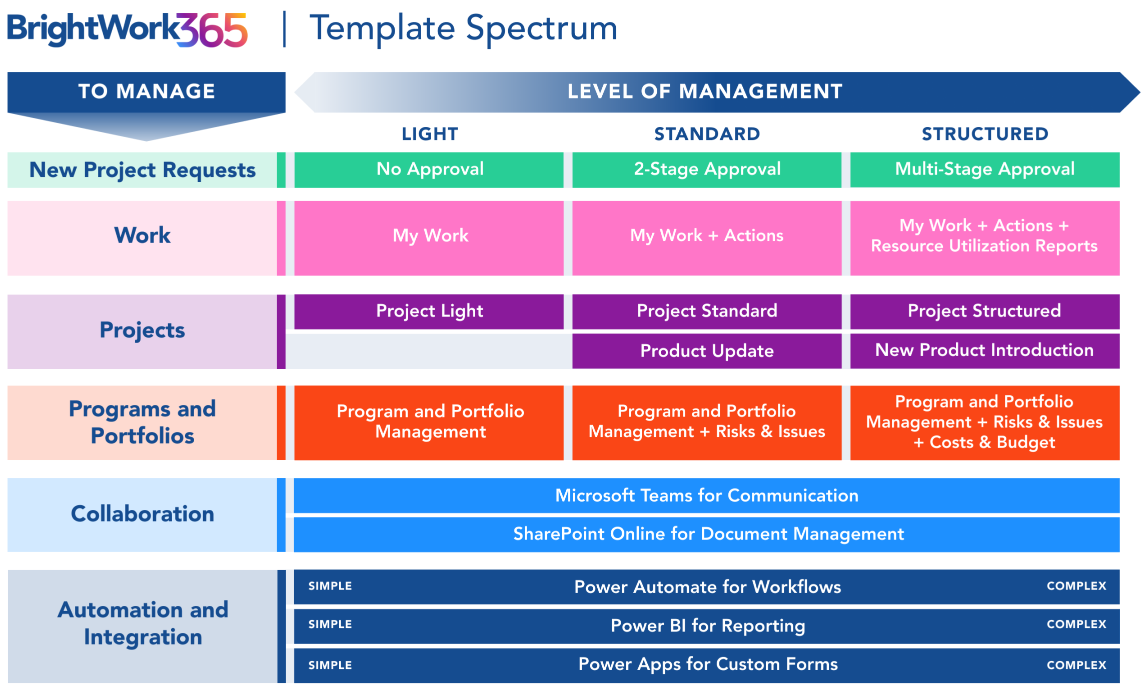
Starter Project Templates

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



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.

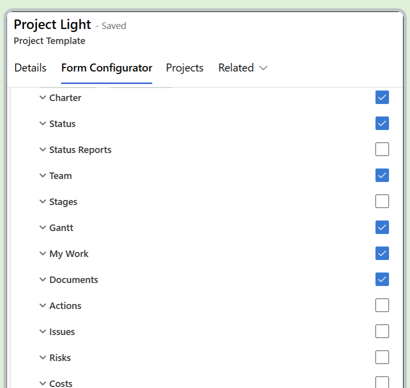
BrightWork 365 brings the best of the Microsoft 365 ecosystem together providing a single solution that allows full control over project approval and starts your projects quickly with out-of-the-box project templates.

> **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

- 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.



Form Configurator Screen

All Templates

Tip Templates that are associated with a Content Template will be prepopulated with project data.

> **Note**
>
> - Document Management Interface: A SharePoint Online document interface will display throughout projects created with release 2025-2 or later, and if you're organization has opted into the Graph API settings (typically done during the installation process). Otherwise, the same document subgrid present on pre-2025-2 Projects will be displayed. See Document Management for details.
> - User entered dates will be saved as time zone independent UTC dates, not user local dates; the same dates will be displayed for all users irrespective of time zone.
> - Only the current project manager, or a user with the BrightWork PMO Manager or System Administrator security role, are considered owners of the project and can change who is listed as the project manager.

The elements below are common to all starter project templates:

Charter

The Charter tab contains high level metadata about the project, including the project title, stakeholder information, and a link to the associated Microsoft Teams Channel, if one has been configured for the project.

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

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

The **Charter** tab also contains the mandatory columns **Program** and **Portfolio**. The values for these fields can later be changed by a user with elevated privileges, and all associated child items will be automatically adjusted to reflect these value changes.

When a Portfolio/Program value is changed, a process will run in the background to reconcile security access with these changes. When all the associated security changes have been completed and the portfolio/program move is done, an email notification will automatically be sent to the project manager and the user that initiated the change. If there is a process failure, an email notification will automatically be sent to the user that initiated the change, and the Flow owner.

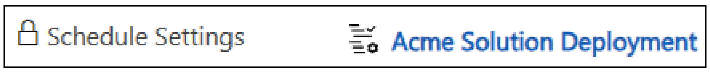
The following can be specified in Project Templates and will populate corresponding columns in new Projects:

- Content Template
- Portfolio

- Program
- Project Manager
- Project Sponsor
- Project Type

Note When the back arrow is clicked while on the Charter tab, the Project form will reload rather than load the view or record from which you opened the project record.

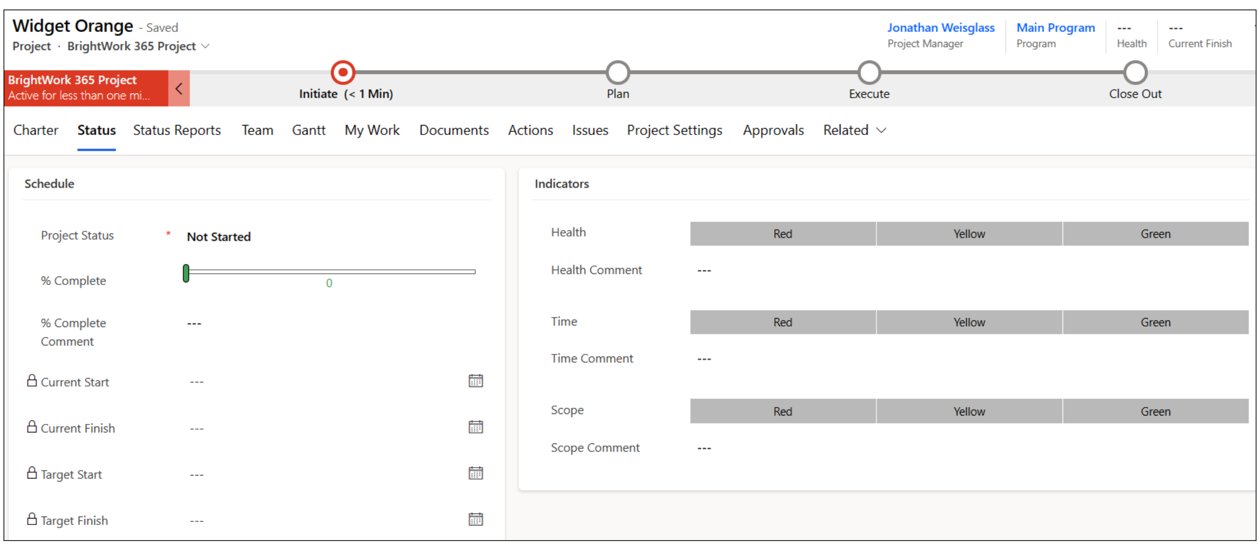
Schedule Settings



The Schedule Settings option on the Charter and Project Settings tabs provides project managers with a convenient method for viewing Global Calendar Settings and configuring project-specific calendar settings for flexible scheduling. See Schedule Settings for more information.

