

Portfolio & Program Issues

Project Management Context

An issue is an unplanned event or previously identified risk that has occurred and is likely to have an impact on the objectives of a project, portfolio, or program. Issues will often have a negative effect on scope, schedule, and/or quality. By assigning an issue to an individual in BrightWork 365 and closely monitoring its status, the issue's effects can be greatly mitigated.

Quick Create Form

To begin the process of creating a new issue via a Quick Create form, in the Issues tab click **New Issue**, fill in the field values, and click **Save and Close** or **Save & Create New**.

The screenshot shows a 'Quick Create: Issue' form with the following fields and values:

- Name: ---
- Escalation: Project
- Description: ---
- Priority: 1. Very High
- Issue Type: Regular
- Actions Requested: ---
- Actions Requested By Date: ---
- Assigned To: ---

At the bottom of the form, there are two buttons: 'Save and Close' (highlighted in blue) and 'Cancel'.

Quick Create Fields

Name: Name of the issue.

Escalation: Specify if the issue is to be set at the project, program, or portfolio level.

Description: Description of the issue.

Priority: The priority level of the issue.

Issue Type: The type of issue that is being logged.

Actions Requested: The actions that are requested of the issue assignee.

Actions Requested By Date: The date by which the requested actions should be completed.

Assigned To: The person assigned to the issue.

Additional Full Form Fields

After an issue is initially created with the Quick Create form, you can expose the full Issue form to add more details by clicking on the **Name** of the issue in the **Issues** tab.

The screenshot displays a web form for an issue, organized into three main columns: Reference, Issue Details, and Resolution. The Reference column includes fields for Name (Issue Sample), Issue Reference (IS-001227), Portfolio (Contoso), Program (Company Operations), Project (JW Widget Sol...), and Escalation (Project). The Issue Details column includes Description, Priority (1. Very High), Issue Type (Regular), Actions Requested By Date, Actions Requested, Requested By (Jonathan Weisg), Related Task, and Assigned To. The Resolution column includes Issue Status (Not Started), Progress Indicator (On Schedule), Actions Taken, Date Actioned, and Resolution Rating (5 stars).

Reference

Issue Reference: Automatically assigned unique identifier for the issue.

Portfolio: The portfolio the issue is associated with.

Program: The program the issue is associated with.

Project: The project the issue is associated with.

Escalation: Specify if the issue is to be set at the project, program, or portfolio level.

Issue Details

Requested By: The person requesting the actions to be taken for addressing the issue.

Related Task: If applicable, choose the Gantt task related to the issue.

Resolution

Issue Status: The current status of the issue.

Progress Indicator: Specify if the issue resolution is on schedule, late, or in danger of being late.

Actions Taken: Actions taken to address the issue.

Date Actioned: The date actions were taken to address the issue.

Resolution Rating: Rating given to the issue resolution.
