BrightWork365

Install Guide

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BrightWork 365 Install and Setup

Prerequisites

Install User

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

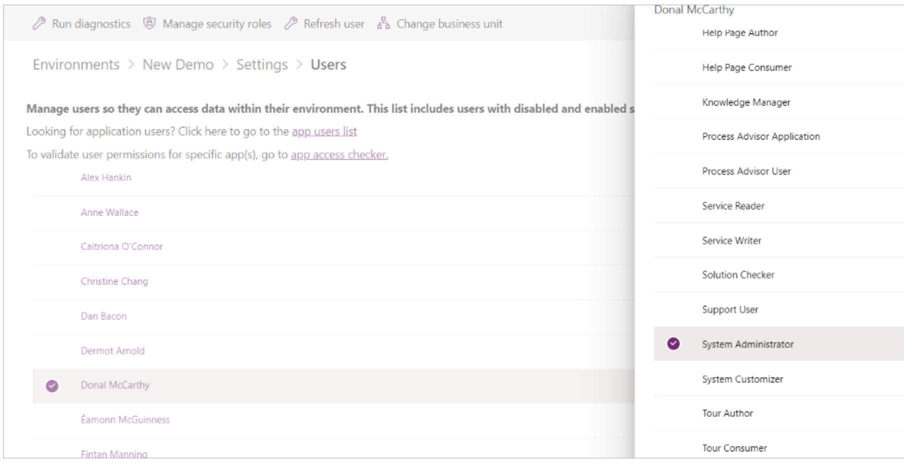
We also recommend that the BrightWork 365 installation be performed on a Windows client computer. Users attempting to install with an Apple or other client machine may be unable to perform some of the steps in this guide.

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

- Power Apps Premium license (this license must be permanently allocated to the install account)

  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 emails
  - This account needs access to Microsoft Teams, including the ability to create and manage teams
- System Administrator role in the installation environments

  The System Administrator security role only gives the user administrator rights in the environment in which it is assigned. It does not grant administrator rights to anywhere outside of the environment.



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

This user account must permanently have a Power Apps Premium 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.

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 the below files:

- BrightWork365_####_managed.zip (do not unzip this file)
- BrightWork365.Setup.zip (this is for upgrades – you will not be using it)
- BrightWork365 Install Guide.pdf (this document)
- BrightWork 365 Security Overview.pdf
- BrightWork365 Upgrade Guide.pdf
- forms-templates.csv
- project-templates.csv
- request-templates.csv
- bw365 - My Work.pbit
- bw365 - Portfolio.pbit
- bw365 - Project Documents.pbit
- bw365 - Resourcing.pbit

Create Three Install Environments

Note: The Environments into which BrightWork 365 is installed must have the English language pack installed prior to beginning installation of BrightWork 365. This will only likely need to be done if the default 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 should not be installed in the Default Environment. We recommend creating three dedicated Power Platform environments and installing BrightWork 365 into all of them:

- Dev
  If BrightWork is hosting your dev environment, you do not need to create a local dev environment.
  The default language in this environment must be English.
- UAT (this is where you will test the custom solution)
- Production (this is where your users will use BrightWork 365)

If your organization was called Acme, we recommend adopting an environment naming structure like the below and reusing the names in the environment URL and associated SharePoint sites.

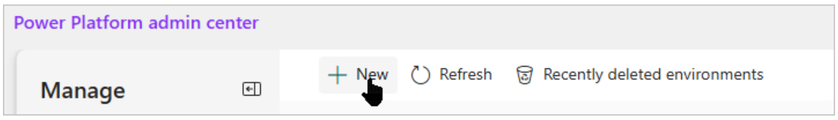
- bw365-acme-dev
- bw365-acme-uat
- bw365-acme-prod

We also recommend that you use dedicated Microsoft 365 security groups to control access to the environment (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 for more information from Microsoft.

How to Create an Environment

1. Navigate to [Environments | Power Platform admin center] in your tenant and click **+ New**.



2. Give the environment a name and copy the name to your clipboard.

   If your organization was called Acme, we recommend an environment naming structure like the below and reusing the names in the environment URLs and associated SharePoint sitenames.

   a. bw365-acme-dev
   b. bw365-acme-uat
   c. bw365-acme-prod

3. We recommend making the environment a Managed Environment.
4. Select your Region.
5. We do not recommend selecting **Get new features early**.
6. Select the type – for Dev and UAT select **Sandbox** and for prod select **Production**.
7. Ensure **Add a Dataverse data store** is selected (it will be automatically selected if you have made this a Managed Environment).
8. Click **Next**.
9. Select your default Language and Currency.

Note: English must be selected as the Default Language for the dev environment.

It is important that you select the default Language and Currency with care as it cannot be changed later.

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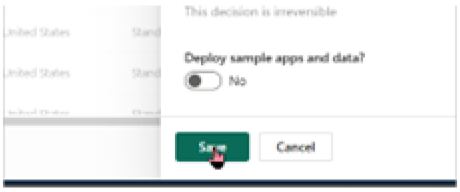
10. Select a Security group.
11. Click **here** in the URL section and paste in the name you copied earlier.
12. Click **Save**.

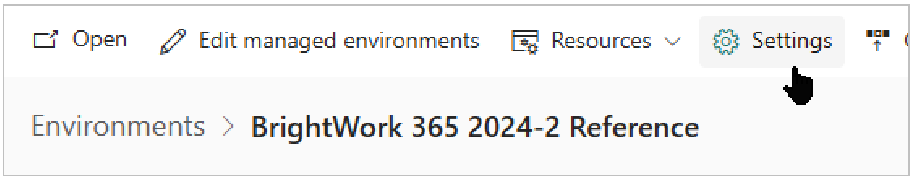


Setup Environments for BrightWork 365

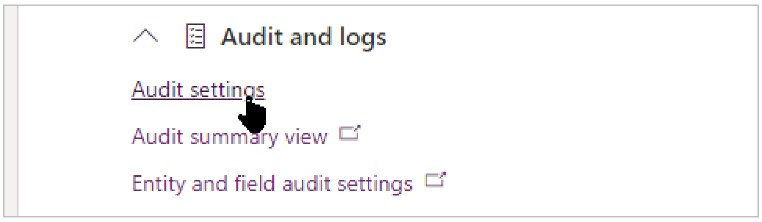
This section must be completed prior to installing BrightWork 365 into an environment.

Enable Audit

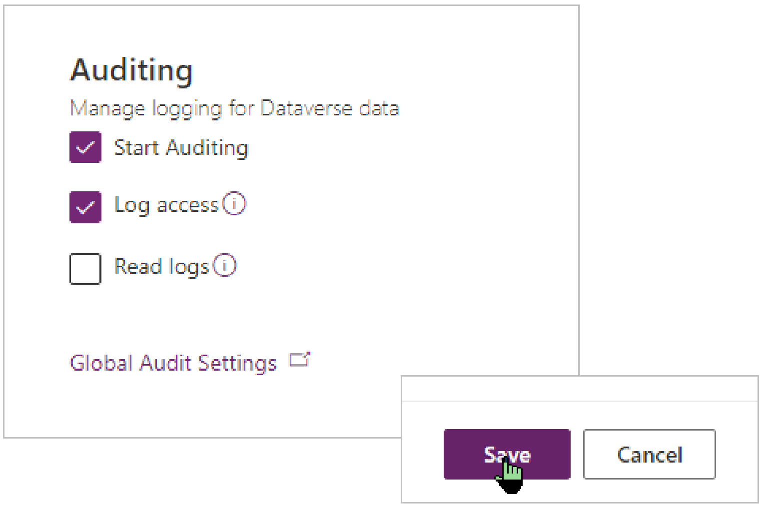
1. Login to https://admin.powerplatform.microsoft.com/environments and open the environment.
2. Click **Settings**.



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



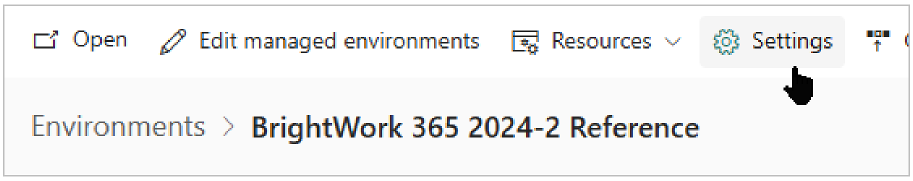
4. Select **Start Auditing** and **Log access**, if presented with a retention period, select a retention period (we recommend 365 days).
5. Click **Save**.



Enable French and English Language Packs

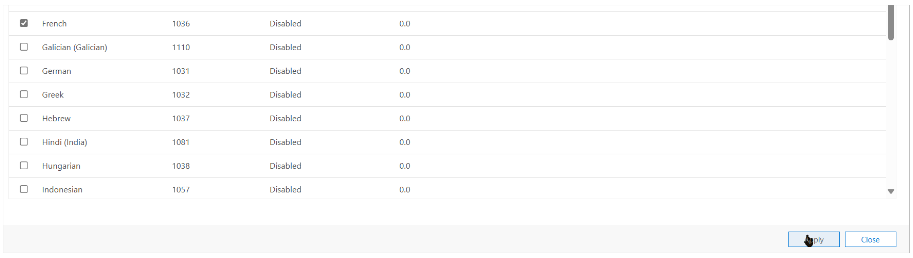
Installing the French language pack is necessary even if you do not use the French language. Installing the English language pack is only necessary if your default environment language is not English.

1. Login to https://admin.powerplatform.microsoft.com/environments and open the environment.
2. Click **Settings**.

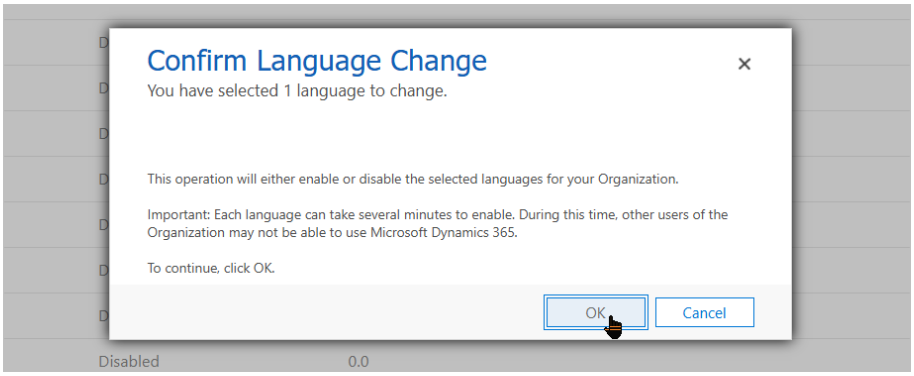


3. Expand **Product** and click **Languages**.

4. Select **French** (and English, if it is available) and click **Apply**.

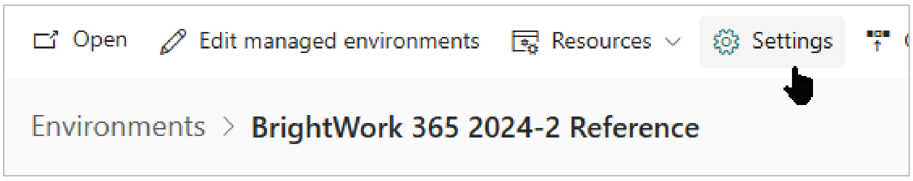


5. Click **OK** and wait for the installation to complete (it can take a few minutes).

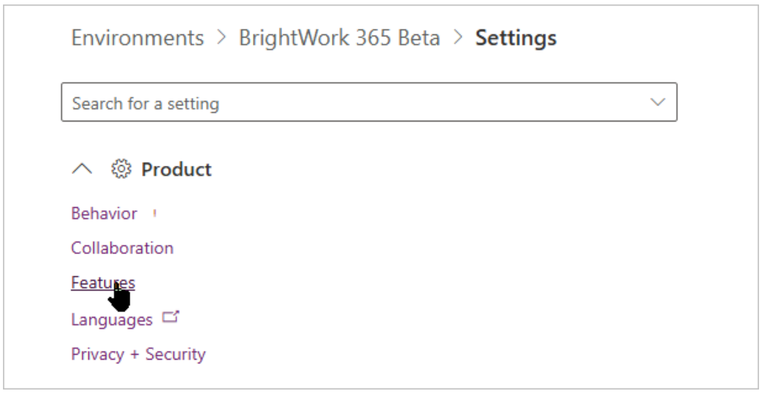


Enable Search and Ownership Across Business Units

1. Login to https://admin.powerplatform.microsoft.com/environments and open the environment.
2. Click **Settings**.

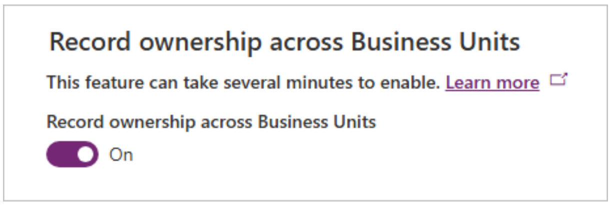


3. Expand **Product** and click **Features**.



4. Enable Dataverse search.

5. Enable Record ownership across Business Units.



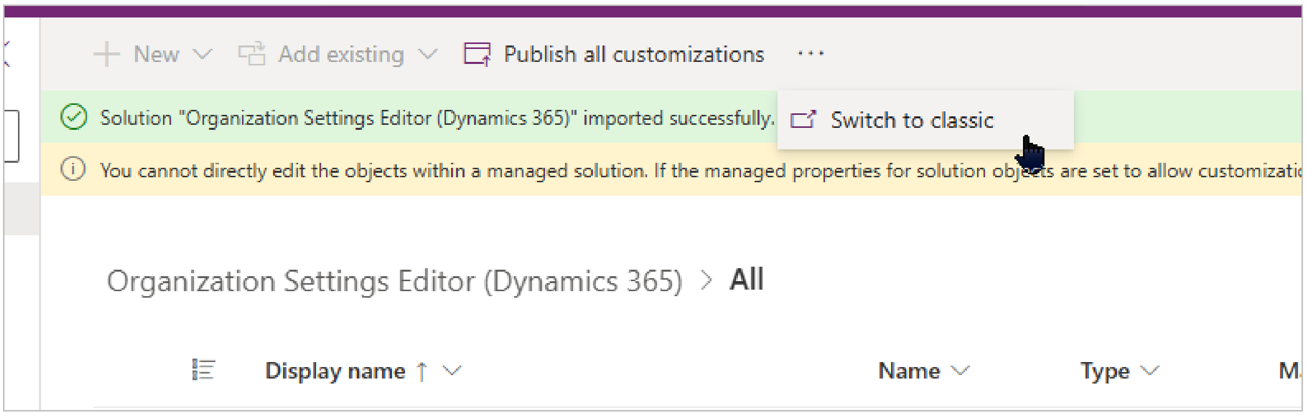
6. Click Save and wait for the process to complete – do not close the browser window.

Update OrgSettings for your Environments

Some Power Platform environment settings are not available in the Power Platform Admin Center and must be set using an external tool.

There are two ways to do this:

- Using the Org Settings tool in [XRM Toolbox] (the recommended approach)
- Using the legacy [OrgDBSettings tool] supplied by Microsoft – see [How to change default environment database settings] – remember to click **Switch to classic** after installing the OrganizationSettingsEditor solution.

