

BrightWork 365 Starter Project Templates

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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. At the top, it says 'Project Light - Saved' and 'Project Template'. Below this are tabs for 'Details', 'Form Configurator' (which is active), 'Projects', and 'Related'. The main area is a list of sections with expandable arrows and checkboxes to the right. The sections and their checkbox states are: Charter (checked), Status (checked), Status Reports (unchecked), Team (checked), Stages (unchecked), Gantt (checked), My Work (checked), Documents (checked), Actions (unchecked), Issues (unchecked), Risks (unchecked), and Costs (unchecked). At the bottom of the screen, there is a dark grey bar with the text 'Form Configurator Screen'.

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

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.

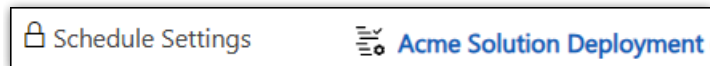
The following can be specified in [Project Templates](#) and will populate corresponding columns in new Projects:

- 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. 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 at the project level):

[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.
- Workday 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

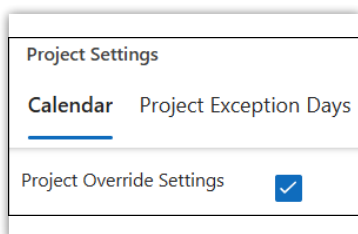
The solution-wide hour of the day that Gantt task work finishes.

Workday 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.

Project Override Settings

Working Week

Day Start

Break Start

Break Finish

Day Finish

Work Day Duration

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

Note After any change is made to the Project Override Settings, perform a Ctrl-F5 browser refresh, and then click into the project's 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.

Name

Type

Start Date

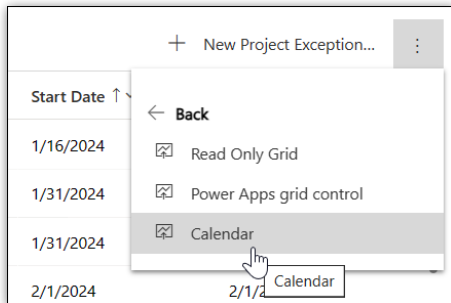
Finish Date

Note

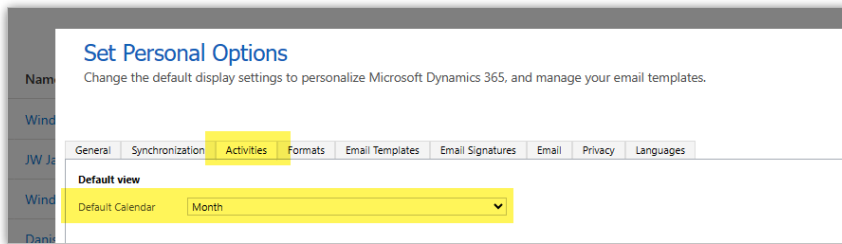
- Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can edit Project Exception Days.

- 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](#).
- Copy to New Project: See [\(2025-2\) Copy to New Project](#).
- Enable Virtual Scroll: 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).
- Teams Channel: See [Microsoft Teams](#). Only available for Projects created in BrightWork 365 version 2025-2 and later.
- Document Library: See [Document Management](#). Only available for Projects created in BrightWork 365 version 2025-2 and later.
- Status Report Email > Default Internal Email Recipients: You can include a default list of *internal* project status report email recipients for easy repeatable use. See [Project Status Reporting](#).
- Status Report Email > Default External Email Recipients: You can include a default list of *external* project status report email recipients for easy repeatable use. See [Project Status Reporting](#).

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 Widget Orange project management tool. The top navigation bar includes 'Initiate (< 1 Min)', 'Plan', 'Execute', and 'Close Out'. The 'Status' tab is selected, showing a 'Schedule' section on the left with fields for Project Status (Not Started), % Complete (0), and various start/finish dates. The right section, 'Indicators', displays a table with columns for Health, Time, and Scope, each with Red, Yellow, and Green status options.

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**.

The screenshot shows a button labeled '+ New Project Team Member...' with a dropdown menu. The dropdown menu contains two options: 'Add New Project Team Member' and 'Add a related Project Team Member to this record.'

