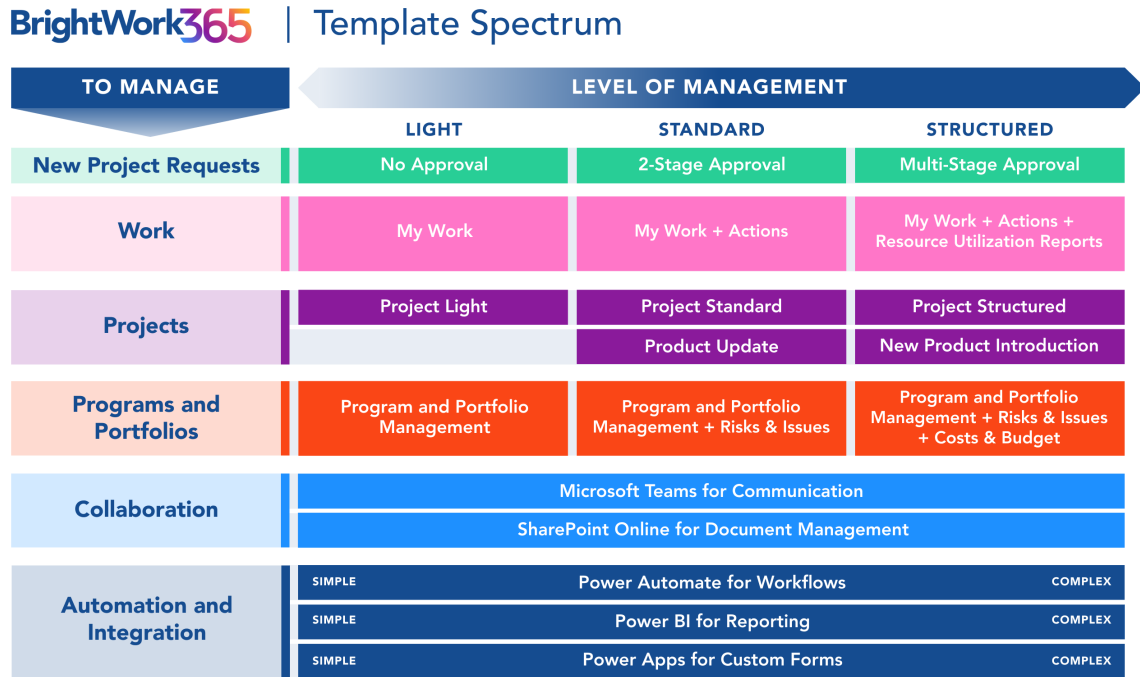


BrightWork 365 Starter Project Templates

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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:

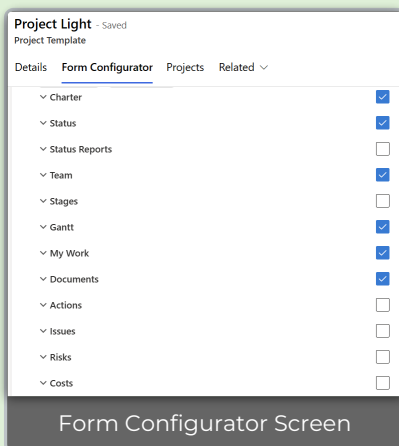
- The **Project Light** starter template is for managing projects that are at the low end of the

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

Tip 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.



Your browser does not support HTML5 video.