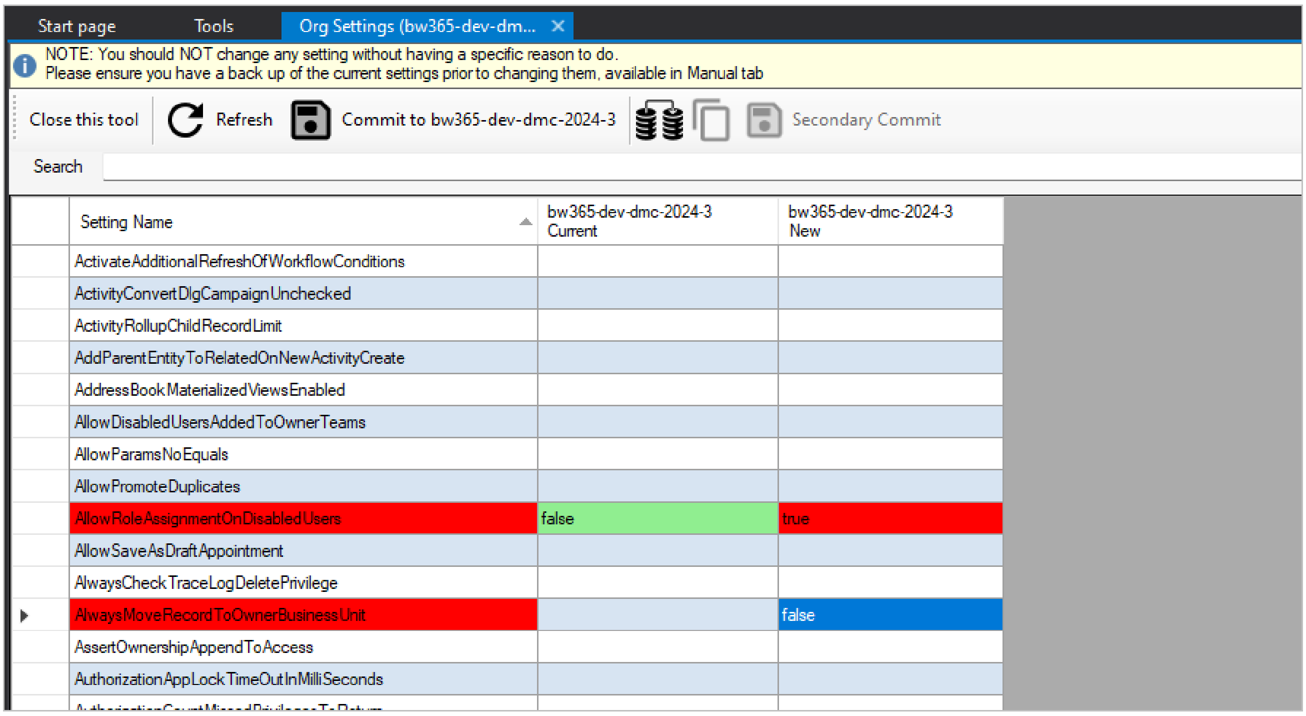


Turn off Always Move Records to New Business Unit

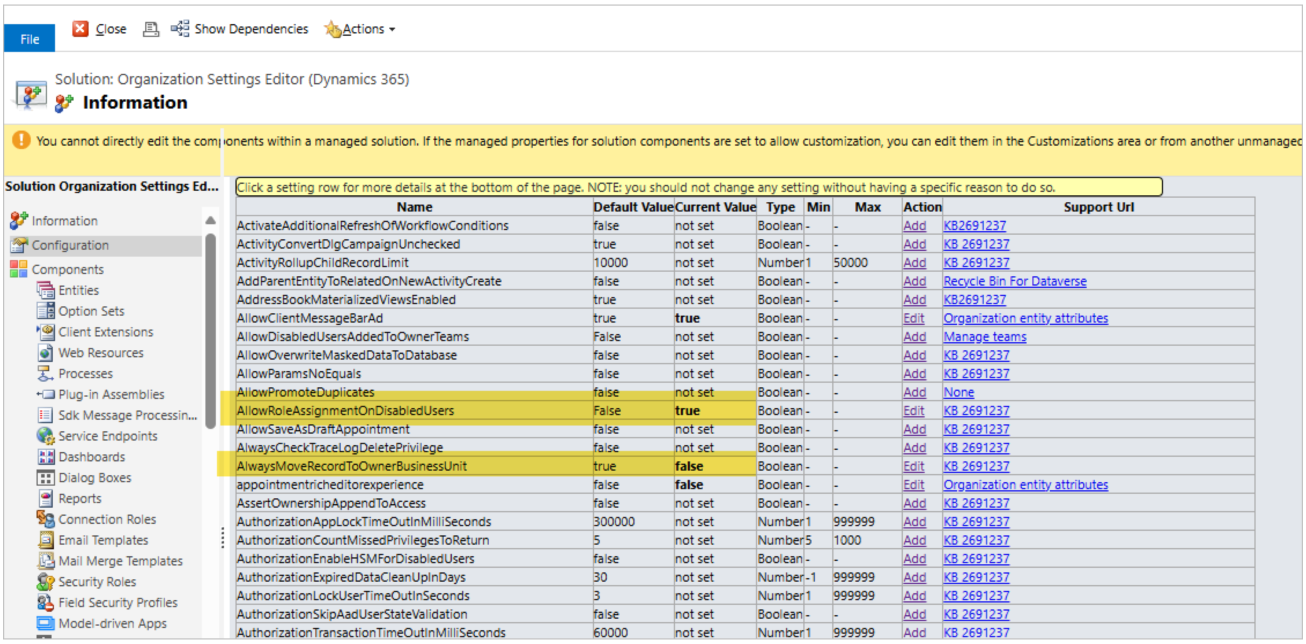
You need to turn the AlwaysMoveRecordToOwnerBusinessUnit setting to false. Doing this ensures that records will not follow users when they move business unit.

Turn on Allow Role Assignment on Disabled Users

You need to turn the AllowRoleAssignmentInDisabledUsers setting to true. Doing this ensures that maintain historical context in projects with users that have left your organization.



Setting Name	bw365-dev-dmc-2024-3 Current	bw365-dev-dmc-2024-3 New
ActivateAdditionalRefreshOfWorkflowConditions		
ActivityConvertDlgCampaignUnchecked		
ActivityRollupChildRecordLimit		
AddParentEntityToRelatedOnNewActivityCreate		
AddressBookMaterializedViewsEnabled		
AllowDisabledUsersAddedToOwnerTeams		
AllowParamsNoEquals		
AllowPromoteDuplicates		
AllowRoleAssignmentOnDisabledUsers	false	true
AllowSaveAsDraftAppointment		
AlwaysCheckTraceLogDeletePrivilege		
AlwaysMoveRecordToOwnerBusinessUnit		false
AssertOwnershipAppendToAccess		
AuthorizationAppLockTimeOutInMilliSeconds		



Name	Default Value	Current Value	Type	Min	Max	Action	Support Url
ActivateAdditionalRefreshOfWorkflowConditions	false	not set	Boolean	-	-	Add	KB2691237
ActivityConvertDlgCampaignUnchecked	true	not set	Boolean	-	-	Add	KB 2691237
ActivityRollupChildRecordLimit	10000	not set	Number	1	50000	Add	KB 2691237
AddParentEntityToRelatedOnNewActivityCreate	false	not set	Boolean	-	-	Add	Recycle Bin For Dataverse
AddressBookMaterializedViewsEnabled	true	not set	Boolean	-	-	Add	KB2691237
AllowClientMessageBarAd	true	**true**	Boolean	-	-	Edit	Organization entity attributes
AllowDisabledUsersAddedToOwnerTeams	False	not set	Boolean	-	-	Add	Manage teams
AllowOverwriteMaskedDataToDatabase	false	not set	Boolean	-	-	Add	KB 2691237
AllowParamsNoEquals	false	not set	Boolean	-	-	Add	KB 2691237
AllowPromoteDuplicates	false	not set	Boolean	-	-	Add	None
AllowRoleAssignmentOnDisabledUsers	False	**true**	Boolean	-	-	Edit	KB 2691237
AllowSaveAsDraftAppointment	false	not set	Boolean	-	-	Add	KB 2691237
AlwaysCheckTraceLogDeletePrivilege	false	not set	Boolean	-	-	Add	KB 2691237
AlwaysMoveRecordToOwnerBusinessUnit	true	**false**	Boolean	-	-	Edit	KB 2691237
appointmentricheditorexperience	false	**false**	Boolean	-	-	Edit	Organization entity attributes
AssertOwnershipAppendToAccess	false	not set	Boolean	-	-	Add	KB 2691237
AuthorizationAppLockTimeOutInMilliSeconds	300000	not set	Number	1	999999	Add	KB 2691237
AuthorizationCountMissedPrivilegesToReturn	5	not set	Number	5	1000	Add	KB 2691237
AuthorizationEnableHSMForDisabledUsers	false	not set	Boolean	-	-	Add	KB 2691237
AuthorizationExpiredDataCleanUpInDays	30	not set	Number	-1	999999	Add	KB 2691237
AuthorizationLockUserTimeOutInSeconds	3	not set	Number	1	999999	Add	KB 2691237
AuthorizationSkipAadUserStateValidation	false	not set	Boolean	-	-	Add	KB 2691237
AuthorizationTransactionTimeOutInMilliSeconds	60000	not set	Number	1	999999	Add	KB 2691237

Set Up BrightWork 365 Graph Client App

BrightWork 365 2025-2 includes a Flexible Teams and Document Management features that enable users with the correct permissions to select a Microsoft Teams Channel to associate with projects, programs, and portfolios.

For this to work, it is necessary to add an app registration that delegates the necessary permissions to make the Graph API query on behalf of the logged in user.

At a high level, the app allows the user to:

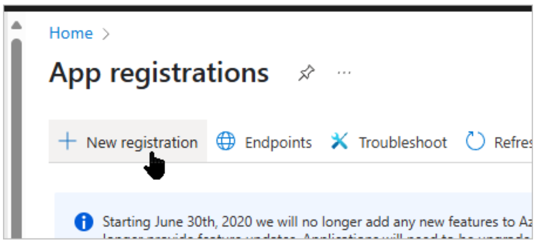
- Select a Channel in Microsoft Teams (to which they must have access) to associate with a project, program, or portfolio.
- Optionally create a tab for the project, program, or portfolio in that channel.
- Select an alternative SharePoint document library or folder to use as the document location for the project, program, or portfolio.

It is important to stress that this app registration does not give users any extra permissions or access – it just leverages the permissions and access that users already have.

Add the App

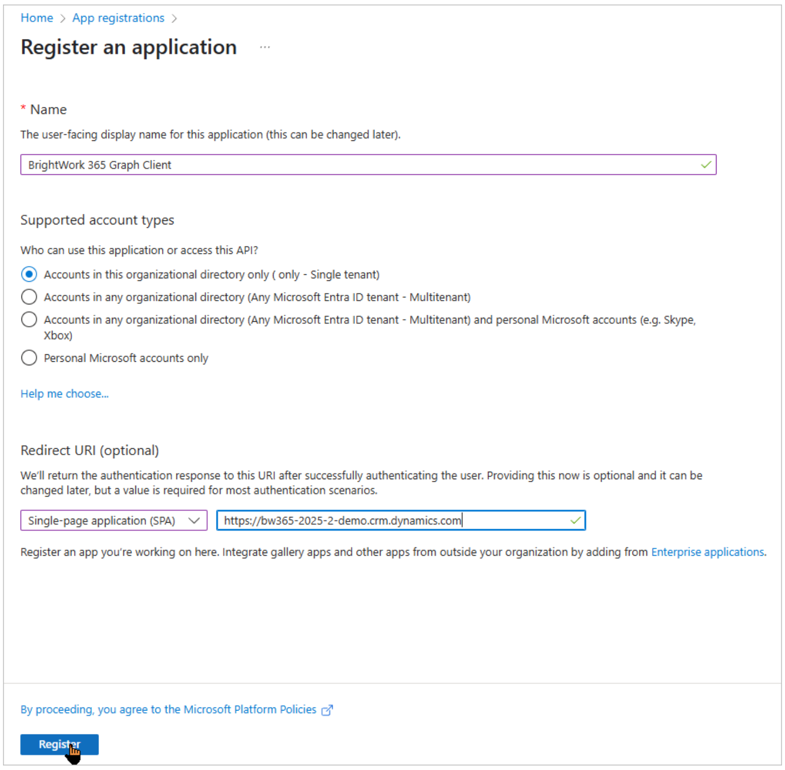
Note: You need at least the [Cloud Application Administrator] role to create the app. A user with the [Privileged Role Administrator] will need to approve the permissions granted by the app.

1. Login to https://entra.microsoft.com.
2. Expand Applications in the Identity section and click **App registrations**.
3. Click **+ New Registrations**.

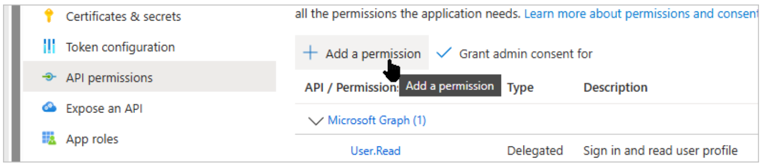


4. Enter 'BrightWork 365 Graph Client' in the Name field.
5. Select **Accounts in this organizational directory only (Single tenant)**.

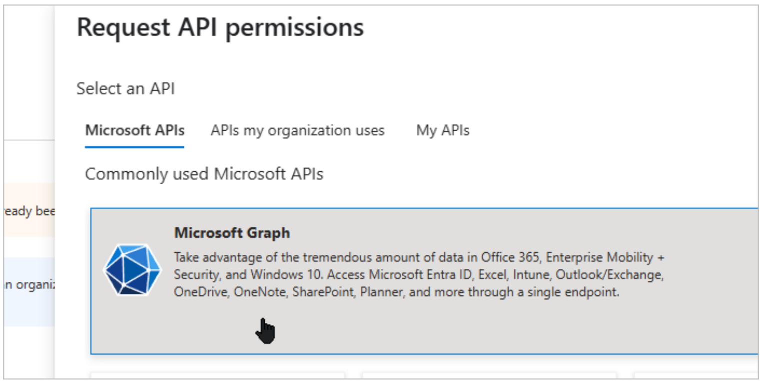
6. Select **Single-page application (SPA)** from the Redirect URI section and enter the URL of the BrightWork 365 environment.
7. Click **Register**.



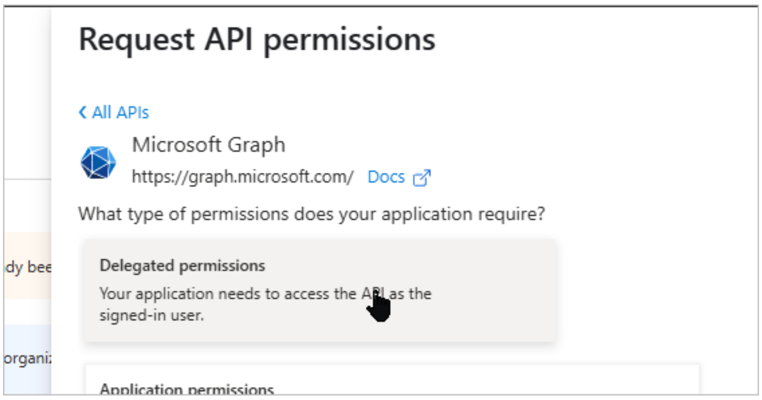
8. Click **API Permissions | + Add a permission**.



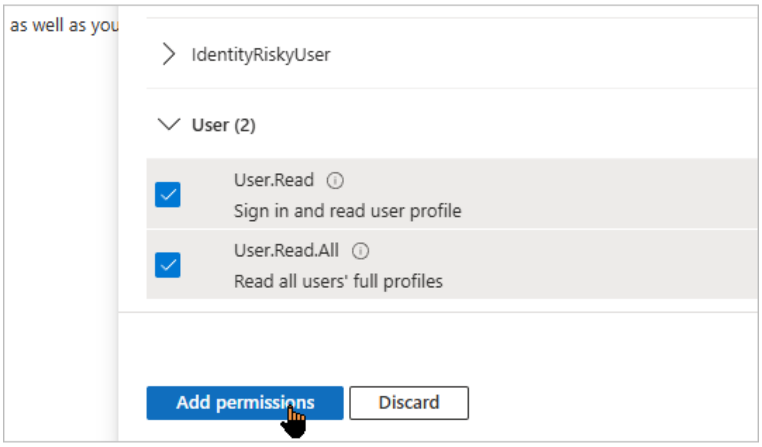
9. Click **Microsoft Graph**.



10. Click **Delegated permissions**.

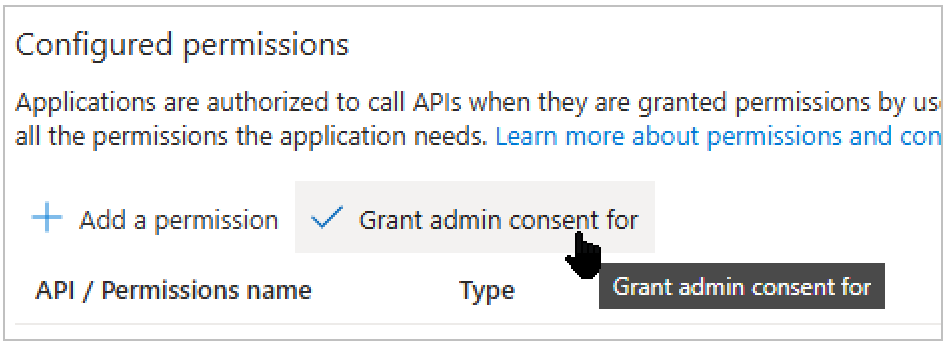


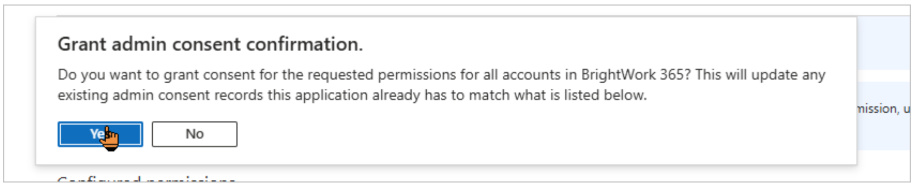
11. Enter User.Read in the filter, select **User.Read** and **User.Read.All** and click **Add permissions**.



