



Install Guide

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BrightWork 365 Install and Setup

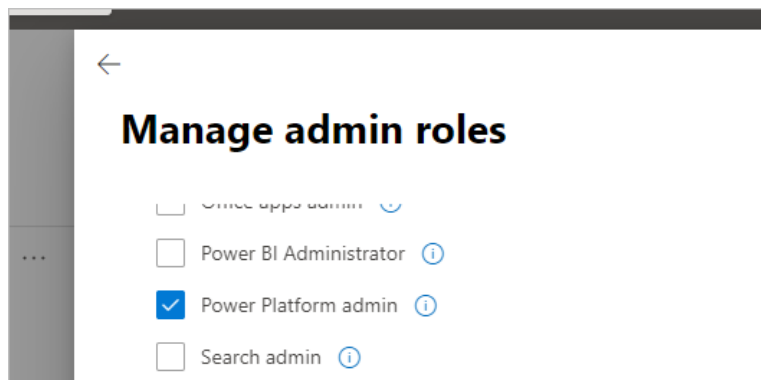
Prerequisites

Install User

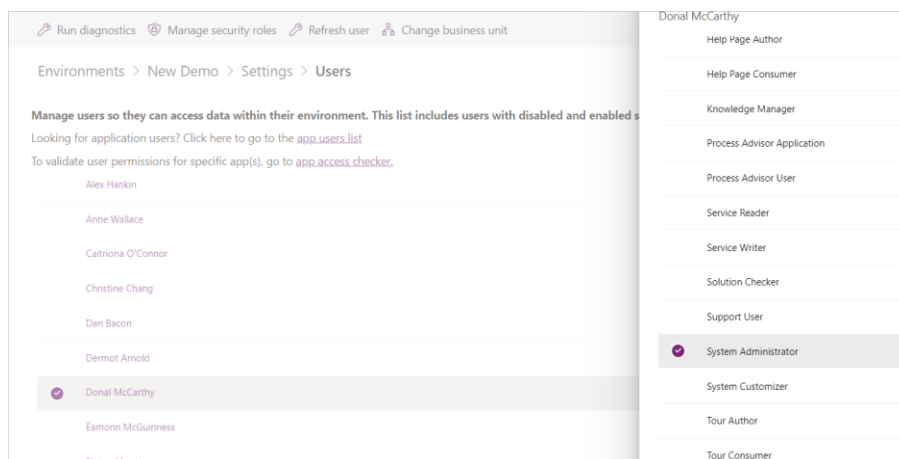
The Microsoft 365 account used to install BrightWork 365 should have the following:

Note: We recommend using a service account to install BrightWork 365. This is to ensure business continuity.

- Power Apps Per User License (this license should not be removed from this user)
If you are unsure what O365 licenses you have, please see [What Office 365 Licenses do I have?](#)
- Office 365 E1 at a minimum
 - The account needs a mailbox to send email
 - This account needs access to Microsoft Teams, including the ability to create and manage teams
- Power Platform Admin role in Microsoft 365



- System Administrator role in the destination environment



- Power BI Pro license to setup Power BI dashboard (optional)

BrightWork recommends that the BrightWork 365 application be installed by a user account with the Power Platform Admin role. This user account must permanently have a Power Apps per User license. This is because BrightWork 365 requires a licensed user to set up connection references using their organizational Microsoft 365 account. These connection references enable different parts of the Microsoft 365 ecosystem to 'talk' to each other (e.g., SharePoint, Outlook etc.). Removing the license means that BrightWork 365 will stop working as expected. Therefore, we recommend that this user account be a service account, to ensure continuity of service should individuals leave the organization.

We typically expect that a member of the organization's Microsoft 365 administration team will perform the installation.

Giving this user the Power Platform Admin role gives them access to all the Power Platform environments in the organization and to manage these environments. Therefore, we expect that the install user be a member of the Microsoft 365 Admin Team.

It may be possible to install BrightWork 365 with a lower 'per-environment' set of privileges; however, this is not a situation that BrightWork has tested.

Create Three Install Environments

We recommend creating three dedicated Power Platform environments and install BrightWork 365 into all of them:

- Dev (this is where your BrightWork consultant will create your custom solution)
- UAT (this is where you will test the custom solution)
- Production (this is where your users will use BrightWork 365)

BrightWork 365 should not be installed in the Default Environment.

We also recommend that you use dedicated Microsoft 365 security groups to control access to the environments (i.e., a security group per environment). If you do not do this, all users in your Entra ID (Azure Active Directory) will be listed in the environment. The easiest way to do this is to create a Microsoft Team and use the associated group to control access to the environment.

See [Control user access to environments: security groups and licenses - Power Platform | Microsoft Docs](#) for more information from Microsoft.

Note: The Environments into which BrightWork 365 is installed must have the English language pack installed. This will only likely need to be done if the base language in your environment is not English.

If you are a GCC or GCC High user, please see [Power Apps US Government service URLs](#).

BrightWork 365 Files

You have downloaded the BrightWork 365 Solution Files.zip to a suitable location on your desktop and unzipped the file.

The BrightWork 365 Solution Files.zip includes

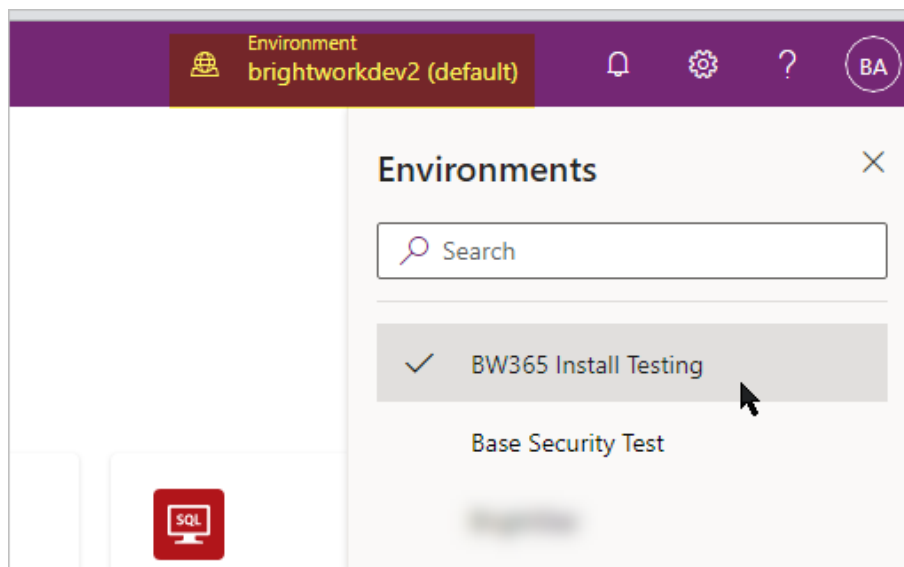
- BrightWork365_####_managed.zip (do not unzip this file)
- BrightWork365 Install Guide.pdf (this document)
- BrightWork365 1.x Upgrade Guide.pdf
- forms-templates.csv
- project-templates.csv
- project-templates-upgrade.csv

- request-templates.csv
- request-templates-upgrade.csv
- bw365 - My Work.pbit
- bw365 - Portfolio.pbit
- bw365 - Project Documents.pbit
- bw365 - Resourcing.pbit
- BrightWork 365 Security Roles.xlsx

Install BrightWork Solution

Note: Please review the [Prerequisites](#) before starting the installation.

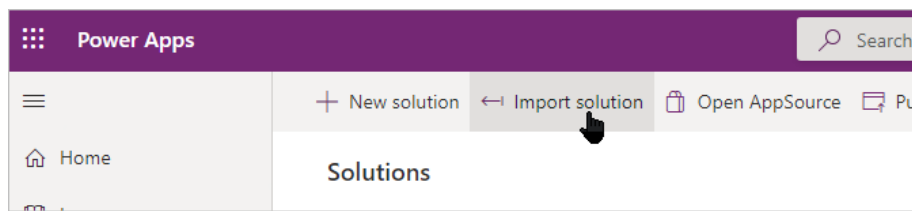
1. Login to <https://make.powerapps.com/> with your organizational Microsoft 365 account.
2. Click the environment switcher and select the Environment into which you want to install BrightWork 365.



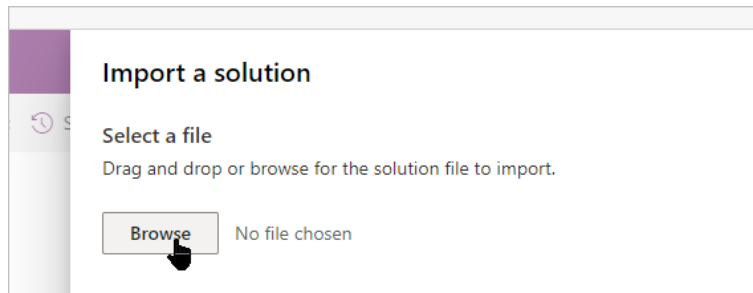
3. Bookmark this environment.
4. Click **Solutions** on the navigation menu.



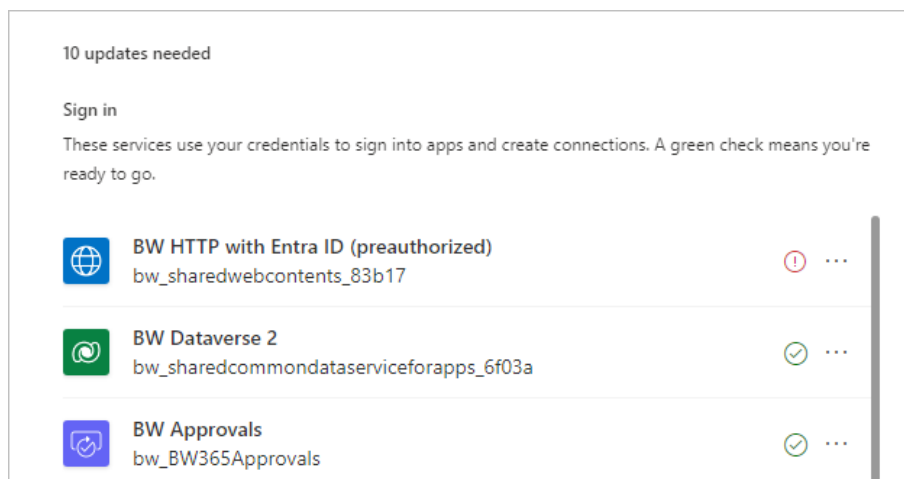
5. Click **Import solution**.



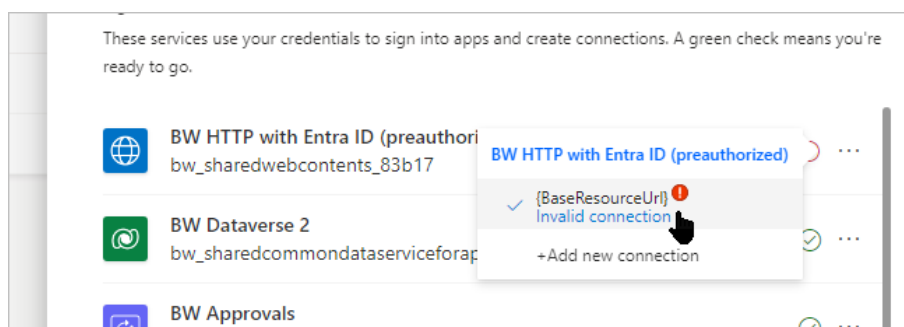
6. Click **Browse**, navigate to the folder with the BrightWork 365 Solution Files, select BrightWork365_####_managed.zip, and click **Open**.



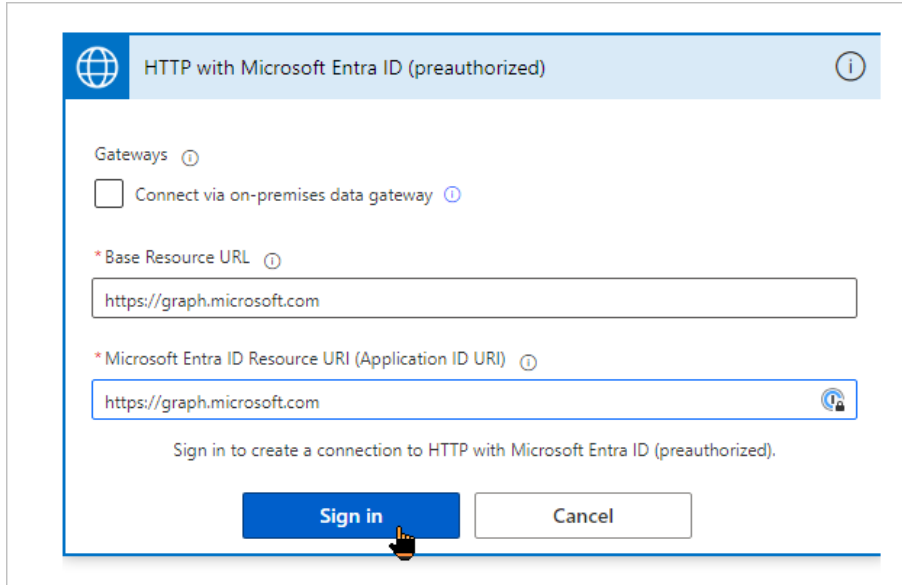
7. Click **Next** and **Next** again.
8. Wait until a green check appears beside all the connections apart from the top one.



9. Click on the Invalid connection link to open it.

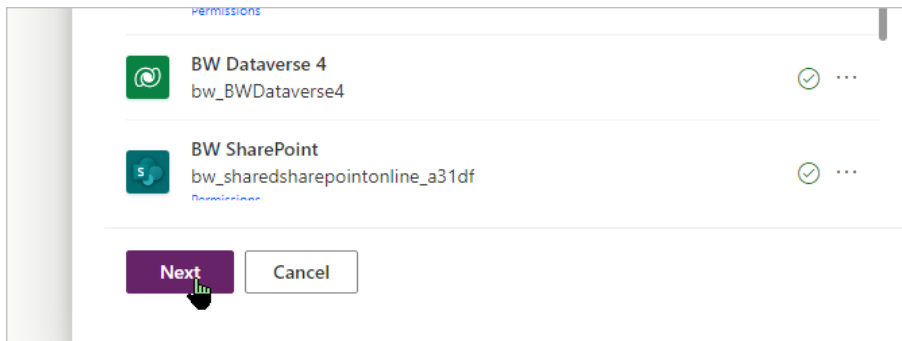


10. Enter `https://graph.microsoft.com` in both Base Resource URL and Microsoft Entra ID Resource URI fields and click **Sign In**.

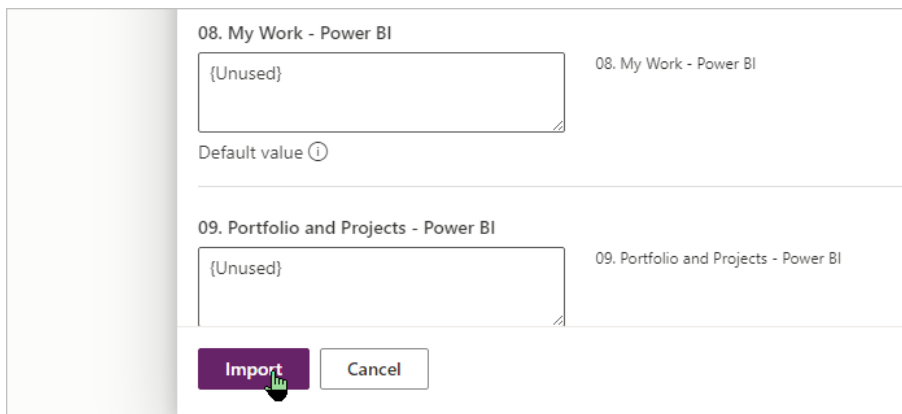


11. Sign in if asked.

12. Click **Next**.

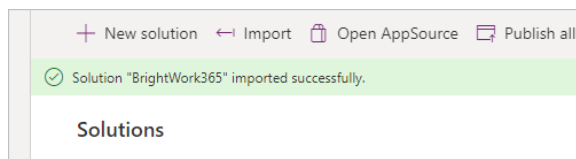


13. Click **Import** – it is safe to ignore the unused Environment Variables.

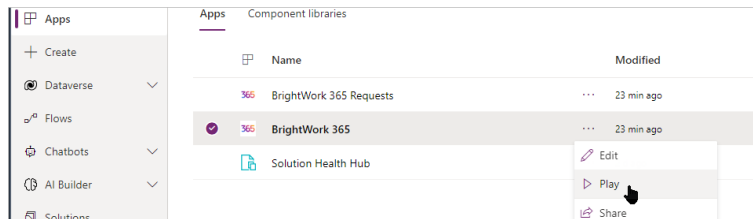


The import process can take around 20 minutes and a message will display when the import is complete. Wait for this before proceeding to the next step. It is safe to ignore any timeout

messages until the below message displays.



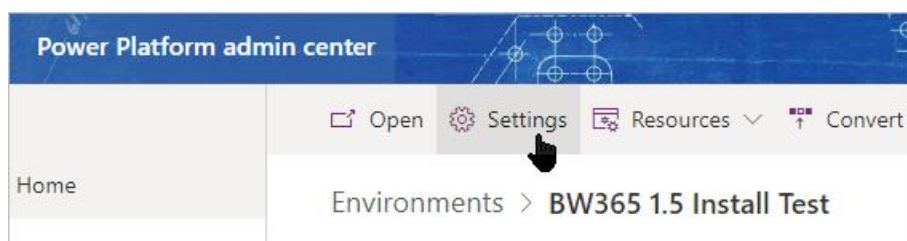
14. Bookmark the solutions page for the BrightWork 365 environment.
15. Click **Apps** on the left navigation panel and select the BrightWork 365 Solution.
16. Click **Play** on the BrightWork 365 app menu.



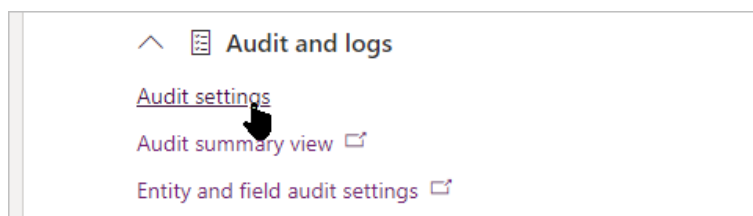
17. Bookmark the BrightWork 365 app.

Enable Audit

1. Navigate to <https://admin.powerplatform.microsoft.com/environments>.
2. Click the BrightWork 365 Environment.
3. Click **Settings**.

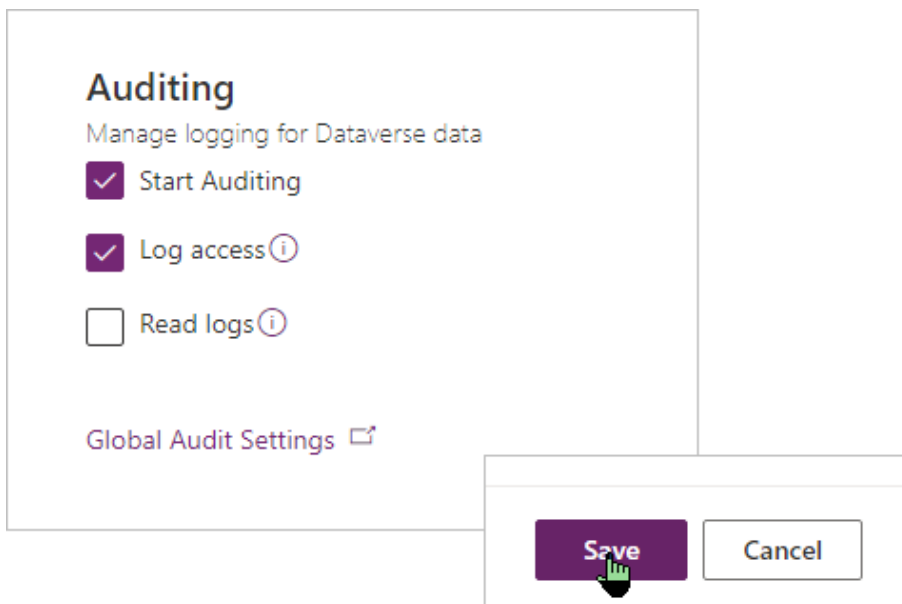


4. Expand **Audit and logs** and click **Audit settings**.



5. Select **Start Auditing** and **Log access**, if presented with a retention period, select a retention period (we recommend 365 days).

