Settings and Actions

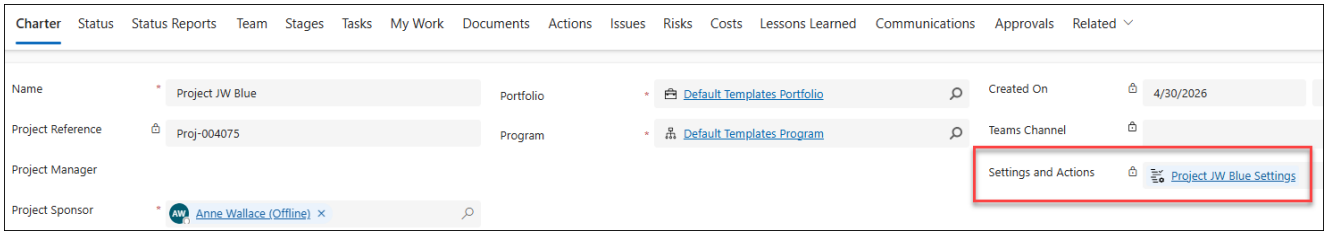
Project Management Context

The Settings and Actions link on the Charter tab provides project managers with a convenient method for configuring project-specific calendar settings for flexible scheduling, and for viewing Global Calendar Settings. BrightWork Team Members can view the settings, and the project's actual Project Manager (not project managers generally), and users with the BrightWork PMO or System Admin security role can edit the settings. These settings have a direct effect on the Gantt.

> **Note** Settings and Actions settings are read-only except for the Actual Project Manager of the project and users with the BrightWork PMO Manager security role.

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Enter the Settings and Actions Screen



To enter the Settings and Actions screen:

1. Select the **Charter** tab within a project.
2. In the Settings and Actions field, click the settings link.

Settings and Actions Elements

Settings tab > Project Settings

- Default Scheduling Type: Choose between Fixed Duration, Fixed Work, and Fixed Unit as the default scheduling type for all new project tasks. See Tasks Gantt.
- Project Template: Displays the project template currently in use by the project. See also Project Template Switcher.Teams Channel: See Microsoft Teams. Only available for Projects created in BrightWork 365 version 2025-2 and later.Document Library: See Document Management. Only available for Projects created in BrightWork 365 version 2025-2 and later.
- Copy to New Project: See Copy to New Project.
- Enable Gantt Virtual Scroll: See Task Management.

Settings tab > Project Configure Options

- Set Health Automatically: Automatically calculate Project Health based on the most severe status across key project indicators or disable this setting to manage Project Health manually. See also Project Status Reporting.
- Include in Snapshot: Set to Yes to include the project in the weekly snapshot. When enabled, the project's status data will be captured and included in snapshot reports. See also Project Status Reporting.
- Default Access Level: Set the default access level for project team members to control project visibility and editing permissions. See also Project Security Access.

Settings tab > Status Report Email

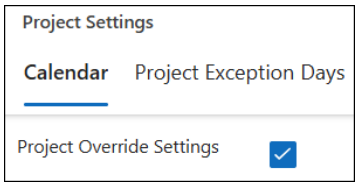
- Default Internal Email Recipients: You can include a default list of *internal* project status report email recipients for easy repeatable use. See Project Status Reporting.
- Default External Email Recipients: You can include a default list of *external* project status report email recipients for easy repeatable use. See also Project Status Reporting.

Calendar tab

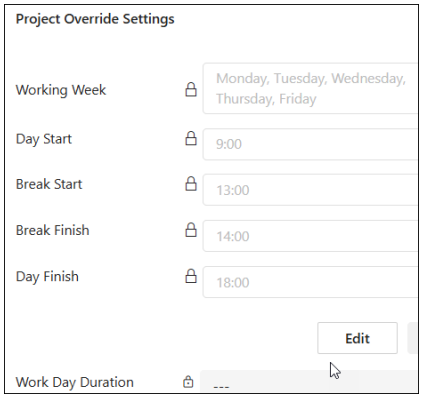
Project Override Settings: The Project Override Settings will initially populate from the Global Settings. The project's actual project manager or BrightWork PMO Manager can then change the field values for the project as required.