All Templates

Note

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

The elements below are common to all starter project templates:

Charter

Name	* Blue Yonder Solution Deployment (Pr...	Portfolio	* Contoso	Created On	11/18/2022
Project Reference	Proj-001016	Program	* Customer Success		7:55 PM
Project Manager	* Alan Morgan (Offline)			Source Request	Blue Yonder Solution Deployment
Project Sponsor	* Anne Wallace (Offline)			Teams Channel	https://teams.microsoft.com/_?tenant...
				Schedule Settings	Blue Yonder Solution Deployment (
Project Type	Other	Priority	3. Medium		
Description	Deploy the solution for Blue Yonder	Objectives	Successful solution deployment		
Exit Criteria	Iteration 1 solution successfully deployed	Overall Project Risk	Iteration 1 requirements not met within budget		
Approval Requirements	All iteration 1 specifications met	Economic Impact	Medium level		
Out of Scope	Iteration 2 requirements				

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

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

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

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

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

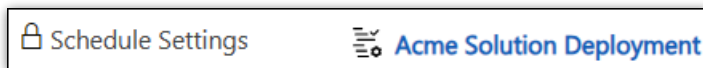
When a Portfolio/Program value is changed, a process will run in the background to reconcile [security access](#) with these changes. When all the associated security changes have been completed and the portfolio/program move is done, an email notification will automatically be sent to the project manager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

When the back arrow is clicked while on the Charter tab, the 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. 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 the System Admin role, can edit the settings.

Calendar

Global Settings (read-only)

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

Project Override Settings

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

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

Project Exception Days

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

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

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

To add new Project Exception Days:

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

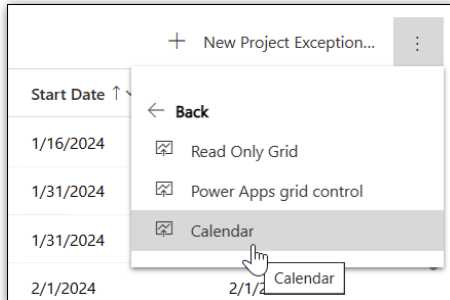
Note

- 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

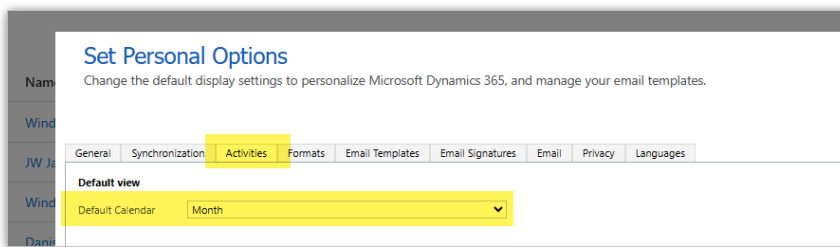
tasks.

- 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](#)).