6. Click **Save**.



Add Users and Assign Security Roles

All BrightWork 365 users requiring access to the BrightWork 365 app should have at a minimum the following roles.

- Basic User
- BrightWork Team Member

See [BrightWork Security Roles Details | BrightWork 365](#) for an outline of the remaining security roles.

To complete the install, you should assign all the BrightWork security roles to the install account. Ensure not to unassign the System Administrator role when you are doing this. See instructions below.

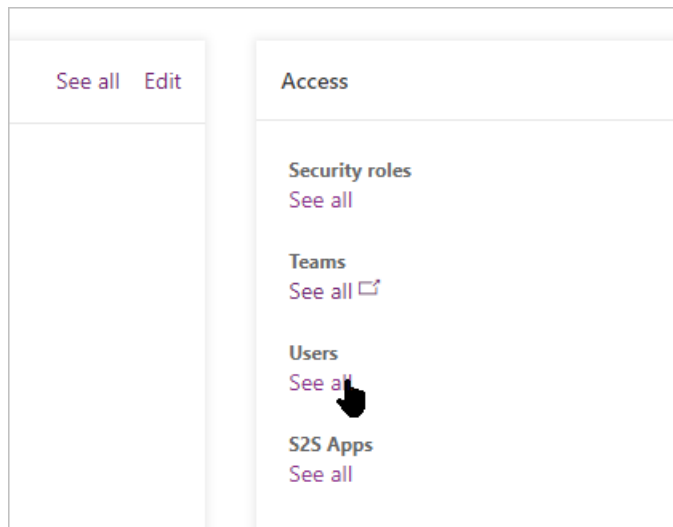
Add Users

We recommend that you use a Microsoft 365 security group to control access to the environment. This means you should not have to add users one by one to the Environment.

See [Control user access to environments: security groups and licenses - Power Platform | Microsoft Docs](#) for more information from Microsoft.

To add users one by one:

1. Login to [Power Platform admin center \(microsoft.com\)](https://powerplatformadmincenter.microsoft.com) and click the environment into which you installed BrightWork 365.
2. Click **See all** under Users.



3. Click **+ Add user** and add the user you want to add.

Assign Security Roles

Review the BrightWork 365 Security Roles Release Version.xlsx included with the solution files and decide what user you want to have which security roles.

You should assign all the BrightWork security roles to the install account you are currently using.

All users need:

- Basic User

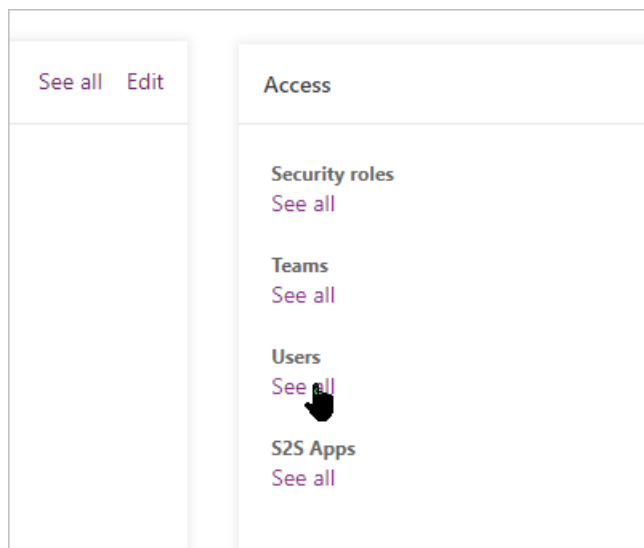
All licensed BrightWork users requiring access to the full app need at least:

- BrightWork Team Member – do not assign the BrightWork Request Submitter role to users with this role

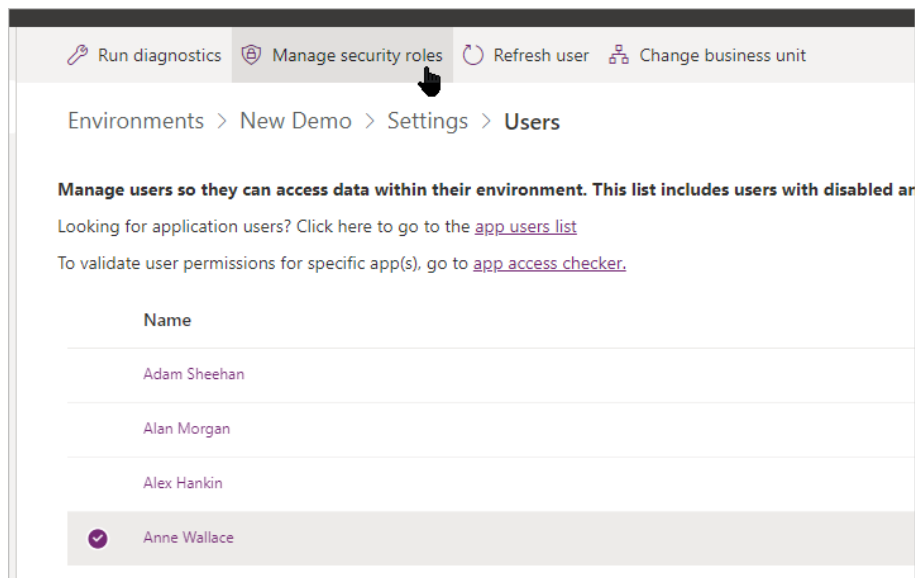
To assign security roles:

1. Login to [Power Platform admin center \(microsoft.com\)](https://powerplatformadmincenter.microsoft.com) and click the environment into which you installed BrightWork 365.

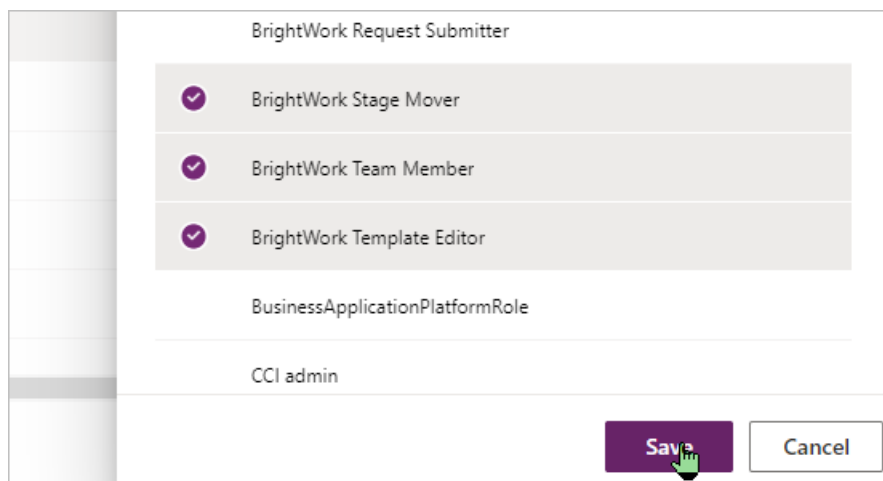
2. Click **See all** under Users.



3. Select a user and click **Manage security roles**.



4. Select the roles you want to apply to the user and click **Save**.



Note: To complete the installation, you should assign all the BrightWork security roles to the install account. Ensure not to unassign the System Administrator role when you are doing this.

You can also bulk assign security roles using the User Roles Manager utility in XRM Toolbox (<https://www.xrmtoolbox.com>).

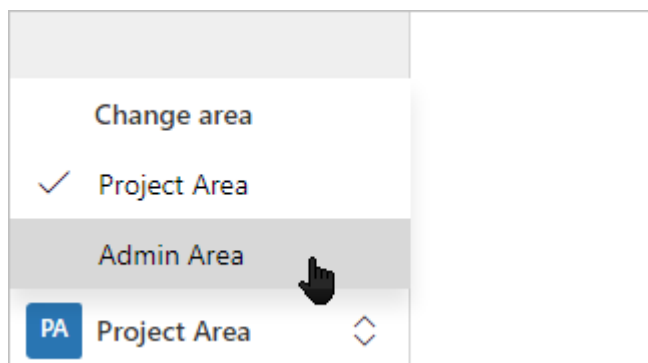
Create Senior Managers Team

The Senior Managers team defines the users returned in these lookups.

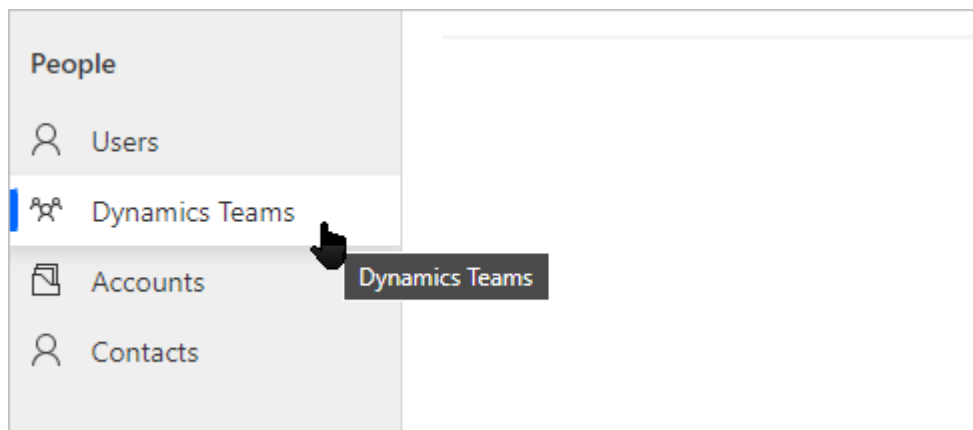
- Group Manager
- Portfolio Manager
- Portfolio Sponsor
- Program Manager
- Program Sponsor
- (Request) Reviewers
- (Request) Approvers

To create the team and add the users:

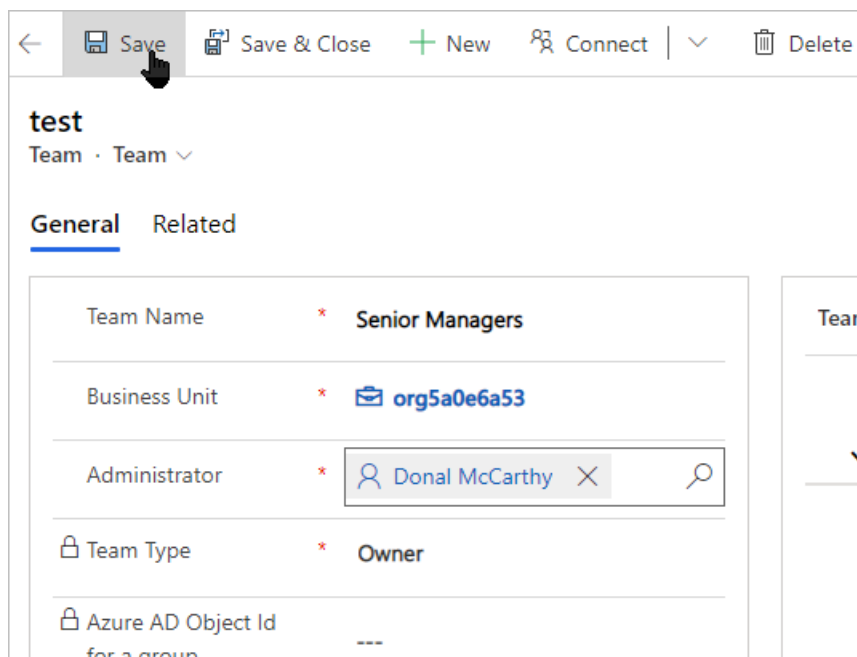
1. Open the bookmarked BrightWork 365 app and perform a Ctrl-F5 browser refresh to update permissions for the logged in user.
2. Switch to the **Admin Area**.



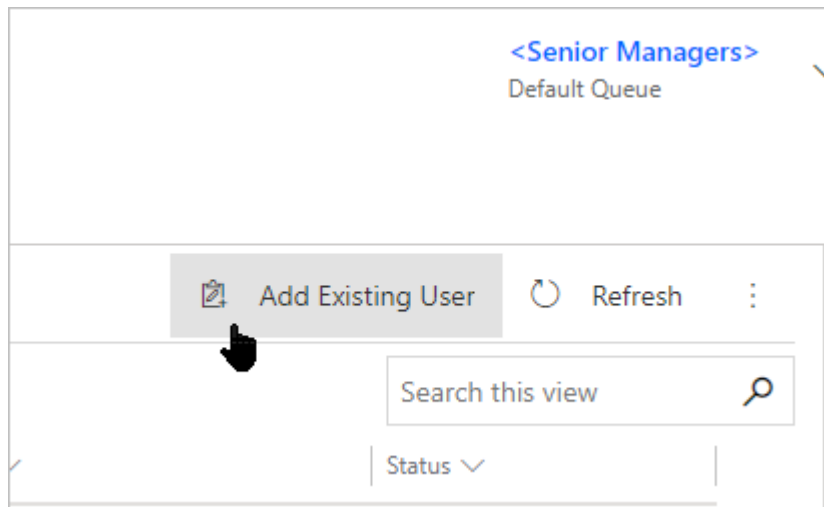
3. Click **Dynamics Teams** and click **+ New**.



4. Name the team 'Senior Managers'.
5. Select a Business Unit, make yourself the Administrator and click **Save**.



6. Click **Add Existing User** to begin adding your users to the team. Ensure to add the install account that you are using – you can remove it later if needed.

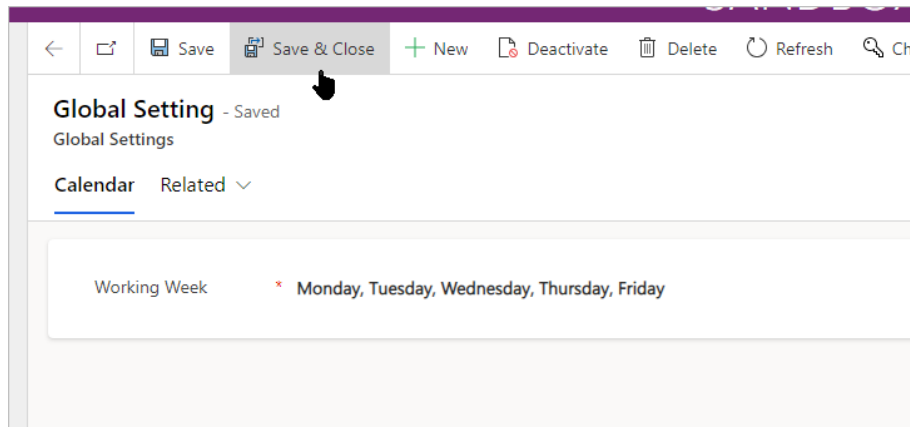


7. When done adding all the existing users, click **Save & Close**.

Note: There is also a corresponding security role for each of the lookups. If you require greater granularity, for example, to limit one of the lookups to only people who hold the specific view, you can change the view definition to limit users that have the appropriate security role and then assign the security role to the users that you want to be selectable in the lookup.

Add Global Settings Record

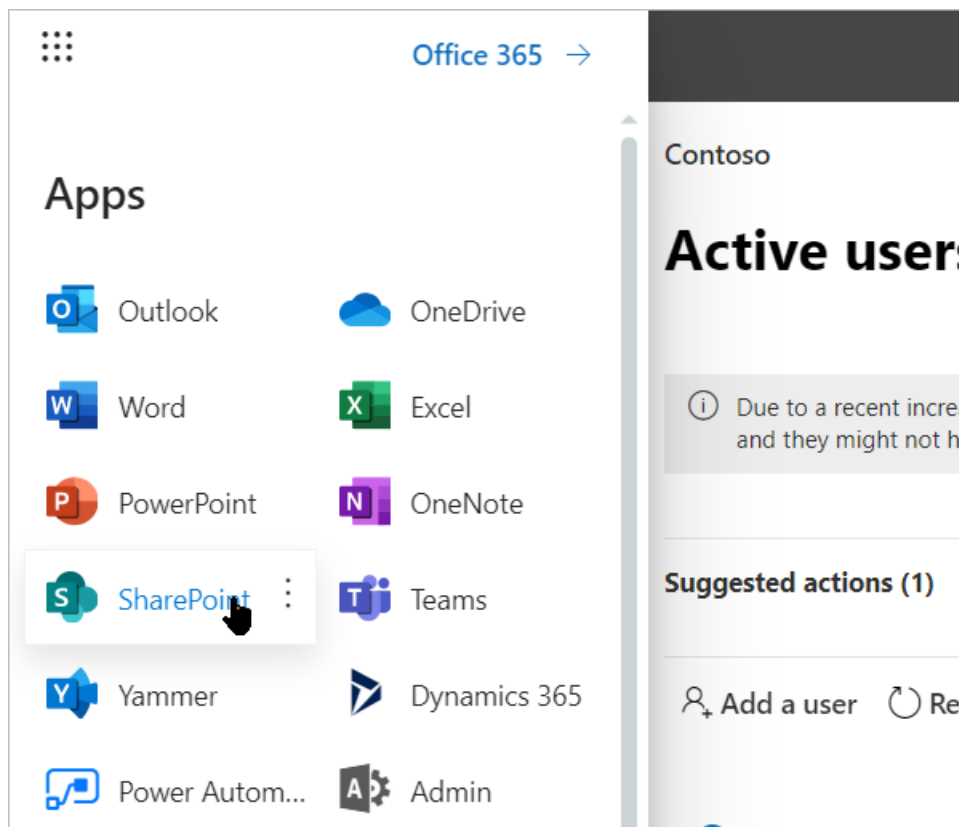
1. Click **Global Settings** in the Admin Area.
2. Click **New** and select your organization's Working Week – typically this will be Monday, Tuesday, Wednesday, Thursday, Friday.
3. Click **Save and Close**.



