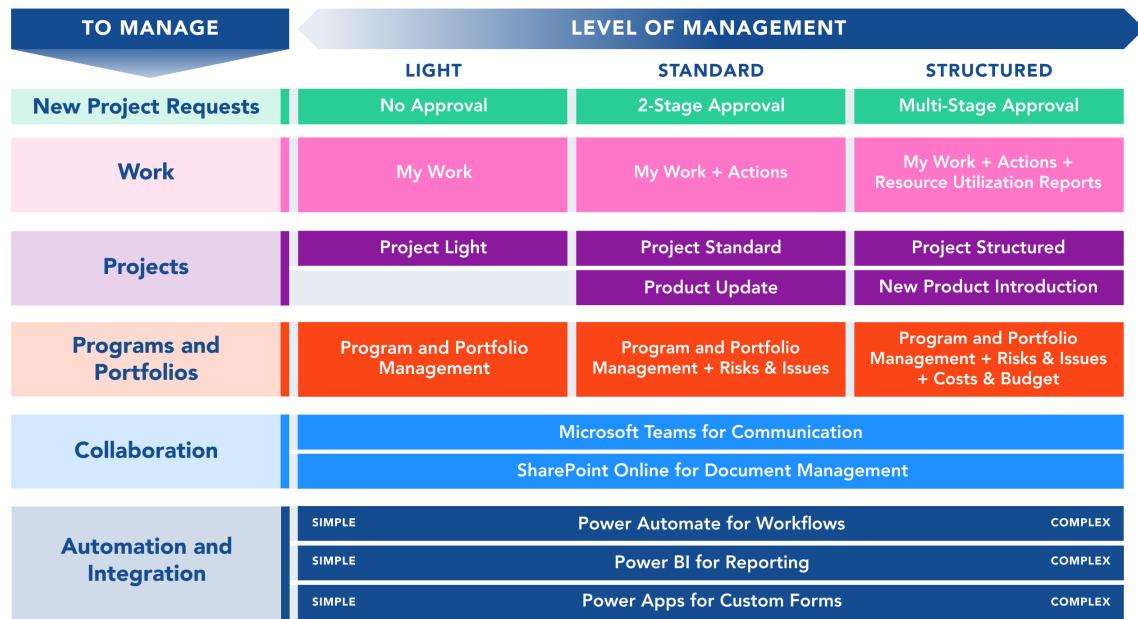


BrightWork 365 Starter Project Templates

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

BrightWork365 | Template Spectrum



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:

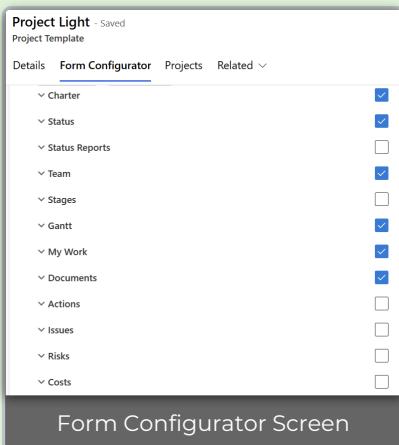
- The **Project Light** starter template is for managing projects that are at the low end of the

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.



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.

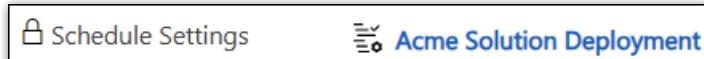
The following can be specified in [Project Templates](#) and will populate corresponding columns in new Projects:

- 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.

Health	Red	Yellow	Green
Health Comment	---		

Time	Red	Yellow	Green
Time Comment	---		

Scope	Red	Yellow	Green
Scope Comment	---		

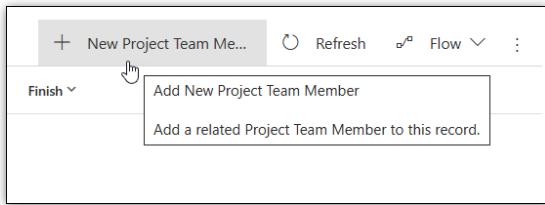
See [Project Status Reporting](#) for more information.

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**.