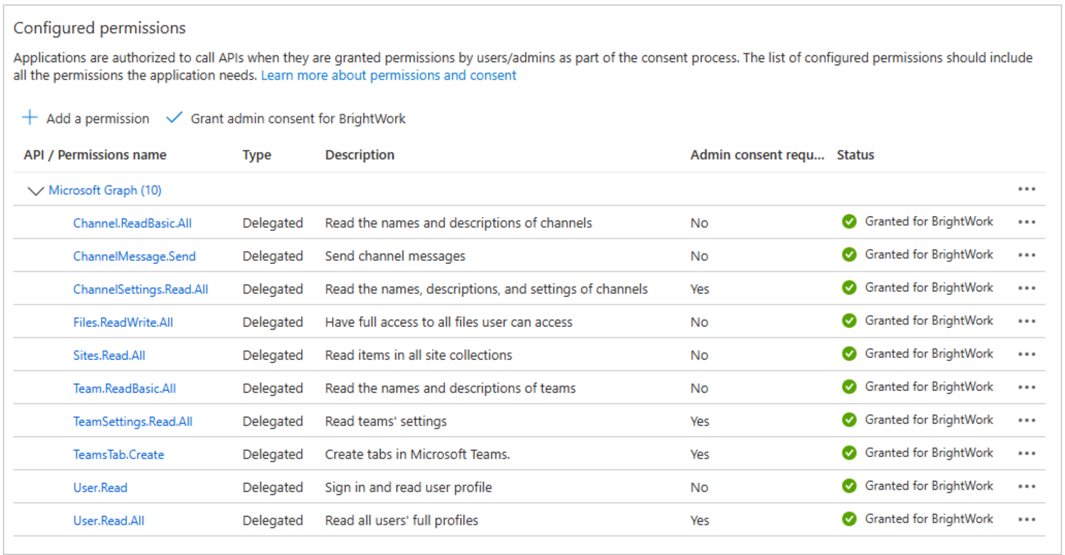
12. Repeat these steps for the following permissions:
    - Channel.ReadBasic.All
    - ChannelMessage.Send
    - ChannelSettings.Read.All
    - Files.ReadWrite.All
    - Sites.Read.All
    - Team.ReadBasic.All
    - TeamSettings.Read.All
    - TeamsTab.Create
    - User.Read
    - User.Read.All

13. Click **Grant admin consent for** and then **Yes** to confirm.





The Configured permissions section should look like the below.



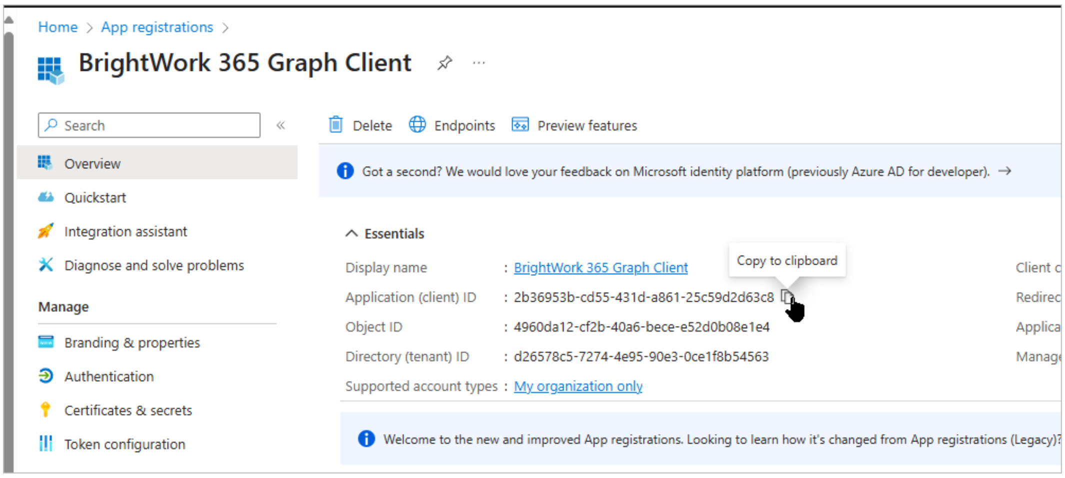
Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. Learn more about permissions and consent

+ Add a permission ✓ Grant admin consent for BrightWork

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (10)				
Channel.ReadBasic.All	Delegated	Read the names and descriptions of channels	No	Granted for BrightWork
ChannelMessage.Send	Delegated	Send channel messages	No	Granted for BrightWork
ChannelSettings.Read.All	Delegated	Read the names, descriptions, and settings of channels	Yes	Granted for BrightWork
Files.ReadWrite.All	Delegated	Have full access to all files user can access	No	Granted for BrightWork
Sites.Read.All	Delegated	Read items in all site collections	No	Granted for BrightWork
Team.ReadBasic.All	Delegated	Read the names and descriptions of teams	No	Granted for BrightWork
TeamSettings.Read.All	Delegated	Read teams' settings	Yes	Granted for BrightWork
TeamsTab.Create	Delegated	Create tabs in Microsoft Teams.	Yes	Granted for BrightWork
User.Read	Delegated	Sign in and read user profile	No	Granted for BrightWork
User.Read.All	Delegated	Read all users' full profiles	Yes	Granted for BrightWork

14. Click Overview and copy the Application (client) ID and Directory (tenant) ID to a text editor.

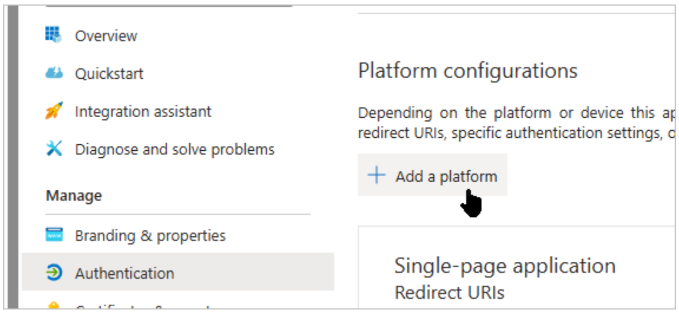


15. Bookmark this page.

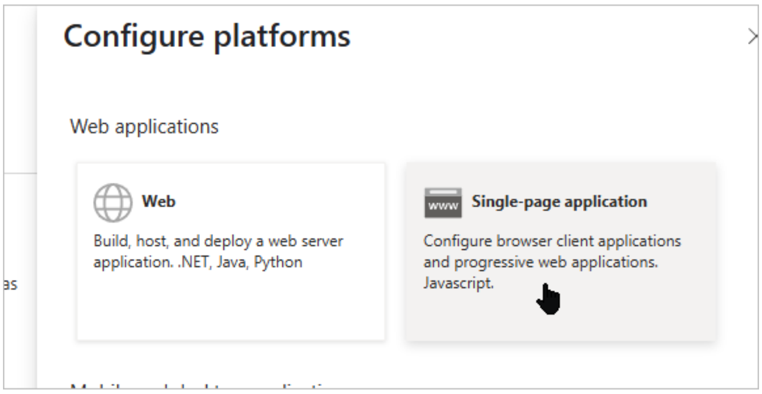
Add Environments to the App

Every BrightWork 365 Environment in which you want to use the app must be added to the app.

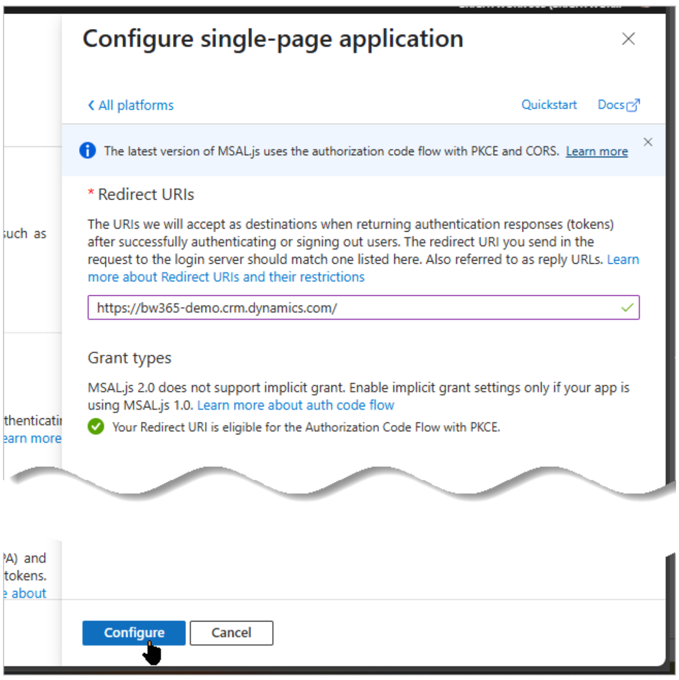
1. Navigate to the BrightWork 365 Graph Client app registration home page.
2. Click **Authentication** on the navigation.
3. Click **+ Add a Platform**. You may need to switch to the 'old experience' to see this option.



4. Click Single-page application.



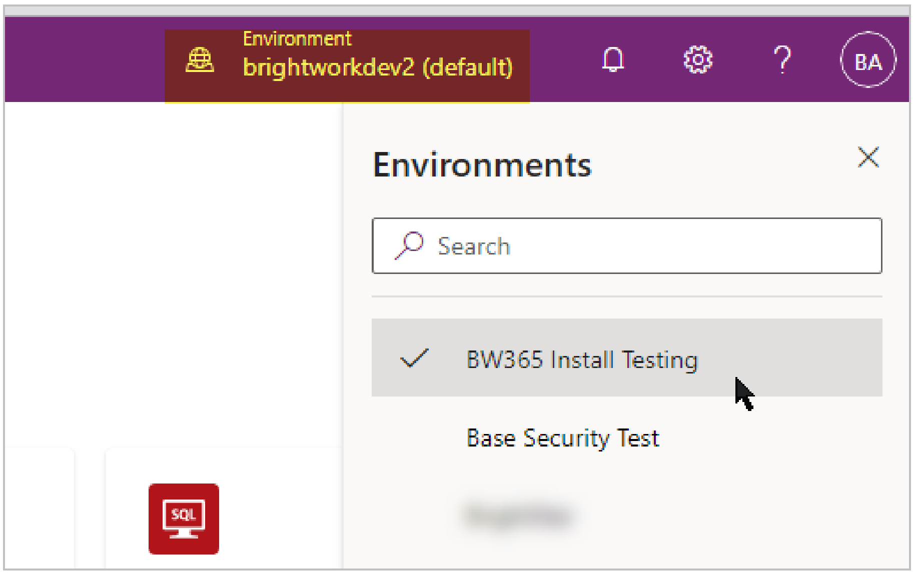
5. Paste the environment URL in and click **Configure**.



Install BrightWork Solution

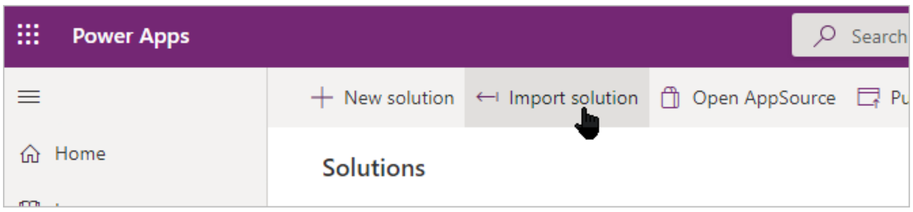
Note: Please review the Prerequisites and Setup steps and ensure that all steps have been completed before starting the installation.

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.

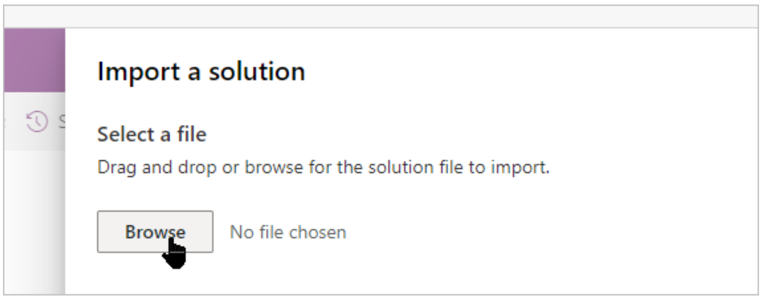


3. Click **Solutions** on the navigation menu.

4. Bookmark this location for later upgrades.
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 two HTTP connections.

Note: This next section needs to be done carefully!

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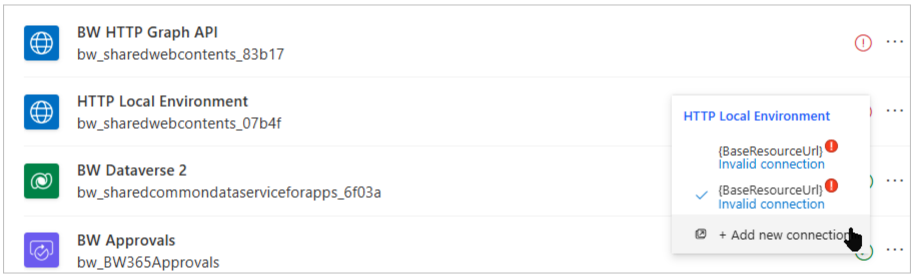
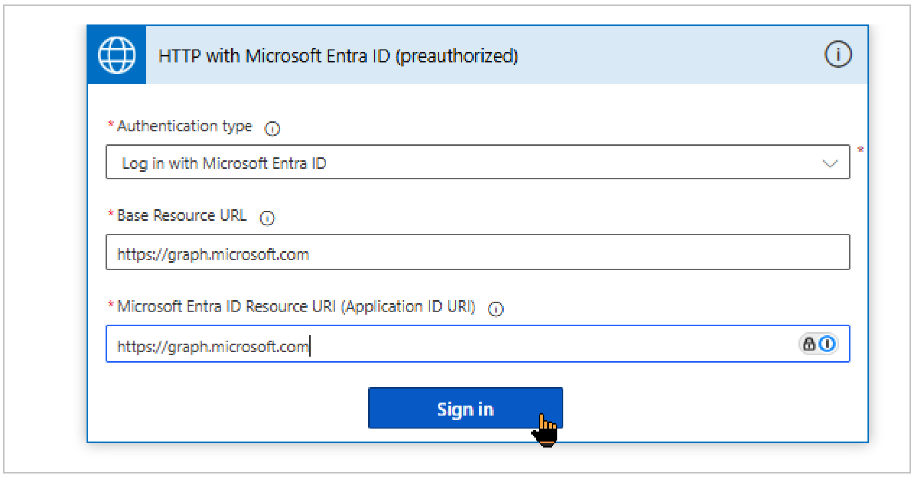
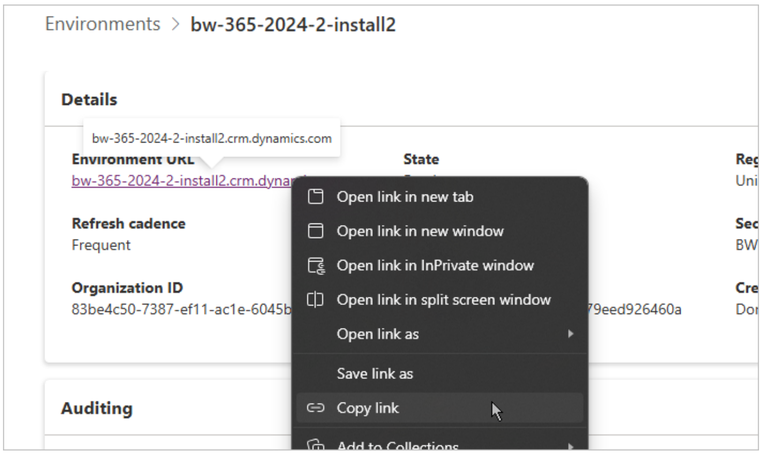
9. Click **+ Add new connection** on the menu for the BW HTTP Graph API connector.