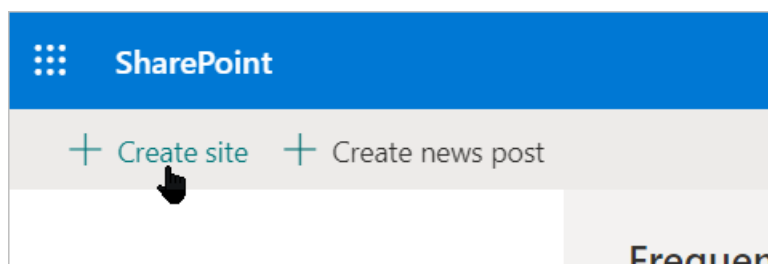
Setup SharePoint Document Management

Create SharePoint Site

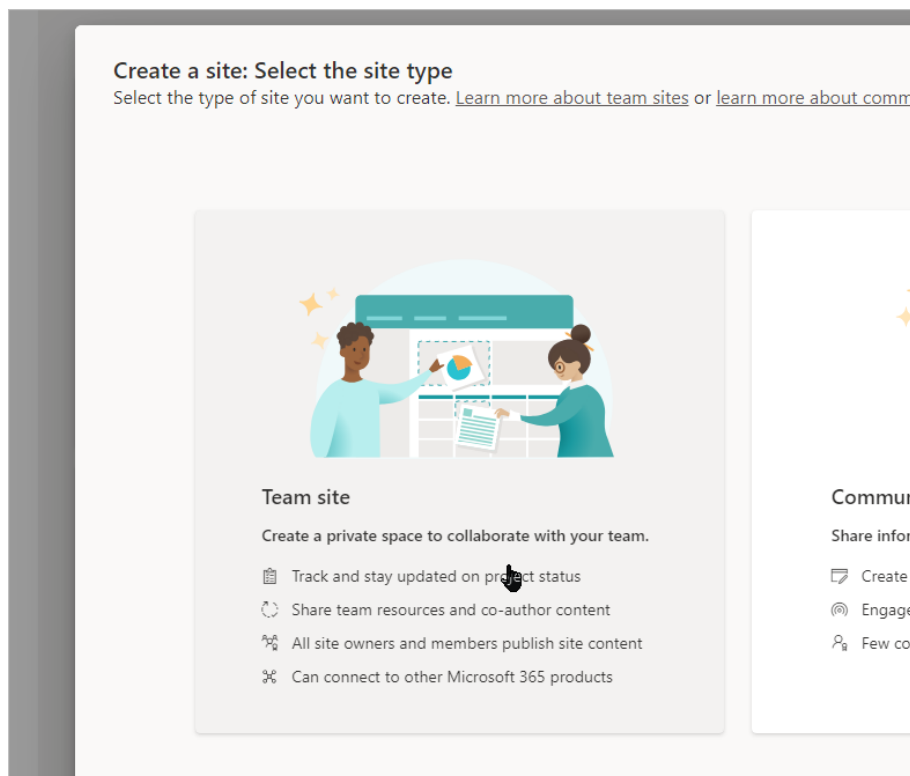
1. Click **SharePoint** on the Microsoft 365 waffle.



2. Click **Create site**.



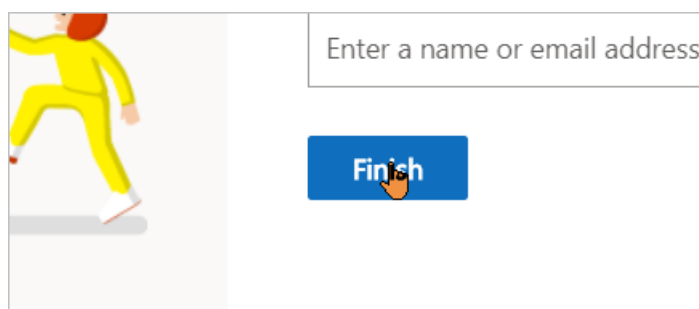
3. Click **Team site**.



4. Click **Standard team**.
5. Click Use template.
6. Give the site a name (e.g., BW365 Docs) and fill out the rest of the form.

Note: From a management point of view, it will be easier if you make the site Public to your organization.

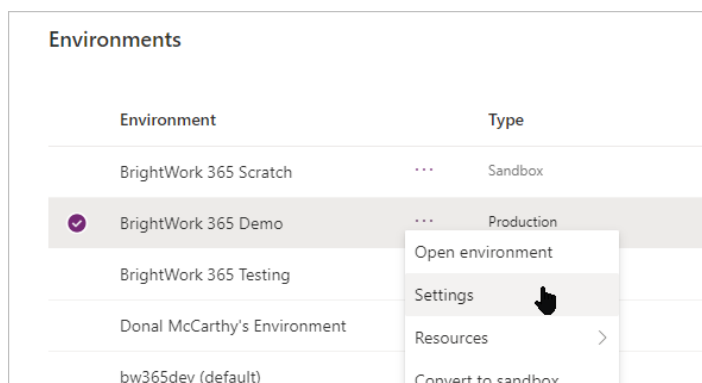
7. Click **Create site**.
8. Add any additional members.
9. Click **Finish**.



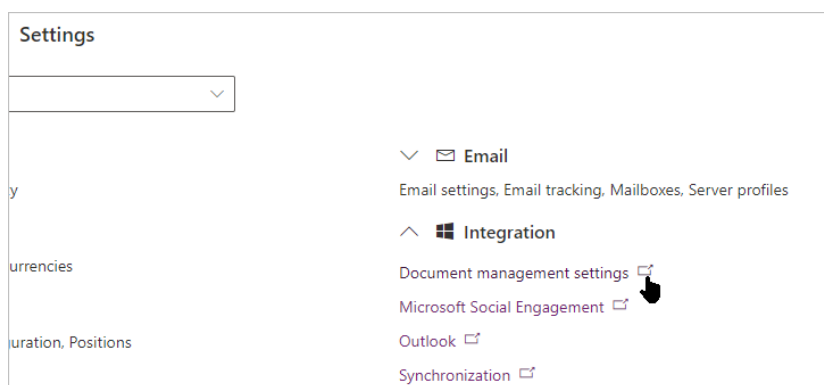
10. Copy the site URL to your clipboard.

Enable SharePoint Document Management and OneNote Integration

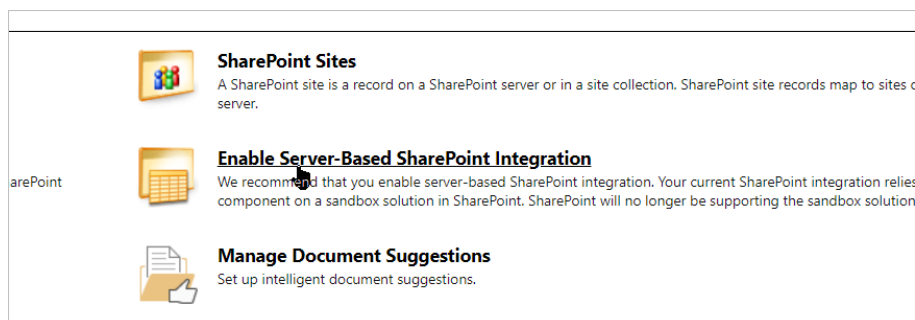
1. Login to <https://admin.powerplatform.microsoft.com/environments>.
2. Click **Settings** on the menu of the environment into which you installed BrightWork 365.



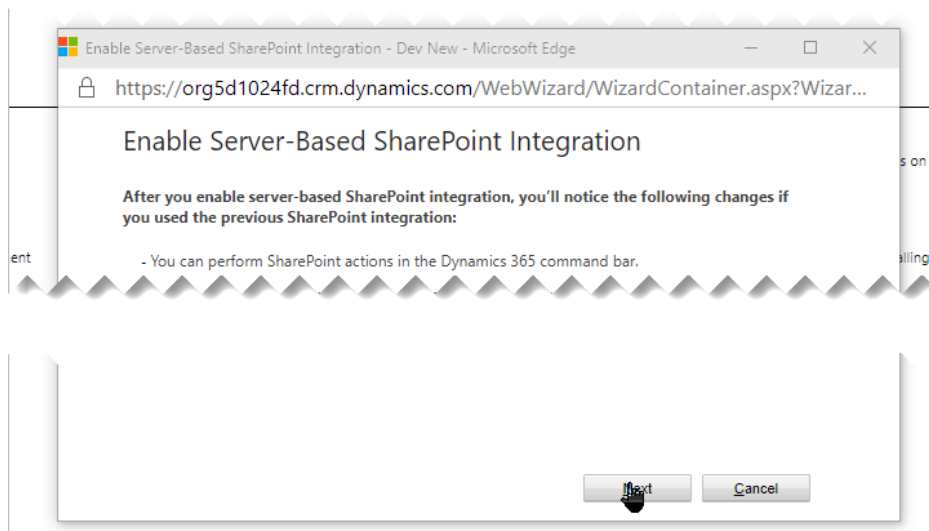
3. Expand **Integration** and click **Document Management Settings**.



4. Click **Enable Server-Based SharePoint Integration**.



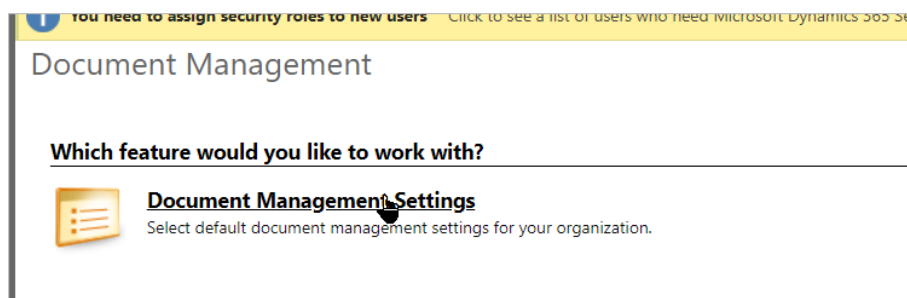
5. Click **Next**.



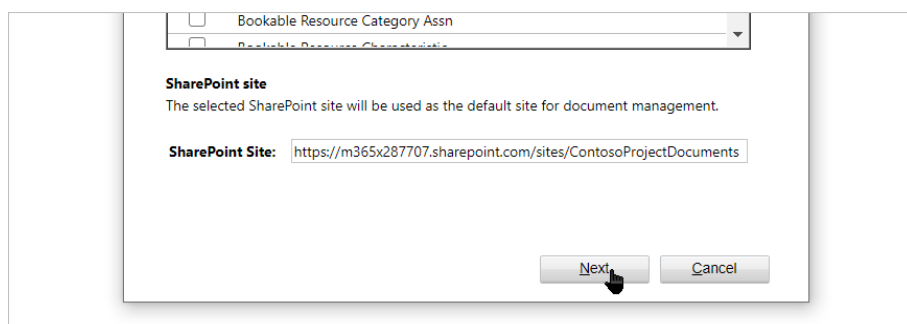
6. Ensure **Online** is selected and click **Next** again.
7. Paste in your SharePoint site URL and click **Next** and then **Enable**.

Wait for the Enable Server-Based SharePoint Integration option to disappear – you may have to refresh the page a few times.

8. Click **Document Management Settings**.

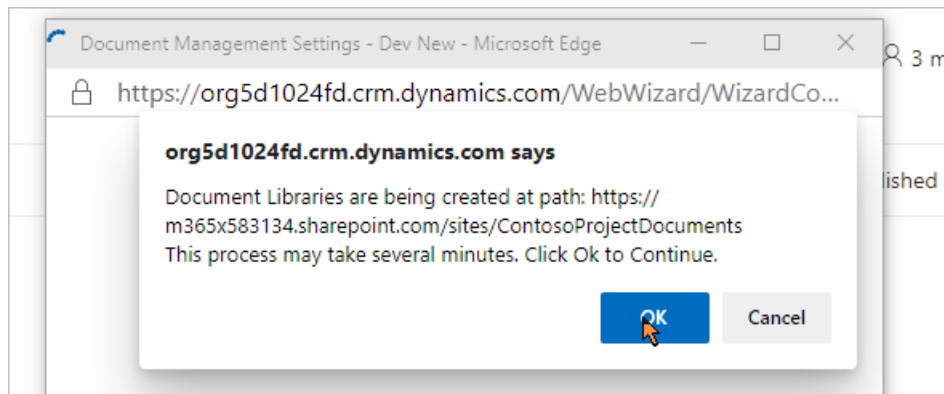


9. Paste in the SharePoint Site URL and click **Next**.

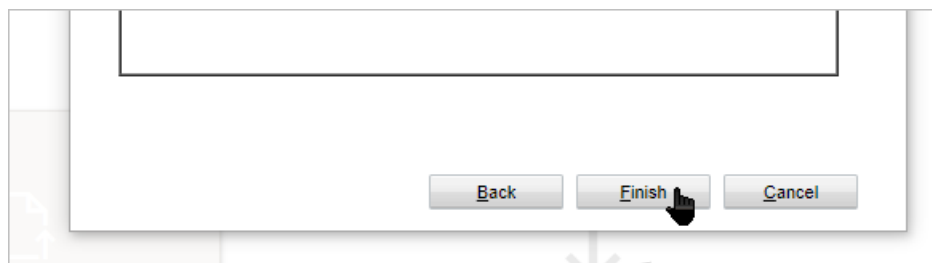


10. Click **Next**.

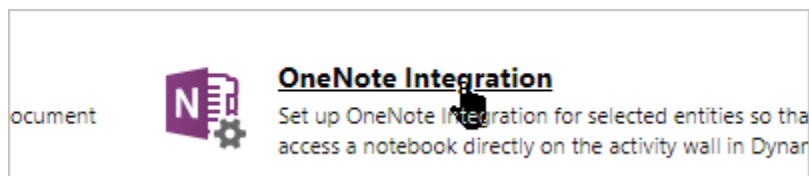
11. Click **Next**. If you receive failure messages, wait a few minutes for the new SharePoint site to finish the creation process and try again.



12. Click **Finish**.



13. Click **OneNote Integration** (you may need to refresh the Document Management settings screen to see this option).

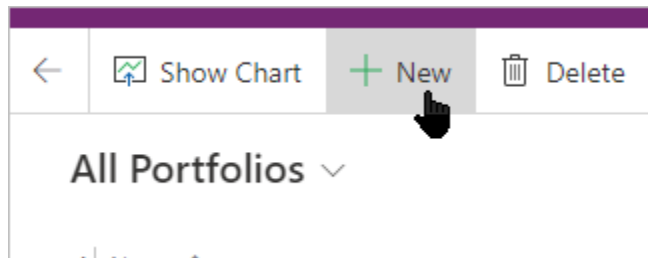


14. Click **Finish**.

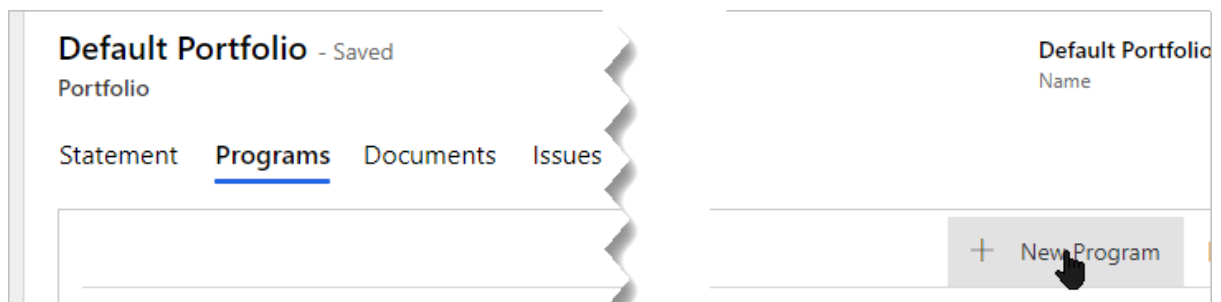
Create Portfolios, Programs and Connect to Microsoft Teams

Return to the bookmarked BrightWork 365 app | Projects Area and create at least one Portfolio and one Program.

1. Click **Portfolios** on the nav and **+ New** – fill out the form and click **Save** (do not close).

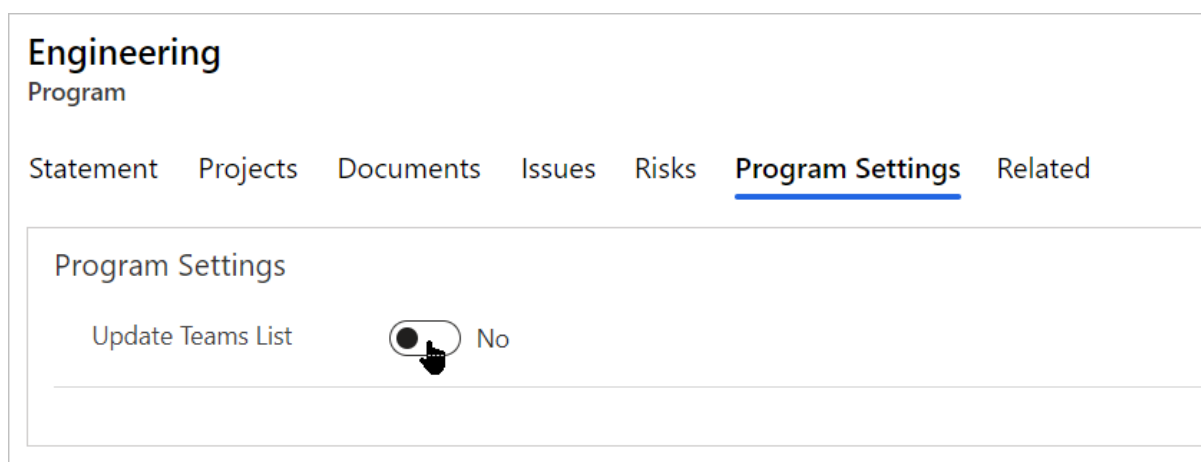


2. In the **Programs** section on the lower half of the Statement tab, click **+ New Program** – fill out the form and click **Save and Close**.



You should also create at least one Team in Microsoft Teams for linking your projects to, ideally one for every program, and with the same name as the program. See [BrightWork 365 Microsoft Teams Admin Guide](#).

Once you've done this, select a Program and run the Update Teams List flow.



This will populate the Teams table with the Teams to which you have access. Once you have done that, point each program to the appropriate team.

Program Type	Regular	Cost
Team	<div> <div>Contoso Projects</div> <div> <div>Microsoft Teams</div> <div> <div>Saravana - Projects 9/14/2021 10:29 AM</div> <div> <div>bw365dev 9/14/2021 10:28 AM</div> <div> <div>+ New Microsoft Team</div> <div>Change View</div> </div> </div> </div> </div> </div>	Cost Comment
		Scope
		Scope Comment

Every time you add a program, you should ensure that it points at a Microsoft Team.

Going forward, when you create projects associated with the program, you can run the Create Teams Channel flow from a project's Project Settings tab to connect the project to the Team and create a Channel in the Team for the project.

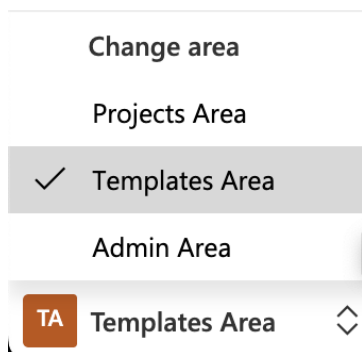
Development		Scale-Up		Launch		Sta	
nents	Issues	Risks	<u>Project Settings</u>				
Reset Target Dates in all Project Tasks				<input type="checkbox"/> No			
				Create Teams Channel <input type="checkbox"/> No			

Import Forms and Templates

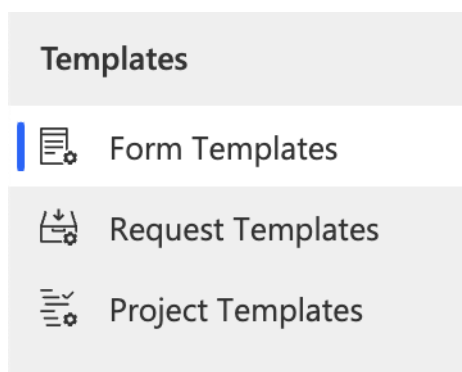
Next, you will import the Forms and Templates necessary to get started with BrightWork Templates.

