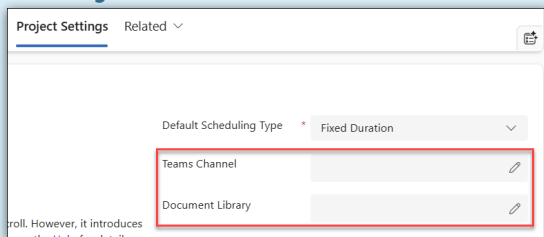


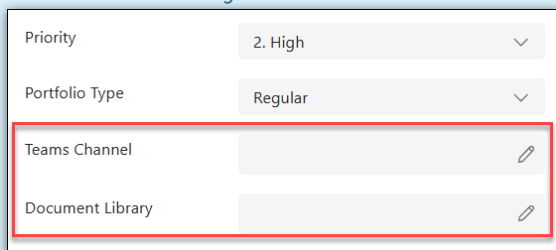
Microsoft Teams

Note This article is for Projects, Programs, and Portfolios created in BrightWork 365 version 2025-2 and later. For all other solution versions, see the older article version tabs at the top of this article.

How to check if a **Project** was created in version 2025-2 or later: In Charter > Schedule Settings > Project Settings, you will see the fields **Teams Channel** and **Document Library**.



How to tell if a **Program or Portfolio** was created in version 2025-2 or later: In the Statement tab you will see the fields **Teams Channel** and **Document Library**.



Caution If your organization has not configured the Application (client) ID and Directory (tenant) ID in Admin > Global Settings > Configuration during the [installation](#) process (also detailed in [Configure BrightWork 365 Graph Client App](#)), you will not be able to assign an existing Microsoft Teams Channel to a project, program, or portfolio as noted below.

Project Management Context

BrightWork 365 provides the actual Project Manager of the project, or a BrightWork PMO Manager security role holder, with the option to connect a Project, Program, and Portfolio to the Microsoft Teams Channels to which they have access.

With the integration of these two robust products, you have alternative methods for your team to stay connected, keep your projects organized, and for team collaboration.

Providing various entry points for team members to work with the data relevant to them will better ensure consistent and meaningful engagement throughout the execution of your projects.

Assign an Existing Microsoft Teams Channel to a Project, Program, or Portfolio

Your browser does not support HTML5 video.

Your browser does not support HTML5 video.

Tip

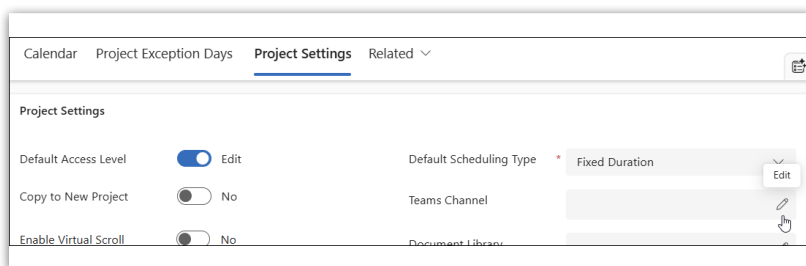
- If the Microsoft Teams Channel is private, you will need to add your team members to the Channel one by one.
- When going through the Teams Channel selection process you will see an option to automatically use the Teams Channel's "Files" tab (its SharePoint library) as the default document library, for simplified document management. See [Document Management](#) for details.

Navigate to the Microsoft Teams Channel Selector

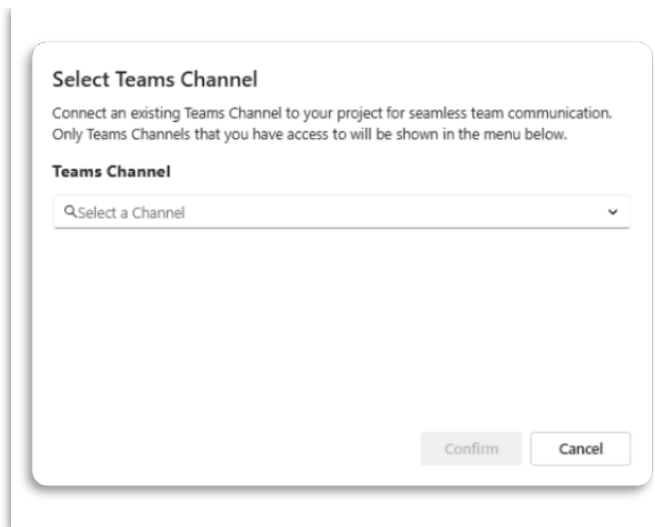
Note

This process can only be done by the actual Project Manager of the project, or a BrightWork PMO Manager security role holder.

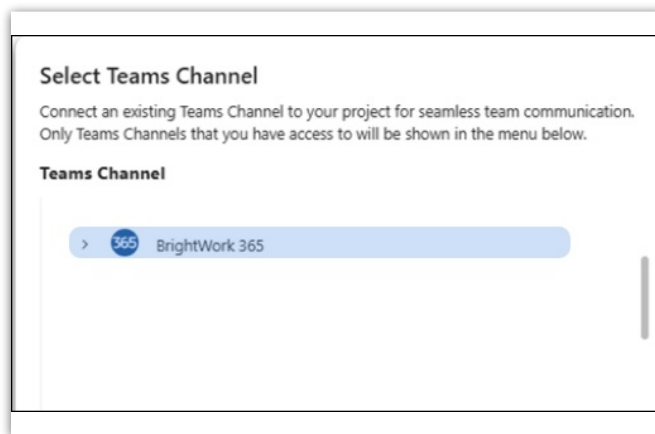
1. In the Charter tab or Project Settings tab of a Project click **Schedule Settings**, or in the Statement tab of a Program or Portfolio click the **Edit icon** in the Teams Channel field.
2. If working in a Project, the Schedule Settings window will display. Click the **Project Settings** tab, and then the **Edit icon** in the Teams Channel field.