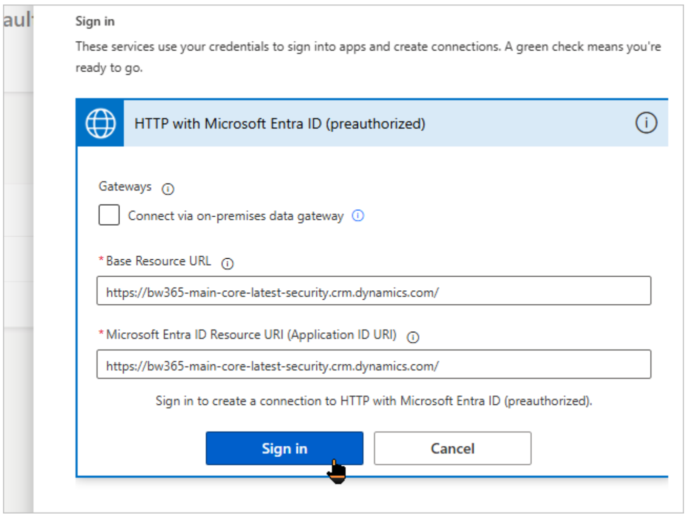
10. Copy and paste https://graph.microsoft.com in both Base Resource URL and Microsoft Entra ID Resource URI fields and click **Sign In**.



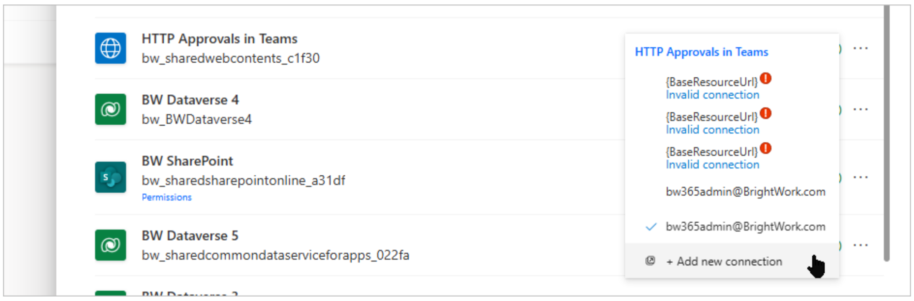
11. Copy the URL for the environment, from the Power Platform admin center home page for your environment, by right-clicking on it and clicking **Copy Link**.



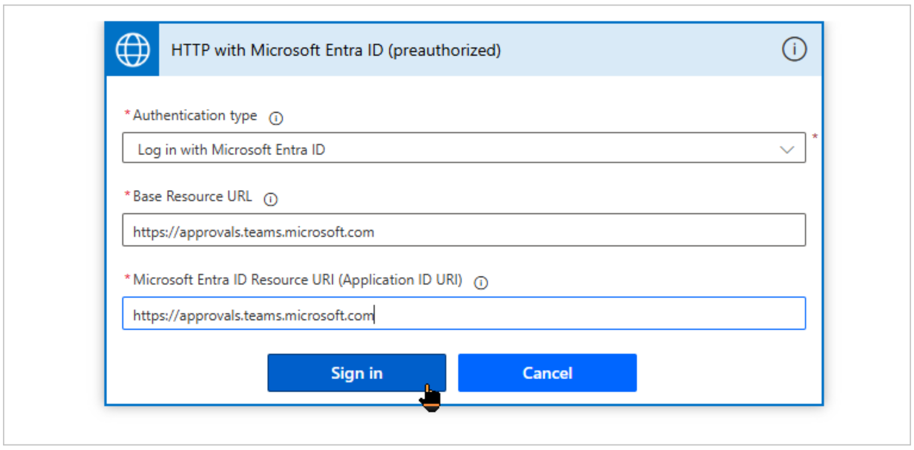
12. Click **+ Add new connection** on the menu for the HTTP Local Environment connection (**Note**: Do this even if the connection displays with a green tick).
13. Paste in the full URL for your Dataverse environment that you copied in the previous step.



14. Sign in if asked.
15. Click **+ Add new connection** on the menu for the HTTP Approvals in Teams connection (**Note**: Do this even if the connection displays with a green tick).



16. Copy and paste https://approvals.teams.microsoft.com in both Base Resource URL and Microsoft Entra ID Resource URI fields and click **Sign In**.

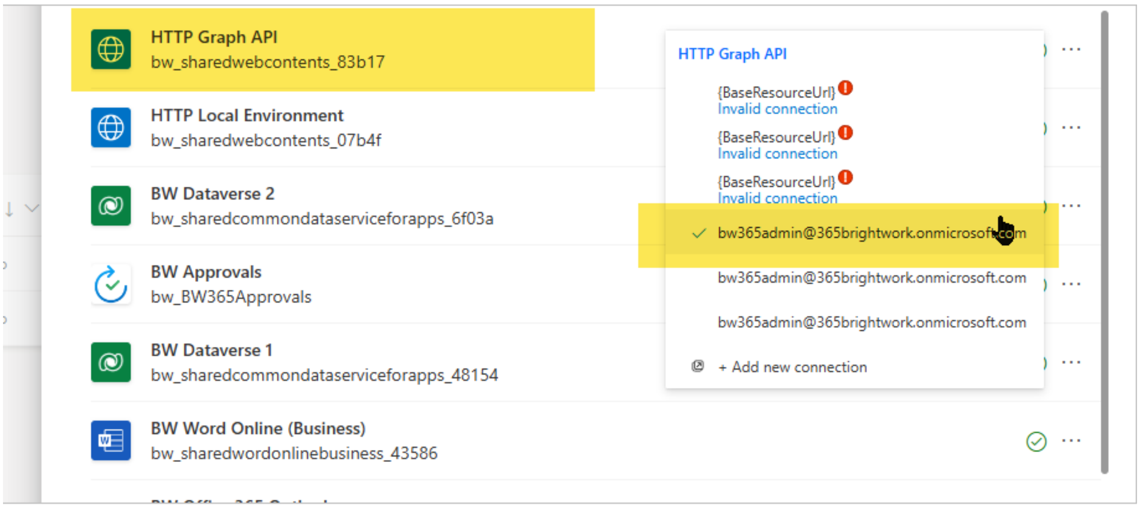


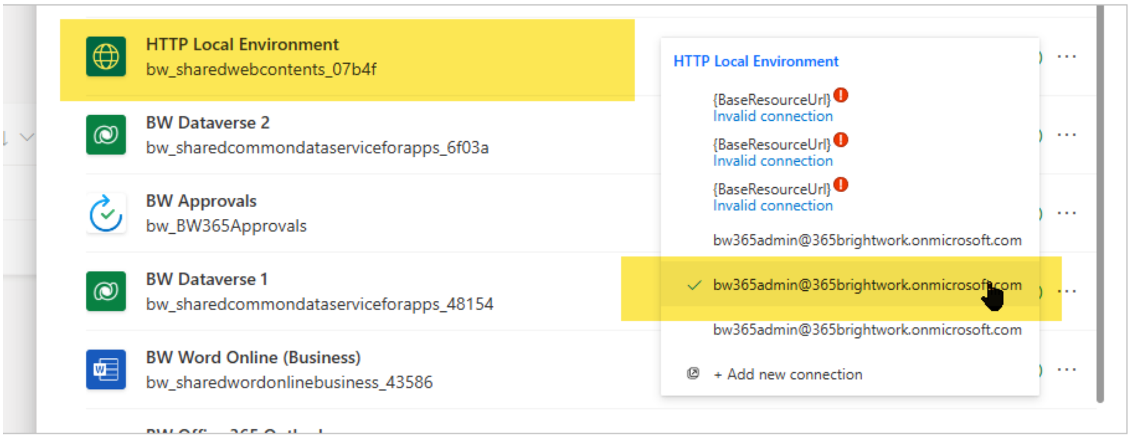
17. Click **Next**.

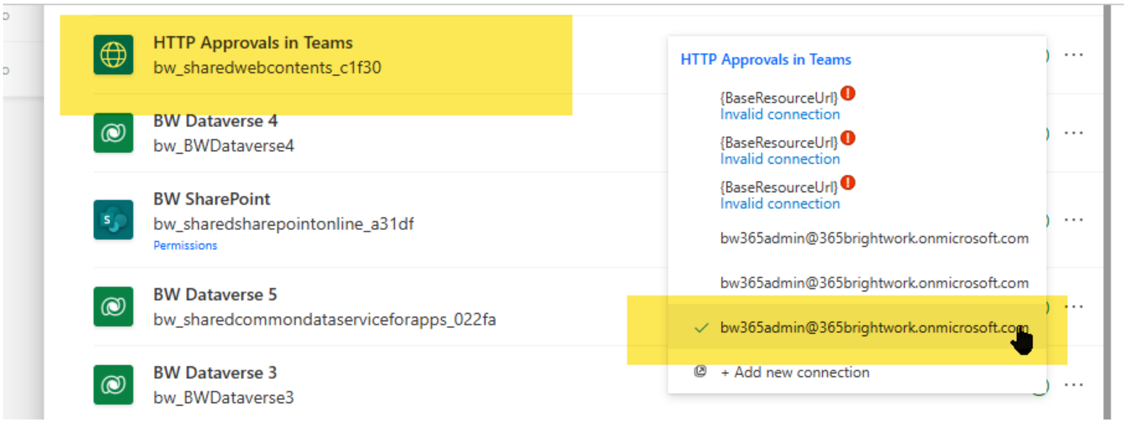
If the Next button is not available, click back and **Next** again to reload the connections.

IMPORTANT: These steps must be performed with care!

18. Check that the BW HTTP Graph API connection is checked for the top connection, and if not, select it. (there is a bug that means you must do this for the connections to work correctly).
19. Check that the HTTP Local Environment connection is checked for the middle connector, and if not, select it.
20. Check that the HTTP Local Environment connection is checked for the bottom connector, and if not, select it.

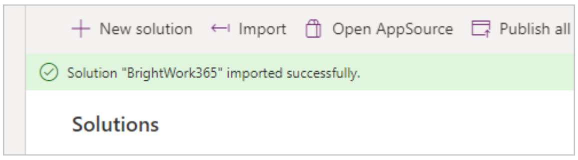




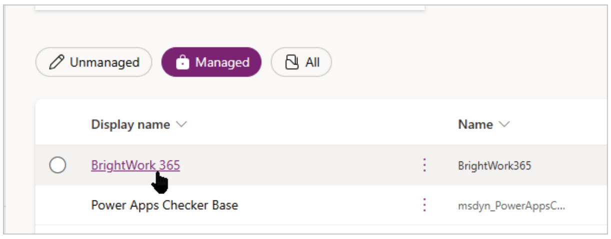


21. Click **Import** – do not update the Email HTML Placeholder environment variable.

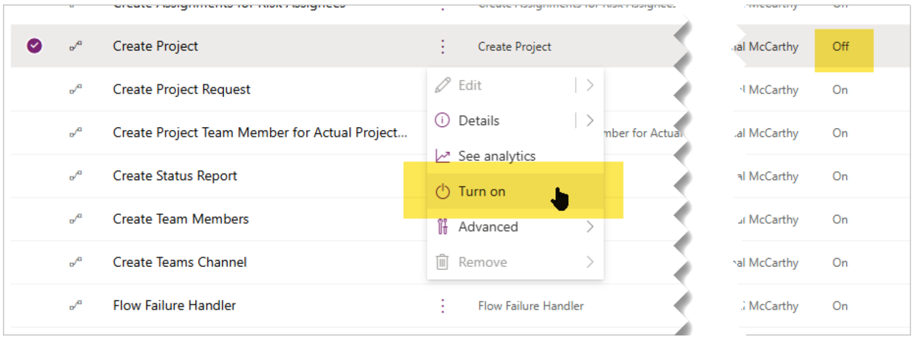
    The import process can take around 20 minutes and a message will be displayed when the import is complete. Wait for this before proceeding to the next step. It is safe to ignore any timeout messages until the message below displays.



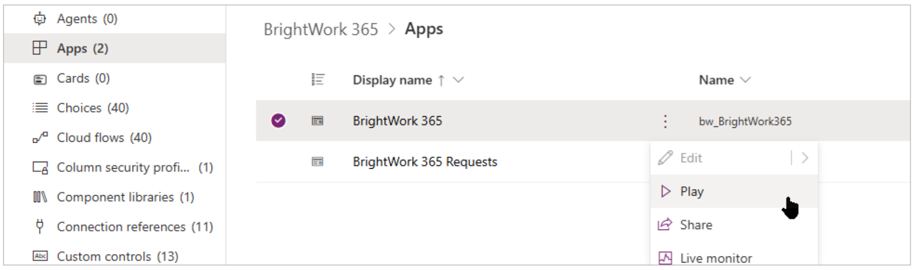
22. Bookmark the solutions page for the BrightWork 365 environment.
23. Click **Managed** and **BrightWork 365**.



24. Click **Cloud Flows** and turn on any flows that are off – in particular, check the Create Project and Create Status report flows.



25. Click **Apps** on the left navigation panel and click **Play** on the BrightWork 365 app menu to open the BrightWork 365 app.



26. Bookmark the BrightWork 365 app.

Add Users and Assign Security Roles

If you want to apply custom security, you should review the BrightWork 365 Security Overview.pdf included in the download zip and discuss your needs with your BrightWork contact.

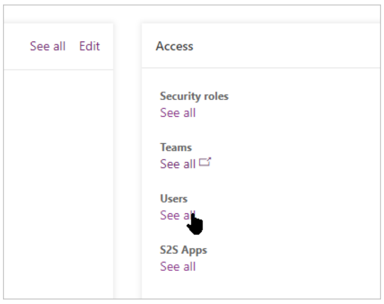
Add Users

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 as they should automatically appear in the environment a few hours after it is created.

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) 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

See [BrightWork Security Roles Details] for an outline of the BrightWork 365 security roles.

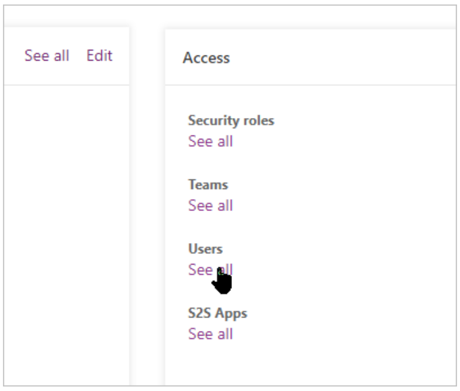
All BrightWork 365 users requiring access to the BrightWork 365 app should have at a minimum the following roles.

- Basic User
- BrightWork Team Member

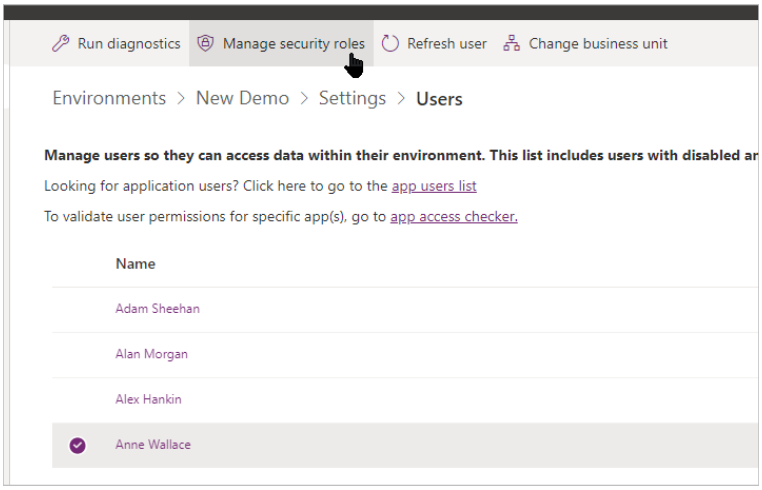
Note: To complete the installation, you should assign all BrightWork security roles to the installation account. Ensure not to unassign the System Administrator role when you are doing this.
Do not assign the Request Submitter role to standard BrightWork Users. This role is to enable unlicensed users to submit project requests.

To assign security roles:

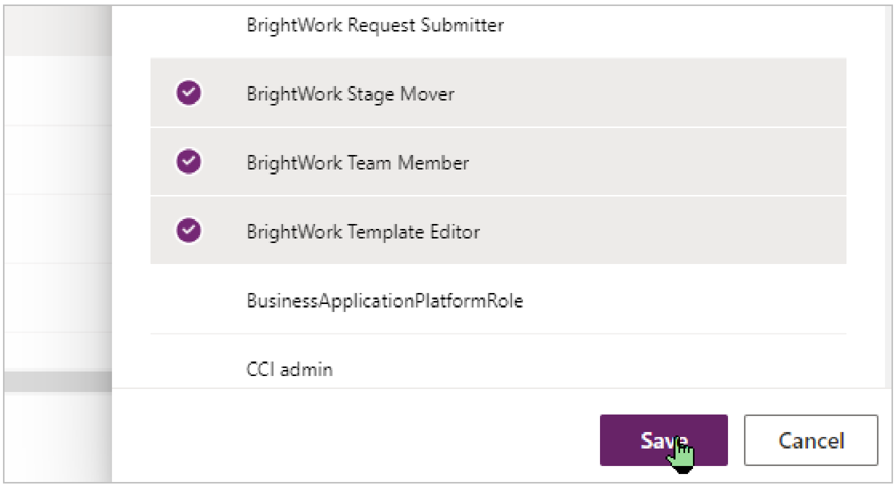
1. Login to Power Platform admin center (microsoft.com) and click the environment into which you installed BrightWork 365.
2. Click **See all** under Users.