Status

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

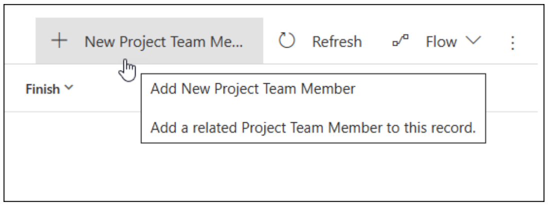


See Project Status Reporting for more information.

Team

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

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

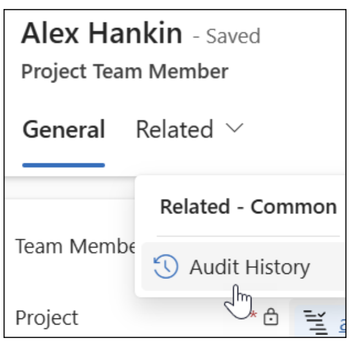


Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can add new team members to the Team tab directly.

> **Tip** If you would like to add multiple users to the Team tab at once rather than individually, you can add a task to the Gantt, add all resources to the single task, wait for the team members to be created in the Team tab, and then delete the task. Note that the task's Start & Finish dates will be present in the Team tab for these users.

> **Note** Also see Project Security & Access for project security related info related to project team members.

You can audit various project team member related changes, including project access security related changes, by clicking on **username > Related > Audit History**.

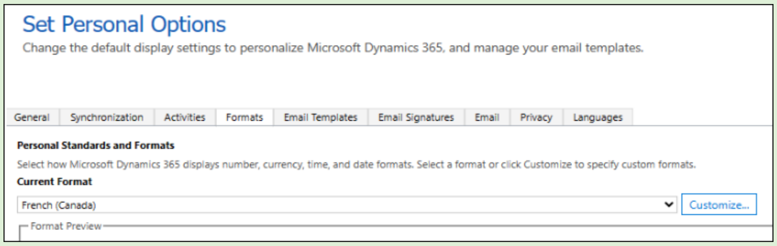


> **Note**
> - To manually delete a Project Team Member from the **Team** tab in a project, you will first need to remove the user from all work assignments in the project.
> - Dates may not update in the Teams tab until an update of some kind is made in the Gantt tab, which will trigger the date update.

Gantt

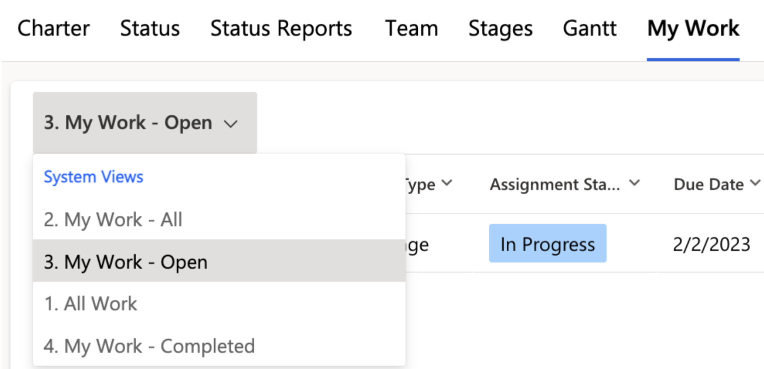
List of project tasks with a corresponding bar chart that represents the project schedule with task start and end dates. Visually depicts dependency relationships between the tasks as well as task status. See the Task Management article for more information.

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.



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.

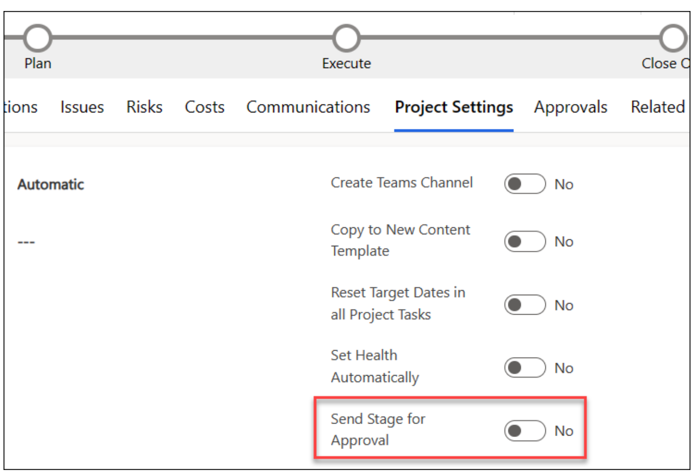
Project Settings

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.



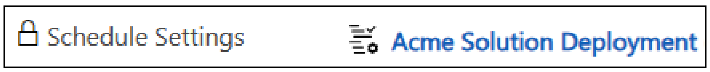
Approval History

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

	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



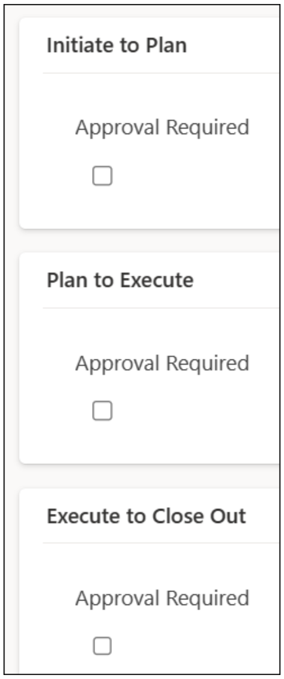
The Schedule Settings option on the Charter tab and Project Settings tab provides project managers with a convenient method for configuring multiple project-specific options including calendar settings, overriding global calendar settings which will adjust the project schedule accordingly. See Schedule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

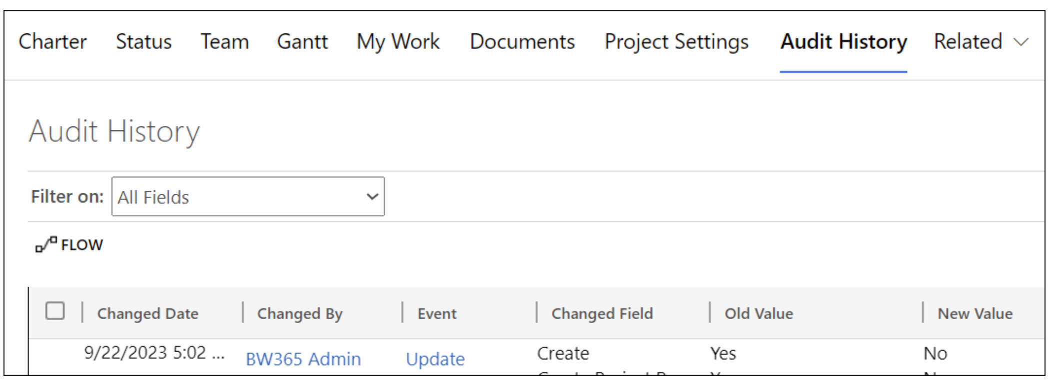
Business Process Flow Stages are used to control the number of stages and the stage names in the Approval sections of the **Approvals** tab. The default settings are controlled by the configuration set in **Templates Area > Project Templates** by a user given the **BrightWork Template Editor** security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



See Project Stage Approval Process and BrightWork Approvals for related information.