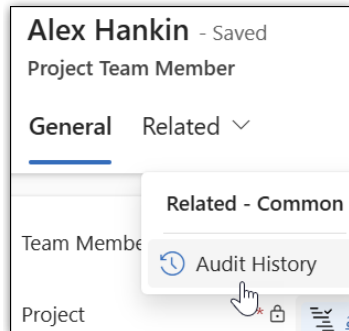
Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can add new team members to the Team tab directly.

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](#) 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

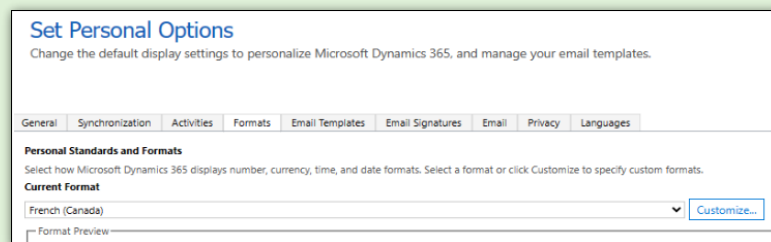
- To manually delete a Project Team Member from the **Team** tab in a project, you will first need to remove the user from all work assignments in the project.
- Dates may not update in the Teams tab until an update of some kind is made in the Gantt tab, which will trigger the date update.

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.



My Work

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

Charter	Status	Status Reports	Team	Stages	Gantt	My Work
3. My Work - Open ▾						
System Views						
2. My Work - All						
3. My Work - Open						
1. All Work						
4. My Work - Completed						

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

See [Document Management](#) for details.

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.

The screenshot shows the 'Project Settings' tab with several toggle switches. The 'Send Stage for Approval' toggle is highlighted with a red box and is currently set to 'No'.

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

Schedule Settings

The screenshot shows the 'Schedule Settings' option in the 'Acme Solution Deployment' interface.

Option
Schedule Settings

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

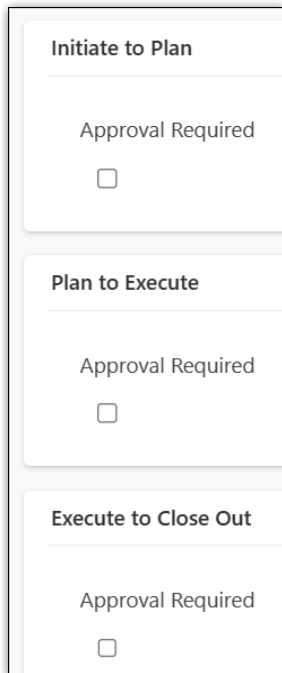
Approvals

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

security role.

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

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



The screenshot displays a vertical list of three stages within the 'Approvals' tab. Each stage is contained in a light gray box with a header and a checkbox. The stages are: 'Initiate to Plan', 'Plan to Execute', and 'Execute to Close Out'. Each stage has a header bar with its name, followed by the text 'Approval Required' and an unchecked checkbox.

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

See [Project Stage Approval Process](#) and [\(2025-2\) DONE - 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	Audit History	Related	▼
Audit History									
Filter on: All Fields ▼									
<div> FLOW </div>									
<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

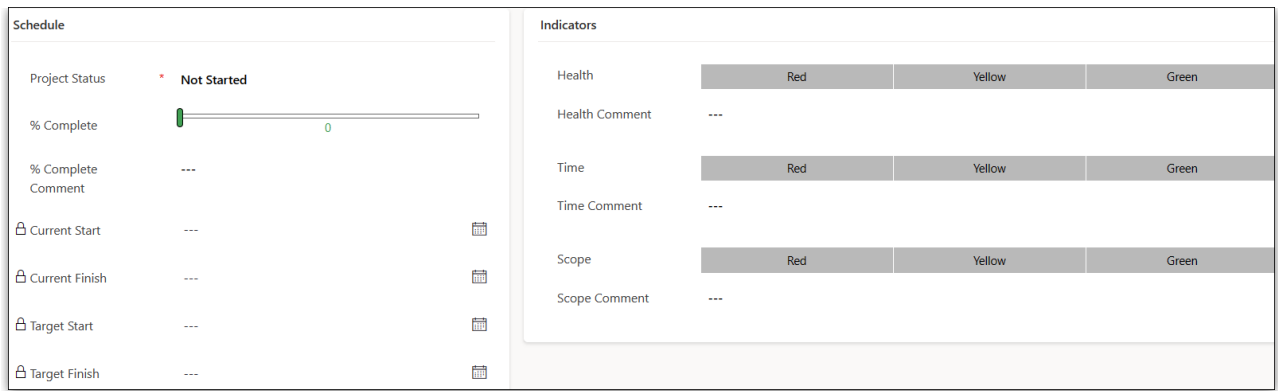
Strategic

Priority

Description

Objectives

Status



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

Project Manager

* Jonathan Weisglass (Busy)