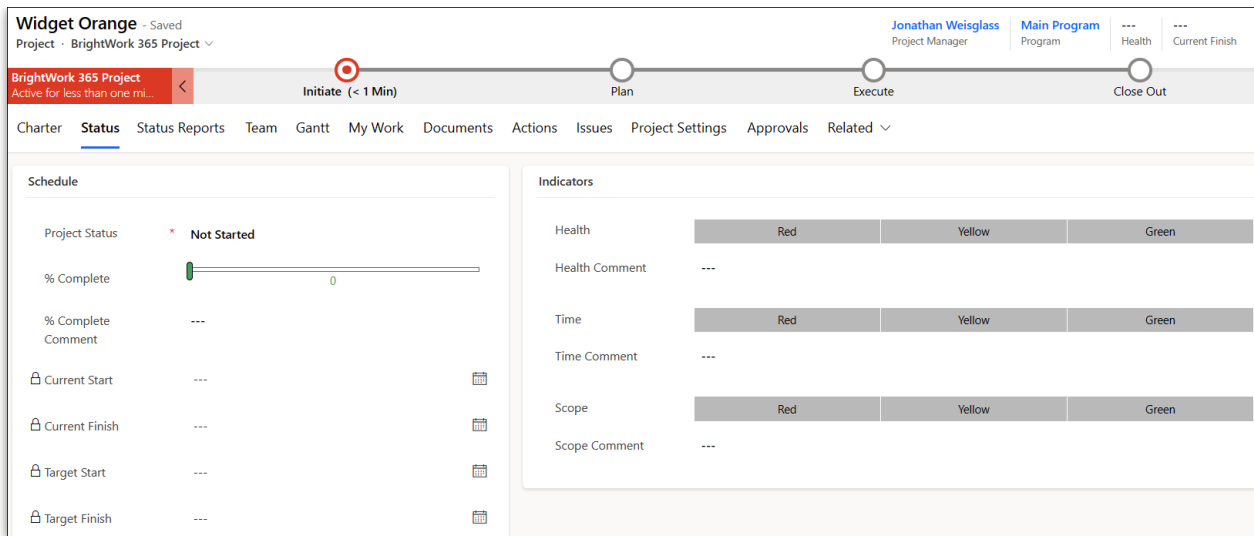


Project Settings

[Schedule Settings](#) > [Project Settings](#) allows the project's actual Project Manager and users with the BrightWork PMO Manager security role to edit the project's Default Access Level (see [Project Security Access](#)), and the Virtual Scroll setting (see [Task Management](#)).

Status

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

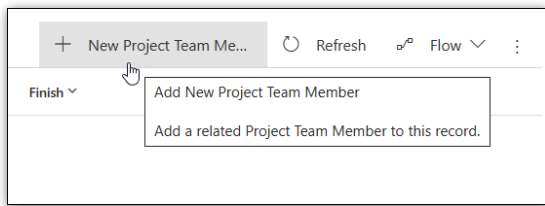


See the [Project Status Reporting](#) article for more information.

Team

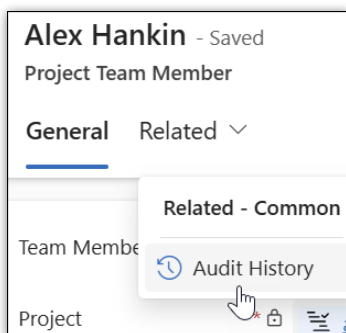
The **Team** tab automatically populates with the names of work item assignees, and the earliest start dates and latest finish dates across all the work assigned to them.

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



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.

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.

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](#).

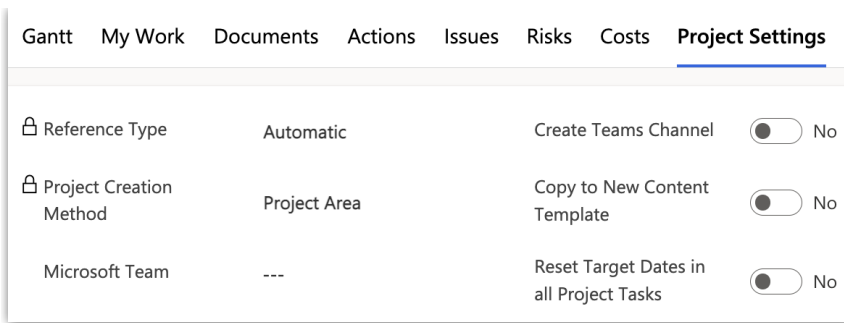
Project Settings

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

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

Microsoft Teams

Project Settings also allows the project manager options with regards to **Microsoft Teams**, e.g., they can create a Microsoft Teams Channel for the 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.