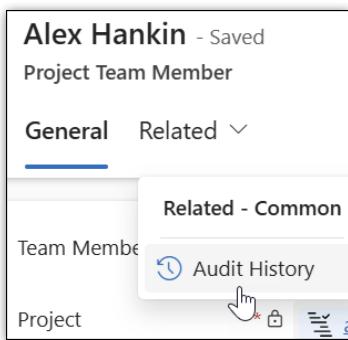


Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can add new team members to the Team tab directly.

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.

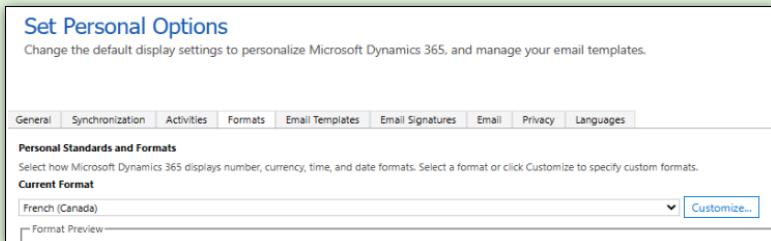
Tasks

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.



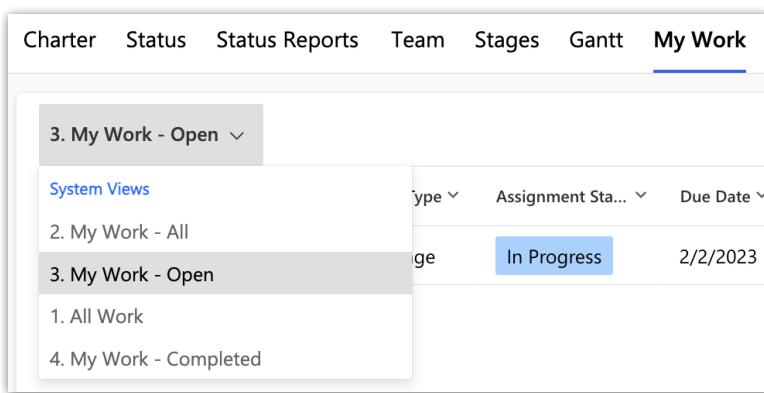
Grid

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.



3. My Work - Open	Type	Assignment Sta...	Due Date
2. My Work - All	Task	In Progress	2/2/2023
3. My Work - Open	Task	In Progress	2/2/2023
1. All Work	Task	In Progress	2/2/2023
4. My Work - Completed	Task	Completed	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.

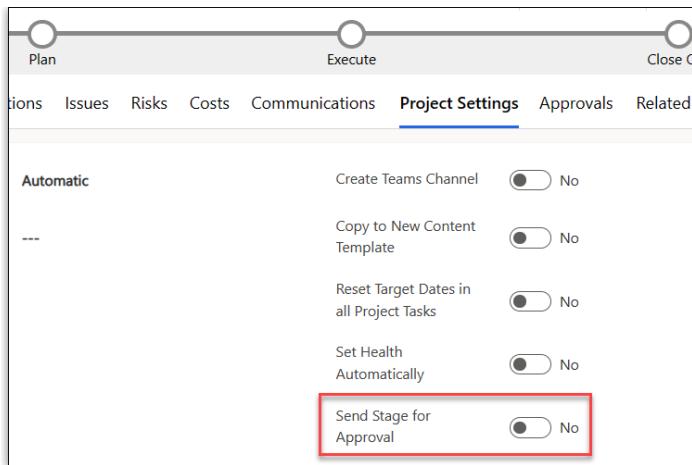
Project Settings

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.

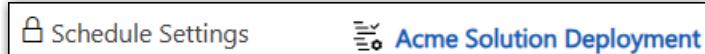


Approval History

The Approval History section of the Project Settings tab includes a history of the approval process for each stage of the Business Process Flow.

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

Schedule Settings



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

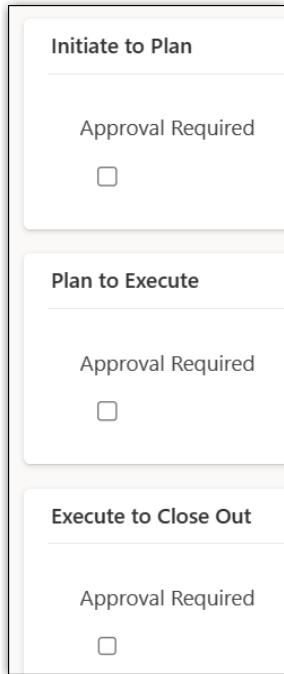
Approvals

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

Approvals Coordinator is a lookup and security role - the nominated user must be chosen in the **Approvals Coordinator** field and also be given the **BrightWork Approvals**

Coordinator security role. The Approvals Coordinator will be notified of approval process progress.

