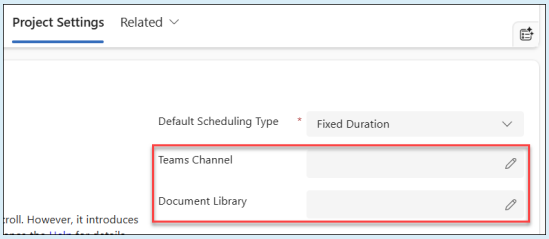
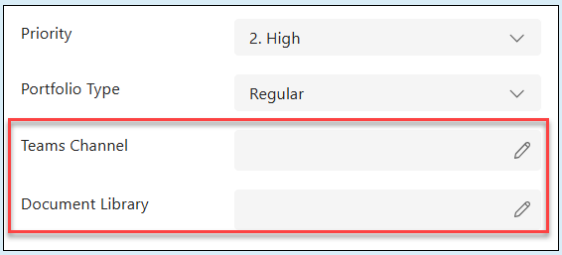
Microsoft Teams

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 the Charter tab > Settings and Actions > 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**.



Note After a browser refresh, accessing Microsoft Teams settings will require user authentication.

Caution If your organization has not configured the Application (client) ID and Directory (tenant) ID 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.

Permission Requirements

Only the following users can update the Microsoft Teams values for a portfolio:

- The Actual Portfolio Manager of the portfolio who also has the BrightWork Portfolio Manager security role.
- Users with the BrightWork PMO Manager security role

Only the following users can update the Microsoft Teams values for a program:

- The Actual Program Manager of the program who also has the BrightWork Program Manager security role.
- The Actual Portfolio Manager listed for the program who also has the BrightWork Portfolio Manager security role.
- Users with BrightWork PMO Manager security role.

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

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.

Note

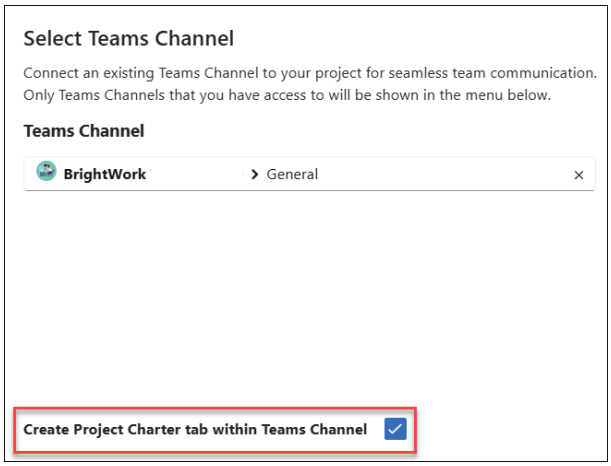
- This process can only be done by the actual Project Manager of the project, or a BrightWork PMO Manager security role holder.
- If a channel was previously assigned to the Project, Program, or Portfolio, and the user does not have permission access to it, the Teams Channel field will be blank. Clicking the Confirm button will remove the previously assigned channel from the record. The user has the option to choose a channel that they have permission access to.
- A project may have already inherited a Microsoft Teams channel as its default channel from its parent program. Only Projects created after the Program's Teams Channel has been configured will inherit the setting. Existing Projects will remain unchanged unless their

> Teams Channel is updated. The inherited Teams Channel settings are saved in Project Settings.

Navigate to the Microsoft Teams Channel Selector

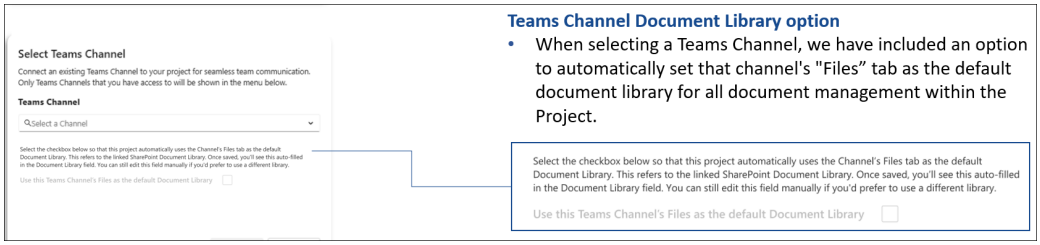
1. If working in a **Project**, in the **Charter** tab of a Project click **Settings and Actions**.
   If working in a **Program or Portfolio**, in the **Statement** tab click the **Edit icon** in the Teams Channel field.
2. If working in a Project, the **Settings** tab will appear - click the **Edit 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.
6. (Optional) Create a Project Charter or Program/Portfolio Statement Tab When Assigning the Teams Channel.

    1. 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.

    2. 

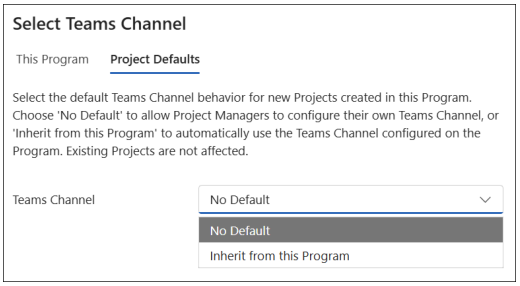
    3. Once in the Teams application, clicking the Charter or Statement tab will open it and the rest of the record in your web browser.

7. (Optional) Default the Teams Channel as the Document Library When Assigning the Channel.
    1.



2. See Document Management for details.

8. Click **Confirm**.
9. (Optional for programs) Select the default Teams Channel behavior for new Projects created in the Program.
    1. Choose 'No Default' to allow Project Managers to configure their own Teams Channel, or 'Inherit from this Program' to automatically use the Teams Channel configured on the Program. Existing Projects are not affected.



10. 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:



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.