Frequently Asked Questions

Are there out of the box starter project templates available?

Absolutely! Starter templates include Project Light, Project Standard, Project Structured, New Product Introduction, and Product Update. See BrightWork 365 Starter Project Templates.

Do projects created directly in the Projects module without a request require any approvals?

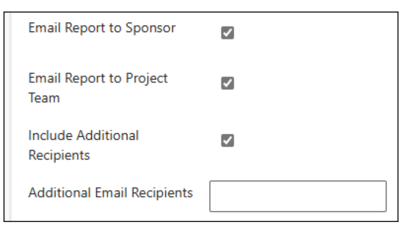
No, users given the BrightWork Project Manager security role (or higher) can create projects directly in the Projects module without any approvals.

How do I create a Status Report?

Status Reports are created in the Status Reports tab. You can save draft versions of a report and whenever it's ready to go out you can specify who should get an emailed copy.

How do I specify which colleagues should get emailed a status report?

You can specify within the status report form which colleagues should get emailed a project status report.



How do I move a Project to a different Program?

Users with the BrightWork Project Manager, BrightWork PMO Manager or BrightWork Program Manager security role can change a project's associated Program from within the Project Settings tab (the field is locked on the Charter tab by design).

How do I move a Project to a different Portfolio?

Users with the BrightWork Project Manager, BrightWork PMO Manager or BrightWork Program Manager security role can change a project's associated Portfolio from the Project

Settings tab (the field is locked on the Charter tab by design).

How do I delete a project?

In order to delete a project, you will need to first delete all of the project's work assignments, and then all of the team members found in the project's Team tab.

Are deleted items, i.e., projects, assignments, etc., permanently deleted?

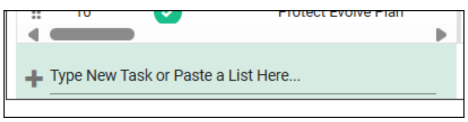
Deleted items, i.e., projects, assignments, etc., are permanently removed and cannot be restored unless the environment Recycle Bin has been enabled.

How do I configure custom schedule settings for a Project?

Users with the BrightWork Project Manager, BrightWork PMO Manager or BrightWork Program Manager security role can change a project's associated Schedule Settings from either the Charter tab or Project Settings tab.

How do I add multiple tasks to the Gantt in bulk?

Option 1: At the bottom of the Gantt you'll find a Quick Add option where you can either type the name of new tasks one by one, or you can paste in a column of many tasks from a spreadsheet.



Option 2: Import tasks into a BrightWork 365 project Gantt from a spreadsheet. See Import Project Gantt Tasks.

Can I add multiple approvers as part of the approval process?

Yes, you have the option to add multiple approvers as part of the approval process. This is done in the project's Approvals tab by a user with appropriate permission.

Can I use Microsoft Teams to approve stage move requests?

Yes, the Microsoft Teams Approvals app can be used to act on stage move approval requests. See Approvals in Microsoft Teams.

What are the different methods for adding documents to a project?

Documents can be added in the following ways:

- The Documents tab in a project: Create a new document or upload an existing document.
- Create a Deliverable type task and associate a document with the task. SeeGantt Sections > Task Details.

Can a Microsoft Teams Channel be used to store project related documents?

Yes, project related documents can be stored within a project's Teams Channel, and can be accessed directly from the channel, by OneDrive desktop syncing, or directly from within a project through form customization. See Document Management for more information.

How do I manage project risks including their status and the different people assigned to them?

Several out of the box starter templates (i.e., Project Structured, New Product Introduction, Product Update) include a Risk tab for managing risks in a very well-defined manner. See Project Structured template.

Why am I getting a "Script Error" when I try to open a project record?

Check the associated Project Template to make sure that all Default columns are populated.