Related > Audit History

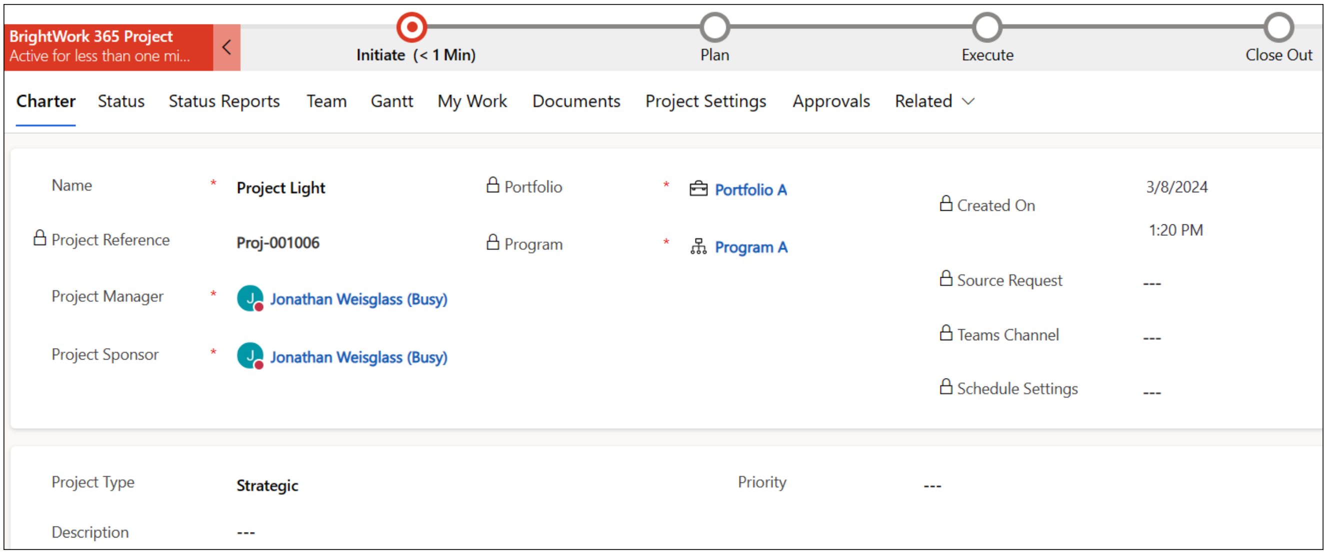
The Related tab contains the Audit History link that allows you to view changes that were made throughout the project.



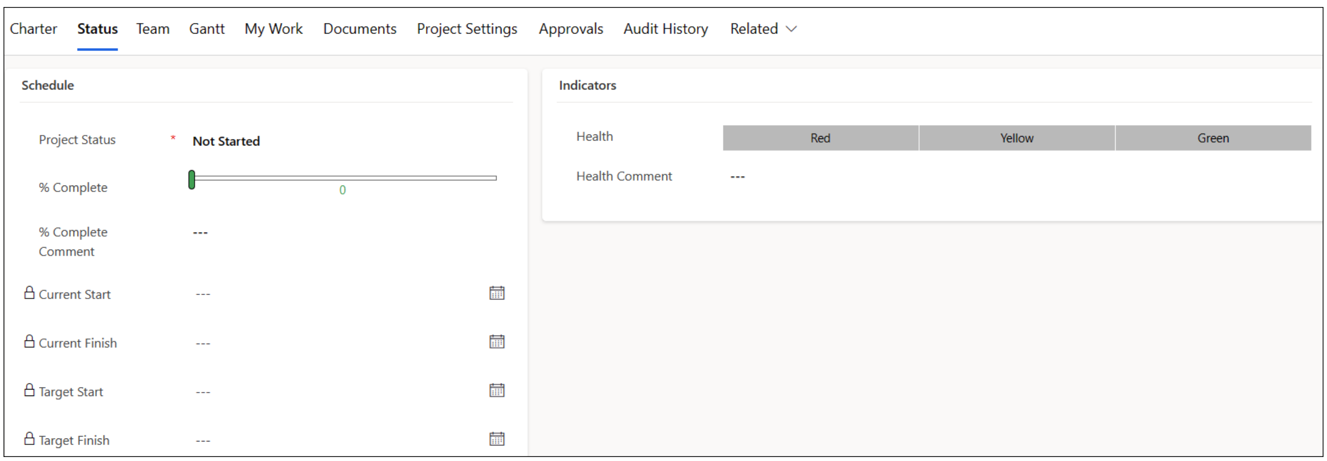
Project Light

The elements below are included in the Project Light template:

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



Status

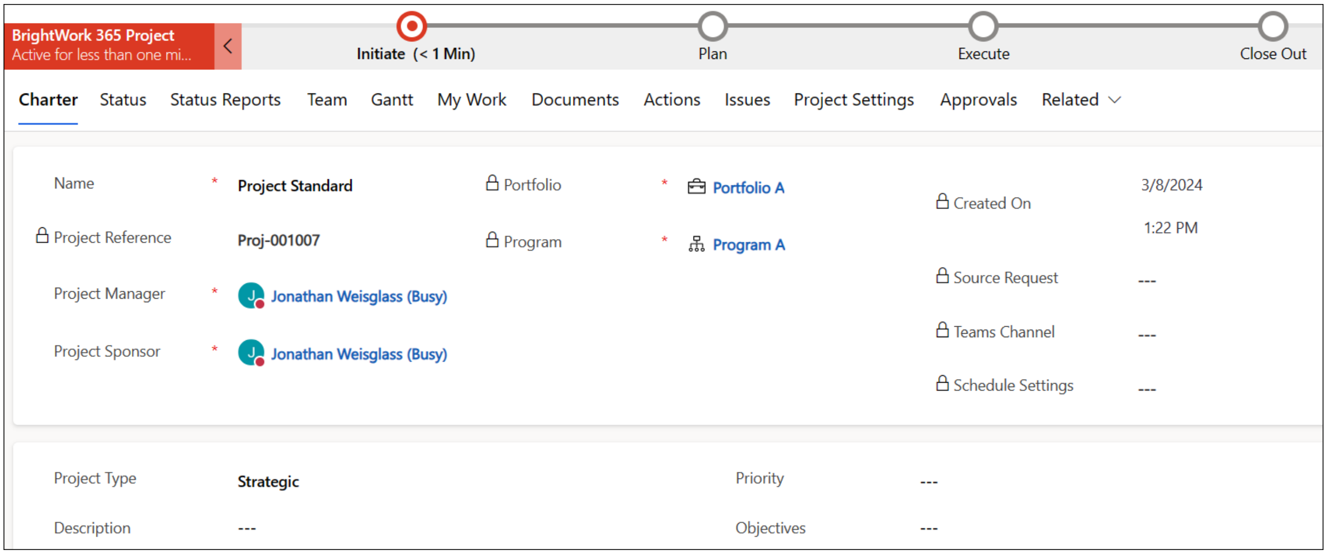


See the Project Status Reporting article for more information.