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



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



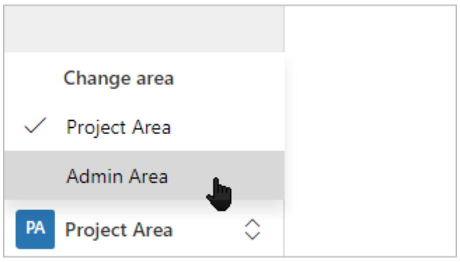
Create Senior Managers Team

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

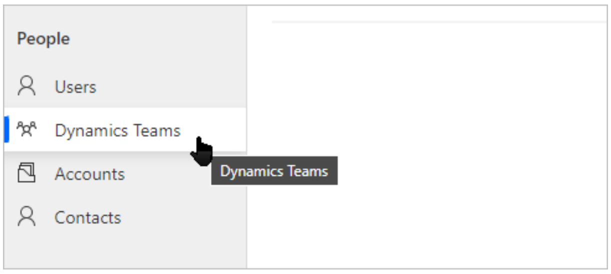
- Group Manager
- Portfolio Manager
- Portfolio Sponsor
- Program Manager
- Program Sponsor

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**.

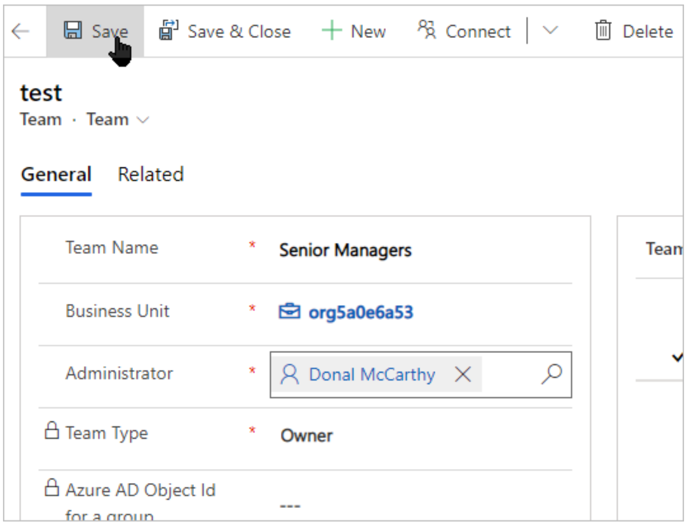


3. Click **Dynamics Teams** and click **+ New**.

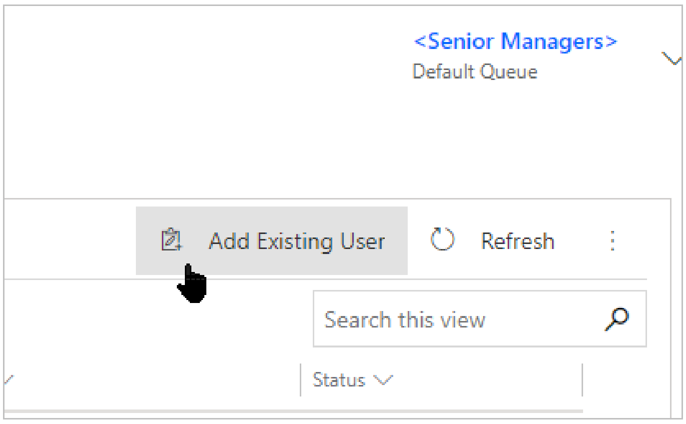


4. Name the team 'Senior Managers'.

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 you are done adding 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.

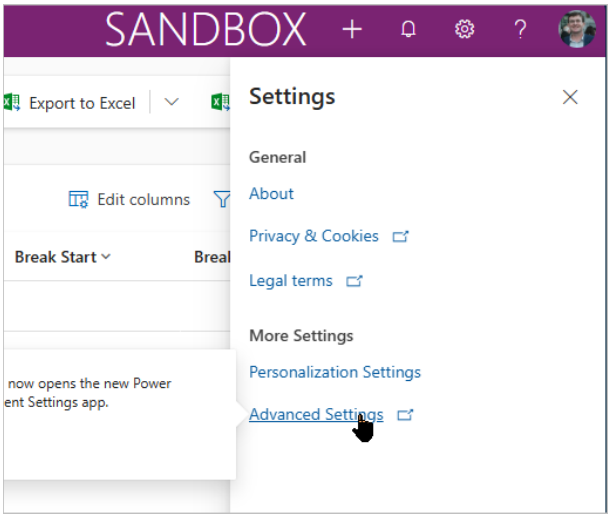
Setup Cost and Budgets Column Security Profile

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.

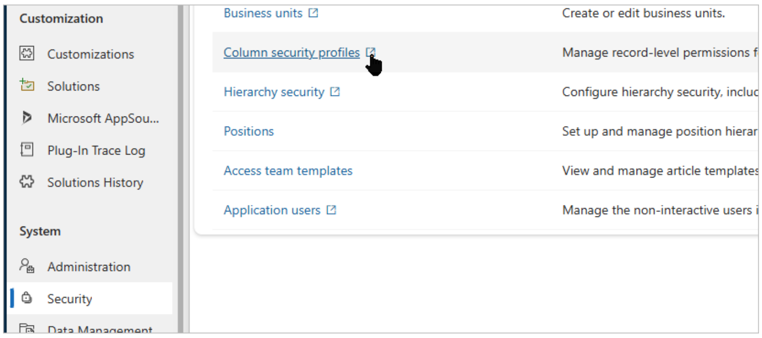
We recommend that you use a Dynamics Team – you can use the Senior Managers team you created earlier, or you can create a new team; alternatively, if you do not want any security on these columns, you can just use the default environment team.

To set up the Costs and Budgets Field Security Profile:

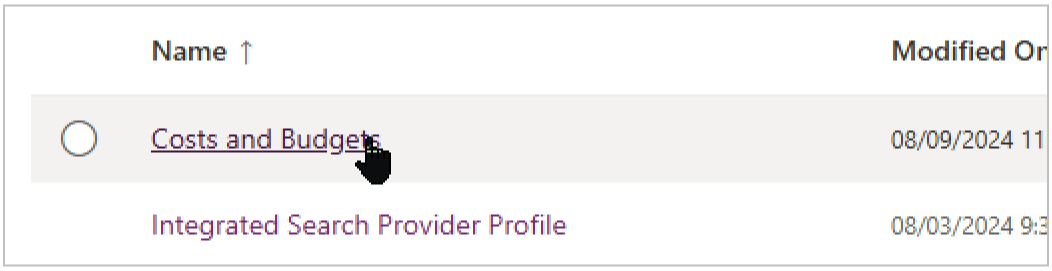
1. Return to your BrightWork 365 app and click **Settings | Advanced Settings**.



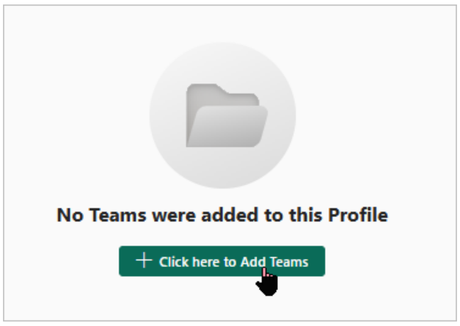
2. Click **Security | Column Security Profiles**.



3. Click **Costs and Budgets**.



4. Click the **Teams** tab.
5. **Click here to Add Teams**.



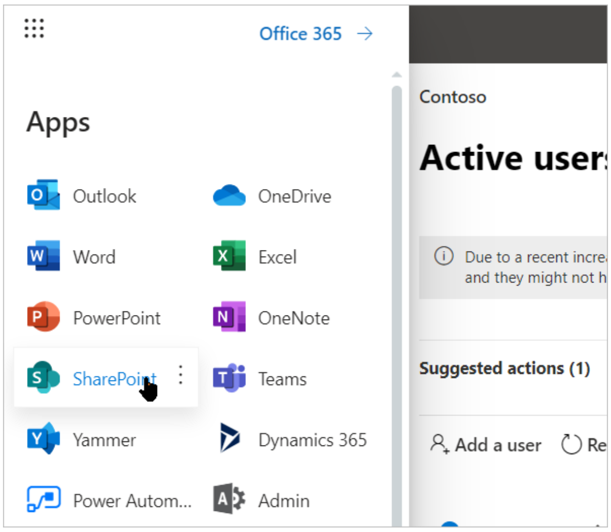
6. Add the Teams (e.g. the Senior Managers team you just created) and Users that you want to be able to view high-level budget data.

Setup SharePoint Document Management

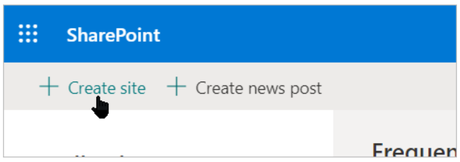
You can use an existing SharePoint site or create a new one.

Create SharePoint Site

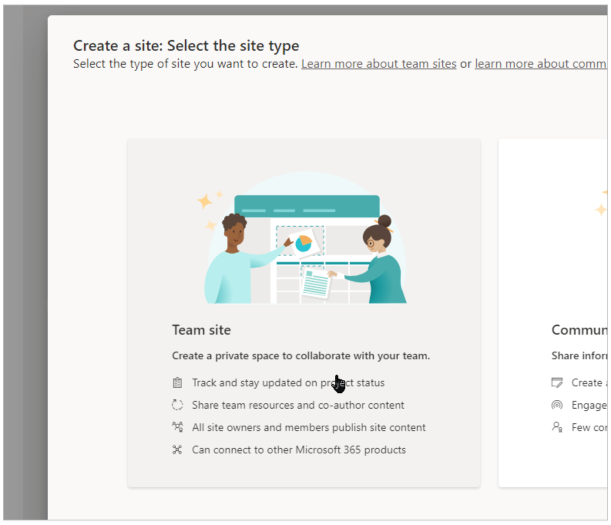
1. Click **SharePoint** on the Microsoft 365 waffle.



2. Click **Create site**.



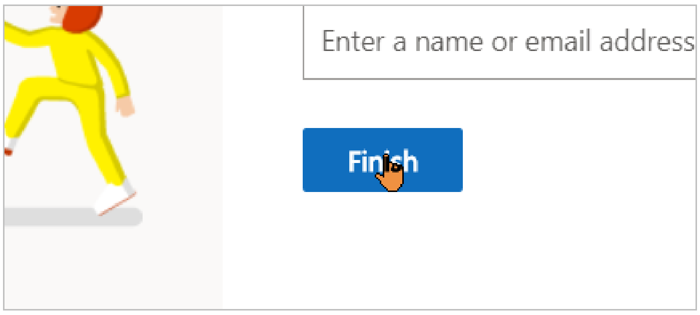
3. Click **Team site**.



4. Click **Standard team**.
5. Click **Use template**.
6. Give the site a name (e.g., bw365-acme-prod) 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.

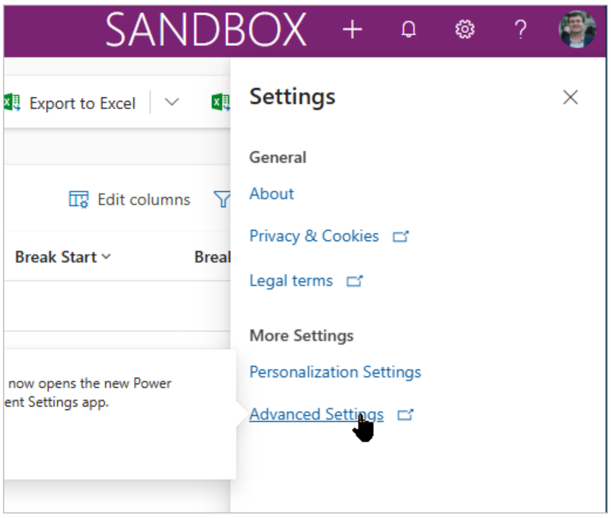
7. Click **Create site**.
8. Add any additional members.
9. Click **Finish**.



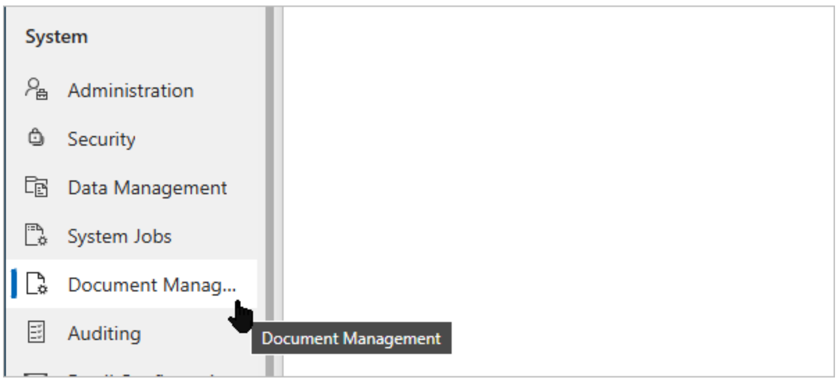
10. Copy the site URL to your clipboard.

Enable SharePoint Document Management

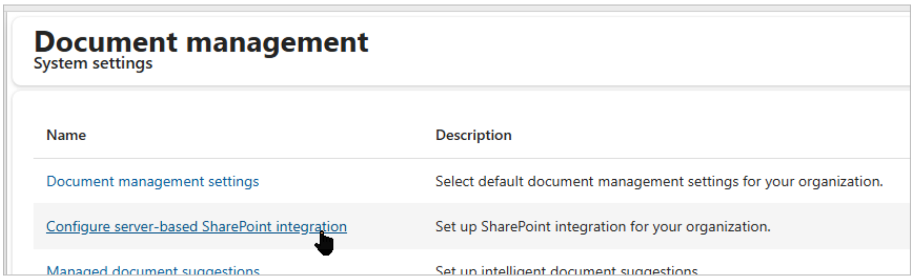
1. Return to your BrightWork 365 app and click **Settings | Advanced Settings**.



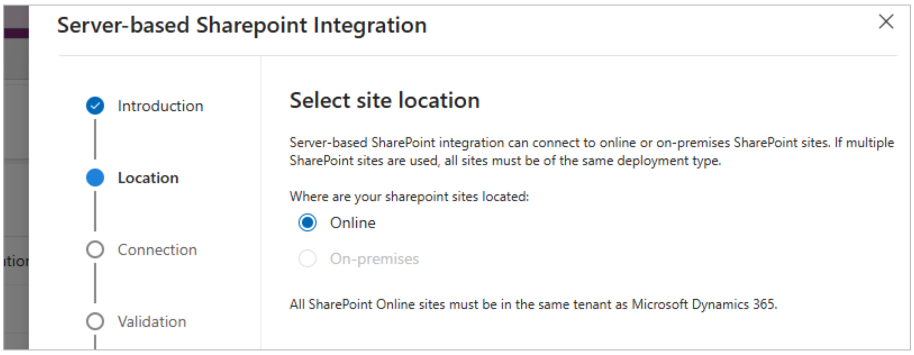
2. Click **Document Management** in the System group.



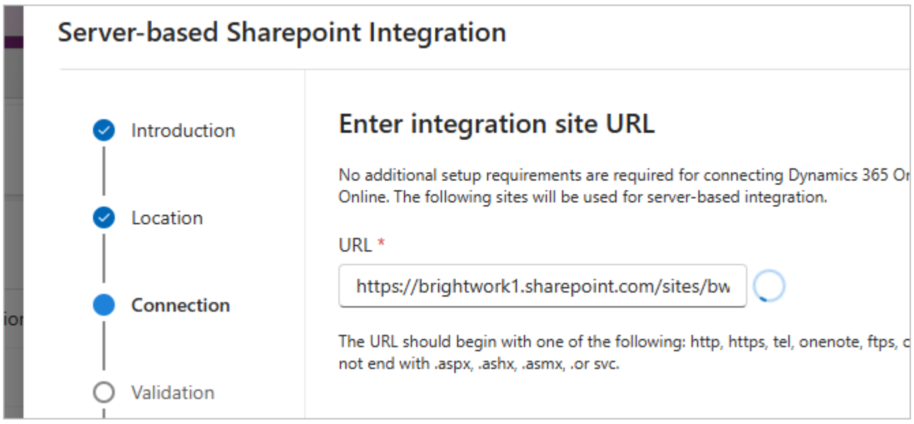
3. Click **Configure server-based SharePoint integration**.