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



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

Related > Audit History

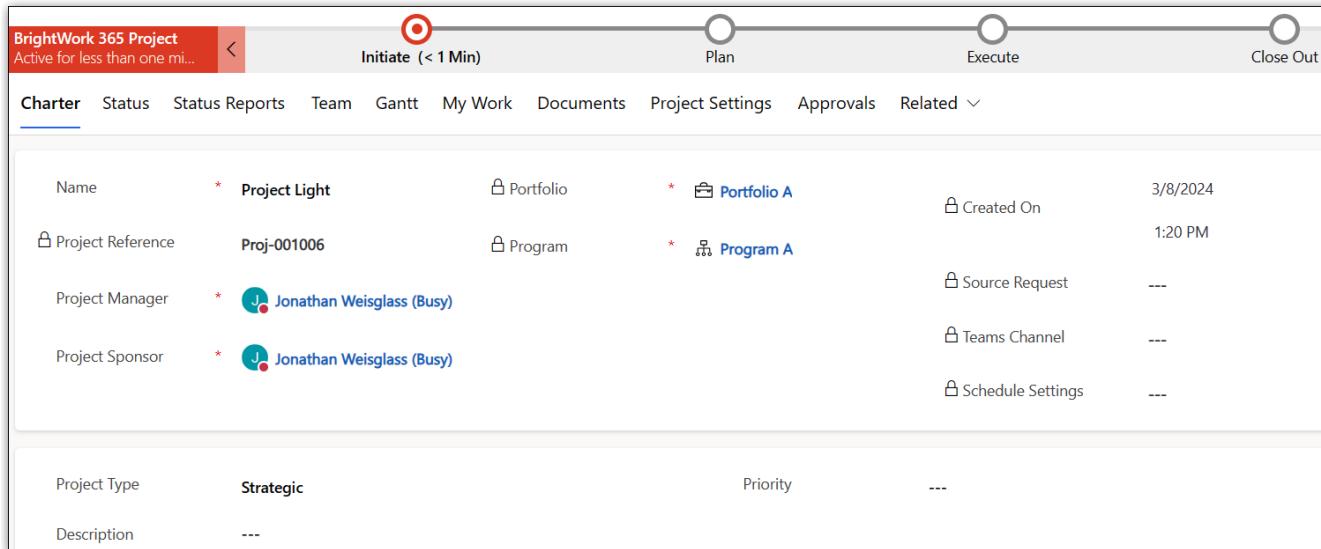
The Related tab contains the Audit History link that allows you to view changes that were made throughout the project.

<input type="checkbox"/>	Changed Date	Changed By	Event	Changed Field	Old Value	New Value
<input type="checkbox"/>	9/22/2023 5:02 ...	BW365 Admin	Update	Create	Yes	No

Project Light

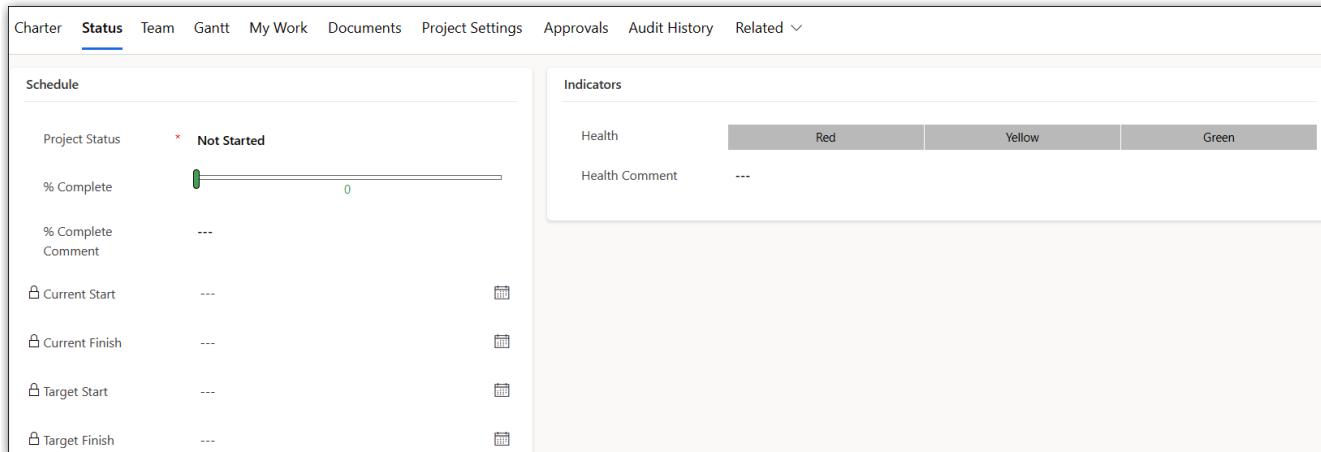
The elements below are included in the Project Light template:

