

Form Configurator - Best Practices

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Project Management Context

The [Form Configurator tool](#) provides users with the BrightWork PMO Manager or BrightWork Template Editor security role the ability to hide or show Project Template Form Tabs, Sections, and Columns with point and click ease. The Form Configurator allows users to adjust the amount of process in projects to better focus on the most relevant project elements.

With the Form Configurator, project forms can be delivered using the same underlying BrightWork 365 out-of-the-box form, and with a different Project Template instance per form.

Note To use the Form Configurator, you will need either the BrightWork PMO Manager or BrightWork Template Editor security role.

Power Platform Form Editor Best Practices

This section covers all actions carried out in the Form Editor in the Power Platform Make Area. It is assumed that users accessing the Form Editor are familiar with the general principles of [Power Platform Solution Customization](#).

General

With the inclusion of the Form Configurator in the form editing process, using Save As to work from a copy of the original form no longer needs to be used with out-of-the-box BrightWork 365 project forms; this is one of the main advantages of the Form Configurator in that it allows you to use BrightWork 365 out-of-the-box project forms to generate your own forms (see "BrightWork 365 Project Forms" below). You will get any updates to these forms in the future and avoid upgrade complications such as needing to recreate your custom forms using the latest standard forms or backfill the new features into your existing custom forms.

Note If a component is hidden on the Form Editor, it will not be displayed on the Form Configurator. This means that the Form Configurator can only be used to hide visible form components. This also means that components hidden via the Form

Configurator will flash briefly when the form loads.

An important detail to understand about forms is that they support merge changes. This means that you can make some changes to a form, and that form will still take updates in a BrightWork 365 solution update. However, if you make changes to a column in a section, it will add a solution layer to the section and this will prevent that section from getting any updates in an upgrade.

See [How managed solutions are merged | Microsoft](#) for more information.

Brightwork 365 Project Forms

BrightWork 365 includes three out-of-the-box project forms:

- BrightWork 365 Project (used in the Project Light, Project Standard and Project Structured Project Templates).
- New Product Introduction
- Product Update

You will typically use the "BrightWork 365 Project" form as the main form for delivering your generic Project Management Templates. The New Product Introduction Template and the Product Update Template are examples of using BrightWork 365 for more specific business processes.

Component Naming Conventions

A component is any element that you can add to a form in the Form Editor. It includes tabs, sections, columns and so on.

Components typically have a Label (the display title) and a Name (the underlying schema name).

Labels

Labels can be hidden on most components (apart from tabs) and do not have to be unique. Section labels that are hidden should give the user some indication of where the section is on the form, i.e., Top, Bottom etc.

Names

Component names are how form elements are addressed via code. Component names must be unique and should follow the convention below:

- Tabs: Use a combination of the tab name and the word tab, i.e., tab_charter, tab_statusreports – note the absence of a space between status and reports – this is a Power Platform convention.
- Sections: Include the tab name and the word section, i.e., tab_charter_section_top,

tab_statusreports_section_statusreports.

- Columns: Column names are automatically assigned on column creation and can only be updated when adding the column (this should only need to be done if you are adding a column with a name that already exists).

Tabs

If you are certain that you do not want to use a particular tab at all, hide the tab in the Form Editor instead of the Form Configurator – this will prevent the unwanted tab from flashing as the form is loading.

If you would like to add an element to the Project Settings tab, add it to a separate section on the tab. Do not make any changes to the out-of-box sections on this tab, or on the Approvals tab.

Sections

As a basic rule, do not make any changes to columns in out-of-the-box sections. Add your own new sections for custom columns, and if you would like to make section changes (e.g., hide some columns and rearrange the layout).

If you would like to make changes to the top and bottom sections on the Charter tab, we recommend you hide them, and recreate them as your own sections. Hiding one of our sections does not prevent the section from getting updates during an upgrade.

Custom sections should be laid out with the multiple end-scenario designs in mind. For example, avoid a scenario like the below where the columns in the middle of a 3-column section are hidden.

The screenshot displays the 'DMC Project Standard' form. At the top, there's a header bar with the project name, a 'Project - Project Standard' dropdown, and user information for Vimal Shetty (Project Manager). Below this is a progress bar with stages: Initiate (72 D), Plan, Execute, and Close Out. The 'Initiate' stage is currently active. A navigation menu below the progress bar includes tabs like Charter, Status, Status Reports, Team, Stages, Gantt, My Work, Documents, Actions, Issues, Risks, Costs, Communications, Project Settings, Approvals, and Related. The main content area shows a form with fields for Name (DMC Project Standard), Project Reference (Proj-001024), Project Manager (Vimal Shetty), and Project Sponsor (Vimal Shetty). To the right of these fields, there are sections for 'Created On' (5/31/2023 10:41 AM), 'Source Request' (---), and 'Teams Channel' (---).

Subgrids and Other Components

Subgrids and other components, such as the Timeline, should be added to a section of their own.

Columns

Columns in our out-of-the-box sections should not be touched, as this will cause the section containing the column to take a solution layer.

If you would like to change the display name of a BrightWork column, you should first change the display name in the column itself in the solution editor, create a new section, and then add the column there.

While changing the display name of the underlying column will not change it on the form, if it already exists on the form, it will change it in views. Therefore for best practice, if the column already exists in one of your sections, change the underlying name of the column, remove it from the custom section and then add it back. Do not change the label of a column in one of the out-of-the-box sections.

Custom columns are added as before but should be added to your own custom sections.

Best Practice FAQs

Q: How should a custom column get added?

A: All new custom columns should be added to new sections.

Q: How should a new column be added to the top section of the Charter?

A: Replicate the top section and add the column to the new section. Hide the out-of-the-box top section with the Form Configurator.

Q: How should an existing column be hidden?

A: Use the Form Configurator to hide the column.

Q: How should the labels/names of a couple of the existing columns be changed?

A: Replicate the relevant section and change the label there. Hide the out-of-the-box section on the Form Editor.

Q: How should the layout of the columns in an existing section be changed?

A: Replicate the relevant section and make the changes there. Hide the out-of-the-box section on the Form Editor.

Q: How should a column be moved to a different tab?

A: Hide the column in its current location using the Form Configurator. Add the column

to a new section in the different tab.

Q: How should different templates for marketing / finance / operations - with different custom columns and different Business Process Flows for each be created?

A: Create a Project Template for each instance.

Q: What are the implications of saving a copy of the BrightWork 365 Project form?

A: The form will be orphaned and will not get updates made to the original form in subsequent releases.

Q: What are the implications of changing an existing column on a form using the make app?

A: The section the column is in will have an unmanaged layer and will not get updates made to the section in the original form in subsequent releases.

Q: What are the implications of changing an existing section on a form using the make app?

A: The section will have an unmanaged layer and will not get updates made to the section in the original form in subsequent releases.

Change Project Template

Currently it is not possible to change the Project Template on a live project. If you need to do this, follow these steps:

1. Create a personal view with just a small number of columns (no calculated ones).
 2. In your personal view include the Project Template and Project Templates columns.
 3. Open the view in Excel Online and paste the text name of the desired Project Template into both columns.
 4. When you reopen the project, click Ctrl-F5 to refresh it.
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