Teams Channel

Project Sponsor

* Jonathan Weisglass (Busy)

Schedule Settings

Project Type

Strategic

Priority

Description

Objectives

Exit Criteria

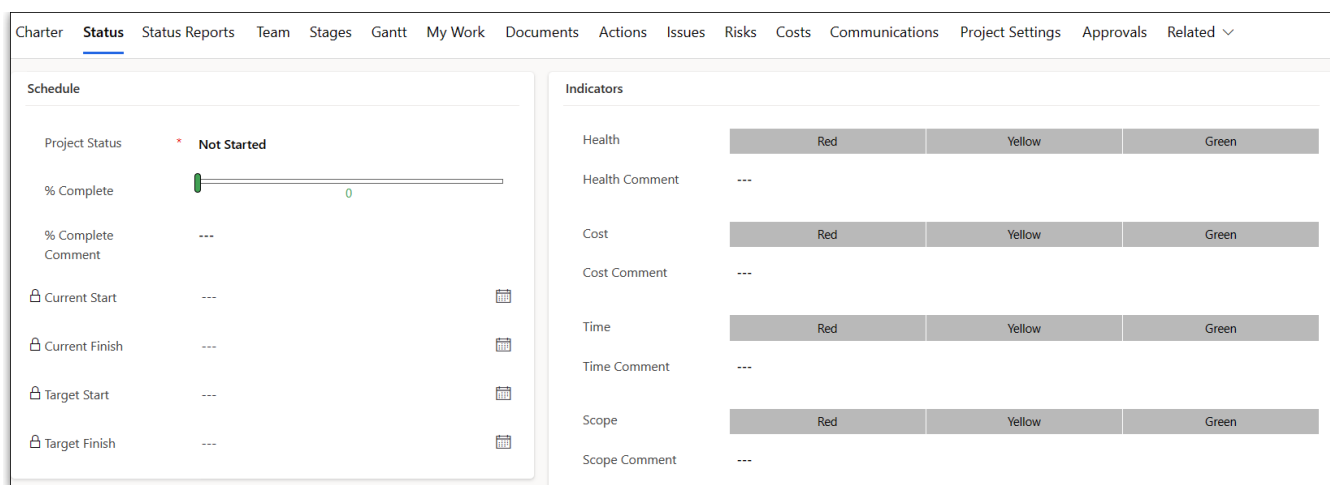
Overall Project Risk

Approval Requirements

Economic Impact

Out of Scope

Status



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

Status Reports

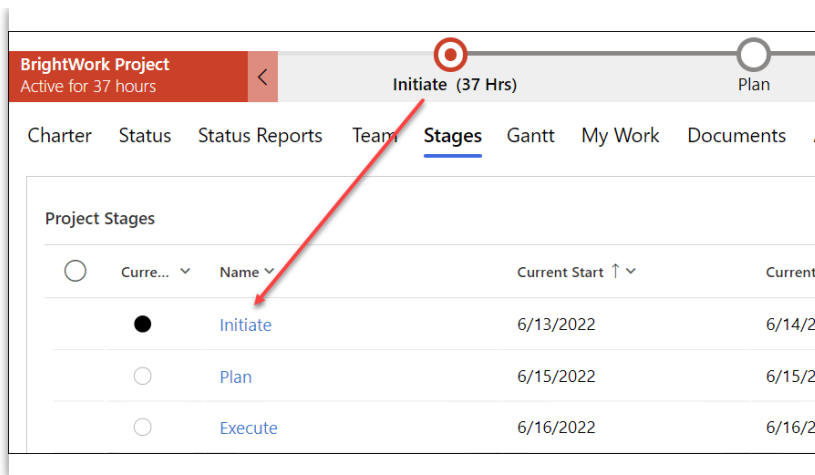
The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Project Status Reporting](#) for details.