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



The screenshot shows the Project Light template interface. At the top, there is a header bar with a red 'BrightWork 365 Project' bar on the left and a grey bar on the right containing five circular icons labeled 'Initiate (< 1 Min)', 'Plan', 'Execute', and 'Close Out'. Below the header is a navigation bar with tabs: Charter (which is selected and underlined), Status, Status Reports, Team, Gantt, My Work, Documents, Project Settings, Approvals, and Related. The main content area is titled 'Charter' and contains several data rows. The first row shows 'Name' as 'Project Light' with a red asterisk, 'Portfolio' as 'Portfolio A', and 'Created On' as '3/8/2024'. The second row shows 'Project Reference' as 'Proj-001006', 'Program' as 'Program A', and 'Source Request' as '1:20 PM'. The third row shows 'Project Manager' as 'Jonathan Weisglass (Busy)', 'Teams Channel' as '---', and 'Schedule Settings' as '---'. The fourth row shows 'Project Sponsor' as 'Jonathan Weisglass (Busy)'. Below these is a section for 'Project Type' (Strategic) and 'Description' (---). The entire interface has a clean, modern design with a light grey background and blue accents for selected items.

Status



The screenshot shows the Project Standard template interface. At the top, there is a navigation bar with tabs: Charter, Status (which is selected and underlined), Team, Gantt, My Work, Documents, Project Settings, Approvals, Audit History, and Related. The main content area is titled 'Status' and is divided into two sections: 'Schedule' and 'Indicators'. The 'Schedule' section contains fields for 'Project Status' (Not Started), '% Complete' (0), 'Current Start' (---), 'Current Finish' (---), 'Target Start' (---), and 'Target Finish' (---). The 'Indicators' section contains a 'Health' indicator with three colored bars: Red, Yellow, and Green, and a 'Health Comment' field with '---'. The interface uses a grid-based layout with horizontal and vertical lines to separate the sections and fields.

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

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

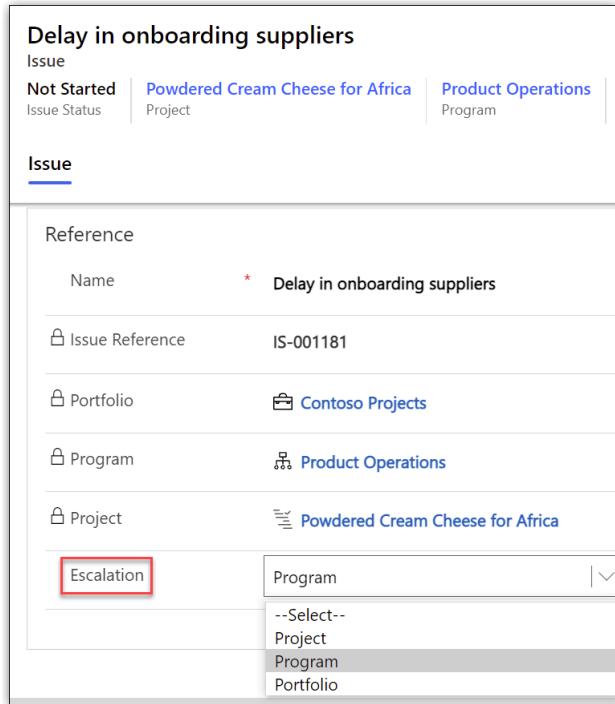
Log project actions, decisions, and changes. See [Actions](#) for details.