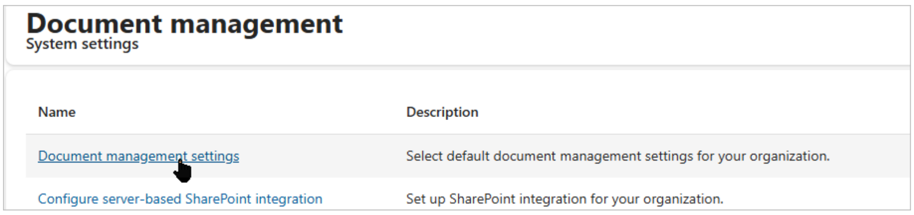
4. Click **Next**.
5. Select **Online** and click **Next** again.



6. Paste in the URL of the SharePoint Online site and click **Next** again.

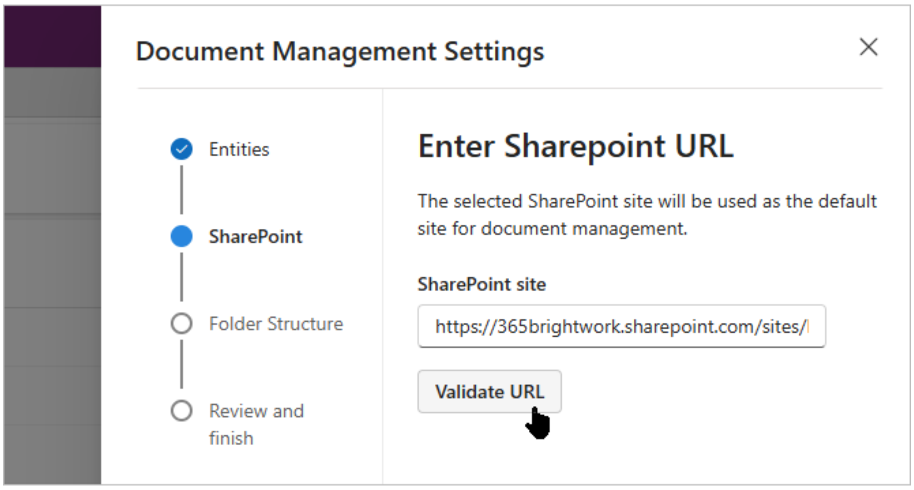


7. Click **Next** again and again.
8. Click **Done**.
9. Click **Document management settings**.



10. Click **Next**.

11. Paste in the SharePoint site and click **Validate URL**.



12. Click **Next** and **Next** again.

    Note: Do not select the Based on entity checkbox during this process.

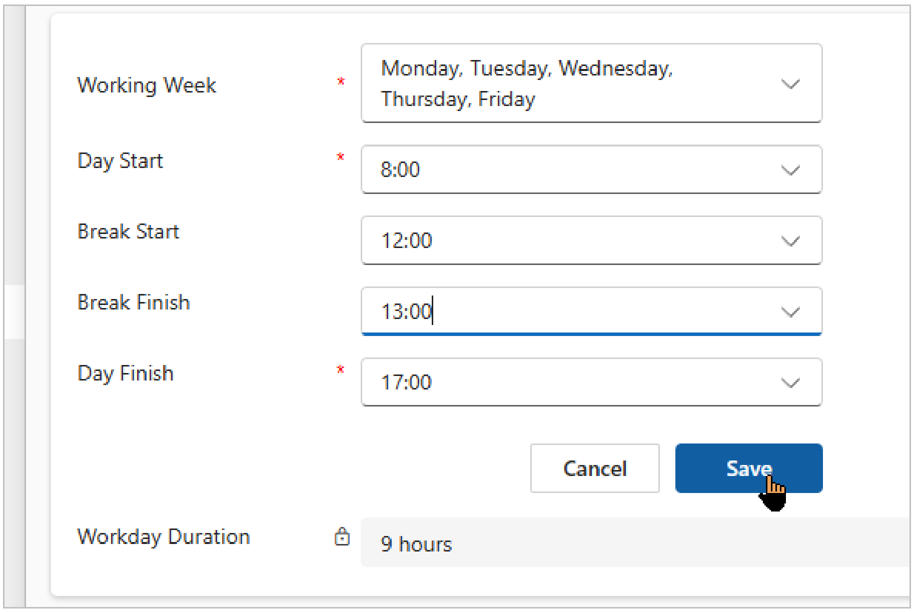
13. Click **Finish**.
14. Click **Close**.

Add Global Settings Record

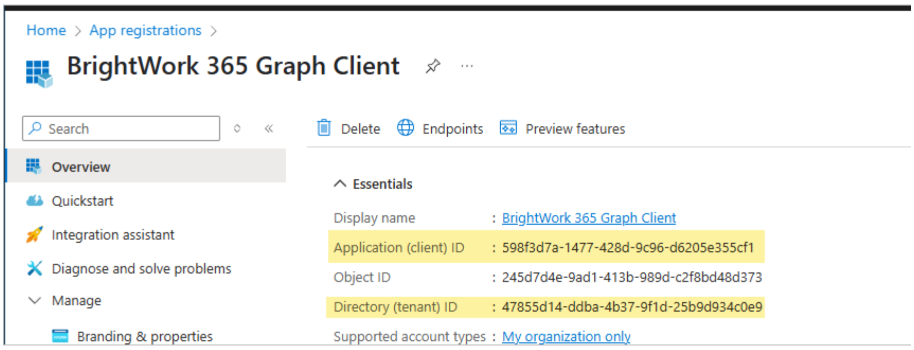
The Global Settings record defines the global working week and working day duration. It also stores the details for the Graph App you created in the previous section.

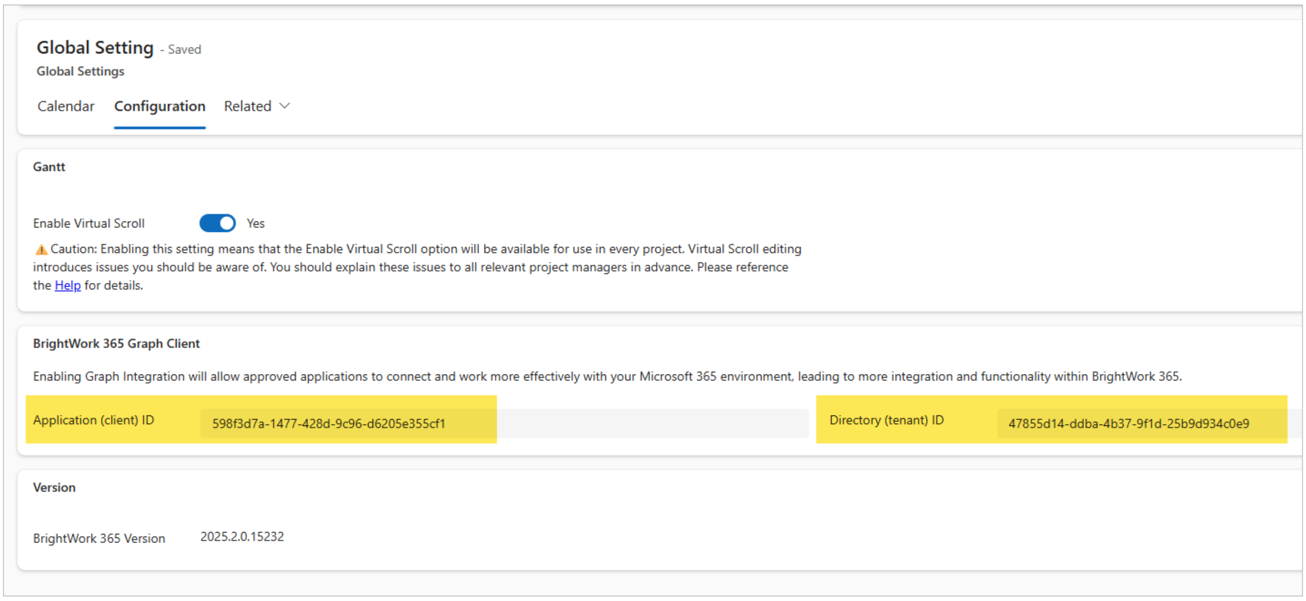
You will need the Application (client) ID and the Directory (tenant) ID from the Set Up the BrightWork Graph App section to complete this section.

1. Click **Global Settings** in the Admin Area.
2. Click **+ New.**
3. **Click Edit** and select your organization's Working Week – typically this will be Monday, Tuesday, Wednesday, Thursday, Friday.
4. Select your organization's Start and Finish times – these define the Working Day Duration.
5. Click **Save**.



6. Copy the Application (client) ID and Directory (tenant) ID from the Set Up BrightWork 365 Graph Client App section into the corresponding columns in the Configuration tab.



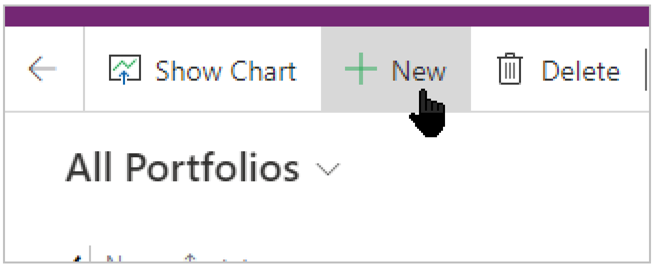


7. Click **Save and Close**.

Create Portfolios and Programs

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**.

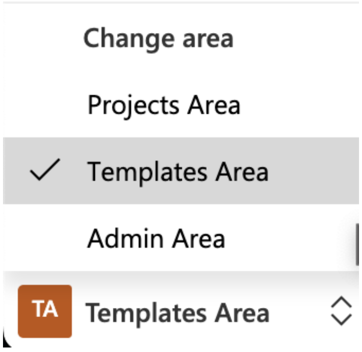
   https://admin.powerplatform.microsoft.com/environments

Import Forms and Templates

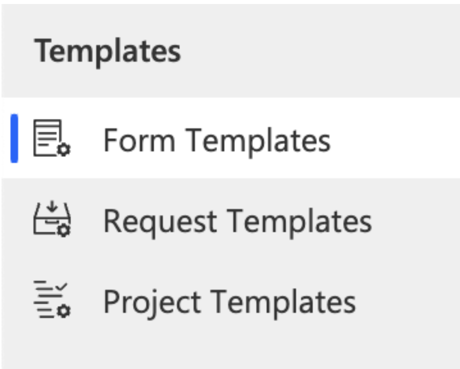
Next, you will import the Forms and Templates necessary to get started with BrightWork Templates.

Import Form Templates

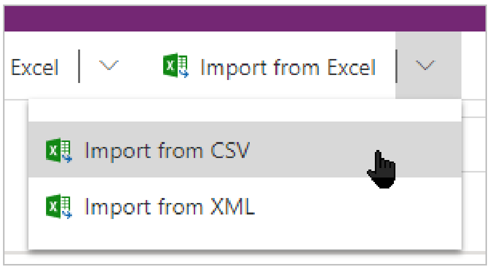
1. Open the bookmarked BrightWork 365 app and click **Projects Area** in the bottom left of the screen and select **Templates Area**.



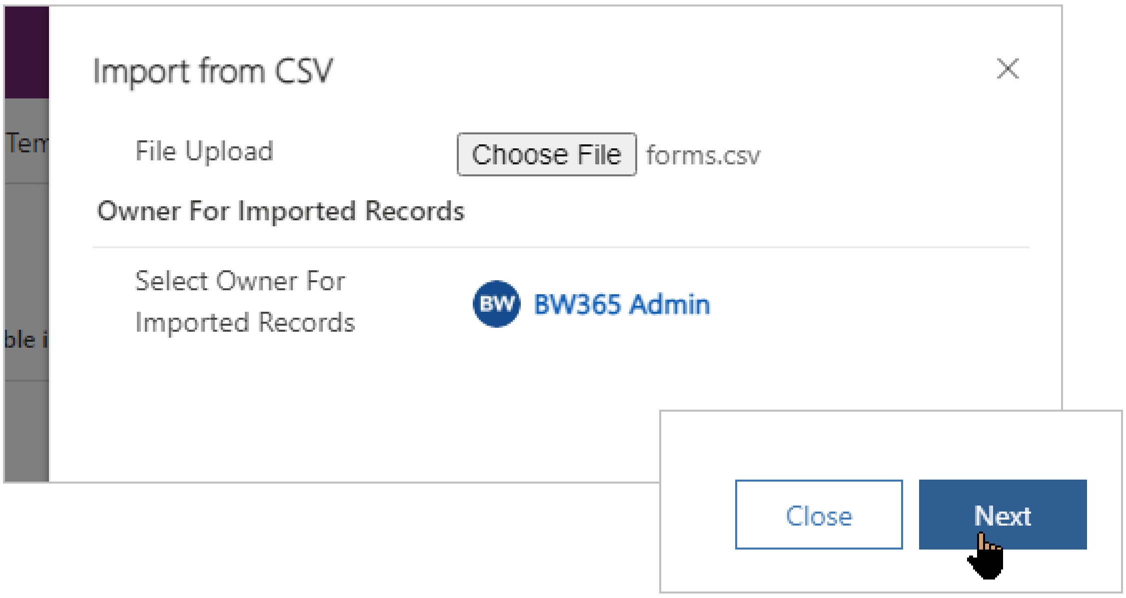
2. Click **Form Templates**.



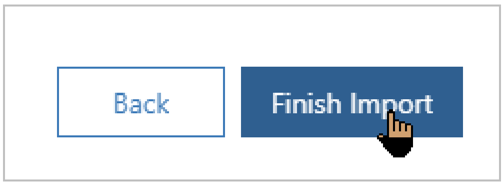
3. Click **Import from Excel | Import from CSV**.



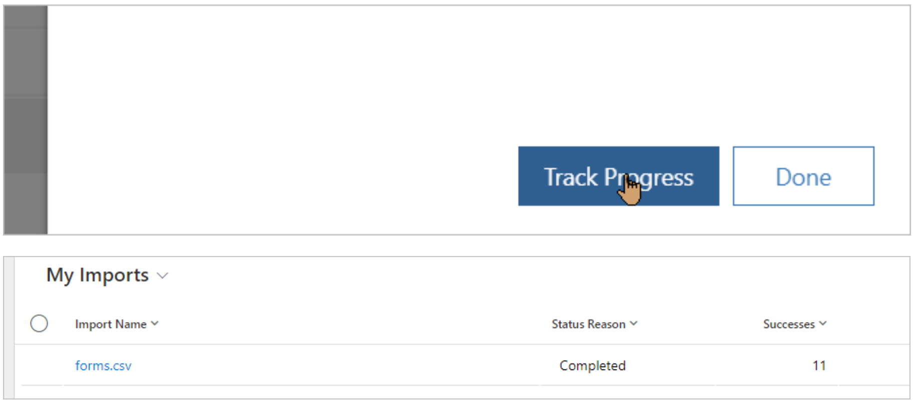
4. Click **Choose File**, select the forms-templates.csv file included in the BrightWork 365 Files zip, and **Next**.



5. Click **Review Mapping**.
6. Click **Finish Import**.



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

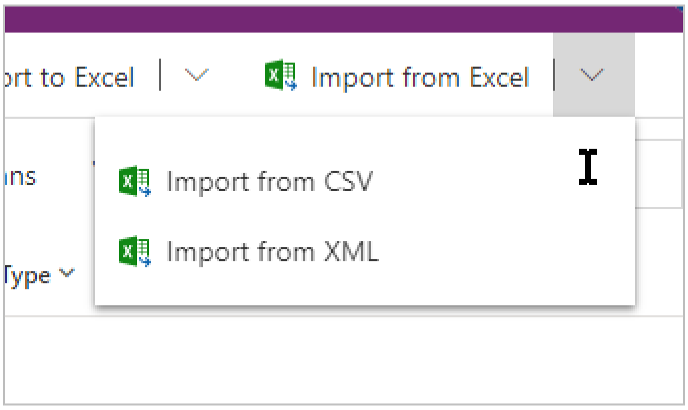


Keep this window open for the other imports.

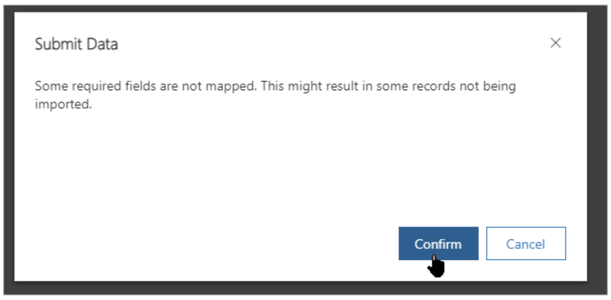
8. Click **Done** on the import screen.