Import Form Templates

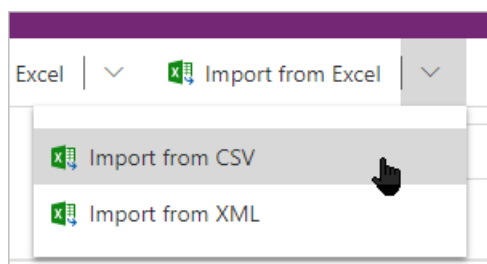
1. Open the bookmarked BrightWork 365 app and click **Projects Area** in the bottom left of the screen and select **Templates Area**.



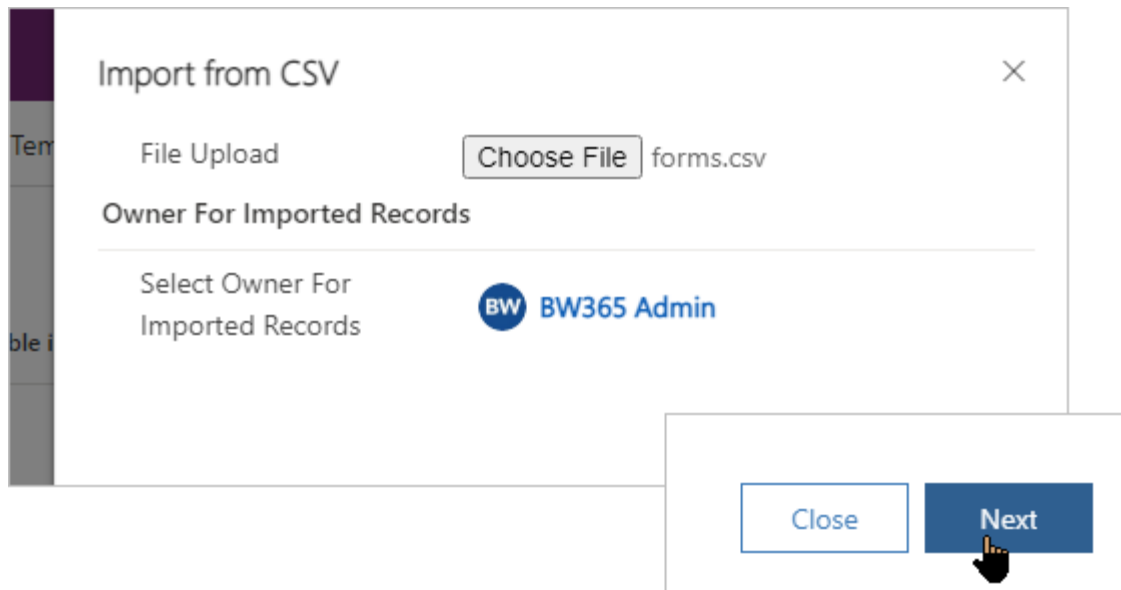
2. Click **Form Templates**.



3. Click **Import from Excel | Import from CSV**.



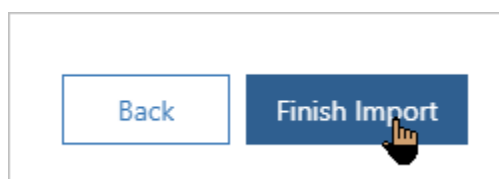
- Click **Choose File**, select the forms-templates.csv file included in the BrightWork 365 Files zip, and **Next**.



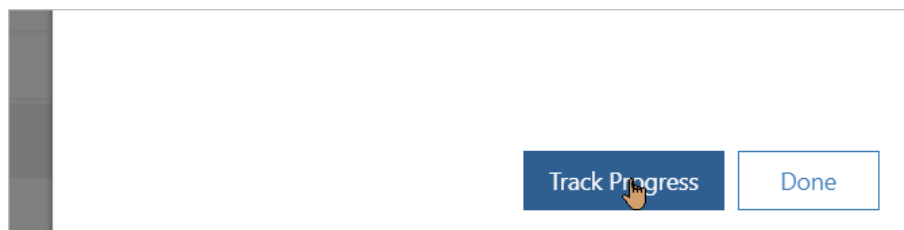
- Select **Name** from the Alternate Key field.



- Click **Review Mapping**.
- Click **Finish Import**.



- Click **Track Progress** and **OK** and wait until the import has completed.

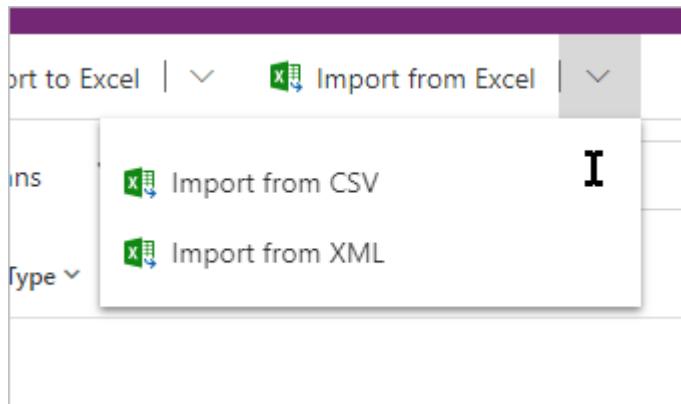


My Imports ▾		
<input type="radio"/> Import Name ▾	Status Reason ▾	Successes ▾
forms.csv	Completed	11

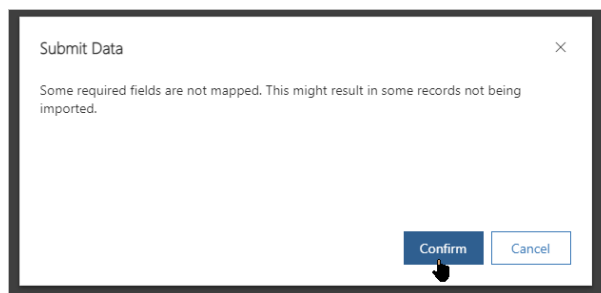
Keep this window open for the other imports.

Import Project Templates

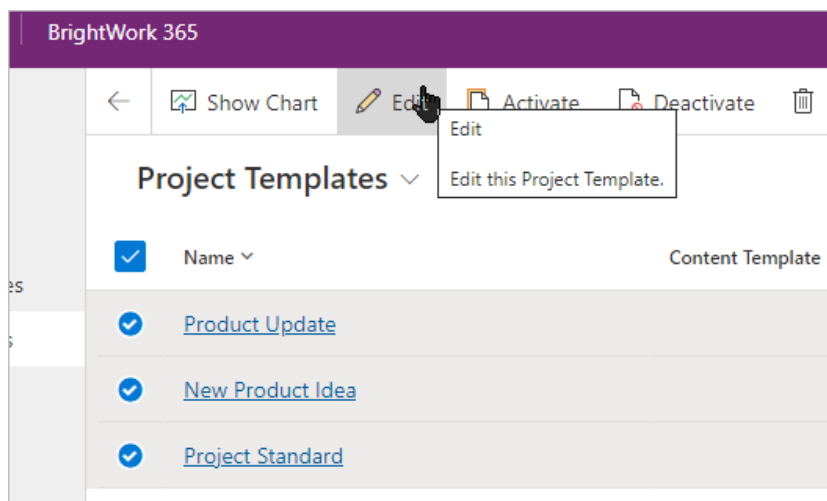
1. Click **Project Templates** on the navigation in the Templates Area.
2. Click **Import from Excel | Import from CSV**.



3. Click **Choose File**, select the project-templates.csv file and click **Next**.
4. Click **Review Mapping**.
5. Click **Finish Import**. It is ok to ignore messages about unmapped fields.
6. Click **Confirm**.



7. Click **Done, return to the Import Tracking page**, and wait for the import to complete.
8. On the Project Templates screen, click **Refresh**, select all the Project Templates and click **Edit**.



9. Select yourself as the **Approvals Coordinator**, select the Portfolio and Program you created earlier, and select yourself **Project Manager** and **Project Sponsor**, and click **Save**.

Edit 3 records ✕

Enter changes in the fields you want to edit.

Form
Project Template

Details Header

Details

Name	*	---	Available in Requests	---
Approvals Coordinator	*	BW365 Ad...	Available in Projects	---
Form Template	*	---	Reference Type	* ---
Business Process Flow	*	---	Create Copy	---

New Project Defaults

Content Template	---	Project Manager	---
Portfolio	Contoso	Project Sponsor	---
Program	IT	Project Type	---

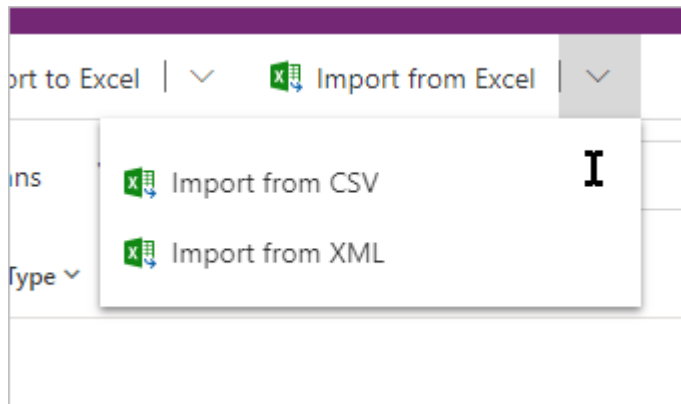
Approval Labels

Customize Approval Labels

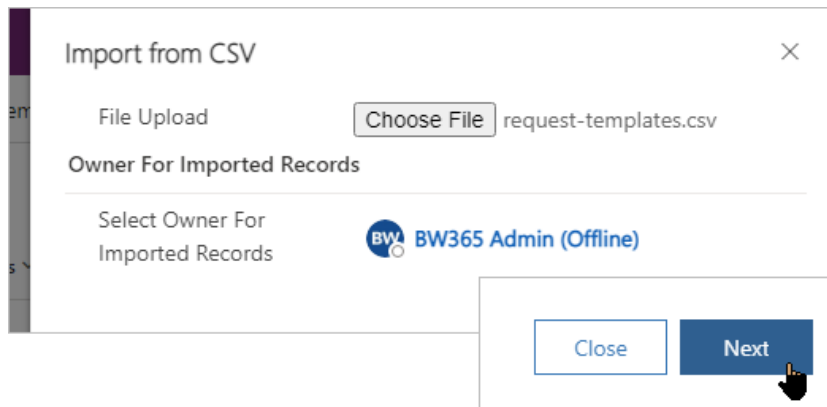
Save **Cancel**

Import Request Templates

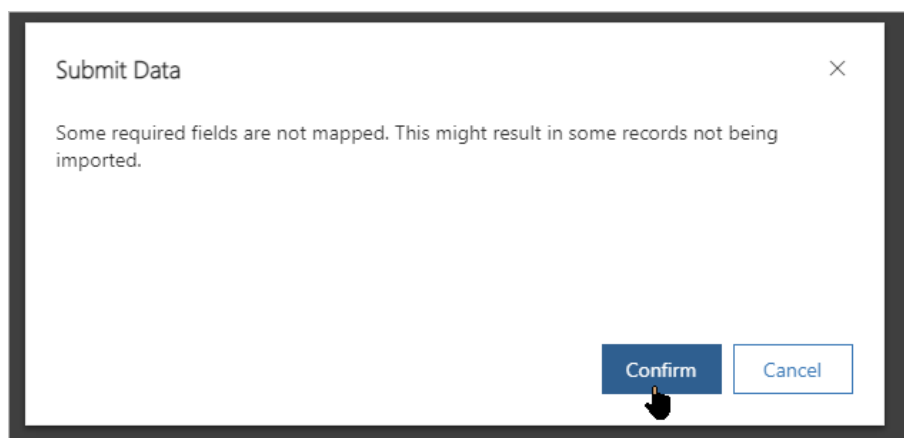
1. Click **Request Templates** on the navigation in the Templates Area.
2. Click **Import from Excel | Import from CSV**.



3. Click **Choose File**, select the request-templates.csv file and click **Next**.

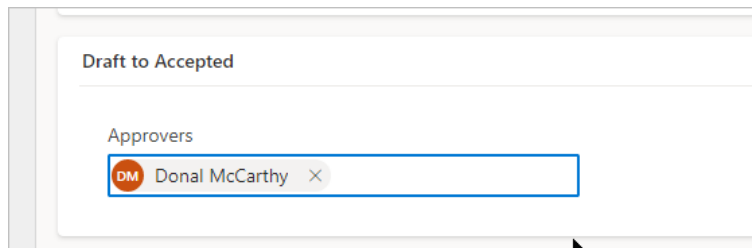


4. Click **Review Mapping**.
5. Click **Finish Import**. It is ok to ignore messages about unmapped fields.
6. Click **Confirm**.



7. Click **Done** and wait for the import to complete.

8. On the Request Templates view, click **Refresh**, select all the Request Templates and click **Edit**.
9. Make yourself the Approvals Coordinator and click **Save**.
10. Open the 'Project Standard' Request and enter your name as the Approver in the Approvers column (you need to enter at least three characters into this type of multi-user column).
At a later stage, you will need to decide who should be the Approvers for the other requests.

A screenshot of a web form titled 'Draft to Accepted'. Below the title is a section labeled 'Approvers'. Inside this section, there is a text input field containing the name 'Donal McCarthy'. To the left of the name is a small orange circle with the letters 'DM' in white. To the right of the name is a small grey 'X' icon. The input field has a blue border.

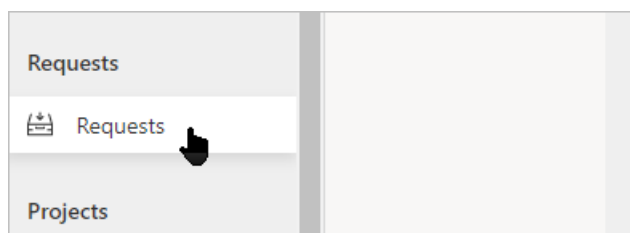
11. Click **Save & Close**.

Install Power Automate Approvals Module

BrightWork 365 uses the Power Automate Approvals feature. This feature must be installed, and the install is started by triggering a flow that uses the Approvals feature.

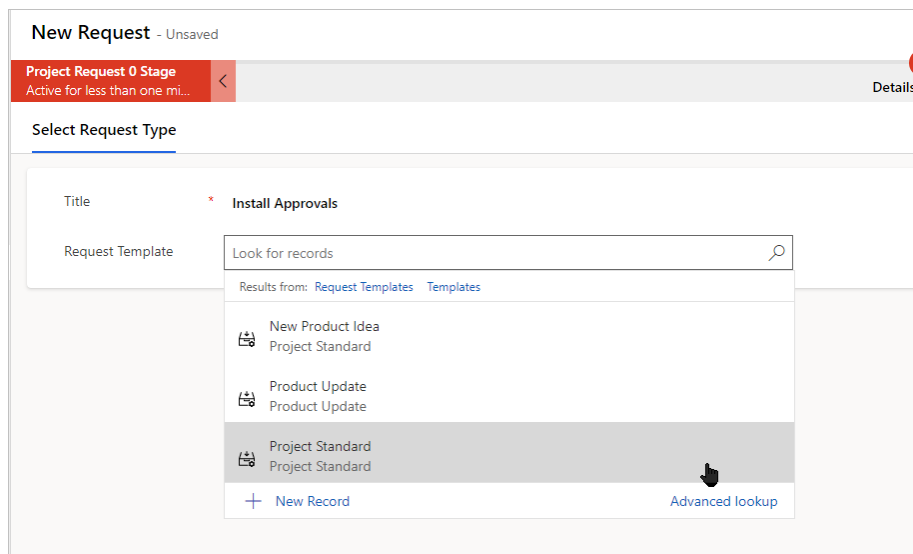
To do this, you simply create and submit a request.

1. Return to the bookmarked app and click **Requests** on the main navigation.



2. Click **+ New**.

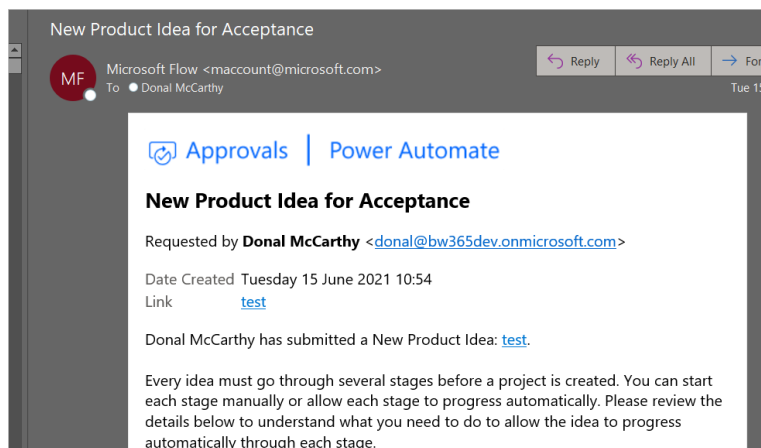
3. Enter a Title and select the 'Project Standard' Request Template.



This will open the project request form for the selected template.

4. Click **Submit Request**.

In around 10-15 minutes, you will receive an email like the below – this means the Requests module was installed successfully.



5. Approve the request.

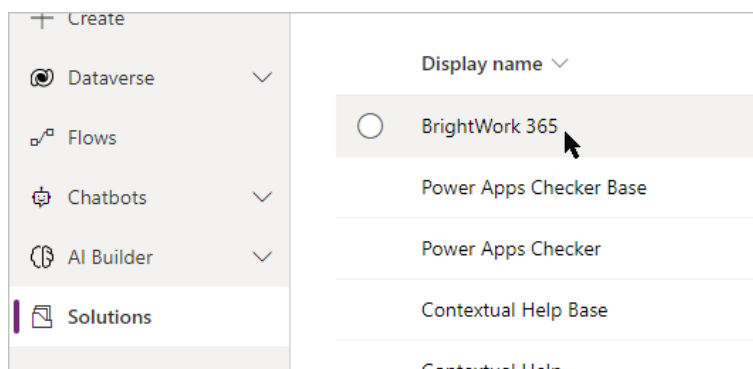
Setup Cost and Budgets Column Security Profile

The costs and budget columns in Programs and Portfolios are security enabled. This means that users must be members of the column security profile (either individually or as a team member) to view and edit the columns.

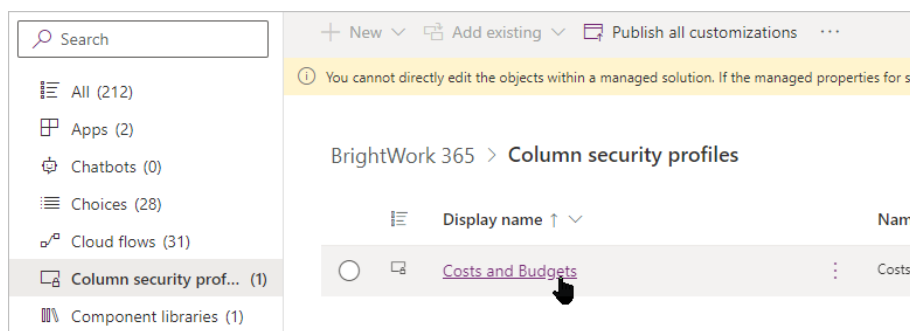
We recommend that you use a Dynamics Team – you can use the Senior Managers team you created earlier, or you can create a new team; alternatively, if you do not want any security on these columns, you can just use the default environment team.