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 | Powdered Cream Cheese for Africa | Product Operations

Issue Status | Project | Program

Issue

Reference

Name * Delay in onboarding suppliers

Issue Reference IS-001181

Portfolio Contoso Projects

Program Product Operations

Project Powdered Cream Cheese for Africa

Escalation

Program

--Select--

Project

Program

Portfolio

Project Structured

The elements below are included in the Project Structured template:

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

BrightWork 365 Project		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											3/8/2024
Project Reference	Proj-001008		Program	* Program A											1:24 PM
Project Manager	* Jonathan Weisglass (Busy)														---
Project Sponsor	* Jonathan Weisglass (Busy)														---

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

Current Start	Name	Current Finish
6/13/2022	Initiate	6/14/2022
6/15/2022	Plan	6/15/2022
6/16/2022	Execute	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 - Task-1

Scale-Up - Deliverable-1

Scale-Up - Deliverable-2

16%

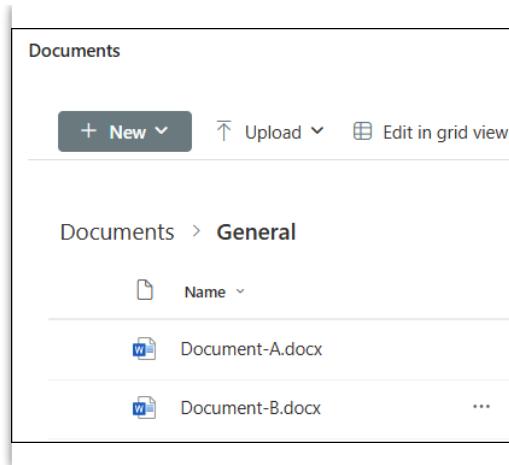
- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information, and to access the [document library associated with the project](#).

Scale-Up

Project Task · Project Stage

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%



The screenshot shows the 'Documents' section of a project. At the top, there are buttons for '+ New', 'Upload', and 'Edit in grid view'. Below this, a breadcrumb navigation shows 'Documents > General'. The main area displays a list of files with columns for Name and a three-dot menu. Two files are listed: 'Document-A.docx' and 'Document-B.docx'.

Actions

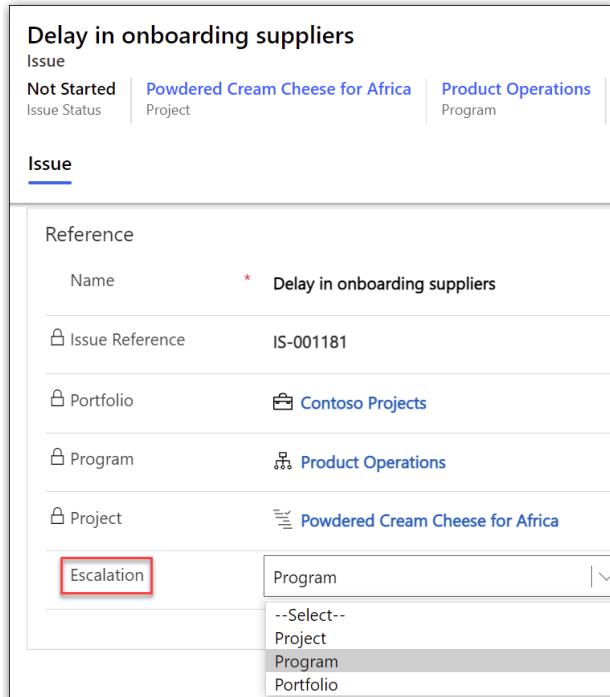
Log project actions, decisions, and changes. See [Actions](#) for details.

Issues

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

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

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



The screenshot shows the 'Issue' creation form for a new issue titled 'Delay in onboarding suppliers'. The form includes sections for 'Issue Status' (Not Started, Project), 'Program' (Product Operations), and 'Reference' (Name: Delay in onboarding suppliers, Issue Reference: IS-001181, Portfolio: Contoso Projects, Program: Product Operations, Project: Powdered Cream Cheese for Africa). The 'Escalation' section is highlighted with a red box, showing a dropdown menu with options: Program (selected), Project, Program, and Portfolio.