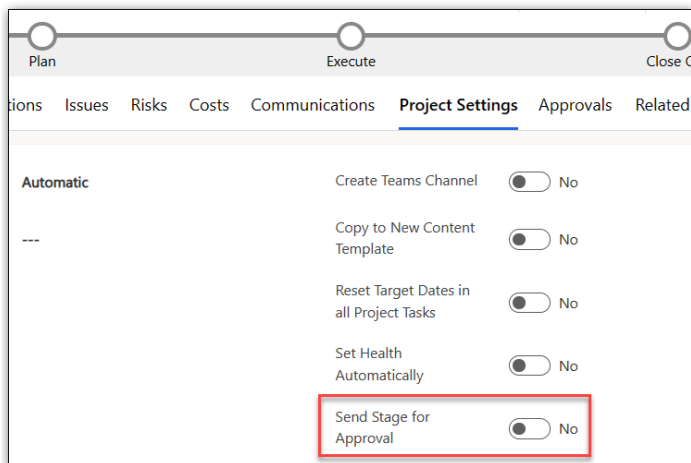


Note

- 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

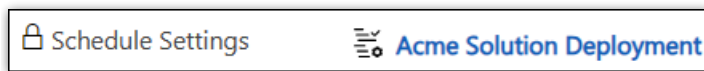
A project's program or portfolio can be changed in the **Project Settings** tab. The list of available choices will filter to what is available based on the chosen program or portfolio.

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

Plan to Execute

Approval Required

Execute to Close Out

Approval Required

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

Related | Audit History

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

Charter	Status	Team	Gantt	My Work	Documents	Project Settings	Audit History	Related ▾
Audit History								
Filter on: All Fields ▾								
FLOW								
<input type="checkbox"/>	Changed Date	Changed By	Event	Changed Field	Old Value	New Value		
	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 

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		Indicators			
Project Status	* Not Started	Health	Red	Yellow	Green
% Complete	0	Health Comment	---		
% Complete Comment	---	Time	Red	Yellow	Green
Current Start	---	Time Comment	---		
Current Finish	---	Scope	Red	Yellow	Green
Target Start	---	Scope Comment	---		
Target Finish	---				

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.

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'. Below this, the 'Reference' table lists the issue name, reference ID (IS-001181), portfolio (Contoso Projects), program (Product Operations), and project (Powdered Cream Cheese for Africa). An 'Escalation' dropdown menu is open, showing options: --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

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

Status Reports

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

Stages

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

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

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

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

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

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

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

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

Actions

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

Issues

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

The list of available users to choose from in the **Assigned To** column is limited to those users given the **BrightWork Team Member** security role.

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

The screenshot shows a form for an issue titled "Delay in onboarding suppliers". The form includes a status "Not Started" and is associated with the "Powdered Cream Cheese for Africa" project and "Product Operations" program. The "Reference" section lists the name, issue reference (IS-001181), portfolio (Contoso Projects), program (Product Operations), and project (Powdered Cream Cheese for Africa). The "Escalation" dropdown menu is open, showing options: Program, --Select--, Project, Program, and Portfolio. The "Escalation" label is highlighted with a red box.

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 risk is logged by Saravana Barathi and is associated with the Contoso Projects Portfolio, Product Operations Program, and Powdered Cream Project. The risk status is "Identified" and the exposure is 0. The "Escalation" dropdown menu is open, showing options: "--Select--", "Project", "Program", and "Portfolio". The "Program" option is currently selected.

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.

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	Source Request	1:26 PM
Project Manager	* Jonathan Weisglass			Teams Channel	---
Project Sponsor	* Jonathan Weisglass			Schedule Settings	---

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

Status

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

Schedule

Project Status * **Not Started**

% Complete

% Complete Comment ---

Current Start ---

Current Finish ---

Target Start ---

Target Finish ---

Indicators

Health

Health Comment ---

Cost

Cost Comment ---

Time

Time Comment ---

Scope

Scope Comment ---

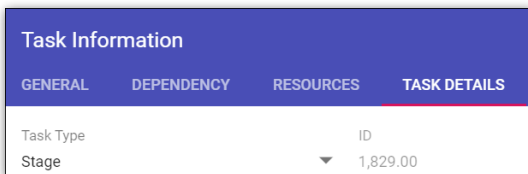
See the [Project Status Reporting](#) article for more information.