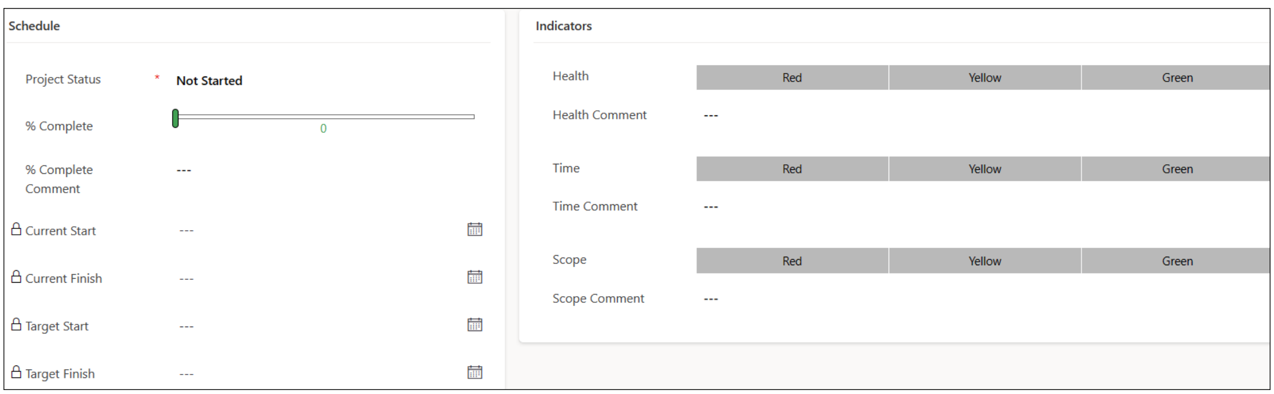
Project Standard

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

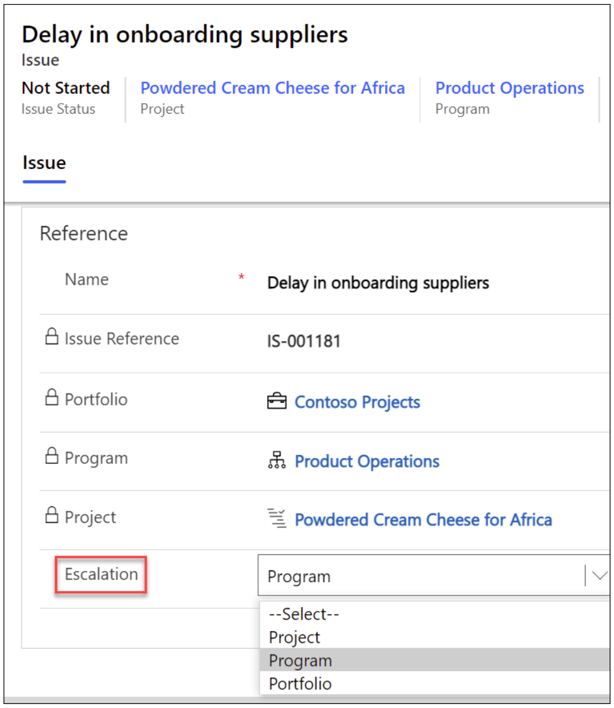
Log project actions, decisions, and changes. See Actions for details.

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.

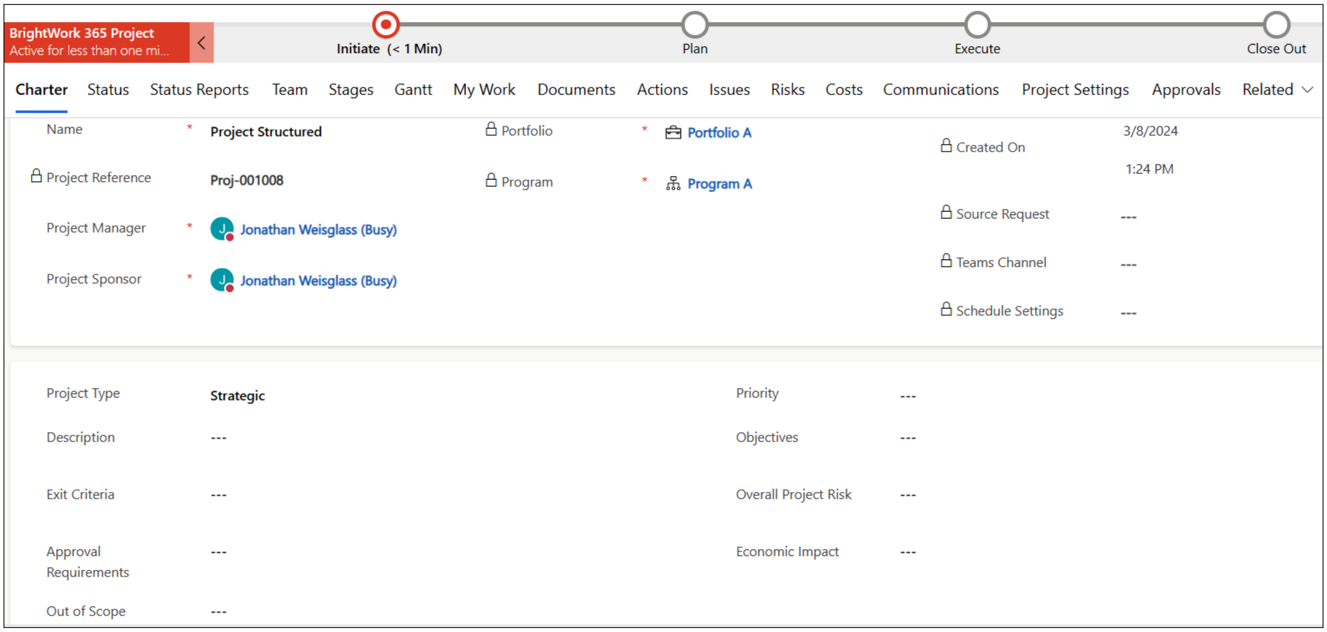
Issues can be added to the project's associated program or portfolio by clicking into the issue and choosing the relevant escalation location.



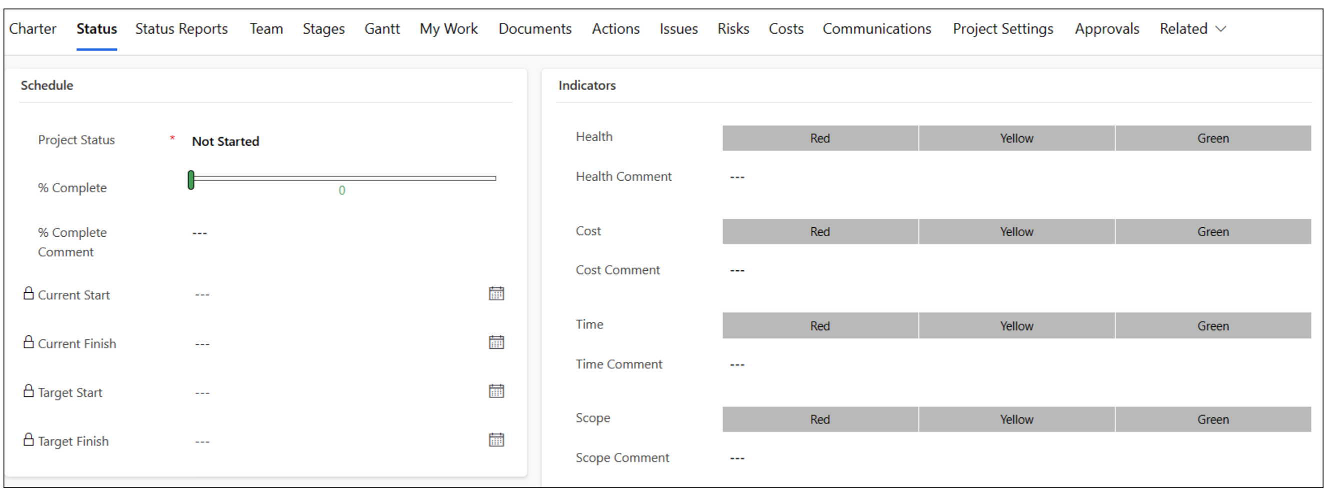
Project Structured

The elements below are included in the Project Structured template:

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



Status



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Stages

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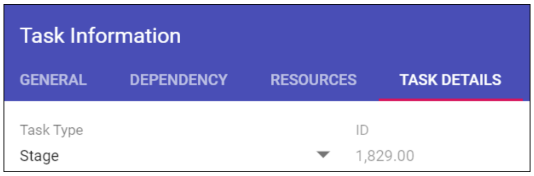
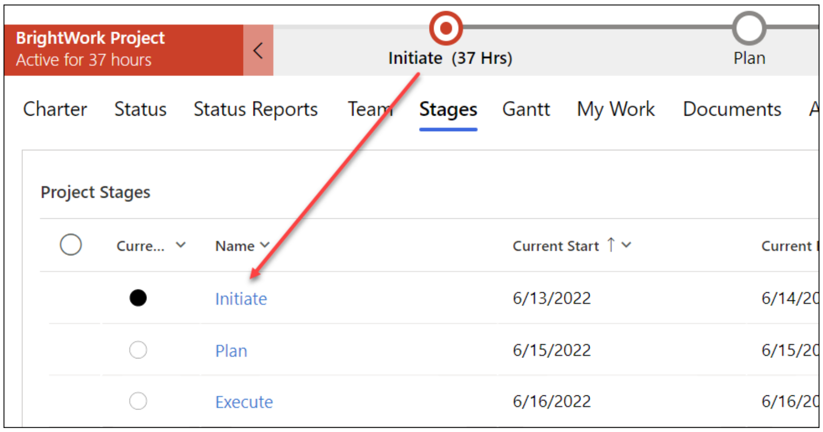
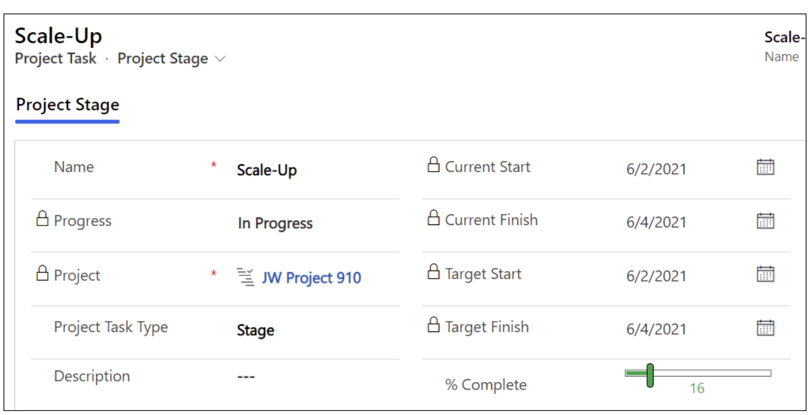


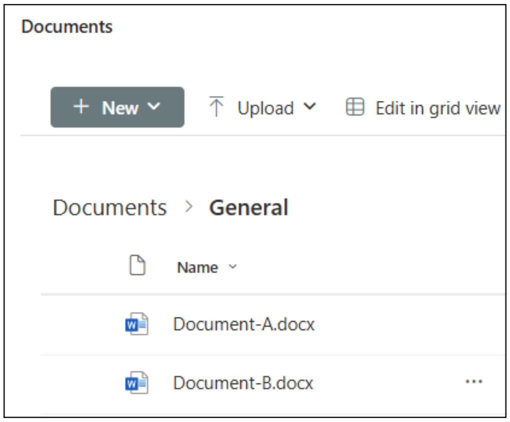
- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the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





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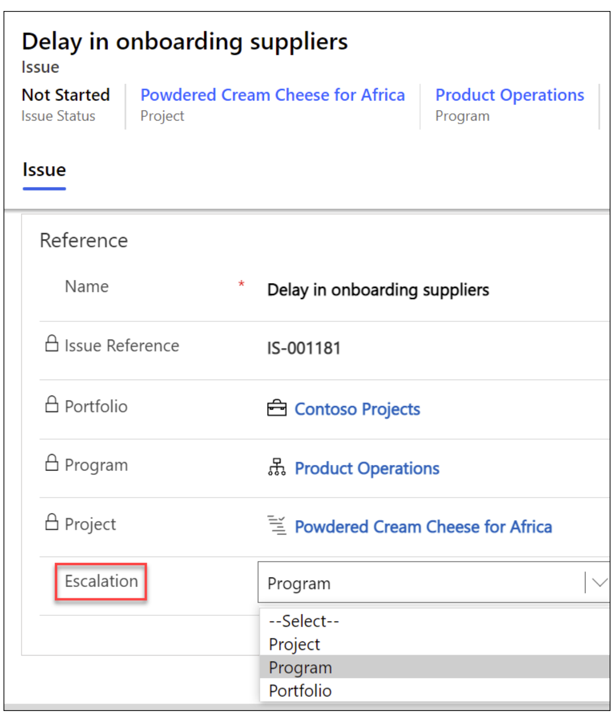

Risks

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> **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.
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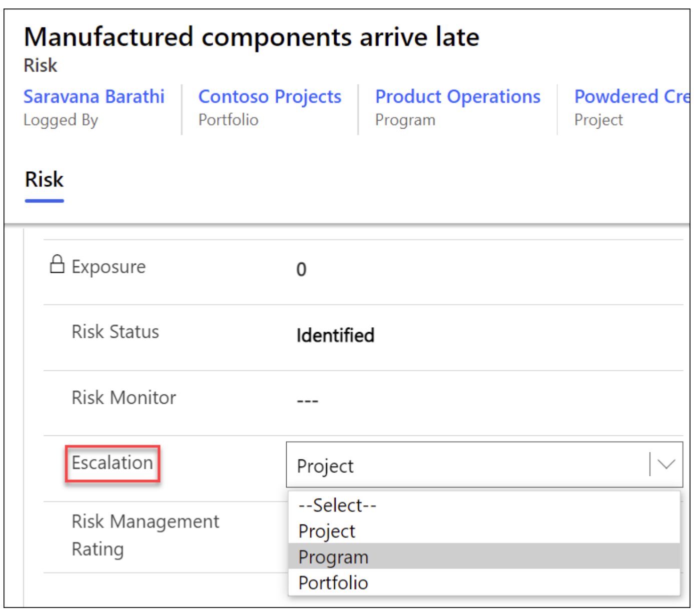


Risk Status Values

- 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.