Risks

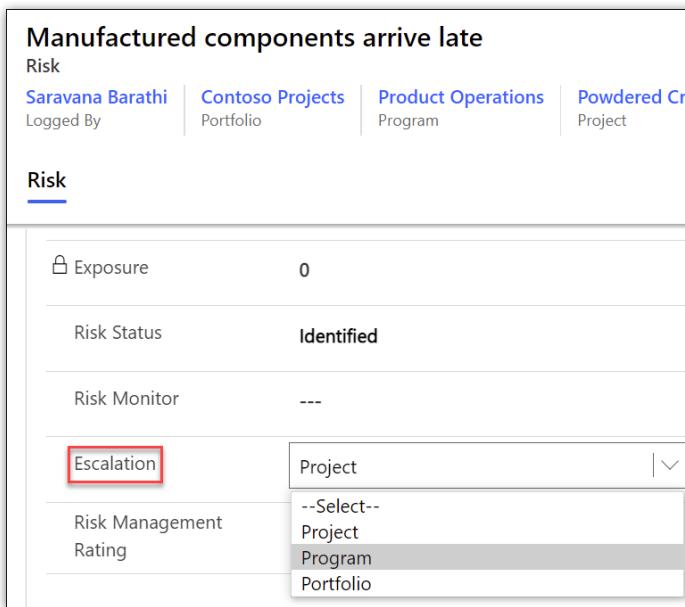
In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

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

Tip

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

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



The screenshot shows a risk card for the risk 'Manufactured components arrive late'. The card includes the following details:

- Risk:** Saravana Barathi (Logged By), Contoso Projects (Portfolio), Product Operations (Program), Powdered Cre...
- Risk:** Manufactured components arrive late
- Exposure:** 0
- Risk Status:** Identified
- Risk Monitor:** ---
- Escalation:** Project (selected from a dropdown menu)
- Risk Management Rating:** (dropdown menu showing options: --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

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						Δ Portfolio	* Portfolio A							3/8/2024	
Project Reference	Proj-001009						Δ Program	* Program A							1:26 PM	
Project Manager	* J Jonathan Weisglass														Source Request	---
Project Sponsor	* J 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						Health		Red		Yellow		Green		
% Complete							Health Comment		---						
% Complete Comment	---						Cost		Red		Yellow		Green		
Current Start	---						Cost Comment		---						
Current Finish	---						Time		Red		Yellow		Green		
Target Start	---						Time Comment		---						
Target Finish	---						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

Charter Status Status Reports Team **Stages** Gantt My Work Documents A

Project Stages

Current Start	Name	Current Finish
6/13/2022	Initiate	6/14/2022
6/15/2022	Plan	6/15/2022
6/16/2022	Execute	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 - Task-1

Scale-Up - Deliverable-1

Scale-Up - Deliverable-2

16%

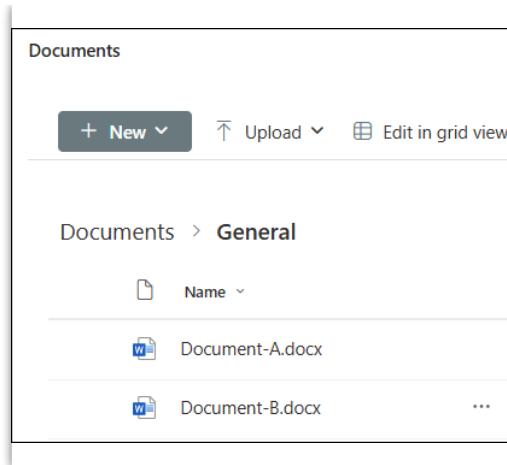
- You can view in the Stages tab the percentage complete of stages within projects in order to easily get a high-level view of how different stages are progressing.
- Click on a stage link to view additional details about the stage including description and status information, and to access the [document library associated with the project](#).

Scale-Up

Project Task · Project Stage ▾

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	█



The screenshot shows the 'Documents' section of a project. At the top, there are buttons for '+ New', 'Upload', and 'Edit in grid view'. Below this, a breadcrumb navigation shows 'Documents > General'. The main area displays a list of files with columns for Name and a three-dot menu. Two files are listed: 'Document-A.docx' and 'Document-B.docx'.