Status Reports

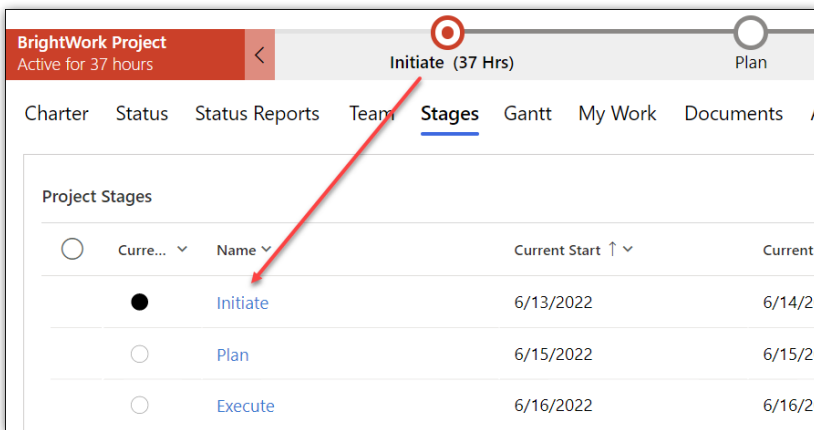
The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Status Reporting](#) for details.

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.



- 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.

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.

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:

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:

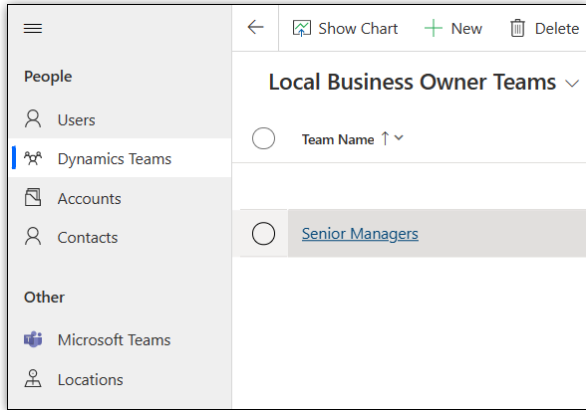
Name	* Product Update	Date Due	---	Created On	3/8/2024	1:28 PM
Project Reference	Proj-001010	Portfolio	* Portfolio A	Source Request	---	
Project Manager	* Jonathan Weisglass (Busy)	Program	* Program A	Teams Channel	---	
Project Sponsor	* Jonathan Weisglass (Busy)	Location	---	Schedule Settings	---	
Group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

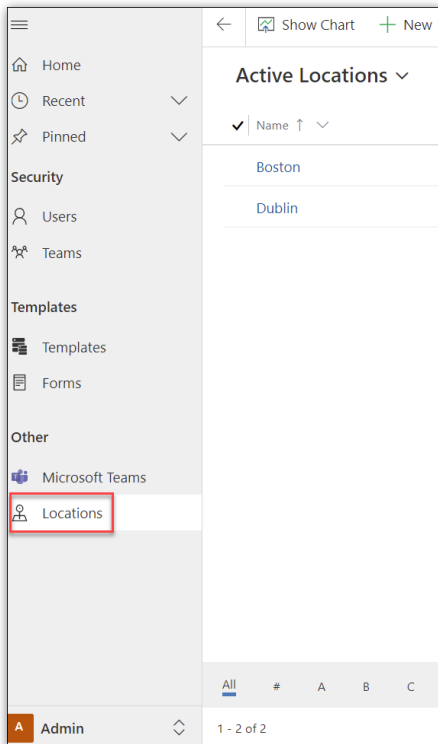
Group Manager Field

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**.