To set up the Costs and Budgets Field Security Profile:

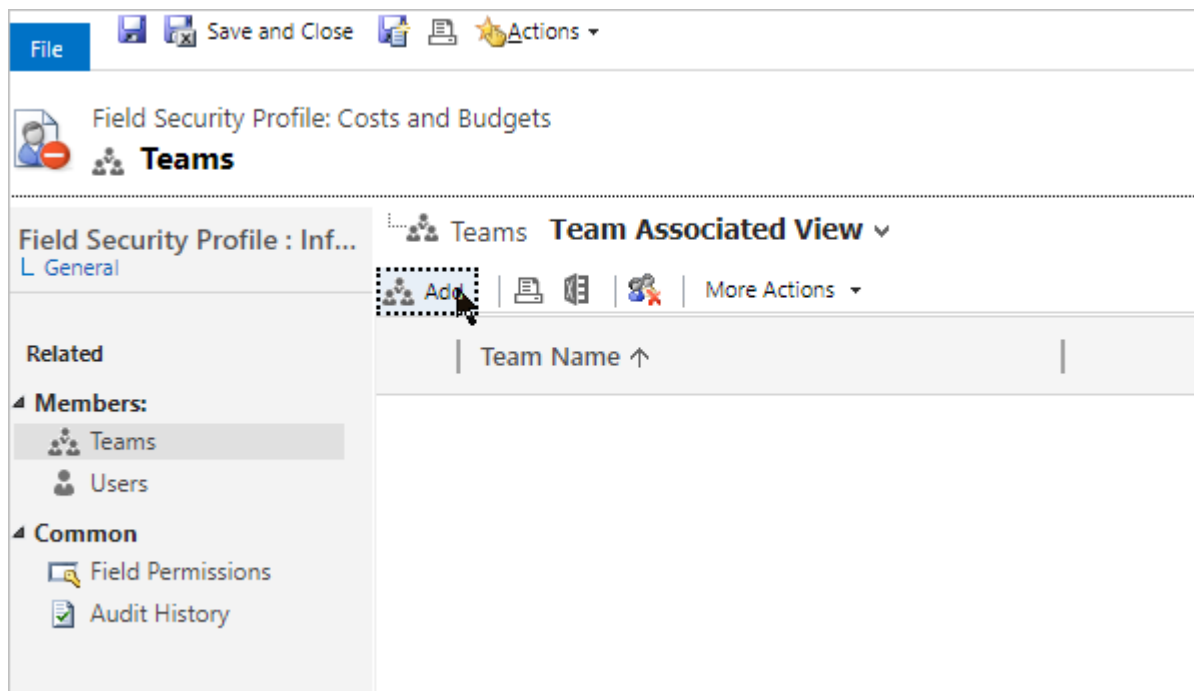
1. Login to the bookmarked solutions page for the BrightWork 365 environment.
2. Click **Solutions** and enter the BrightWork 365 solution.



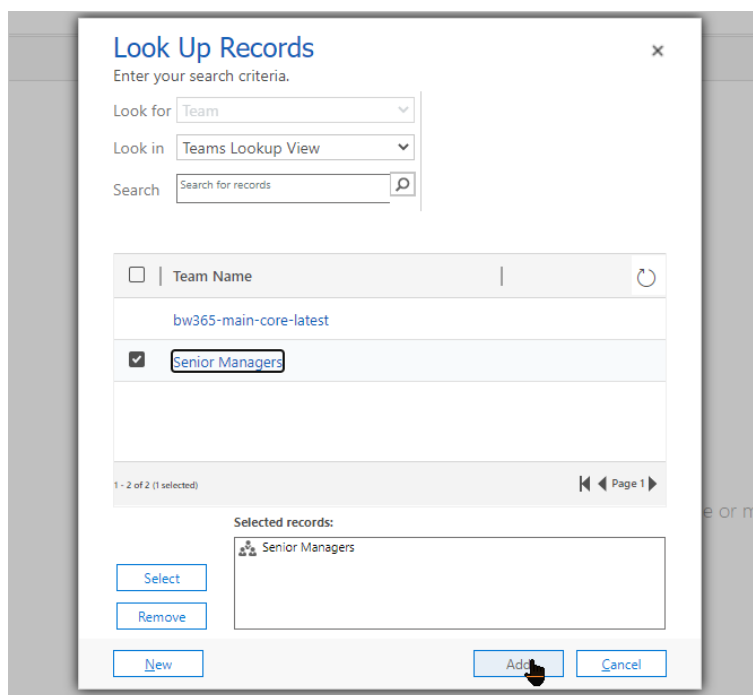
3. Click **Column security profiles**.
4. Open the **Costs and Budgets** profile.



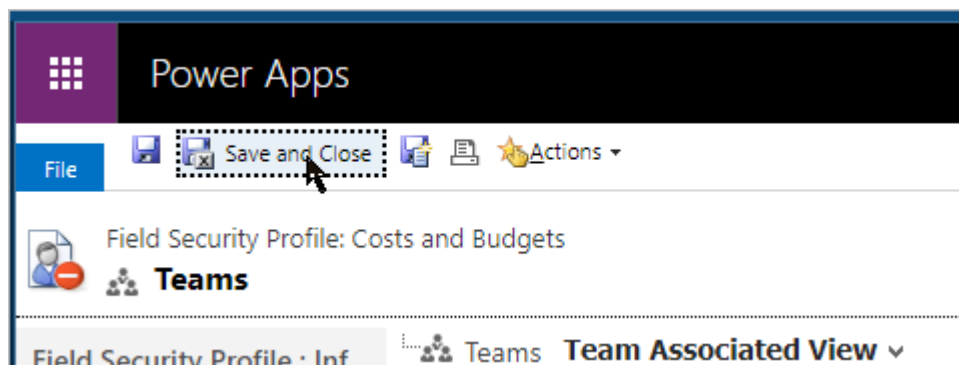
5. Click **Teams** and then click **Add**.



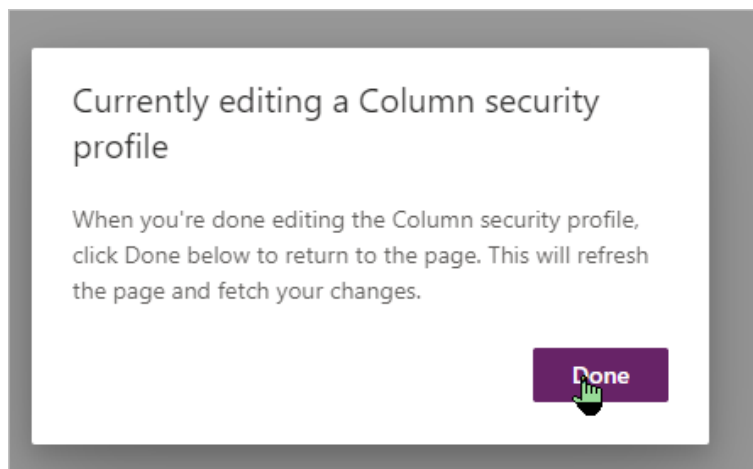
6. Select the Senior Managers team and click **Add**.



7. Click **Save and Close**.



8. Click **Done**.



Power BI Set Up

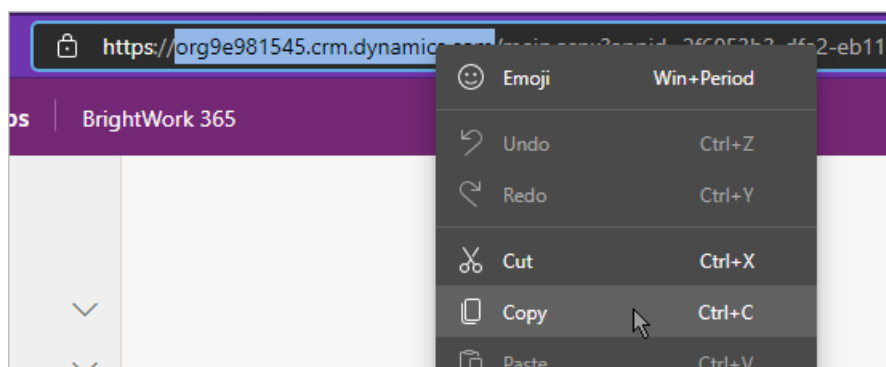
For this section you will need the Power BI desktop app. You can get it from the Microsoft Windows app store. You will also need a Power BI Pro License.

You should also [Create a workspace](#) (or have one ready to use).

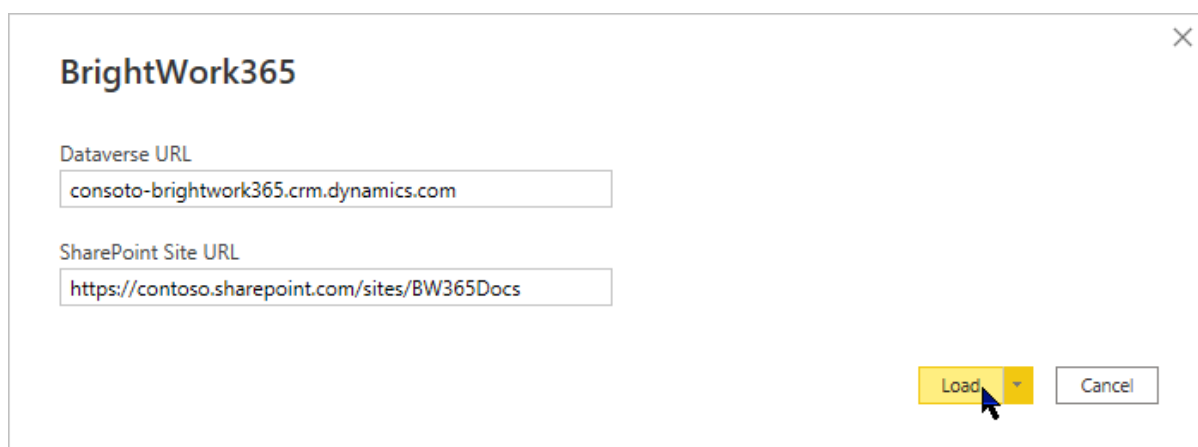
Setup BrightWork 365 PBIs

1. Return to the download folder and open the bw365 - Project Documents.pbit file.
A window will open requiring you to enter content.
2. Paste the SharePoint site URL from the SharePoint site you created earlier into the SharePoint Site URL field.
3. Login to the BrightWork 365 app and copy your Dataverse URL, up to 'dynamics.com'.

Do not include https:// in the copy!



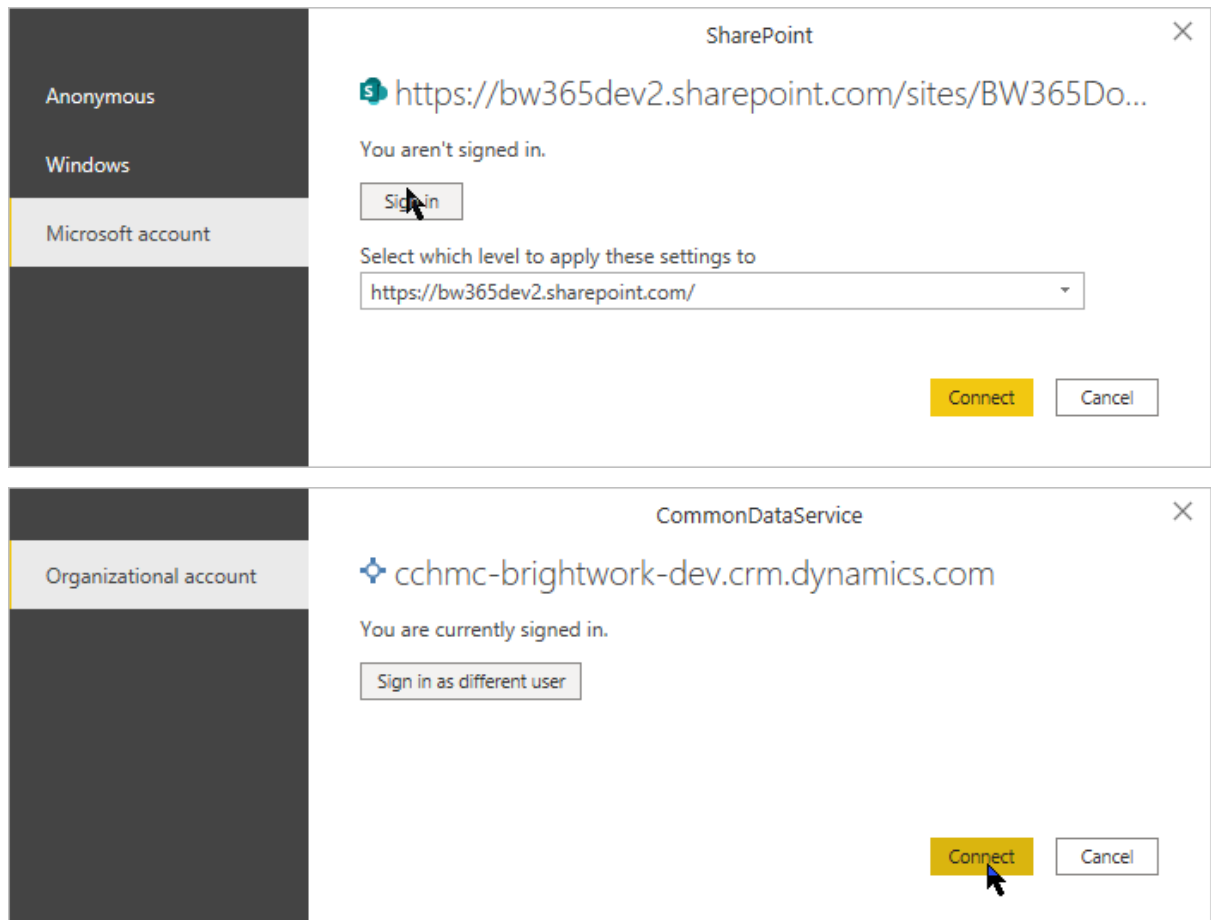
4. Paste the URL into the Dataverse URL field and click **Load**.



Note: The Dataverse URL should not have the HTTPS element in the URL.

5. You will be prompted to sign into both SharePoint and Dataverse.

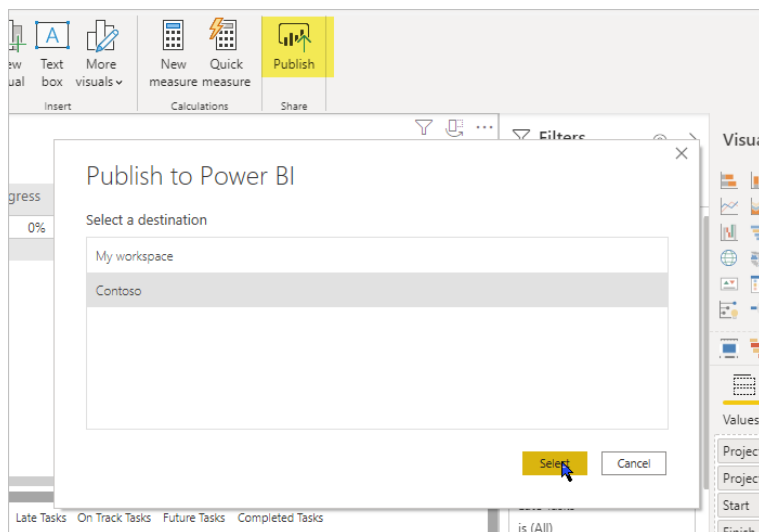
Use your Microsoft 365 credentials and click **Connect**.



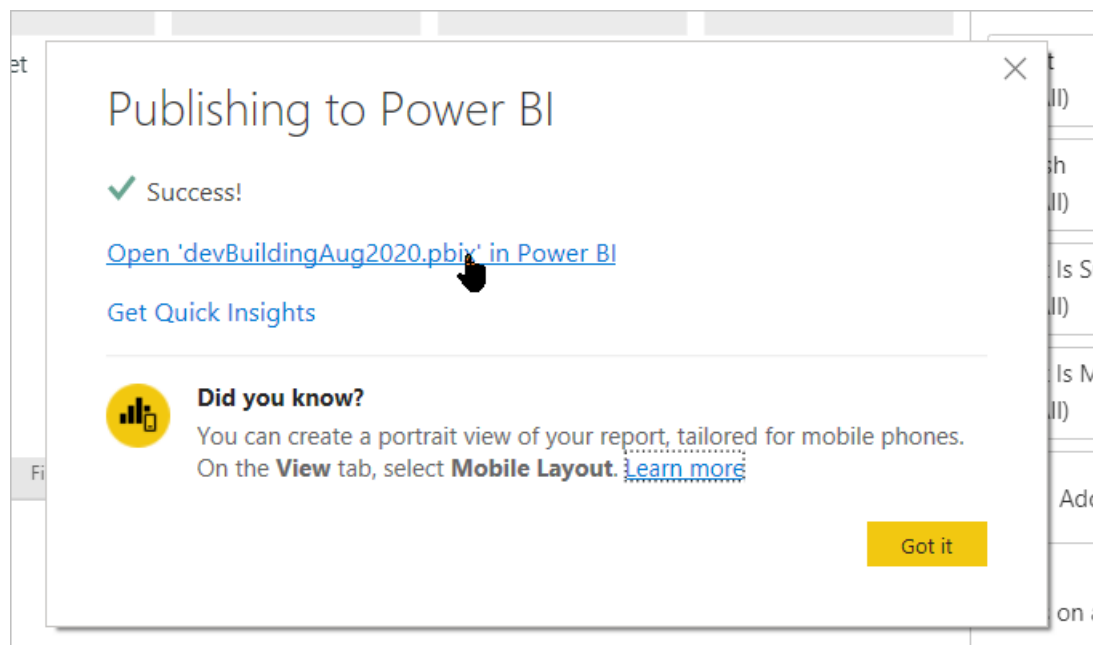
The report should load and display whatever data exists in your BrightWork 365 environment.

6. If prompted to select which level to apply settings to, select the SharePoint site from which you copied the URL.
7. Click **F12** on your keyboard and save the PBI file, for example, as BrightWork365 – Project Documents.pbix.
8. Click **Publish** and login if prompted.

9. Select the Workspace into which you want to publish the report and click **Select**.



10. Click the link to open your report in the Power BI service and proceed to the next step.



11. Repeat for the bw365 - Portfolio.pbit, bw365 - Resourcing.pbit and the bw365 - My Work.pbit – you will not be required to set up the SharePoint connection for these reports.

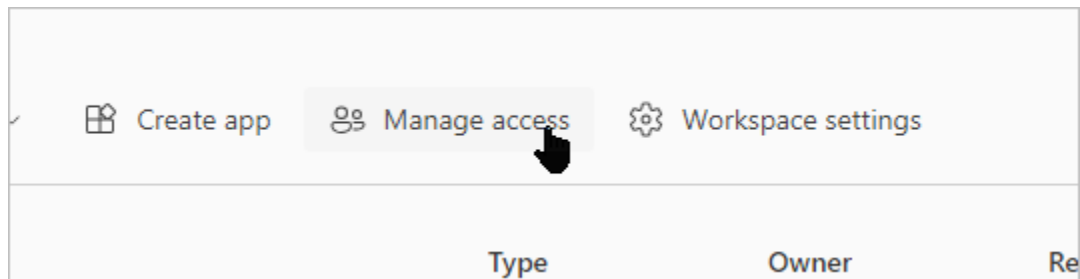
Setup My Work Users

The BrightWork 365 My Work report utilizes row level security to filter work and display only the work belonging to the logged in user.

