅 Created On	3/8/2024	📅 1:28 PM
🔒 Project Reference	Proj-001010	🔒 Portfolio	* 🗑️ <b>Portfolio A</b>	🔒 Source Request	---	
Project Manager	* 👤 <b>Jonathan Weisglass (Busy)</b>	🔒 Program	* 👥 <b>Program A</b>	🔒 Teams Channel	---	
Project Sponsor	* 👤 <b>Jonathan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

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

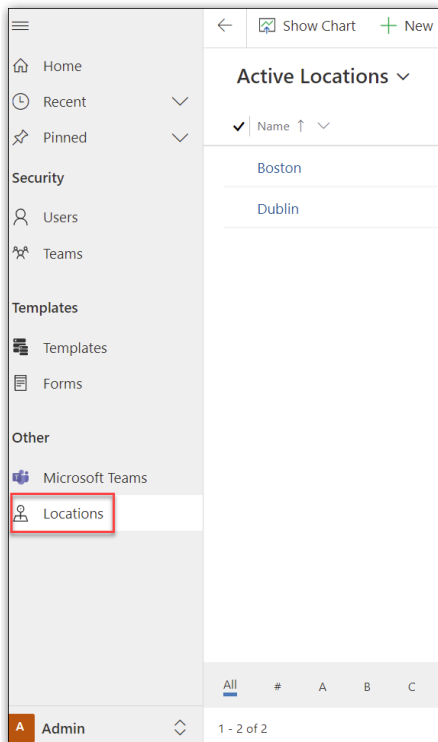
## Group Manager Field

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**.



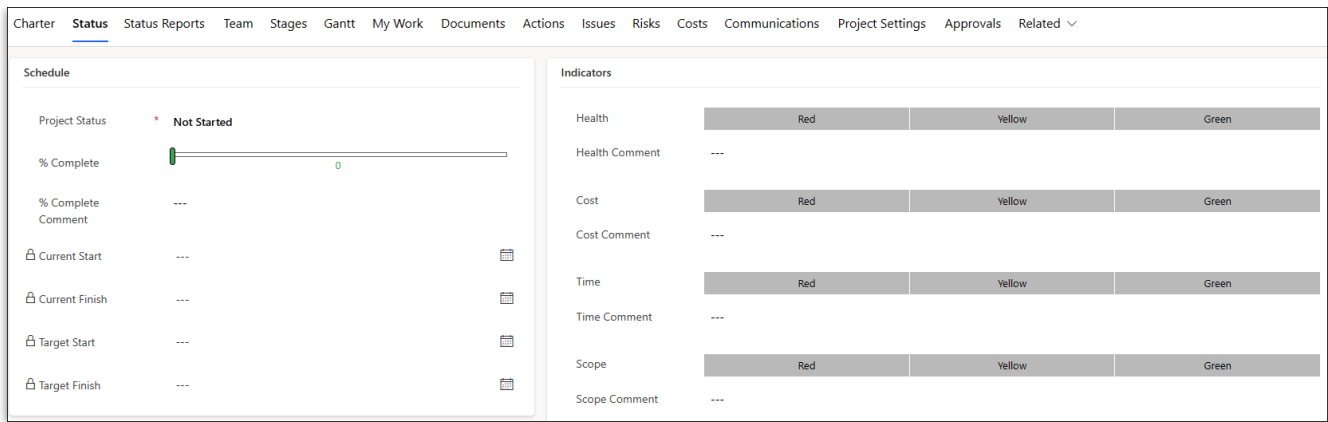
## Location Field

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





See [Project Status Reporting](#) 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 [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.

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**

	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
Scale-Up - Task-1	Scale-Up - Task-1	16%
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, 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.

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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, 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

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throughout its lifecycle.

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**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

Project

Risk Management Rating

--Select--  
Project  
Program  
Portfolio

## Risk Status Values

- Identified
- Mitigated
- Occurred
- Managed
- Closed

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- In Progress
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