Actions

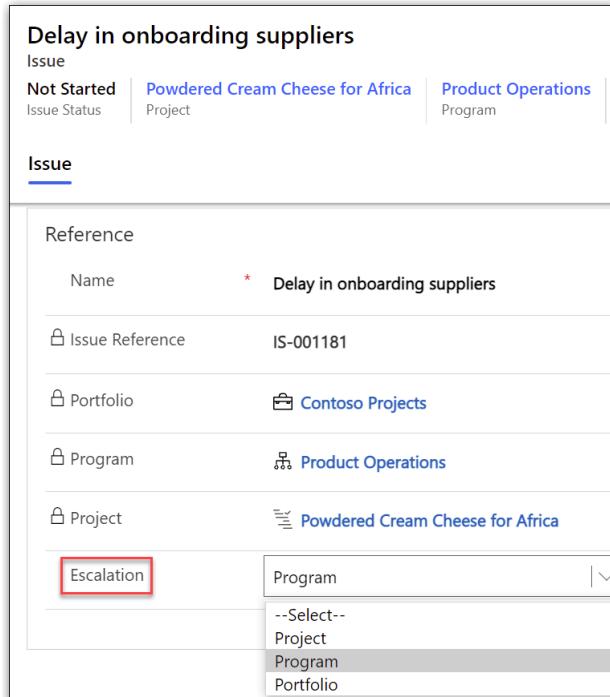
Log project actions, decisions, and changes. See [Actions](#) for details.

Issues

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

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

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



The screenshot shows the 'Issue' creation form for a new issue titled 'Delay in onboarding suppliers'. The form includes fields for Issue Status (Not Started), Project (Powdered Cream Cheese for Africa), and Program (Product Operations). The 'Issue' tab is selected. In the 'Reference' section, the Name is set to 'Delay in onboarding suppliers'. The 'Escalation' dropdown menu is open, showing options: Program (selected), Project, and Portfolio. The 'Escalation' field is highlighted with a red box.

Risks

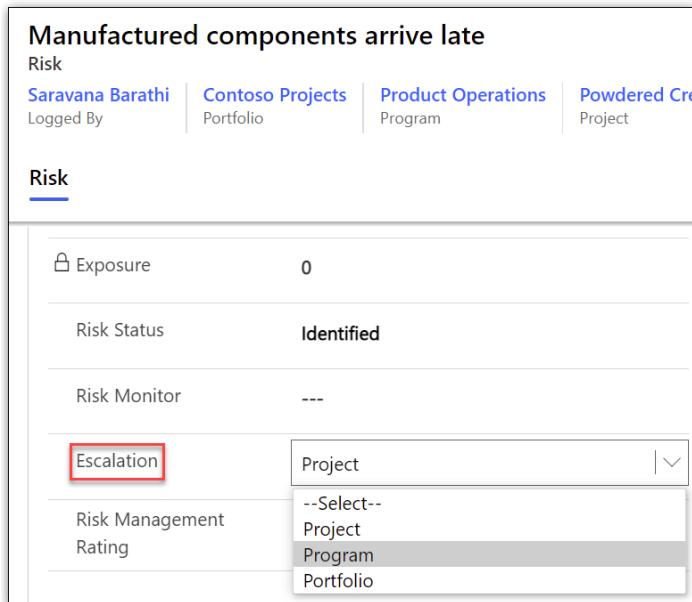
In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

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 card for 'Manufactured components arrive late'. At the top, it displays 'Risk' and the 'Logged By' information: 'Saravana Barathi' (Portfolio), 'Contoso Projects' (Program), 'Product Operations' (Program), and 'Powdered Cre...' (Project). Below this, the 'Risk' section is expanded, showing 'Exposure' (0), 'Risk Status' (Identified), and 'Risk Monitor' (---). The 'Escalation' field is highlighted with a red box, showing a dropdown menu with options: 'Project' (selected), '--Select--', 'Program', and 'Portfolio'. The 'Risk Management Rating' field is also visible.

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.