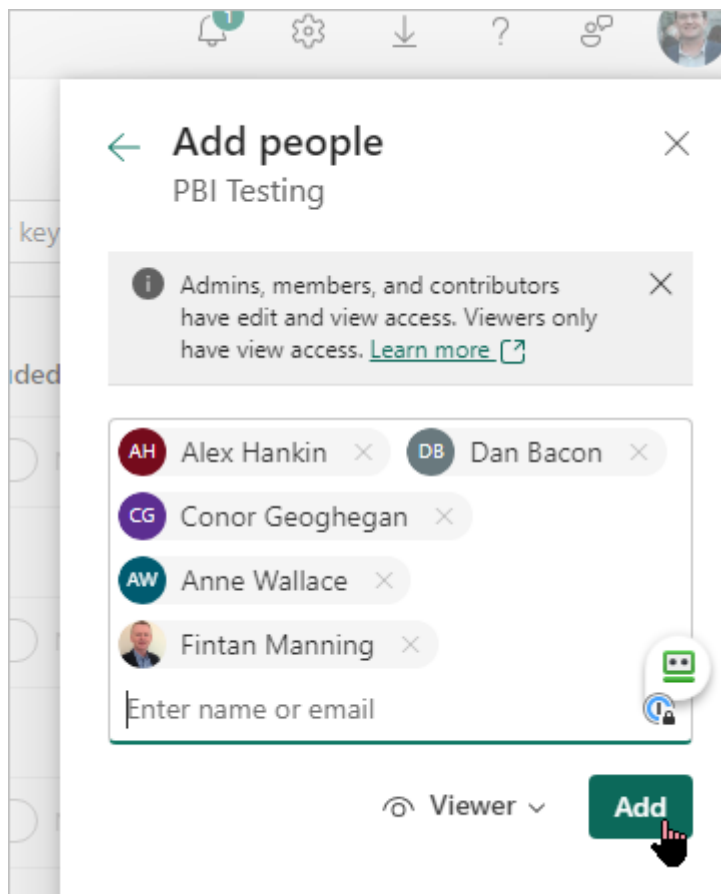
For this to work, the users must be added to the Workspace as Viewers and added to the User security group for the report dataset.

Add Users as Viewers

1. Login to <https://app.powerbi.com/> and navigate to the workspace into which you published the reports in the previous section.
2. Click **Manage access**.



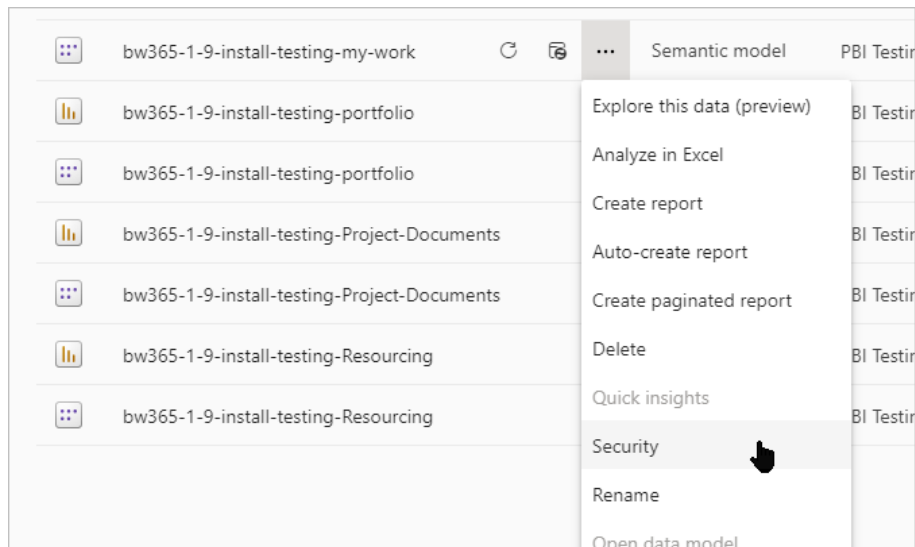
3. Click + **Add people or groups**.
4. Add each user who will be accessing the report as a viewer.



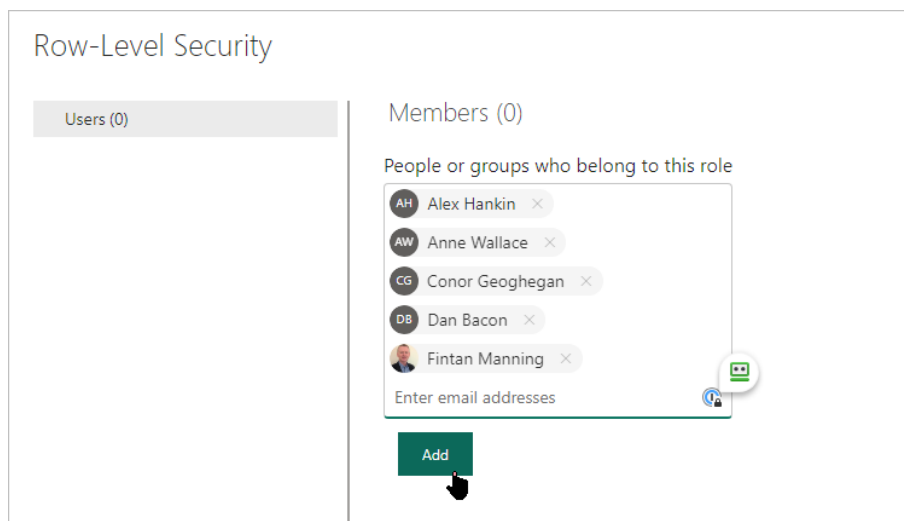
Note: My Work will only work with users added as Viewers. If the users are not added as Viewers, they will have to use the slicer to see their work.

Add Users to Security

1. Login to <https://app.powerbi.com/> and navigate to the workspace into which you published the reports in the previous section (you may need to refresh the page).
2. Click **Security** on the My Work dataset menu.



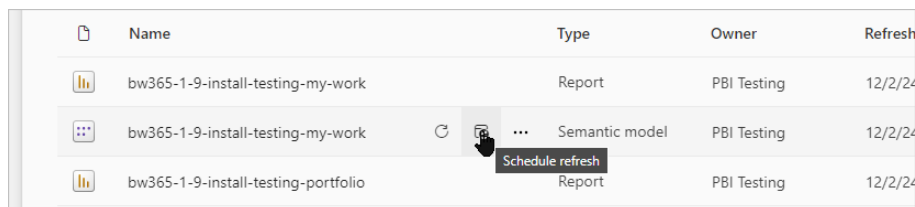
3. Add each user who will be accessing the My Work report and click **Save** when done.



Configure Power BI Scheduled Refresh

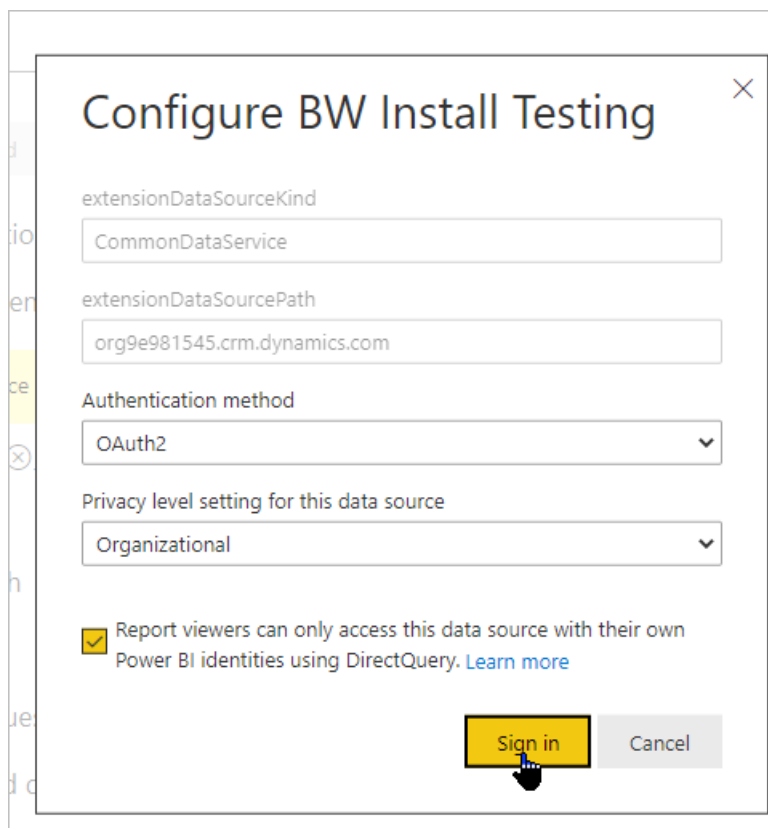
Complete this step for each of the reports.

1. Login to <https://app.powerbi.com/> and navigate to the workspace into which you published the report in the previous section.
2. Click the **Schedule refresh** icon for one of the Semantic model rows.



	Name	Type	Owner	Refresh
	bw365-1-9-install-testing-my-work	Report	PBI Testing	12/2/24
	bw365-1-9-install-testing-my-work	Semantic model	PBI Testing	12/2/24
	bw365-1-9-install-testing-portfolio	Report	PBI Testing	12/2/24

3. Under Data source Credentials click **Edit credentials** and login.



Configure BW Install Testing

extensionDataSourceKind
CommonDataService

extensionDataSourcePath
org9e981545.crm.dynamics.com

Authentication method
OAuth2

Privacy level setting for this data source
Organizational

☒ Report viewers can only access this data source with their own Power BI identities using DirectQuery. [Learn more](#)

Sign in Cancel

4. Expand **Refresh** and turn on **Configure a refresh schedule** and configure the refresh as you would like it – at a minimum you should set it to run daily. With Power BI Pro, you can have a maximum of 8 refreshes per day.

- Click **Apply**.

Define a data refresh schedule to import data from the data source into the semantic model. [Learn more](#)

☒ On

Refresh frequency
Daily

Time zone
(UTC) Dublin, Edinburgh, Lisbon, Lond

Time

6 00 AM x

8 00 AM x

11 00 AM x

2 00 PM x

4 00 PM x

6 00 PM x

9 00 PM x

[Add another time](#)

Send refresh failure notifications to

☒ Semantic model owner

☐ These contacts:

Enter email addresses

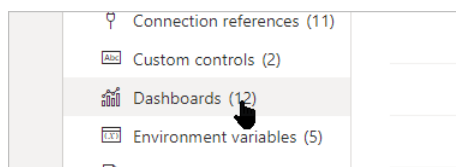
Apply Discard

- Repeat for the remaining semantic models. You will also need to edit the credentials for the Project Documents semantic model and login to SharePoint.

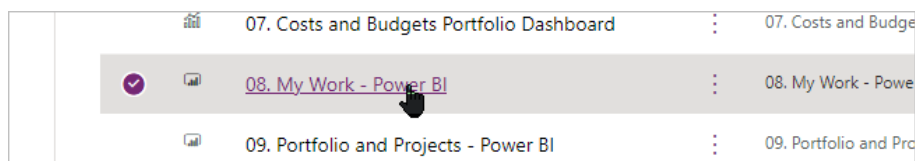
Update Dashboard Settings

The Power BI reports you just set up are delivered via Power Platform Dashboards. Next you must update the dashboards to point at your reports.

- Return to the BrightWork 365 solution in <https://make.powerapps.com/> and click **Dashboards** on the navigation.

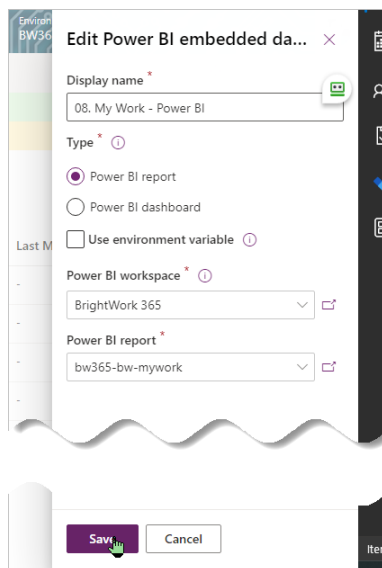


- Click **08. My Work – Power BI**.

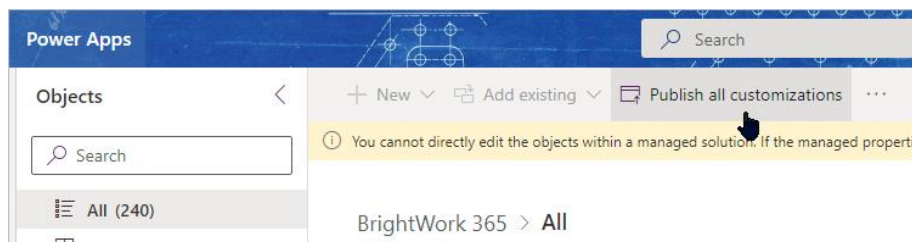


- Select the Power BI workspace into which you published the reports.

4. Select the **My Work** Report and click **Save**.



5. Repeat for the remaining Power BI reports.
6. Click **All | Publish all customizations**.



Setup Dynamics Email

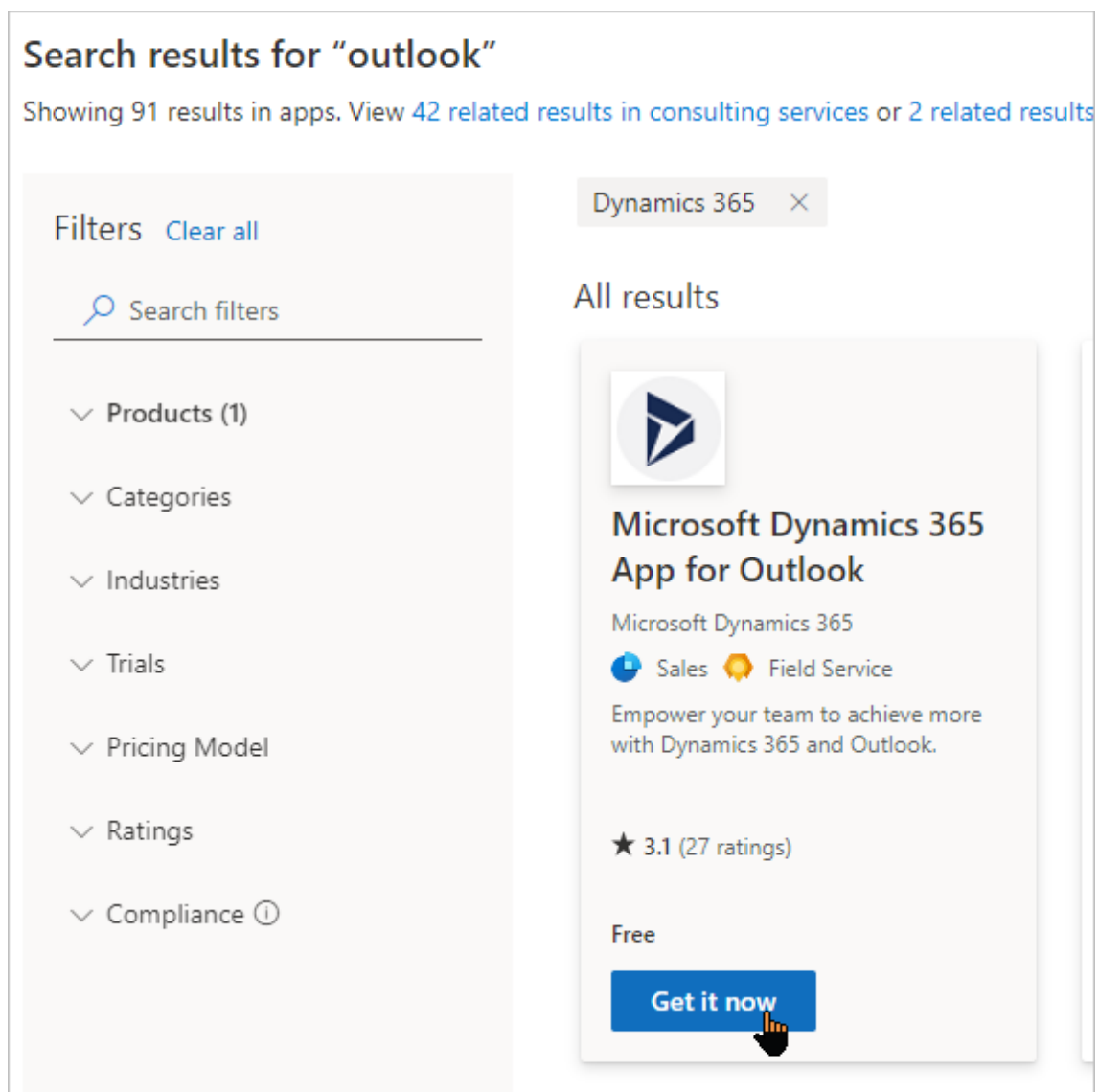
This section does not need to be done if you do not intend to use email activities in projects.

Note: GCC customers must request the Microsoft Dynamics 365 App for Outlook from their Microsoft representative.

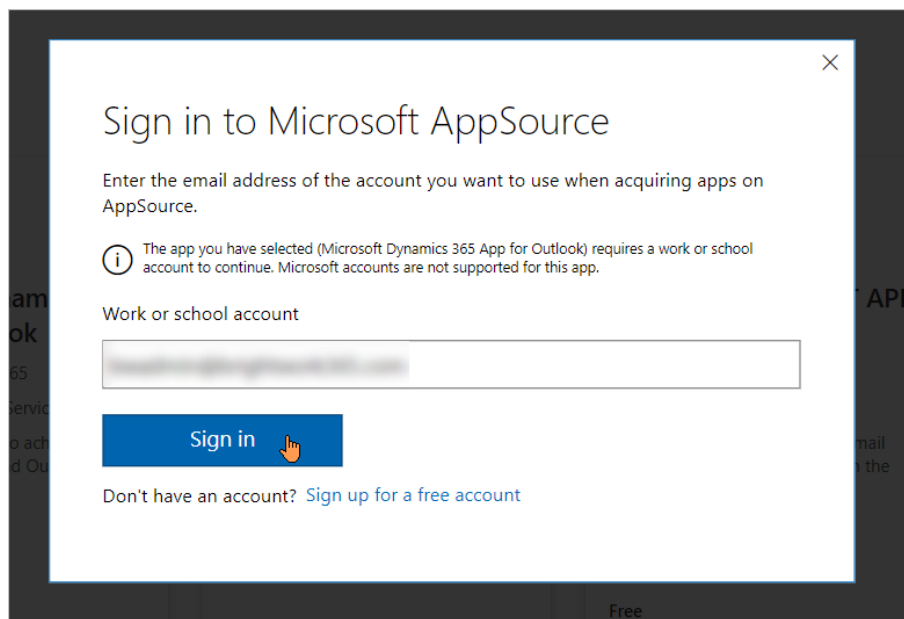
A user can only sync to one Dynamics or Dataverse environment at a time. If you have other Dynamics or Dataverse environments with email setup, consult your Exchange administrator.