Import Project Templates

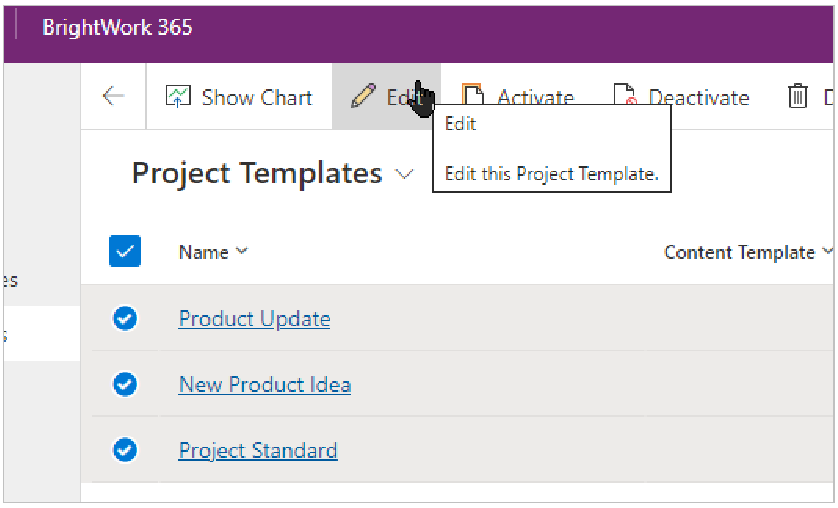
1. Click **Project Templates** on the navigation in the Templates Area.
2. Click **Import from Excel | Import from CSV**.



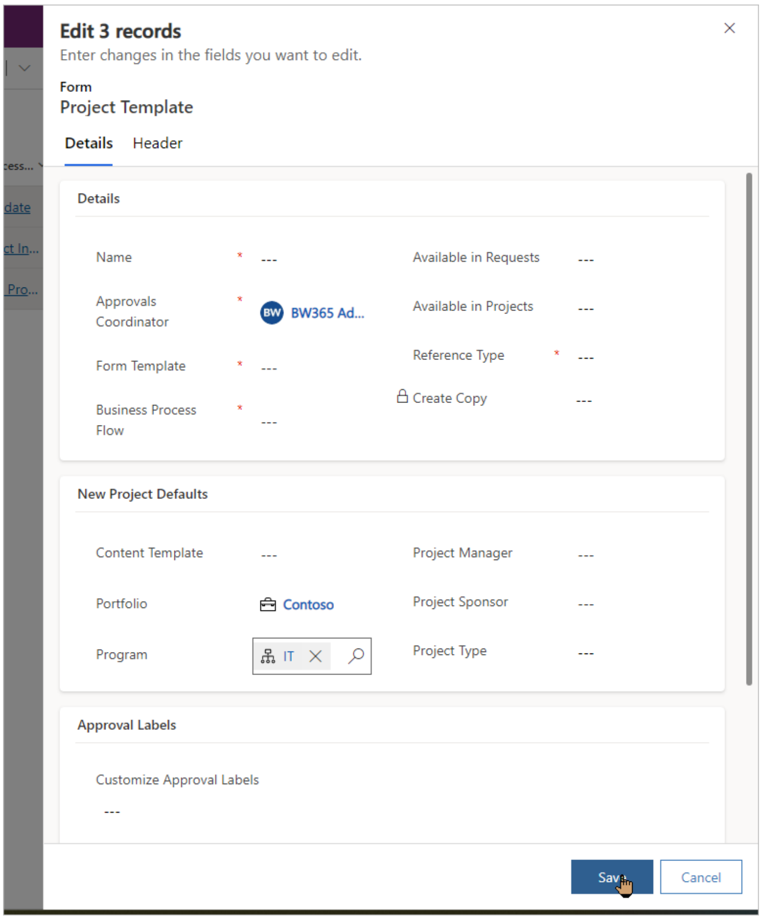
3. Click **Choose File**, select the project-templates.csv file and click **Next**.
4. Click **Review Mapping**.
5. Click **Finish Import**. It is ok to ignore messages about unmapped fields.
6. Click **Confirm**.



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**.

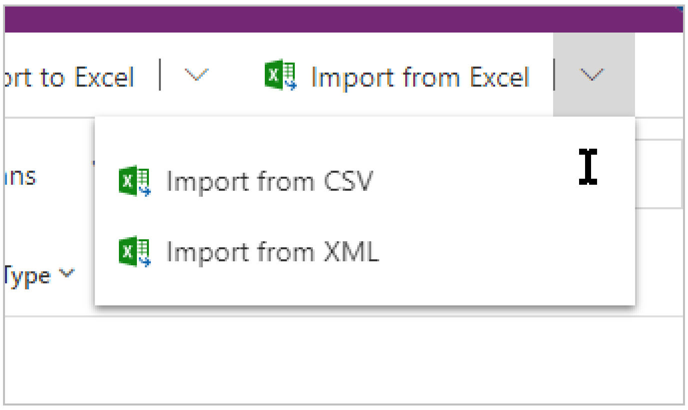


9. Select yourself as the **Approvals Coordinator**, select the Portfolio and Program you created earlier, and select yourself **Project Manager** and **Project Sponsor**, and click **Save**.

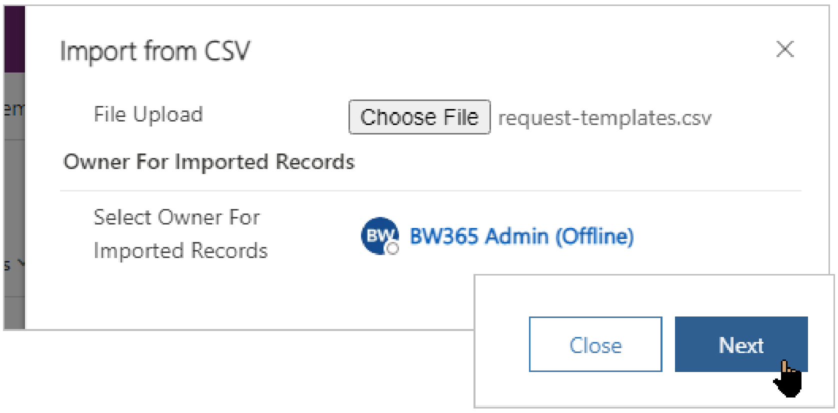


Import Request Templates

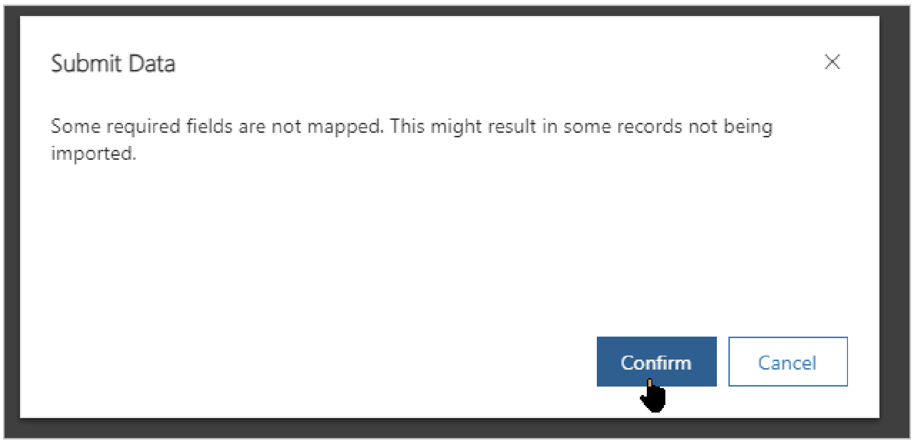
1. Click **Request Templates** on the navigation in the Templates Area.
2. Click **Import from Excel | Import from CSV**.



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



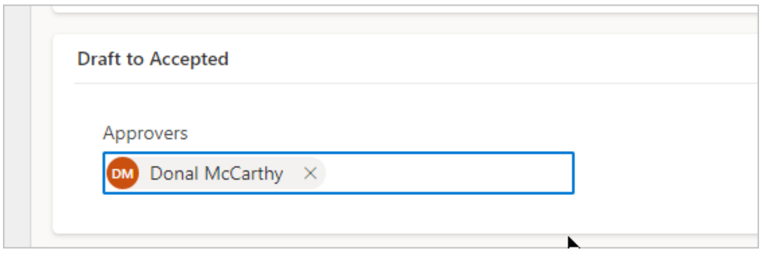
4. Click **Review Mapping**.
5. Click **Finish Import**. It is ok to ignore messages about unmapped fields.
6. Click **Confirm**.



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 columns in the lower part of the form (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.

11. Click **Save & Close**.

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.

Note: You should also Create a workspace (or have one ready to use).

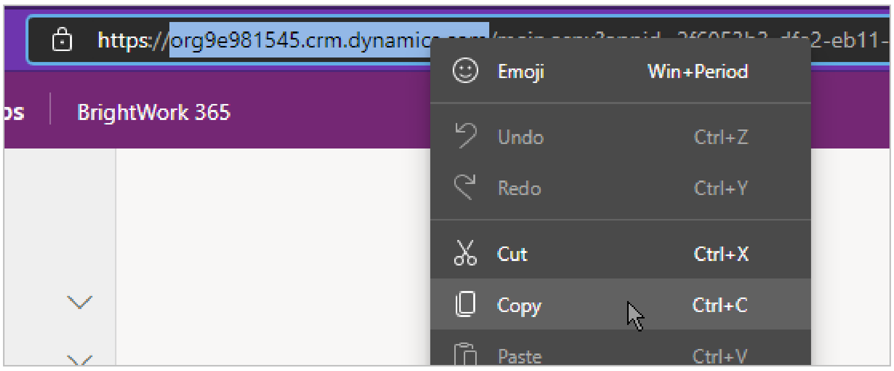
You should also create a project, create a document on the Documents tab of the project, add a task to the Gantt, and assign the task to a resource. This will ensure that the reports are loaded with data.

Setup BrightWork 365 PBITs

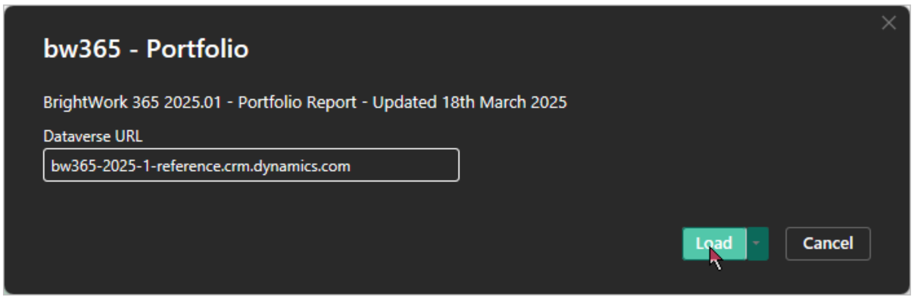
1. Return to the download folder and open the bw365 - Portfolio.pbit file.

   A window will open requiring you to enter content.

2. Login to the BrightWork 365 app and copy your Dataverse URL, up through 'dynamics.com'. Do not include https:// in the copy!



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



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

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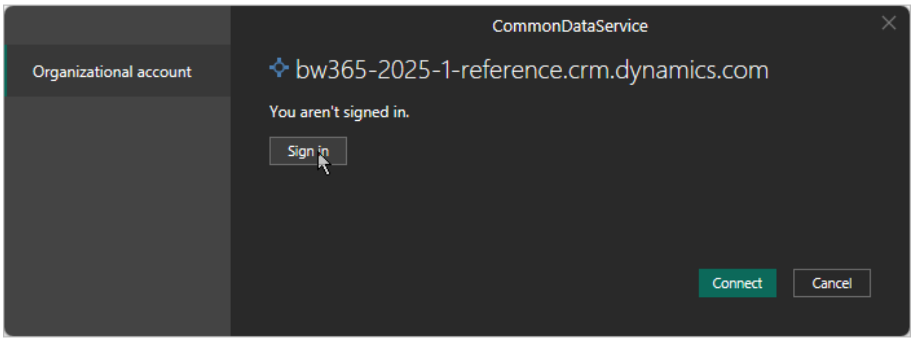
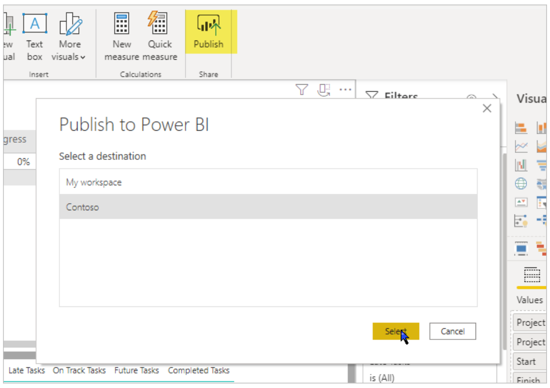
4. You will be prompted to sign into Dataverse.

   Click Sign in, use your Microsoft 365 credentials and click **Connect**.

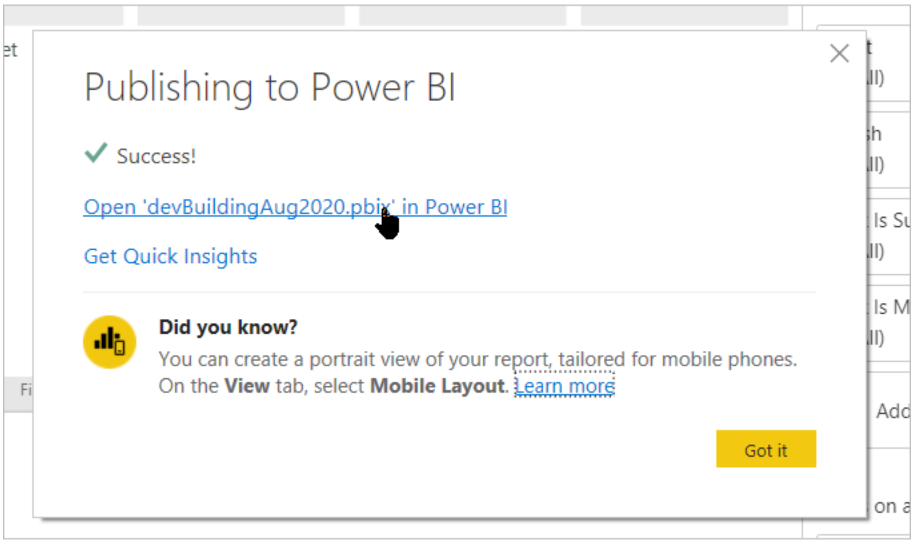


The report should load and display whatever data exists in your BrightWork 365 environment.

5. Click **F12** on your keyboard and save the PBI file, for example, as BrightWork365 – Portfolio.pbix.
6. Click **Publish** and login if prompted.
7. Select the Workspace into which you want to publish the report and click **Select**.



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



9. Repeat for bw365 - Resourcing.pbit and the bw365 - My Work.pbit

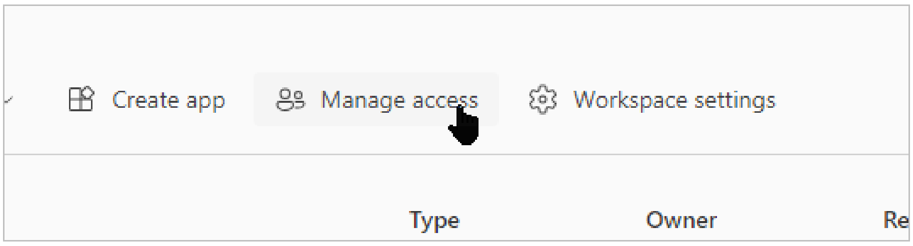
Setup My Work Users

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

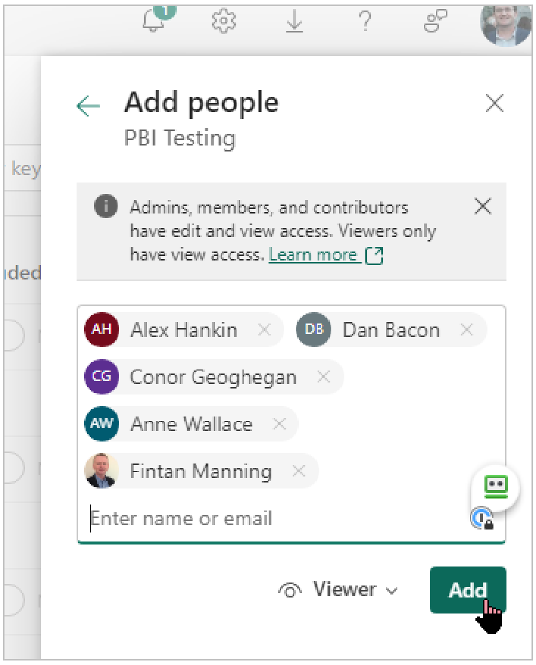
For this to work, the users must be added to the Workspace as Viewers and added to the User security group for the report dataset.