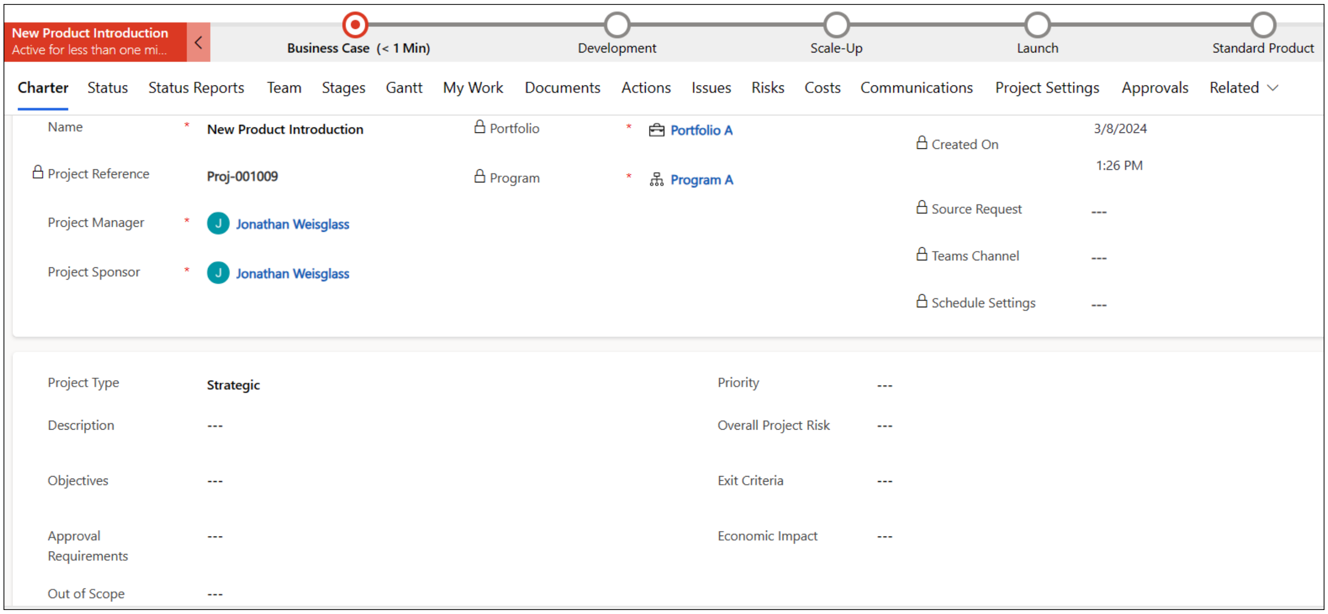
Communications

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



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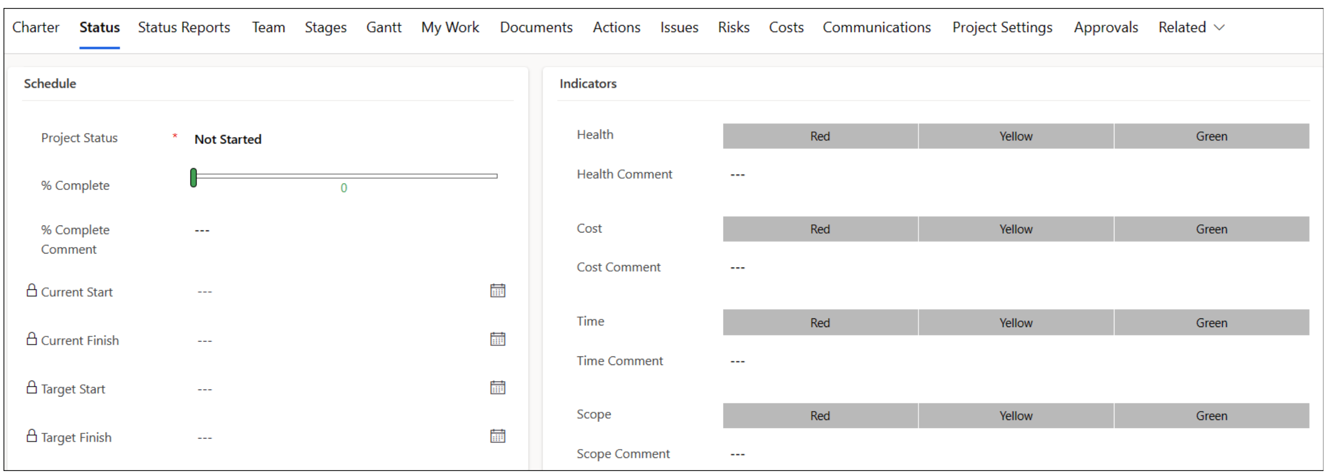

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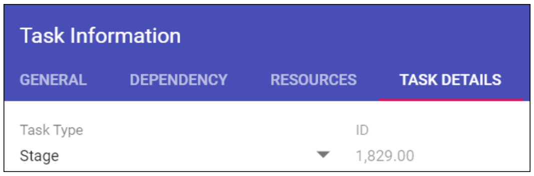

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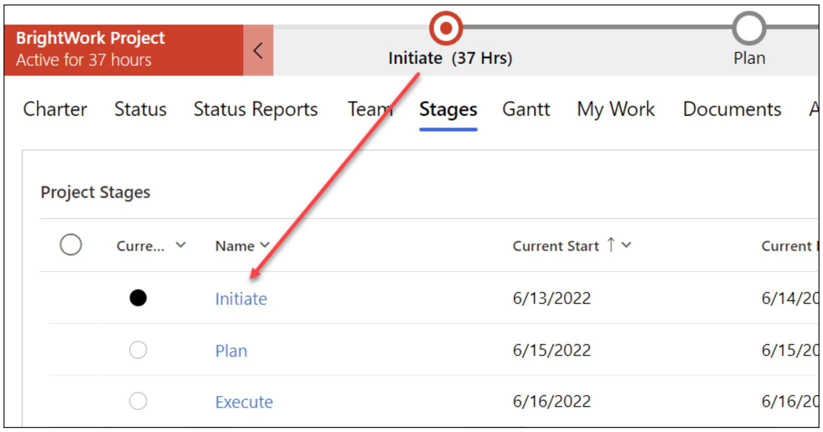

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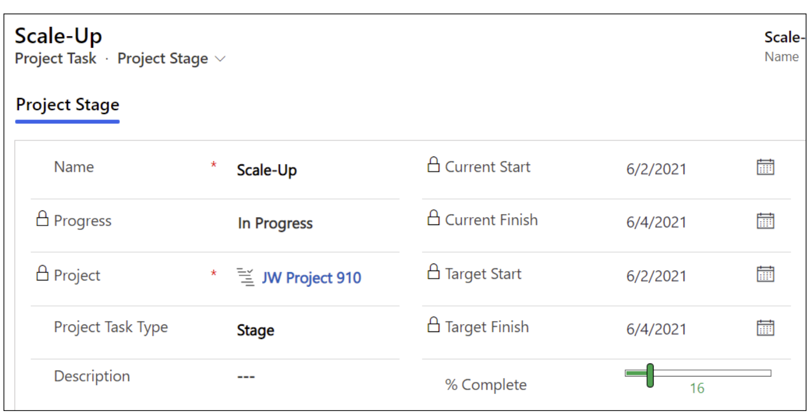

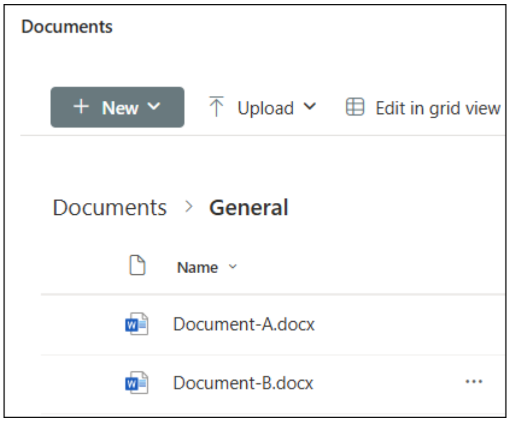

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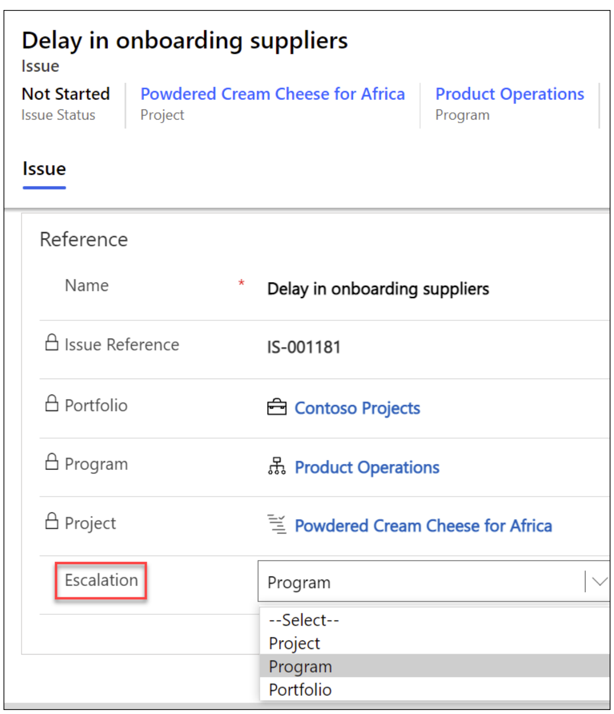