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

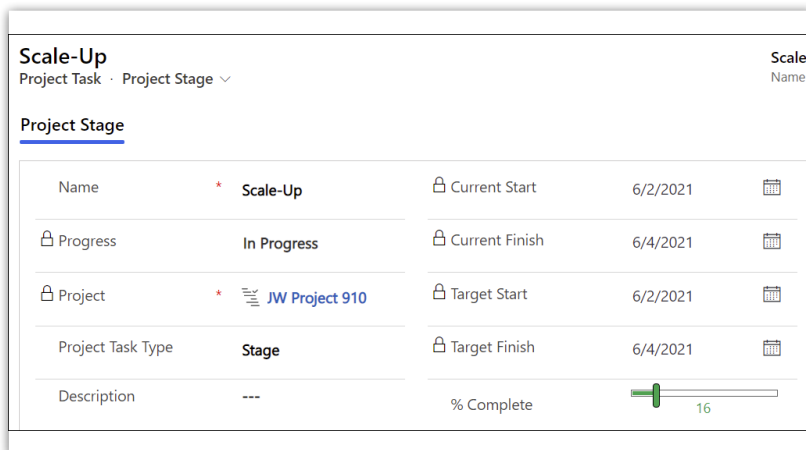
- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the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



- 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 [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	<div>Project</div> <div> <div>--Select--</div> <div>Project</div> <div>Program</div> <div>Portfolio</div> </div>
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

Source Request

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

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

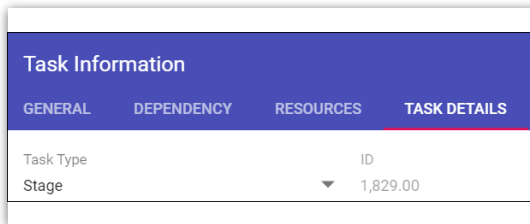
See [Project Status Reporting](#) for more information.

Status Reports

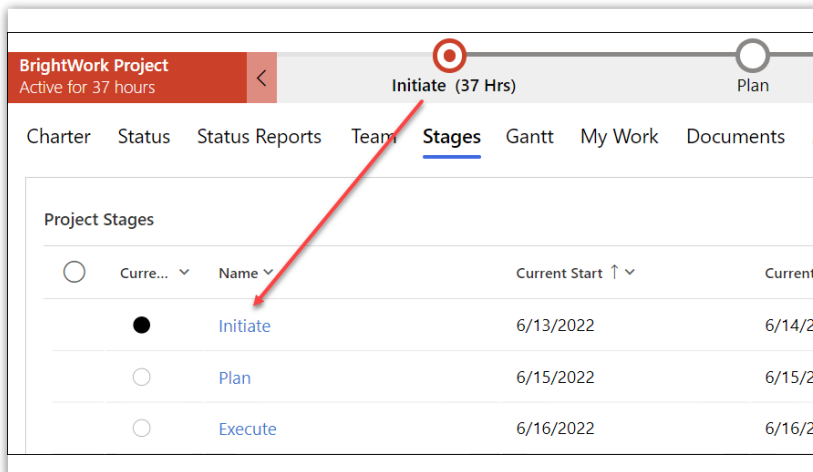
The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See [Project Status Reporting](#) for details.

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.



- 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

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	<div> <div></div> <div>16</div> </div>	

Actions

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

Issues

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

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

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

Delay in onboarding suppliers

Issue

Not Started

Powdered Cream Cheese for Africa

Product Operations

Issue Status

Project

Program

Issue

Reference

Name	* Delay in onboarding suppliers
📅 Issue Reference	IS-001181
📅 Portfolio	📋 Contoso Projects
📅 Program	📋 Product Operations
📅 Project	📋 Powdered Cream Cheese for Africa
Escalation	<div>Program ▾</div> <div> --Select-- Project Program Portfolio </div>

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 Cream
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

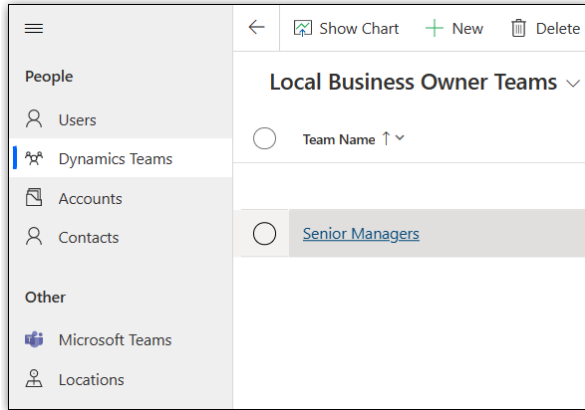
Charter
Status
Status Reports
Team
Stages
Gantt
My Work
Documents
Actions
Issues
Risks
Costs
Communications
Project Settings
Approvals
Related