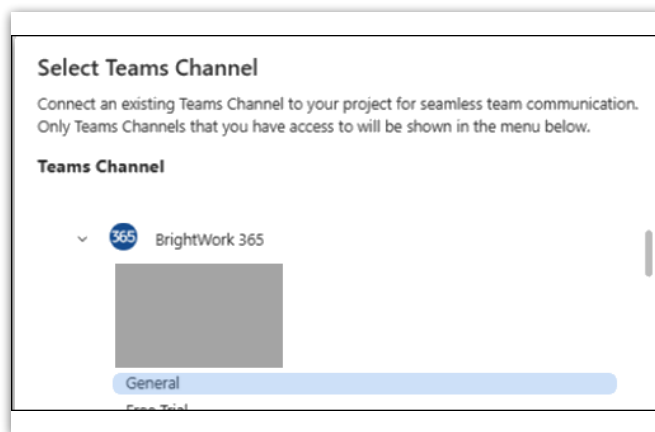
3. The Select Teams Channel dialog displays.



4. Navigate to the parent Team of the relevant Teams Channel.



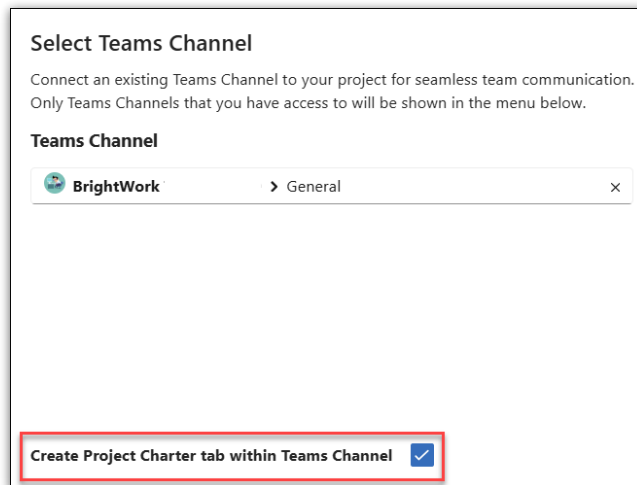
5. Select the relevant Teams Channel.



Option to Create a Project Charter or a Statement Tab When Assigning the Teams Channel

When you assign a Microsoft Teams Channel, there is an option to create a Project Charter (for Projects) or a Statement tab (for Programs and Portfolios) within the Teams Channel, so that you can easily choose to access it directly from Teams. You

will need to first visit the Teams Channel at least once in advance of choosing this option in order for the process to complete successfully.



Select Teams Channel

Connect an existing Teams Channel to your project for seamless team communication. Only Teams Channels that you have access to will be shown in the menu below.

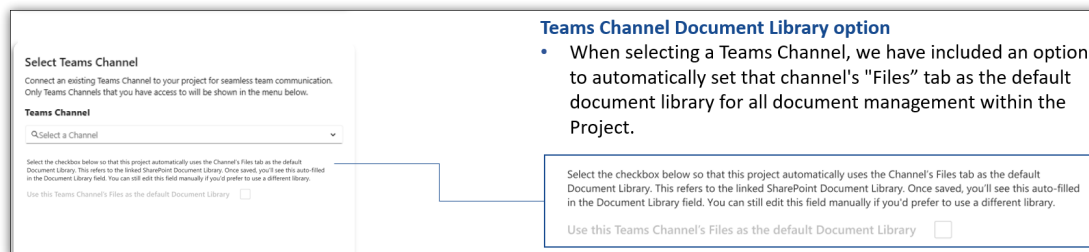
Teams Channel

BrightWork > General

Create Project Charter tab within Teams Channel ☒

Once in the Teams application, clicking the Charter or Statement tab will open it and the rest of the record in your web browser.

Option to Default the Teams Channel as the Document Library When Assigning the Channel



Select Teams Channel

Connect an existing Teams Channel to your project for seamless team communication. Only Teams Channels that you have access to will be shown in the menu below.

Teams Channel

Select a Channel

Select the checkbox below so that this project automatically uses the Channel's Files tab as the default Document Library. This refers to the linked SharePoint Document Library. Once saved, you'll see this auto-filled in the Document Library field. You can still edit this field manually if you'd prefer to use a different library.

Use this Teams Channel's Files as the default Document Library ☐

Teams Channel Document Library option

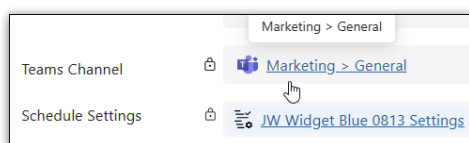
- When selecting a Teams Channel, we have included an option to automatically set that channel's "Files" tab as the default document library for all document management within the Project.

Select the checkbox below so that this project automatically uses the Channel's Files tab as the default Document Library. This refers to the linked SharePoint Document Library. Once saved, you'll see this auto-filled in the Document Library field. You can still edit this field manually if you'd prefer to use a different library.


Use this Teams Channel's Files as the default Document Library ☐


See [Document Management](#) for details.

- Click **Confirm**.
- After the process to assign the Teams Channel is complete, you will be able to open the Teams Channel directly in the Microsoft Teams application from a link in the Project, Program, or Portfolio.



Marketing > General

Teams Channel  Marketing > General

Schedule Settings  JW Widget Blue 0813 Settings

Caution Changing the name of a Microsoft Team or Channel, or deleting the associated document library, will result in a "404 Not Found" error in document views in projects that are configured to use the associated Team or Channel for documents.