Install the Microsoft Dynamics 365 App for Outlook

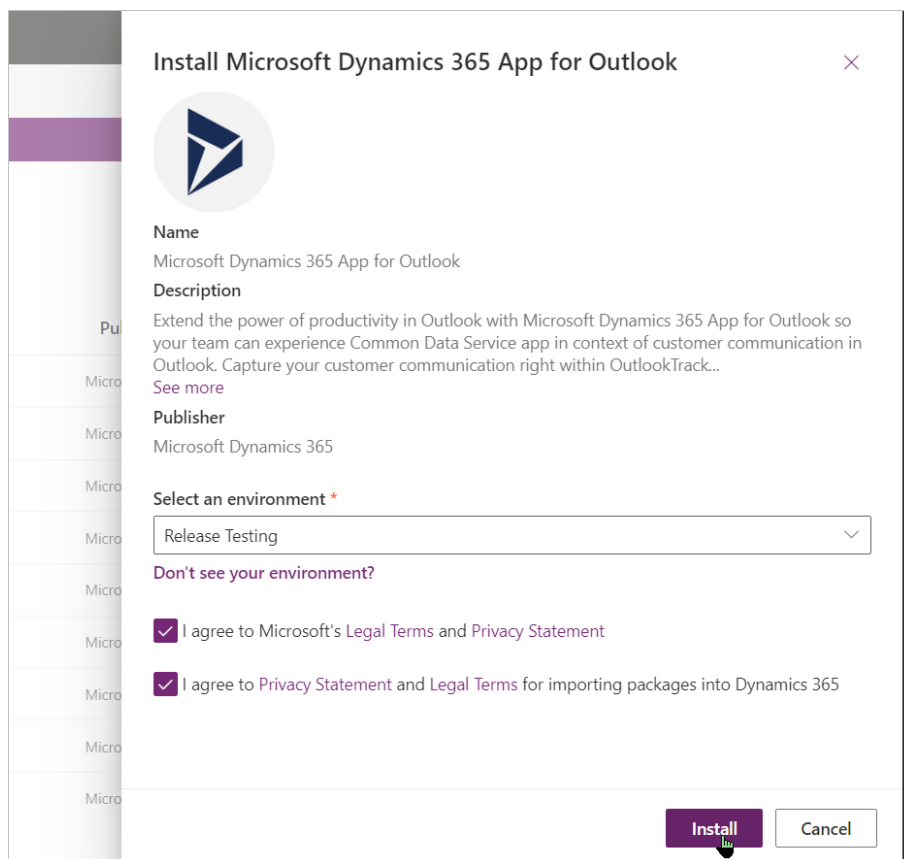
1. Navigate to <https://appsource.microsoft.com/en-US/product/dynamics-365/mscrm.fa50aa98-e8bb-4757-83ce-6d607959b985?tab=Overview>
2. Click **Get it now** on the Microsoft Dynamics 365 App for Outlook.



3. Sign in if asked.



4. Select the destination environment, agree to the terms, and click **Install**.



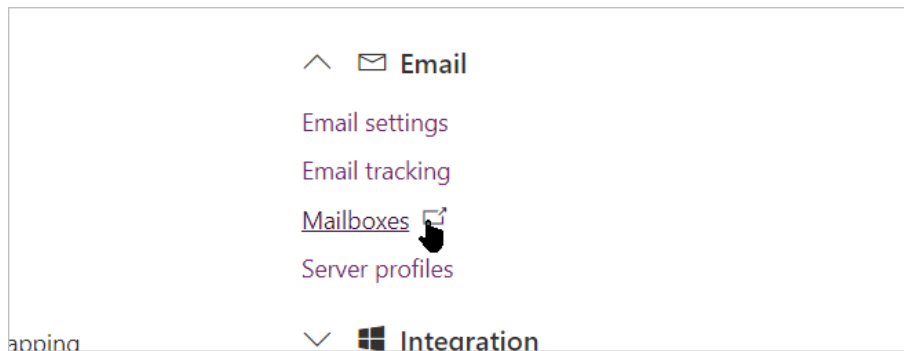
Approve Mailboxes

Note: This task must be carried out by a user with Global Administrator or Exchange Administrator role in Office 365, and System Administrator role in the Power Platform Environment

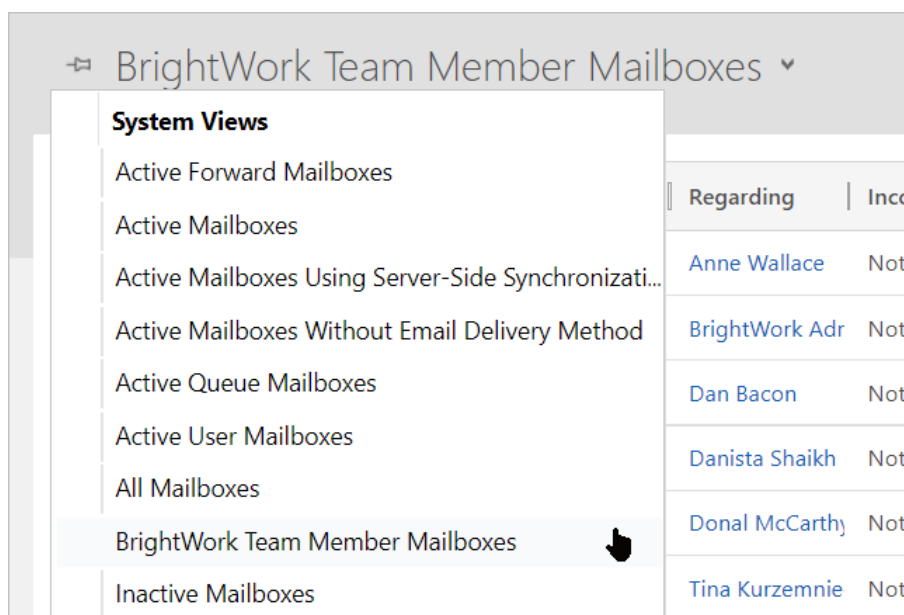
1. Login to <https://admin.powerplatform.microsoft.com/environments> and click **Settings** for the destination environment.



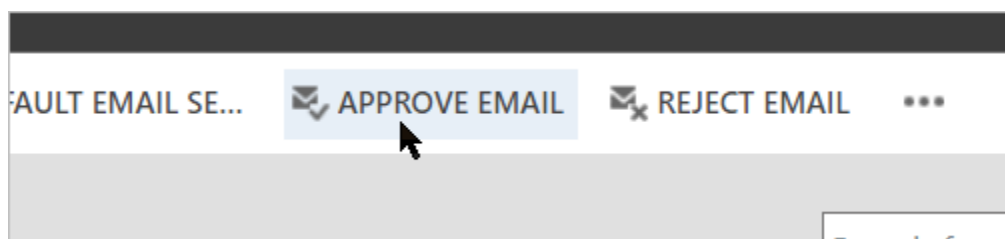
2. Expand **Email** and click **Mailboxes**.



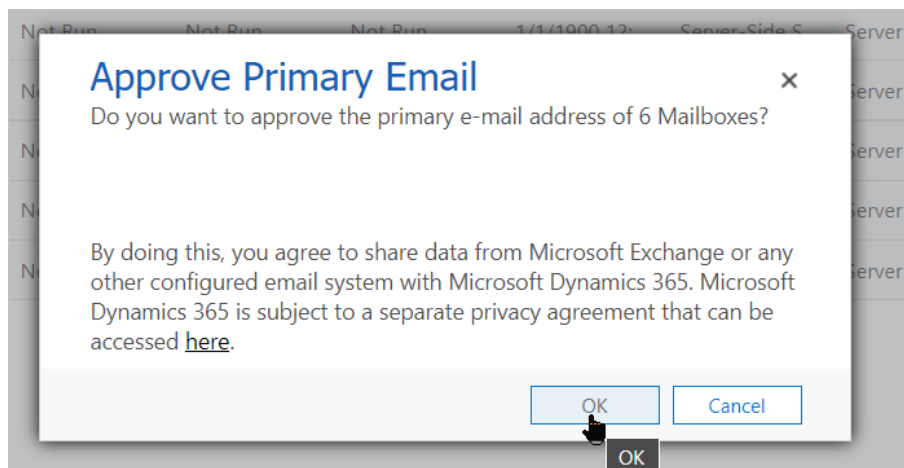
3. Select the **BrightWork Team Member Mailboxes** view.



4. Select all the BrightWork users you want to enable and click **Approve Email**.



5. Click **OK**.

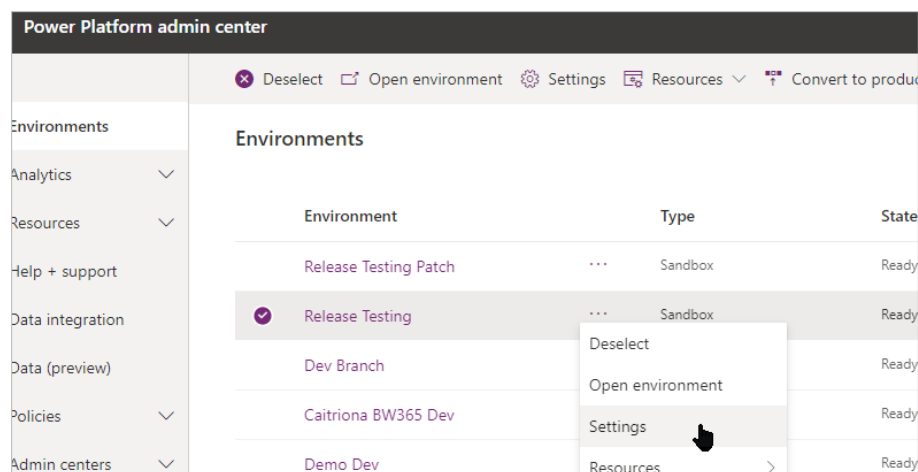


Enable Mailboxes

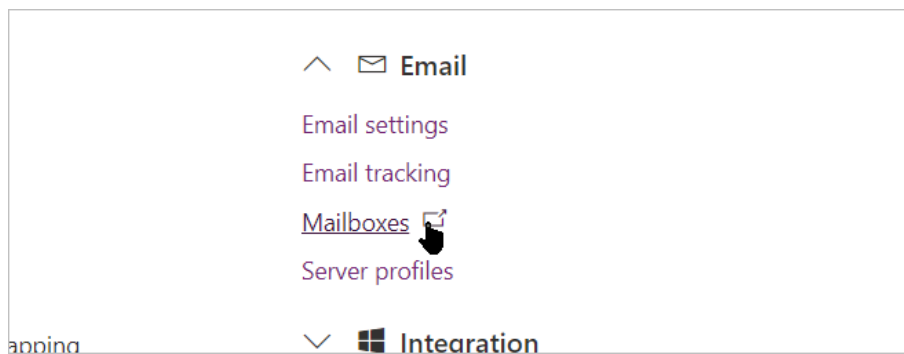
Note: It is very important to understand that an Exchange mailbox can only be synced with one Dynamics mailbox. Syncing an Exchange mailbox that is already synced with another Dynamics mailbox will break that sync. This situation will only arise if you have users active in other Power Platform environments (e.g., one where Dynamics 365 is installed).

See [When would I want to use this check box?](#) for more information.

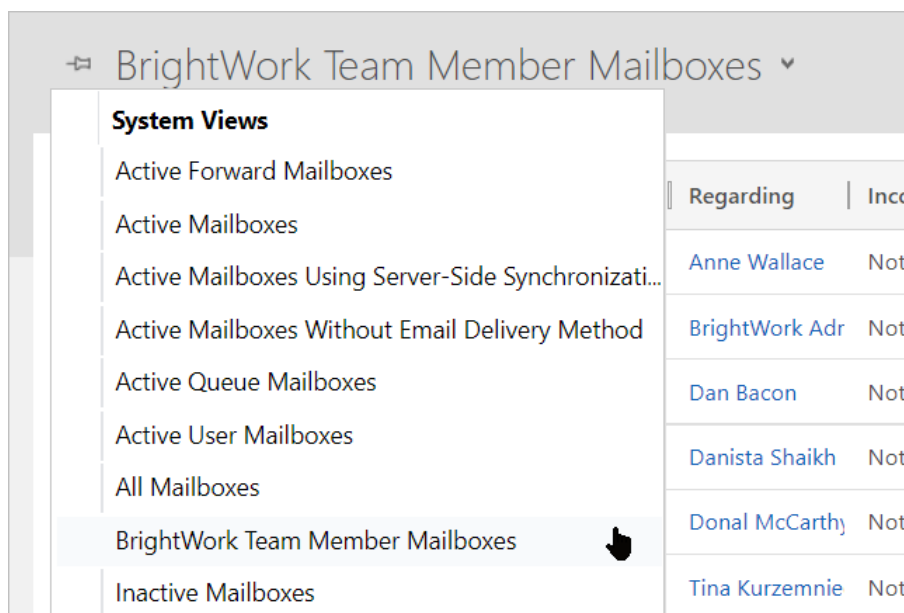
1. Login to <https://admin.powerplatform.microsoft.com/environments> and click **Settings** for the destination environment.



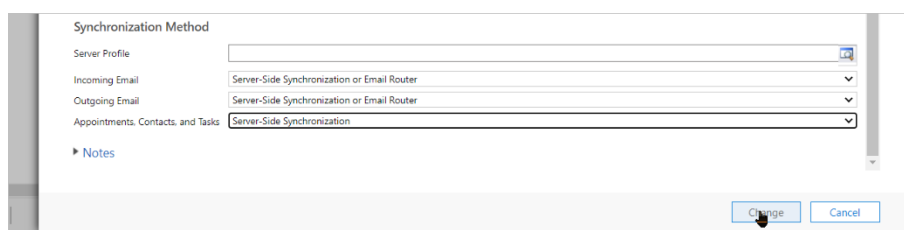
- Expand **Email** and click **Mailboxes**.



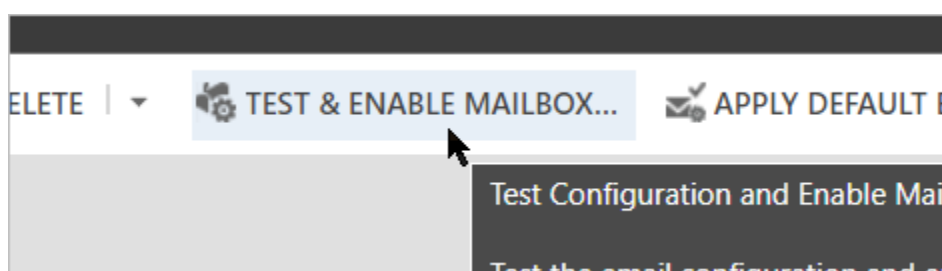
- Select the **BrightWork Team Member Mailboxes** view.



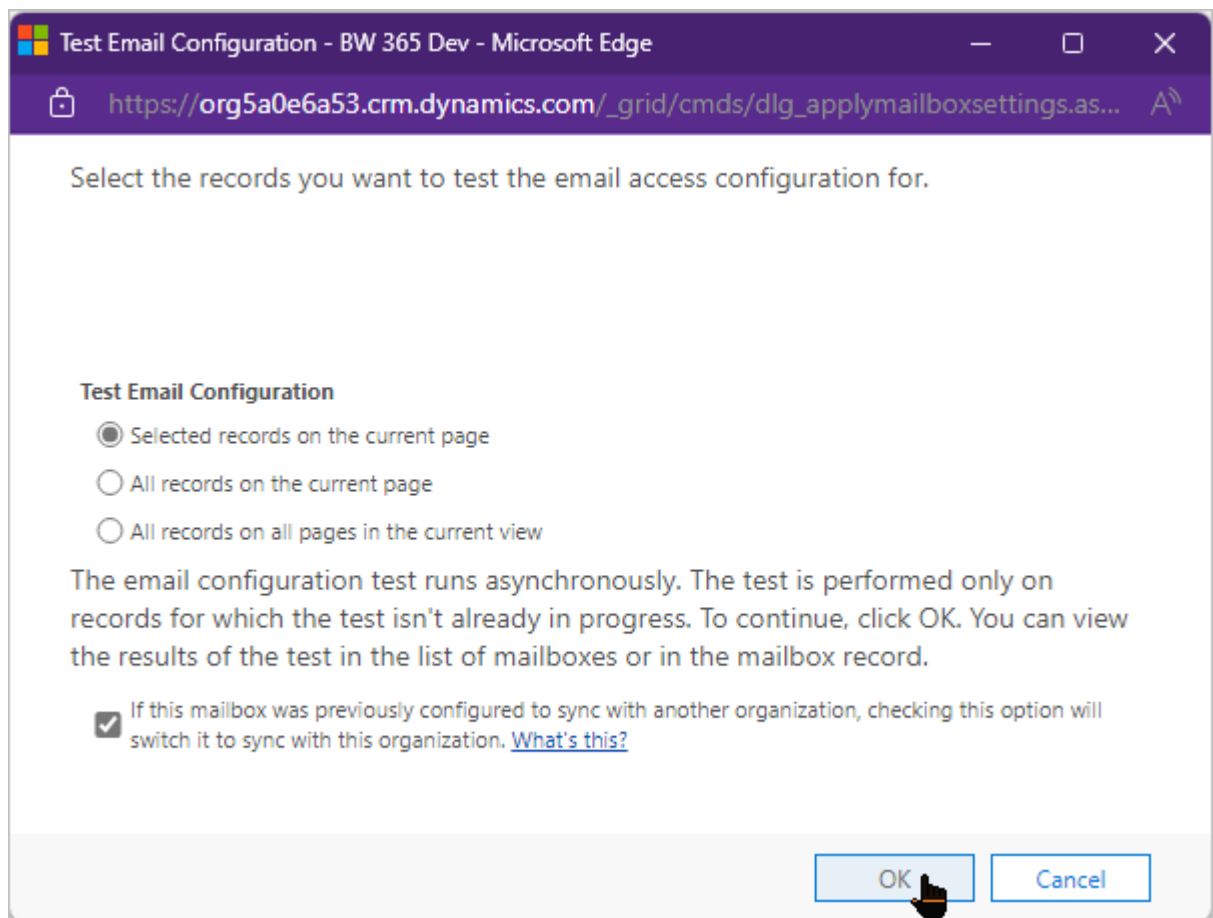
- Select all the BrightWork users you want to enable and click **Edit**.
- Ensure **Server-Side Synchronization** is the selected method for all three options and click **Change (or Save)**, and close the window.



- Select the users again and click **TEST & ENABLE MAILBOXES**.

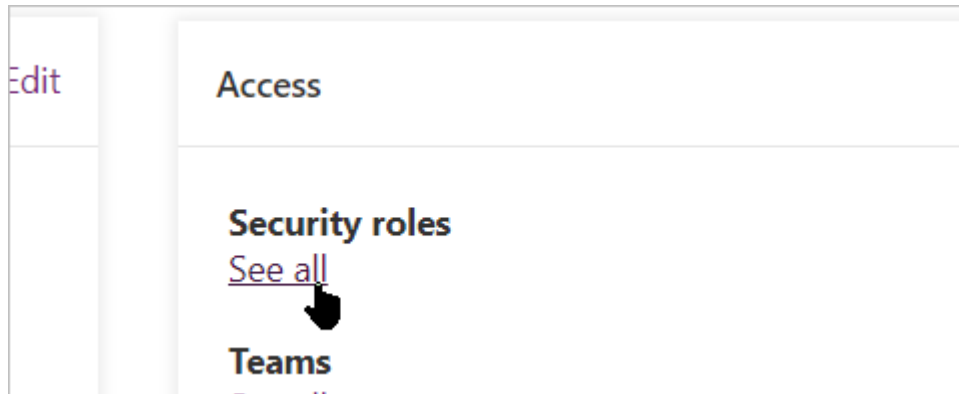


7. Click **OK**.

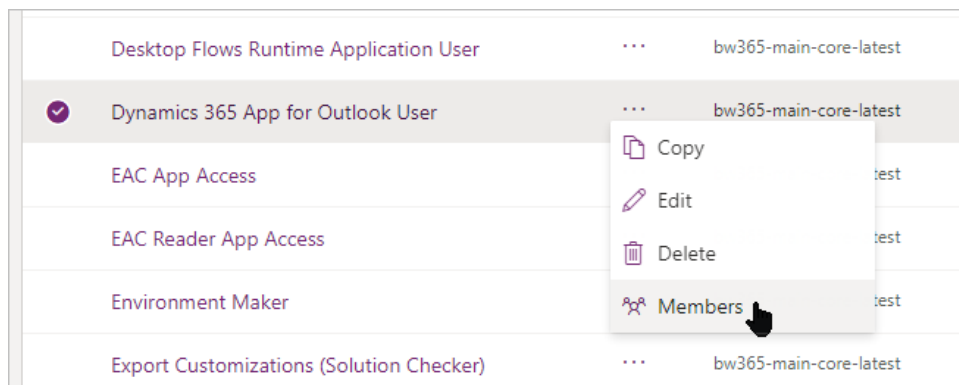


Add the Users to the Dynamics 365 App for Outlook User security role

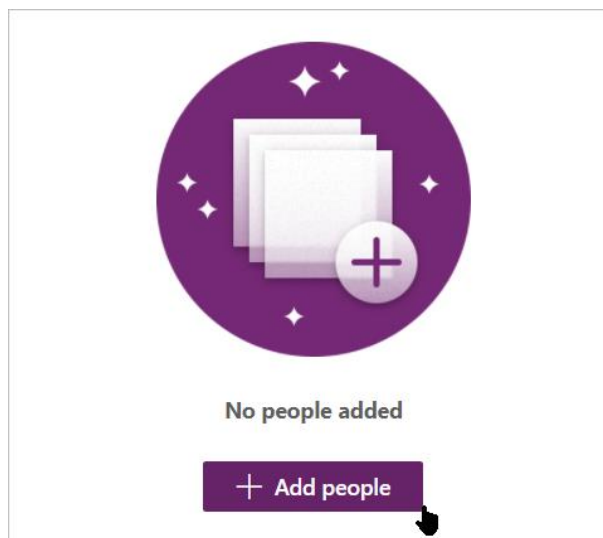
1. Login to the <https://admin.powerplatform.microsoft.com/> and click into the destination environment.
2. Click **Security Roles | See all**.



