

# Projects

## Note

- The content in this article is limited to the features of BrightWork 365 Free. To access the Knowledge Base for the full BrightWork 365 paid product, click **Home** at the top of the screen.
- Click **HERE** to return to the BrightWork 365 Free - Knowledge Base home page.

The main components of BrightWork 365 Free projects are noted below.

## Tip

Many of the values entered into the tabs referenced below will be represented in various views.

|                 |                                  |                 |                                  |
|-----------------|----------------------------------|-----------------|----------------------------------|
| Name            | <b>Strategic Planning Pro...</b> | Name            | <b>Organizational Initiative</b> |
| Project Status  | <b>On Hold</b>                   | Project Status  | <b>Cancelled</b>                 |
| % Complete      | <b>25%</b>                       | % Complete      | <b>0%</b>                        |
| Health          | <b>Yellow</b>                    | Health          | <b>Red</b>                       |
| Current Start   | <b>8/31/2025</b>                 | Current Start   | <b>8/31/2025</b>                 |
| Current Finish  | <b>9/30/2025</b>                 | Current Finish  | <b>9/30/2025</b>                 |
| Project Manager | <b>Dan Bacon</b>                 | Project Manager | <b>Anne Wallace</b>              |
| Project Sponsor | <b>Alz</b>                       | Project Sponsor | <b>Alan</b>                      |
| Last Modified   | <b>9/22/2025 7:07 AM</b>         | Last Modified   | <b>9/22/2025 6:51 AM</b>         |

## Charter tab

Quickly define and understand a project's core purpose and scope using a minimal set of essential fields, so you can ensure clarity from the outset and gain immediate alignment with stakeholders.

The Project Manager and Project Sponsor fields are lookups to all users given necessary permissions (at least the Basic User and BrightWork 365 Free User security roles) in the BrightWork 365 Free environment.

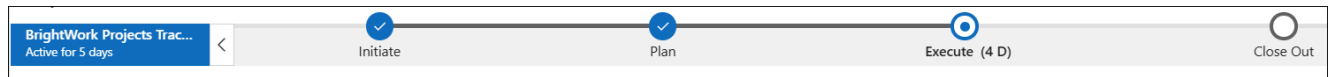
## Status tab

Status reporting is an efficient method for keeping multiple stakeholders informed about how projects are progressing. Crucial information such as a project's overall status and health, attributes your stakeholders are likely very interested in seeing, can easily be updated and distributed by the project manager. BrightWork 365 Free provides project

managers with an intuitive interface for keeping metrics and qualitative information updated as necessary.

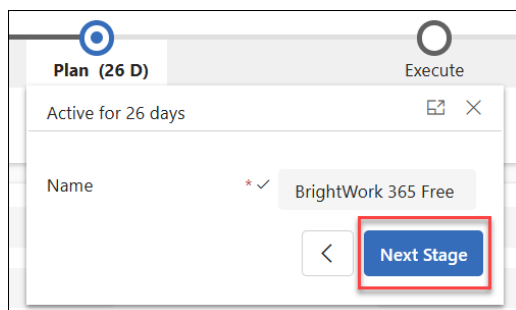
See [Project Status](#) for more details.

## Business Process Flow

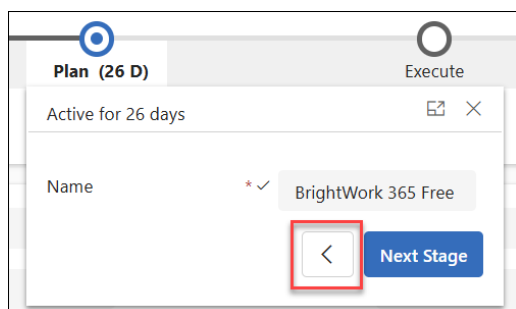


Business Process Flow functionality affords the ability to visualize and follow the project's progression easily.

To progress the project to the next stage, select the current stage in the Business Process Flow and click **Next Stage**.



To revert to the prior stage, select the current stage in the Business Process Flow and click the back arrow.



## Header

|                                |                                 |                 |                             |   |
|--------------------------------|---------------------------------|-----------------|-----------------------------|---|
| Alex Hankin<br>Project Manager | Anne Wallace<br>Project Sponsor | Green<br>Health | 10/2/2025<br>Current Finish | ▼ |
|--------------------------------|---------------------------------|-----------------|-----------------------------|---|

The Project Manager is able to view the header and 'pop-out' the header additional detail from any of the project tabs. From this header, the Project Manager can change the Project Manager, Project Sponsor, Health and Current Finish values.

## Audit History

BrightWork 365 Free together with the Microsoft Power Platform provides organizations with the ability to track data change history and activity logging for use in analysis and reporting purposes. See [Audit History](#) for details.

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