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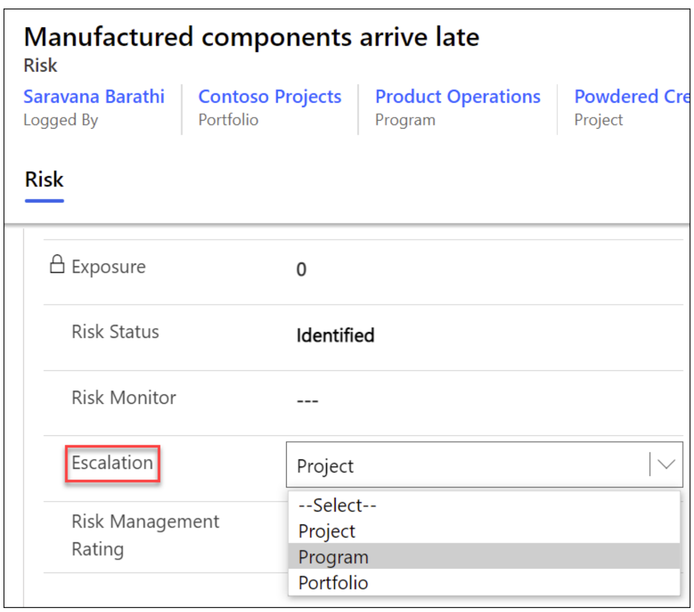

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Product Update

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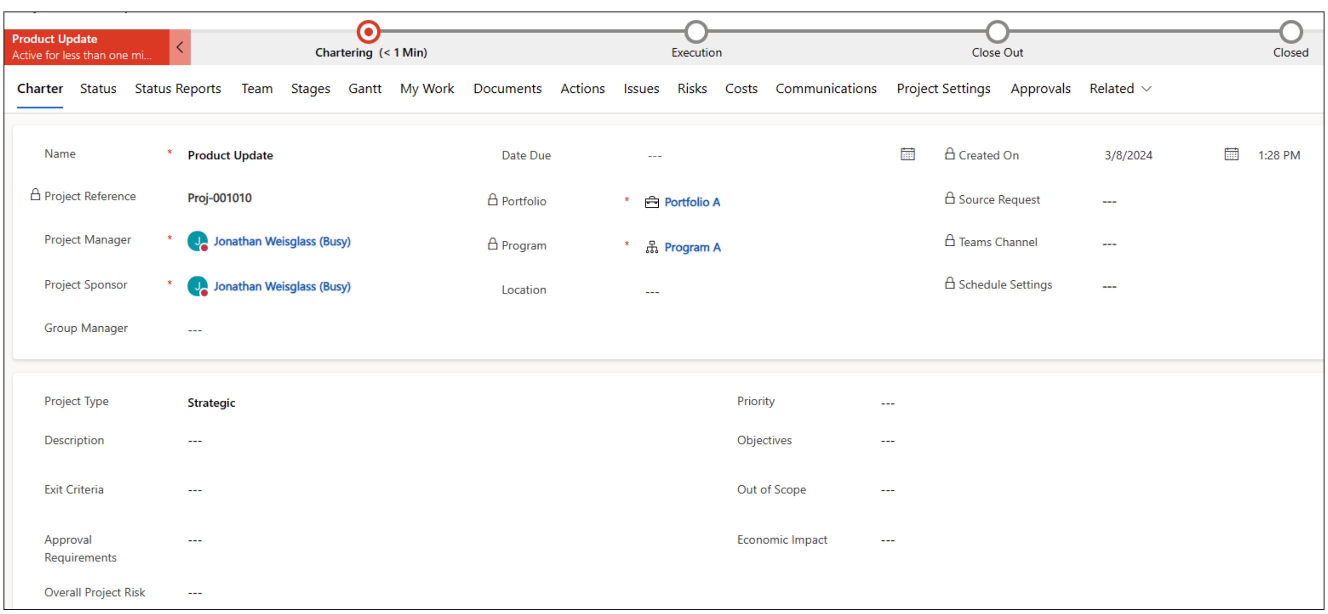
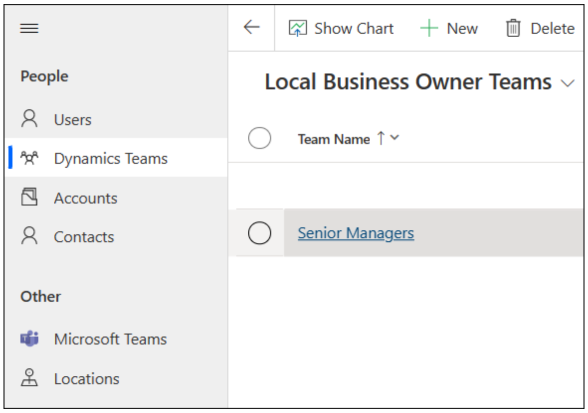


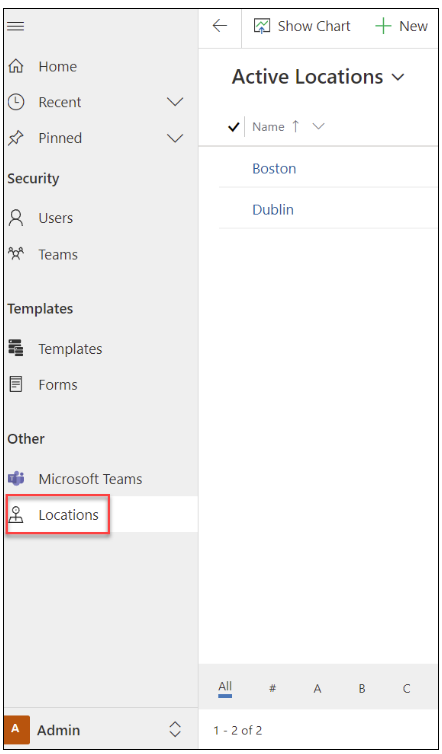
Group Manager Field

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**.

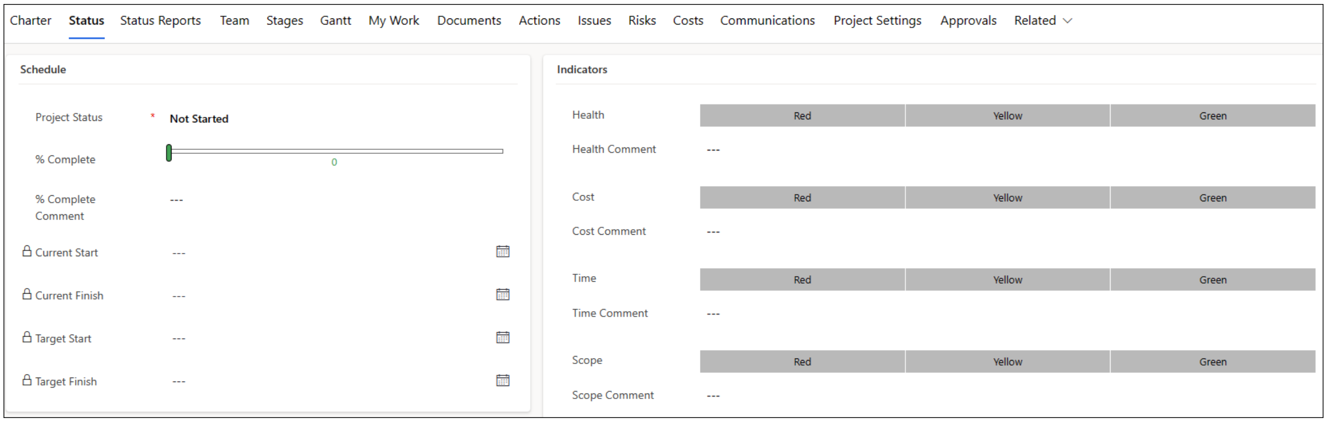


Location Field

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



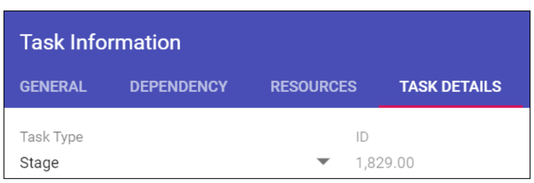
See Project Status Reporting for more information.