3. Click **Members** on the **Dynamics 365 App for Outlook User** role menu (if you do not see this option, turn off the option 'Display only parent security roles.')



4. Click **Add People**.



5. Add the users and click **Add**.

Add people [X]

Choose the people who should be added to the role.

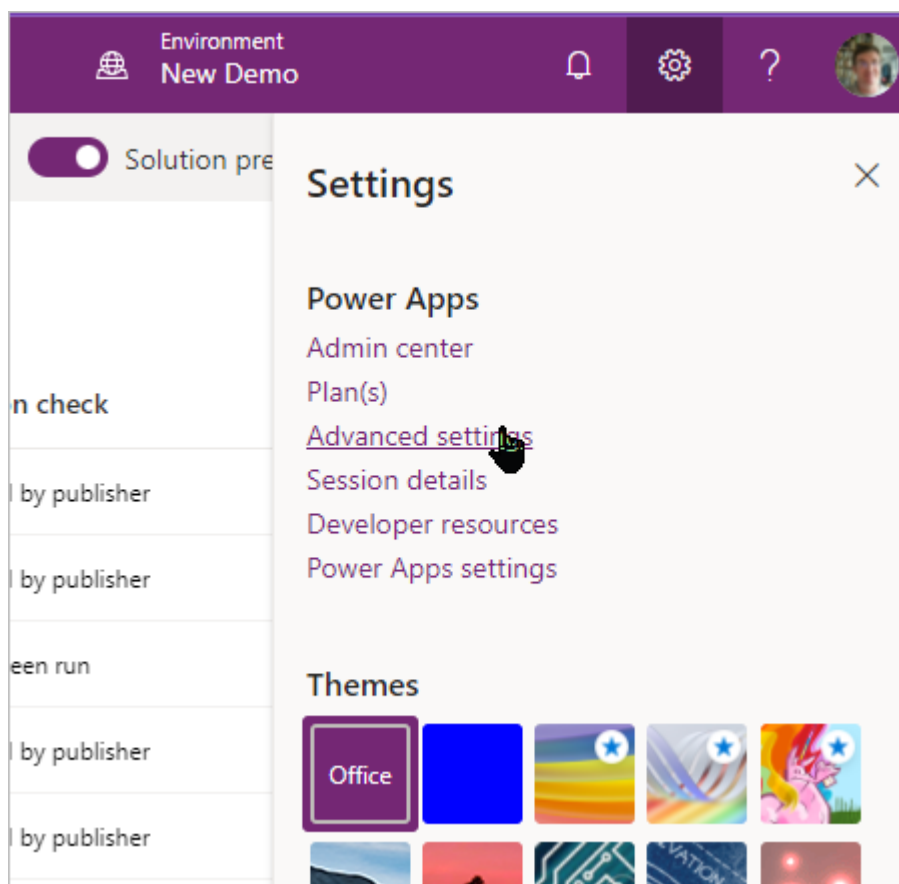
Search for a name, email address or team name

AW	Anne Wallace anne@brightwork365.com	[X]
BA	BrightWork Admin bwadmin@brightwork365.com	[X]
DB	Dan Bacon dan@brightwork365.com	[X]
DS	Danista Shaikh danista@brightwork365.com	[X]
DM	Donal McCarthy donal@brightwork365.com	[X]
TK	Tina Kurzemiece tina@brightwork365.com	[X]

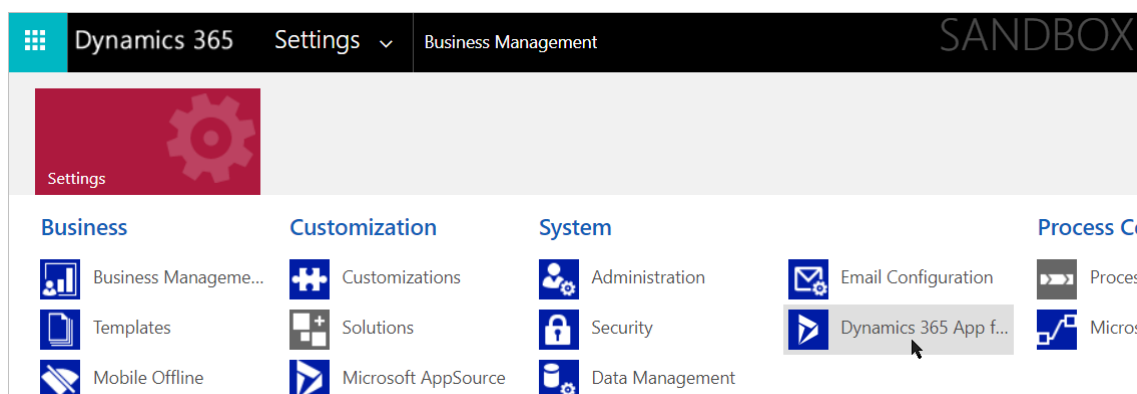
Add Cancel

Install the Microsoft Dynamics 365 App for Outlook for Users

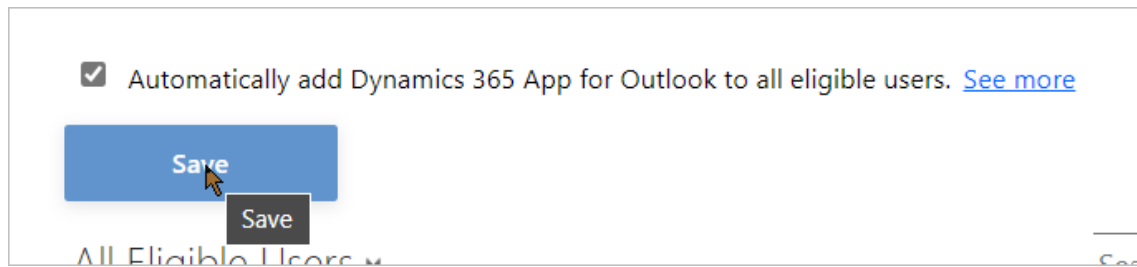
1. Login to <https://make.preview.powerapps.com/> for your environment and click **Settings** | **Advanced settings** for the destination environment.



2. Expand the **Settings** drop-down menu and click **Dynamics 365 App for Outlook**.



3. Select **Automatically add Dynamics 365 App for Outlook to all eligible users** and click **Save**.



The system will start to install the app into outlook for the eligible users.

4. Click **Refresh** a few times until it is installed into all the users.

ADD APP FOR ALL ELIGIBLE USERS				
<input type="checkbox"/>	Full name	Status	Enabled for I...	Enabled for A...
	Donal McCarthy	Added to Outlook	Yes	Yes
	Tina Kurzemniec	Added to Outlook	Yes	Yes

Uninstall BrightWork 365

You have two options to remove BrightWork 365 from your Power Platform tenant:

- Delete the BrightWork 365 environment
- Delete the BrightWork 365 solution and any other associated solutions

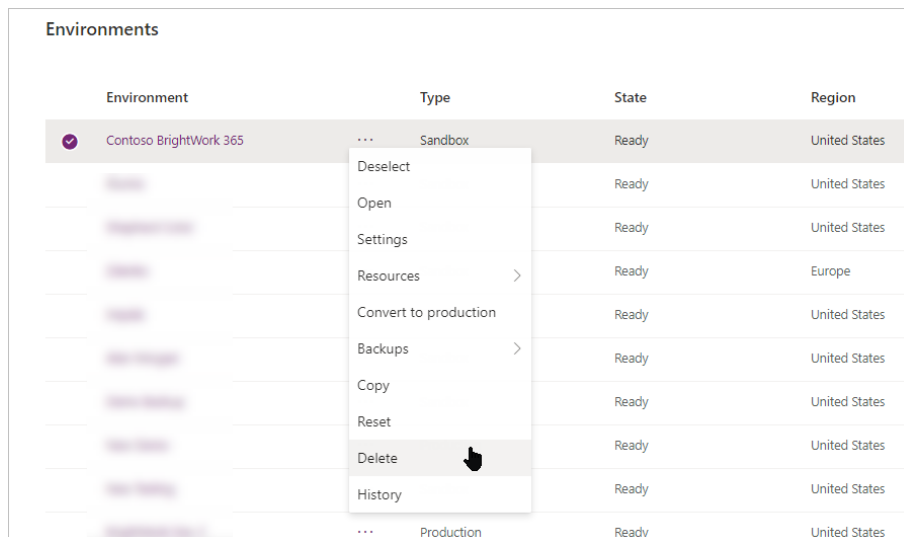
Delete the BrightWork 365 Environment

The easiest way to remove BrightWork 365 from your Power Platform tenant is to delete the environment into which BrightWork 365 is installed.

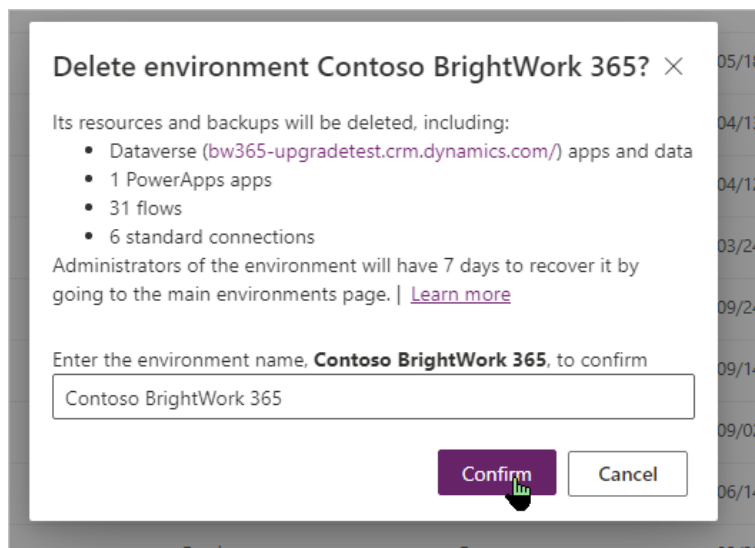
Note: You need to be a Power Platform Administrator to carry out this step. Clearly, it should be done with caution.

To delete the BrightWork 365 Environment.

1. Login to <https://admin.powerplatform.microsoft.com/environments> and select the environment into which you installed BrightWork 365.
2. Expand the ... menu and click **Delete**.



3. Enter the environment name and click **Confirm**.

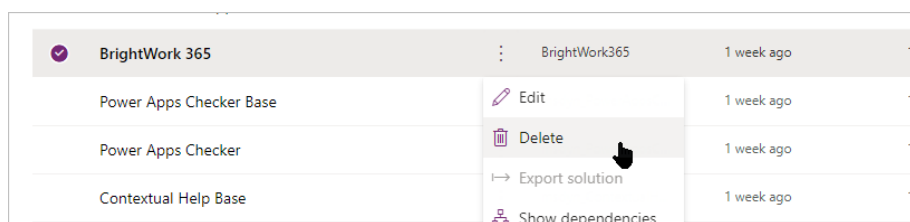


Delete the BrightWork 365 Solution

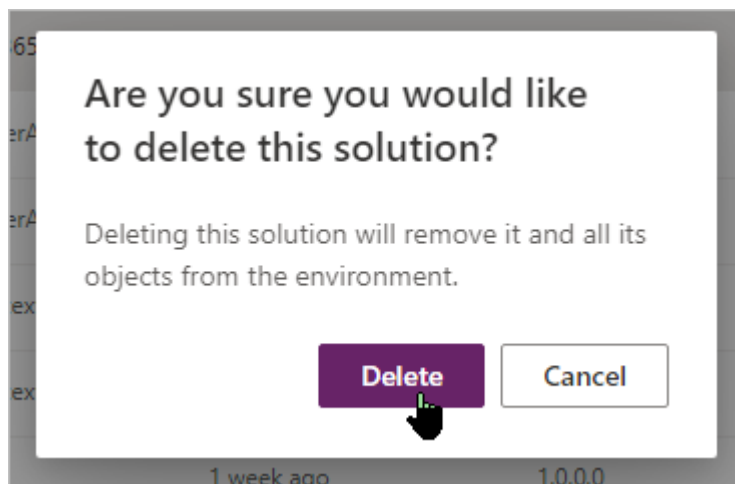
If you want to keep the environment, you can also delete BrightWork 365 from the environment. If you have a custom managed solution for BrightWork 365, on top of the main BrightWork 365 solution, you must delete this custom managed solution first.

To delete the BrightWork 365 solution:

1. Login to <https://make.preview.powerapps.com/> and select the environment into which you installed BrightWork 365 from the environment switcher in the top right.
2. Select the BrightWork 365 Solution, expand the ... menu and click **Delete**.



3. Click **Delete** to confirm that you want to delete the solution.

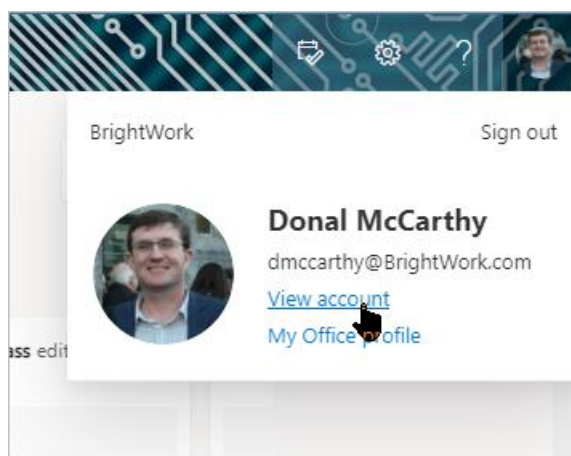


Appendix

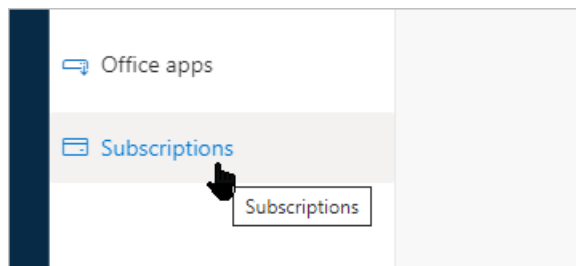
What Microsoft 365 Licenses do I have?

The BrightWork 365 Install user must have a Power Apps per User license. See below to establish if this applies to you.

1. Login into <https://www.office.com>
2. Click **View account** on your profile menu.

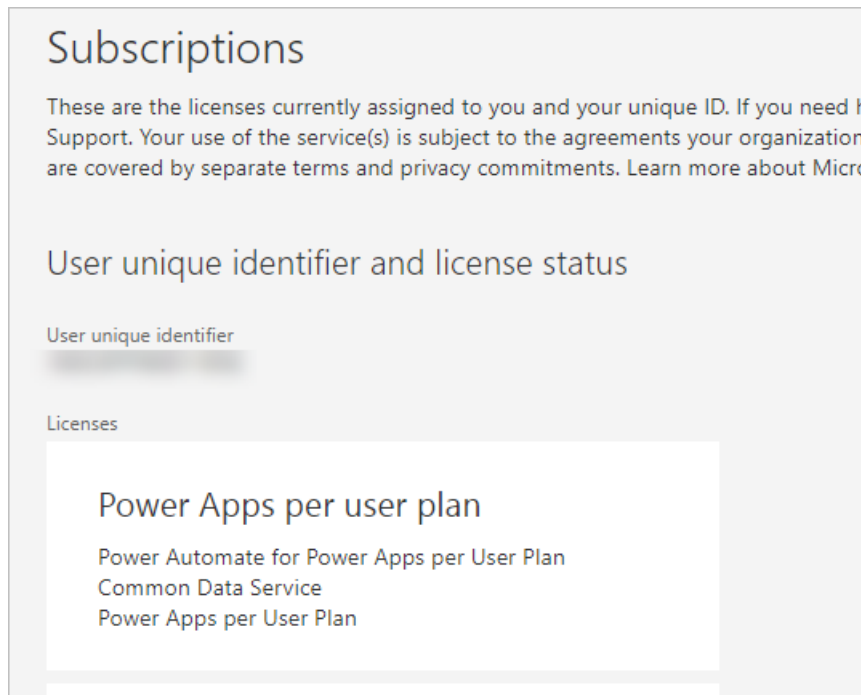


3. Click **Subscriptions** on the nav.



4. If the 'Power Apps per user plan' is not listed, do not proceed with the install.

Contact your O365 Admin to get a Power Apps per User license added to your account.



Note: The Power Apps for Office 365 license is not sufficient to use the premium connectors included with BrightWork 365.

Power Apps US Government service URLs

You use a different set of URLs to access Power Apps US Government environments, as shown in the following table (the commercial URLs are also shown for contextual reference, in case they are more readily familiar to you).*

POWER APPS US GOVERNMENT SERVICE URLS

Commercial version URL	US Government version URL
https://make.powerapps.com	https://make.gov.powerapps.us (GCC) https://make.high.powerapps.us (GCC High) https://make.apps.appsplatform.us (DoD)
https://create.powerapps.com	https://make.gov.powerapps.us (GCC) https://make.high.powerapps.us (GCC High) https://make.apps.appsplatform.us (DoD)
https://flow.microsoft.com/connectors	https://gov.flow.microsoft.us/connectors https://high.flow.microsoft.us/connectors (GCC High) https://flow.appsplatform.us (DoD)
https://admin.powerplatform.microsoft.com	https://gcc.admin.powerplatform.microsoft.us https://high.admin.powerplatform.microsoft.us (GCC High) https://admin.appsplatform.us (DoD)
https://apps.powerapps.com	https://play.apps.appsplatform.us (GCC) https://apps.high.powerapps.us (GCC High) https://play.apps.appsplatform.us (DoD)
https://app.powerbi.com	https://app.powerbigov.us (GCC) https://app.high.powerbigov.us (GCC High)

POWER APPS US GOVERNMENT SERVICE URLS

Commercial version URL	US Government version URL
	https://app.mil.powerbigov.us (DoD)