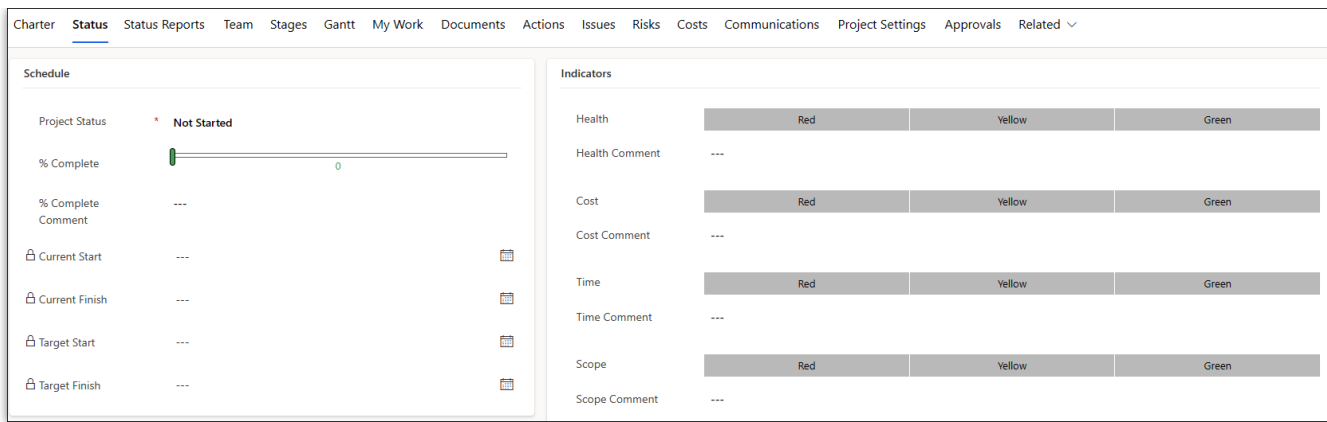


Location Field

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



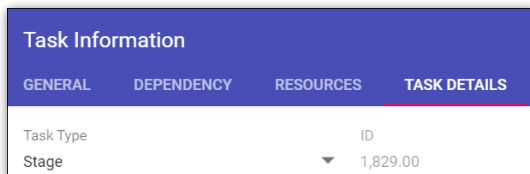
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Status Reports

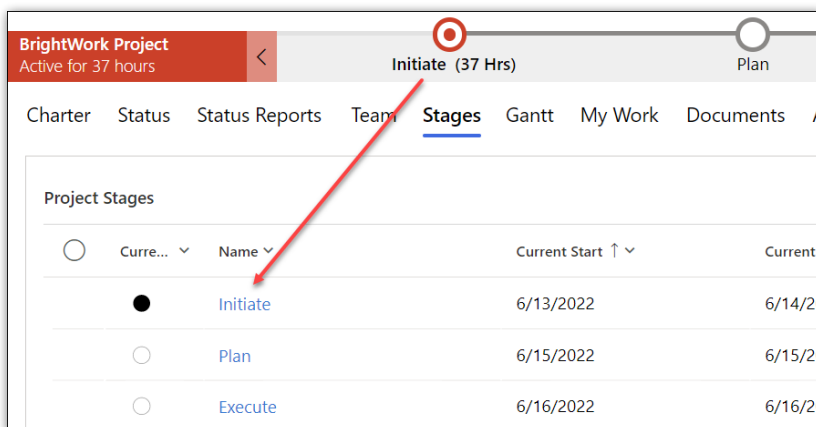
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Stages

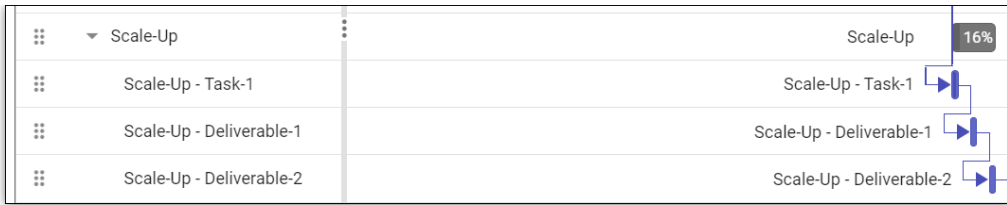
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- Click on a stage link to view additional details about the stage including description and status information.

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

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Delay in onboarding suppliers
Issue

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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

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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--

 Project

 Program

 Portfolio

Risk Management

Rating

Risk Status Values

- Identified
- Mitigated
- Occurred
- Managed
- Closed

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