Status Reports

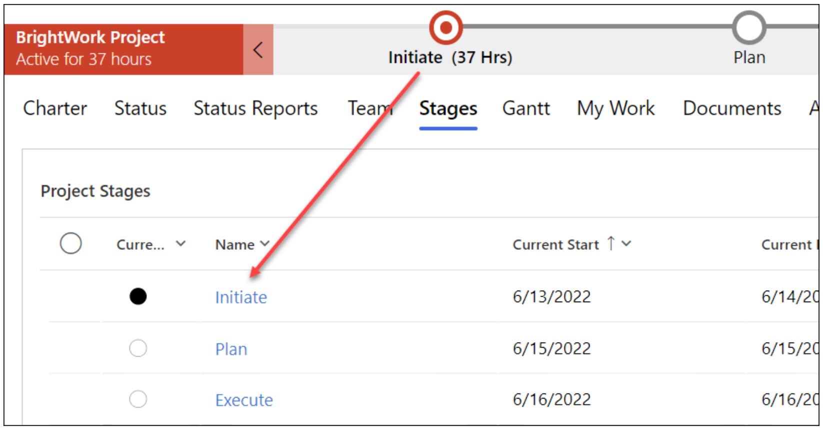
The **Status Reports** tab provides the project manager with the ability to create snapshot status reports of the project's current standing and to view a history of status reports. See Project Status Reporting for details.

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.

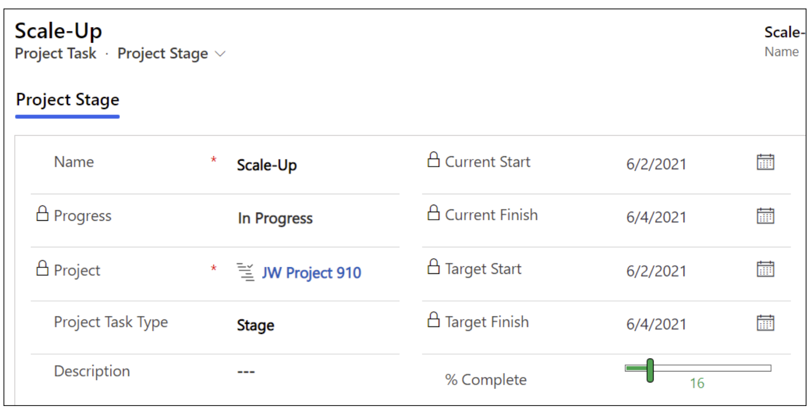


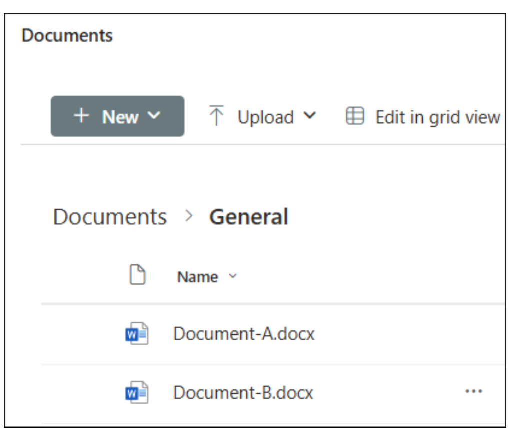
- The default sorting for the Stages list is by Current Start - Older to Newer.
- In the **Stages** section, the **Current Stage** column will match the current stage set in the Business Process Flow if the names of the stages in the Gantt match exactly with those in the Business Process Flow at the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



- 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.





Actions

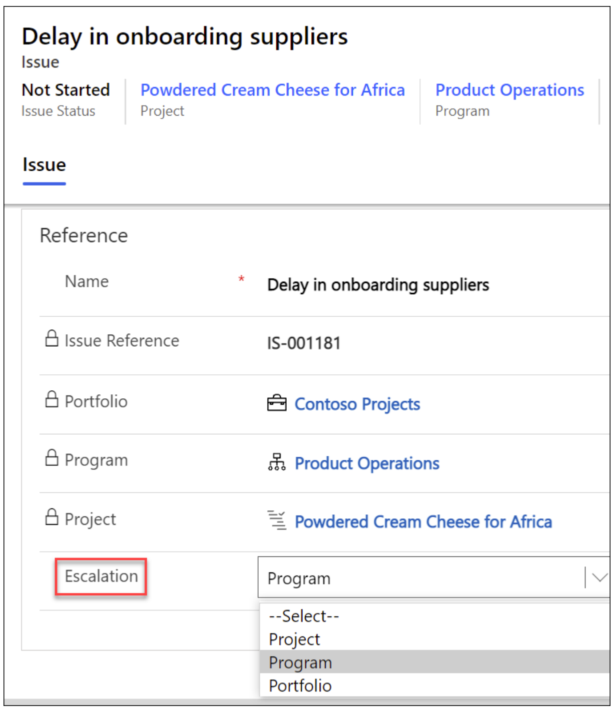
Log project actions, decisions, and changes. See Actions for details.

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.



Risks

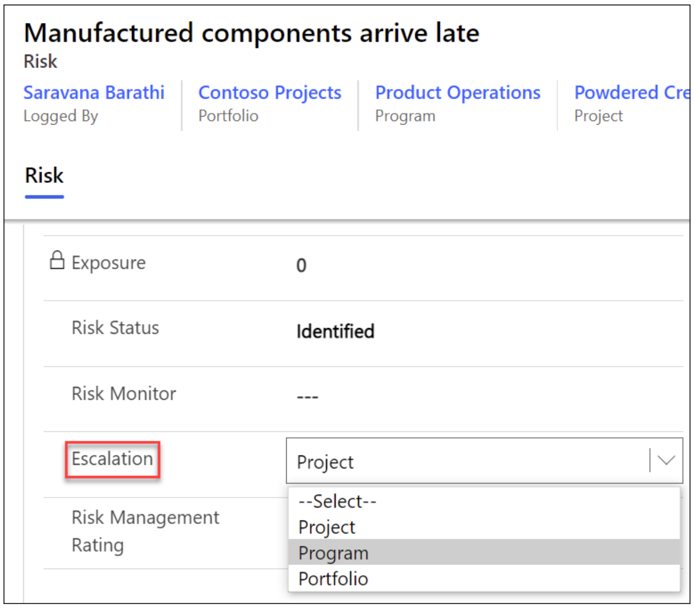
In the **Risks** section you can create a new risk by clicking **+ New Risk** (do not use the Add Existing Risk option). Enter Risk information for those items identified as potential future issues, with probability, impact, status and other relevant Risk details.

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.



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.