To configure Project Override Settings:

1. Check the box for Project Override Settings.



2. Click **Edit** at the bottom of the Project Override Settings section.



3. Select the project's Working Week and working hours.
4. Click **Save**.

> **Note** After any change is made to the Project Override Settings, perform a Ctrl-F5 browser refresh, and then click into the project's Gantt tab in order for the changes to be reflected in the Gantt.

Calendar tab > Global Settings

Global Settings are only editable in **Admin Area > Global Settings**, not from within a project.

- Working Week
  - To enable project schedules to accurately reflect the organization's work practices, users with the BrightWork PMO Manager or the System Admin security role have the ability to set and update the global calendar settings (i.e., Working Week) for all projects using the Admin Area > Global Settings link. The Global Settings record is created with a default working week of Monday to Friday.
  - Days that are configured to be not part of the Working Week will format differently in the Gantt chart.
- Day Start: The hour of the day that Gantt task work starts.
- Break Start: The start hour of the day that Gantt task work is not done.
- Break Finish: The finish hour of the day that Gantt task work is not done.
- Day Finish: The hour of the day that Gantt task work finishes.
- Workday Duration: Automatically calculated based on the times entered above.

> **Note** The default out of the box Global Settings for Working Week is Monday - Friday, and for Working Hours is Day Start 8 am, Break Start 12 pm, Break Finish 1 pm, and Day Finish 5 pm.

Exception Days tab

In the Project Exception Days tab, the project can be configured to add an extra day off or to ignore a global Non-Working Day (e.g., holiday) which was initially applied to the project from Global Settings. Project Exception Days will format differently in the Gantt chart.

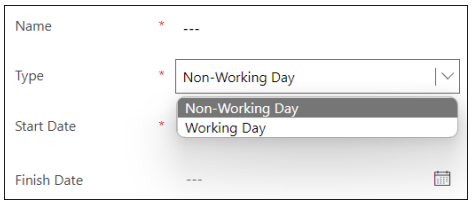
Project Exception Days - Views (accessed via the drop-down menu):

- Project Exception Days
- Previous Project Exception Days
- All Project Exception Days

To add new Project Exception Days:

1. Click **+ New Project Exception Days** (found in the overflow menu when not in full screen mode).

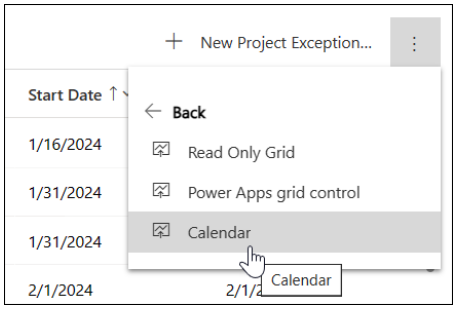
2. Fill out the Project Exception Days form.



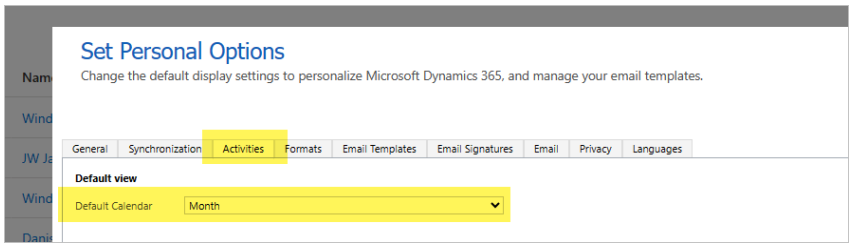
Note

- Only a project's actual Project Manager and users with the BrightWork PMO Manager security role can edit Project Exception Days.
- Project Exception Days affects all tasks in the project, including completed tasks. We strongly recommend not adding older historical Project Exception Days because of the impact on all tasks.
- Project Exception Days do not override the Working Week set within Global Settings, they only override the solution-wide configured Non-Working Days (e.g., holidays).

The Project Exception Days can be displayed in a Calendar view.



Users can set the Month display default in their Personalization Settings (BrightWork 365 app settings gear > Personalization Settings > Activities > Default view > Default Calendar).



Actions tab

- Copy to New Project: See Copy to New Project.
- Reset Target Dates: See Tasks Gantt.
- Copy to Content Template: See Content Templates.
- Send Stage for Approval (only visible when the project is configured for approvals): See Project Stage Approval Process.

Related tab > Audit History

View a timestamped list of changes.