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

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

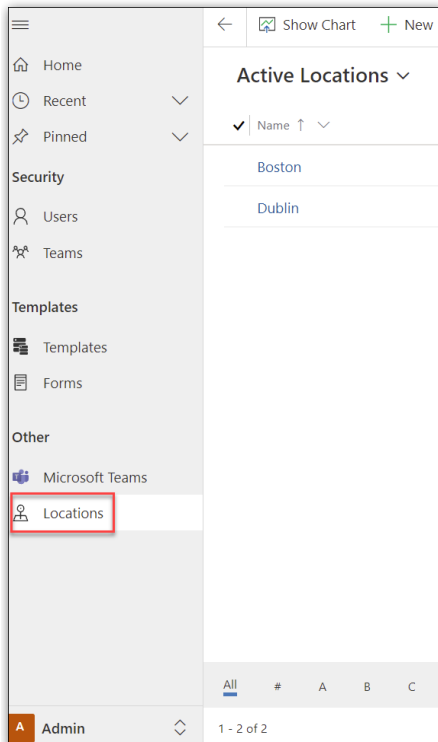
Group Manager Field

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

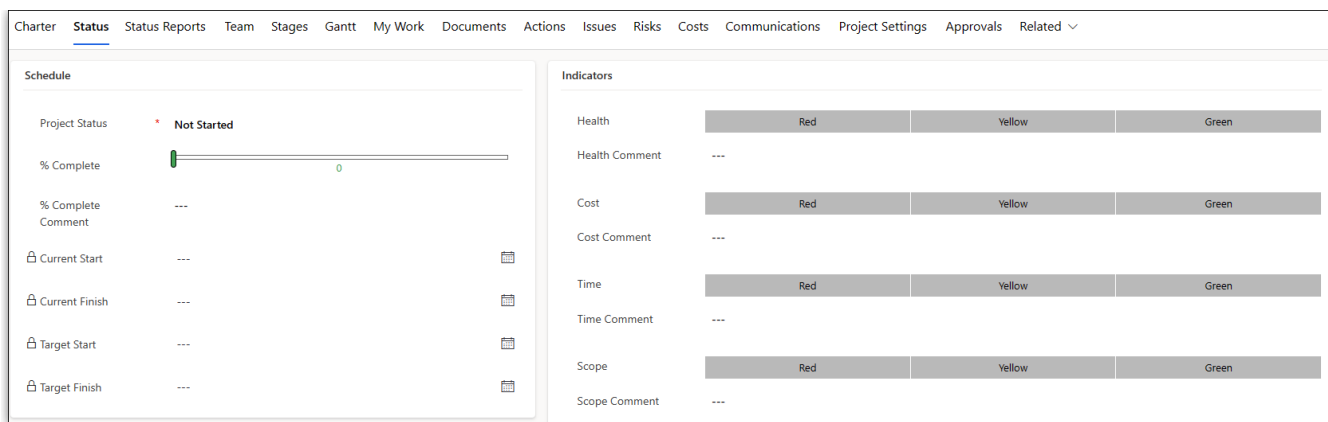


Location Field

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

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- 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

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 16%

Scale-Up - Task-1

Scale-Up - Deliverable-1

Scale-Up - Deliverable-2

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

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

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 web form for an issue titled "Delay in onboarding suppliers". At the top, there are tabs for "Issue Status" (Not Started), "Project" (Powdered Cream Cheese for Africa), and "Program" (Product Operations). Below these is a section titled "Reference" containing several rows: "Name" with the value "Delay in onboarding suppliers", "Issue Reference" with "IS-001181", "Portfolio" with "Contoso Projects", "Program" with "Product Operations", and "Project" with "Powdered Cream Cheese for Africa". At the bottom of the "Reference" section is an "Escalation" dropdown menu, which is highlighted with a red box. The dropdown is currently set to "Program" and shows a list of options: "--Select--", "Project", "Program" (which is highlighted), and "Portfolio".

Risks

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

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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	<div>Project</div> <div> --Select-- Project Program Portfolio </div>
Risk Management Rating	

app and save these items as well as Phone Call details and Notes, within associated projects. See the [Communications](#) article for details.