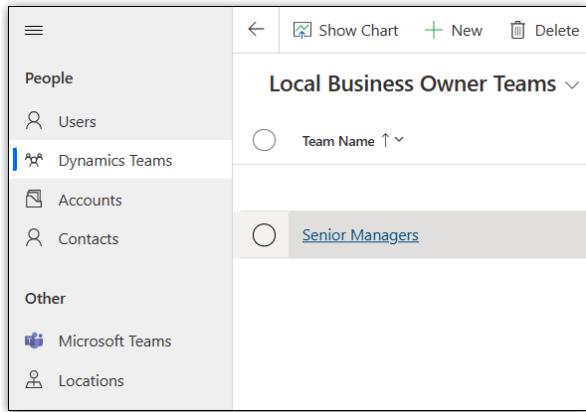
Product Update

The elements below are included in the Product Update template:

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

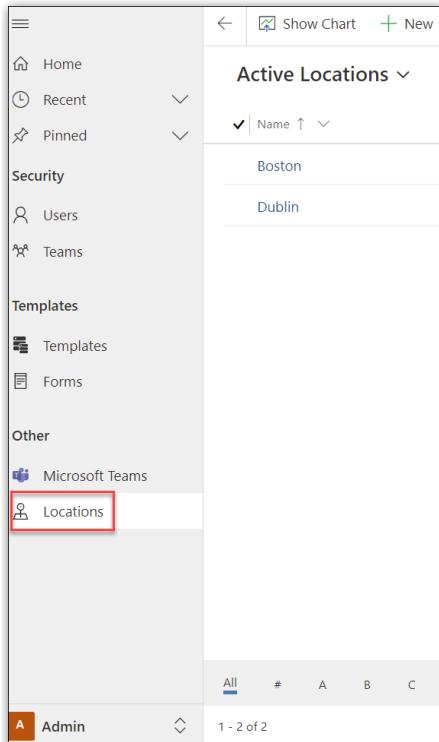
Group Manager Field

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.

- 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

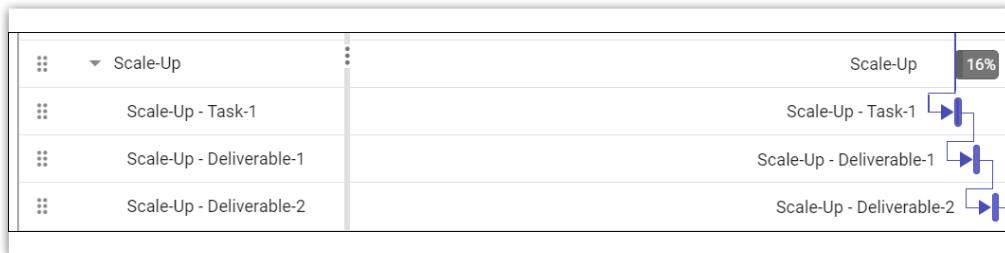
Initiate (37 Hrs) Plan

Charter Status Status Reports Team **Stages** Gantt My Work Documents A

Project Stages

Current	Name	Current Start	Current Finish
●	Initiate	6/13/2022	6/14/2022
○	Plan	6/15/2022	6/15/2022
○	Execute	6/16/2022	6/16/2022

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



- 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

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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

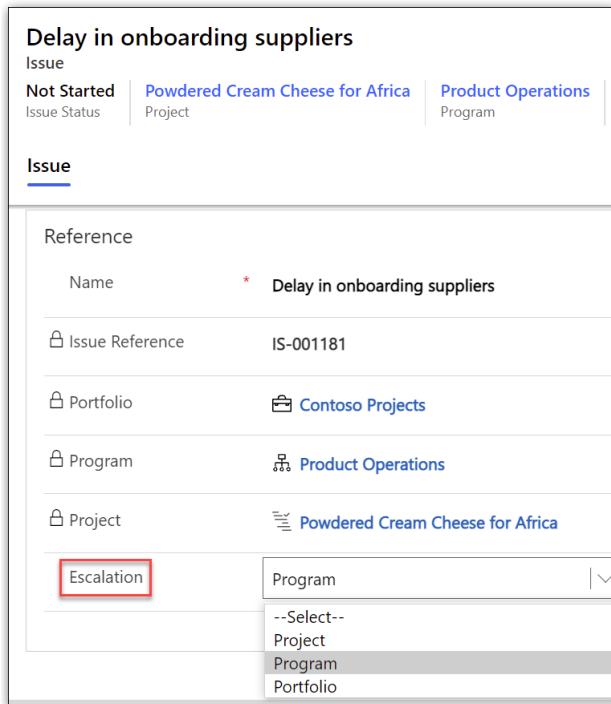
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Delay in onboarding suppliers

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

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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

Sarvana Barathi | Contoso Projects | Product Operations | Powdered Cre
Logged By Portfolio Program Project

Escalation	Project
--Select--	Project
	Program
	Portfolio

Risk Status Values

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