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**.



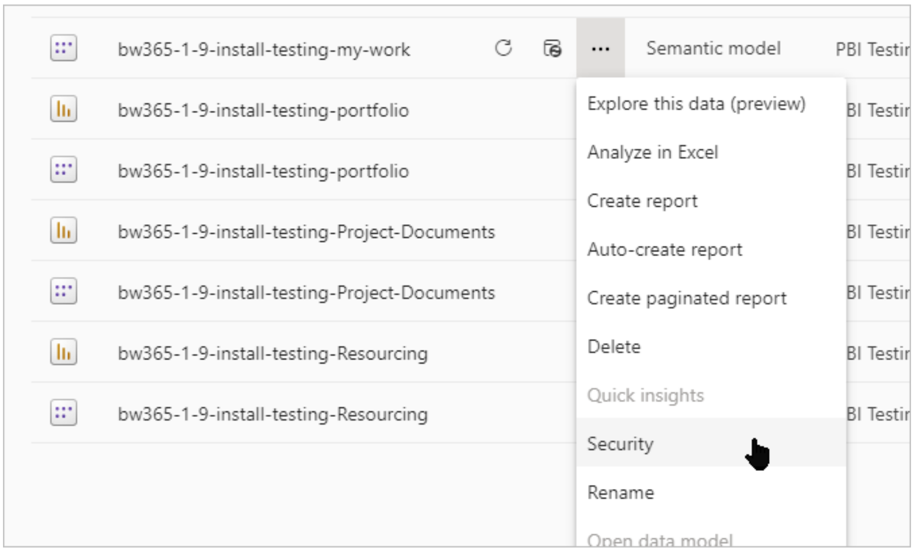
3. Click **+ Add people or groups**.
4. Add each user who will be accessing the report as a viewer.



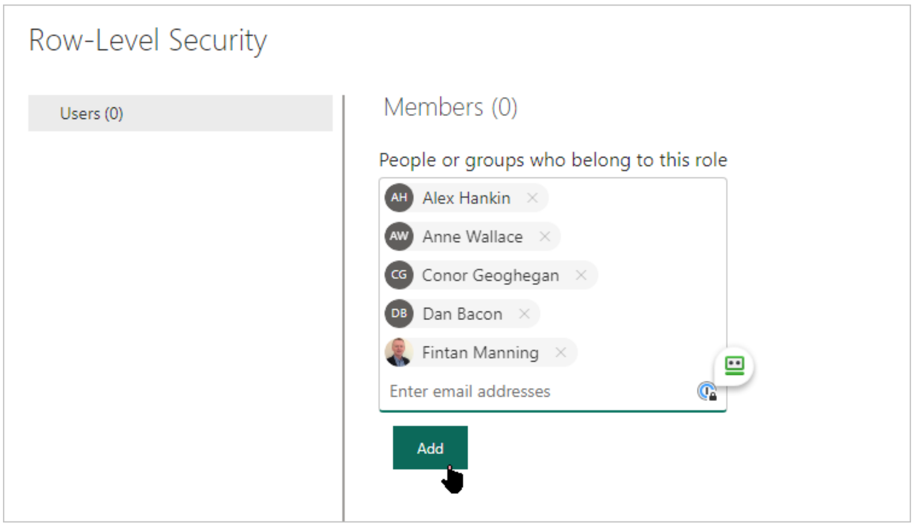
Note: My Work will only work with users added as Viewers. If the users are not added as Viewers, they will have to use the slicer to see their work.

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.



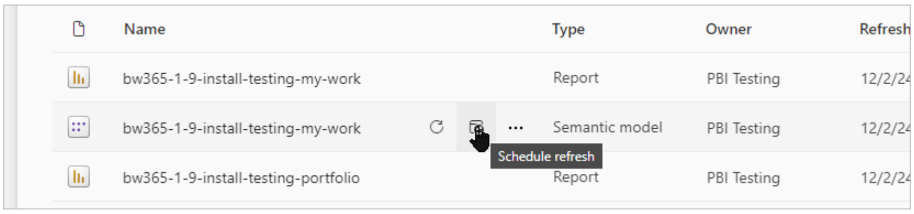
3. Add each user who will be accessing the My Work report and click **Save** when done.



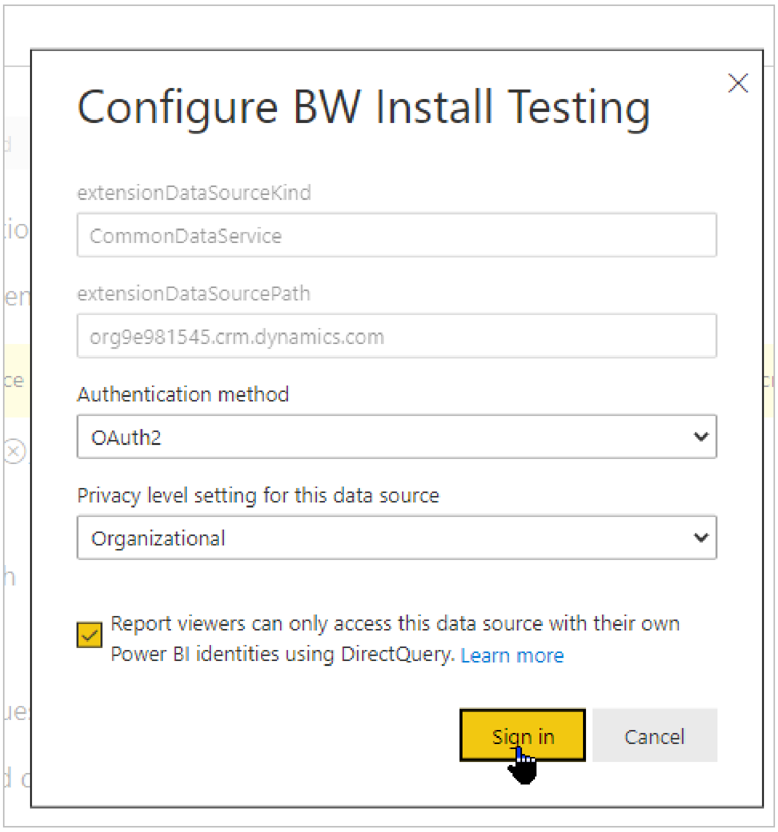
Configure Power BI Scheduled Refresh

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.

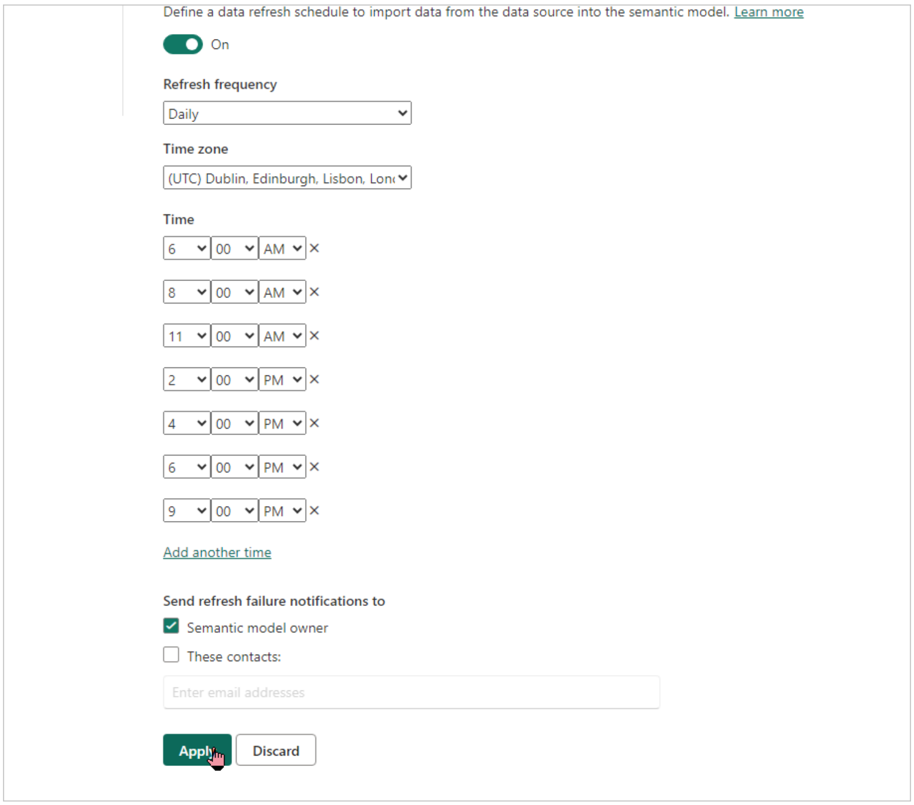


3. Under Data source credentials click **Edit credentials** and sign in using the setting shown below.



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.

5. Click **Apply**.

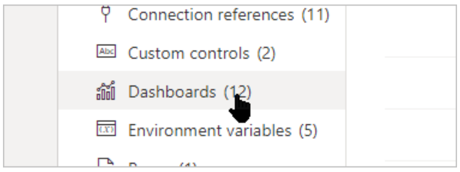


6. Repeat for the remaining semantic models. You will also need to edit the credentials for the Project Documents semantic model and login to SharePoint.

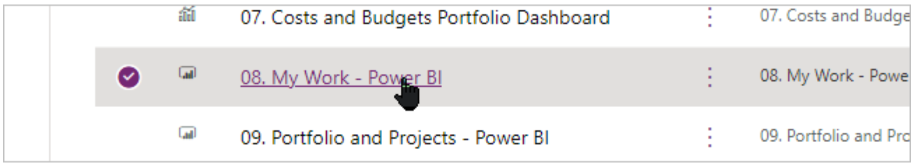
Update Dashboard Settings

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.

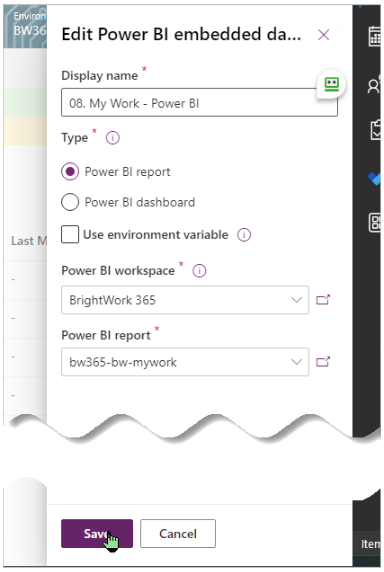
1. Return to the BrightWork 365 solution in https://make.powerapps.com/ and click **Dashboards** on the navigation.



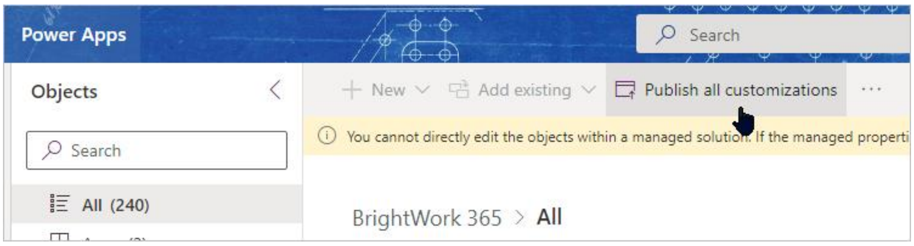
2. Click **08. My Work – Power BI**.



3. 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**.



Optional: Setup Dynamics Email

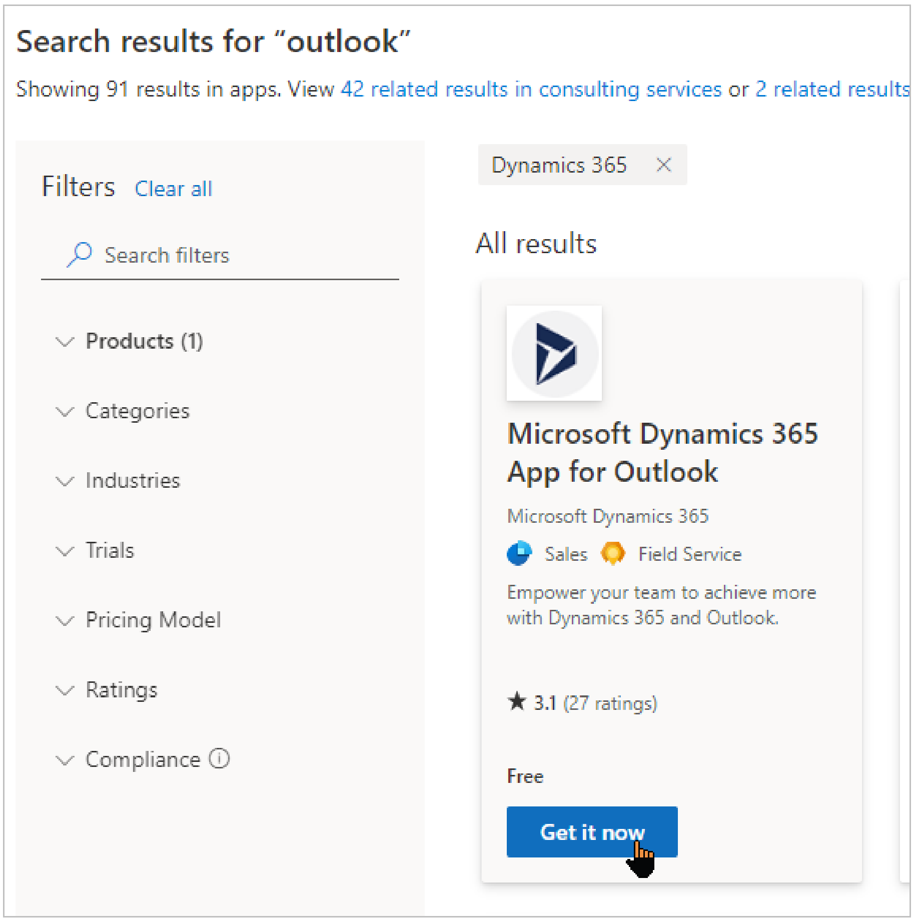
This section does not need to be done if you do not intend to use email activities in projects.

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

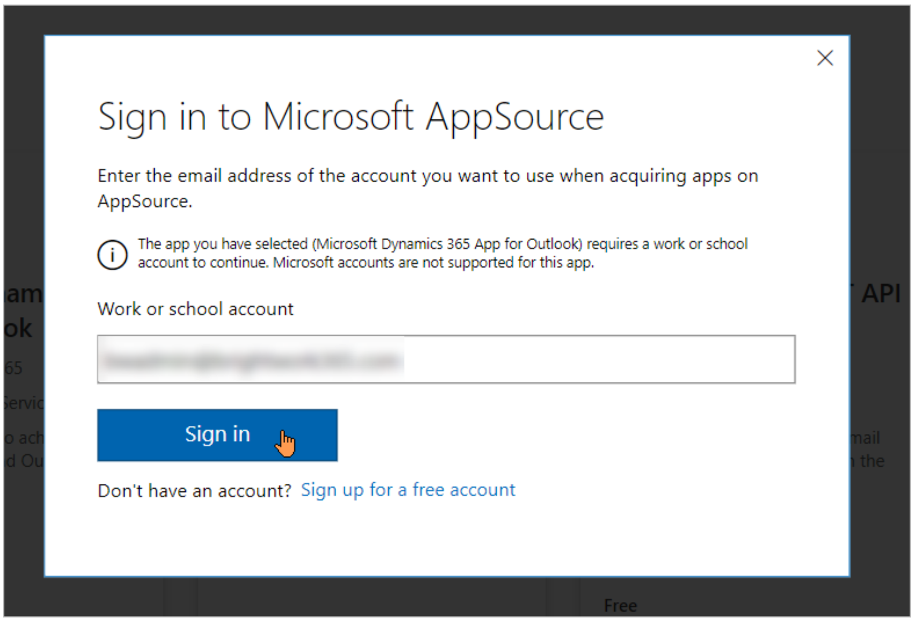
A user can only sync to one Dynamics or Dataverse environment at a time. If you have other Dynamics or Dataverse environments with email setup, consult your Exchange administrator.

Install the Microsoft Dynamics 365 App for Outlook

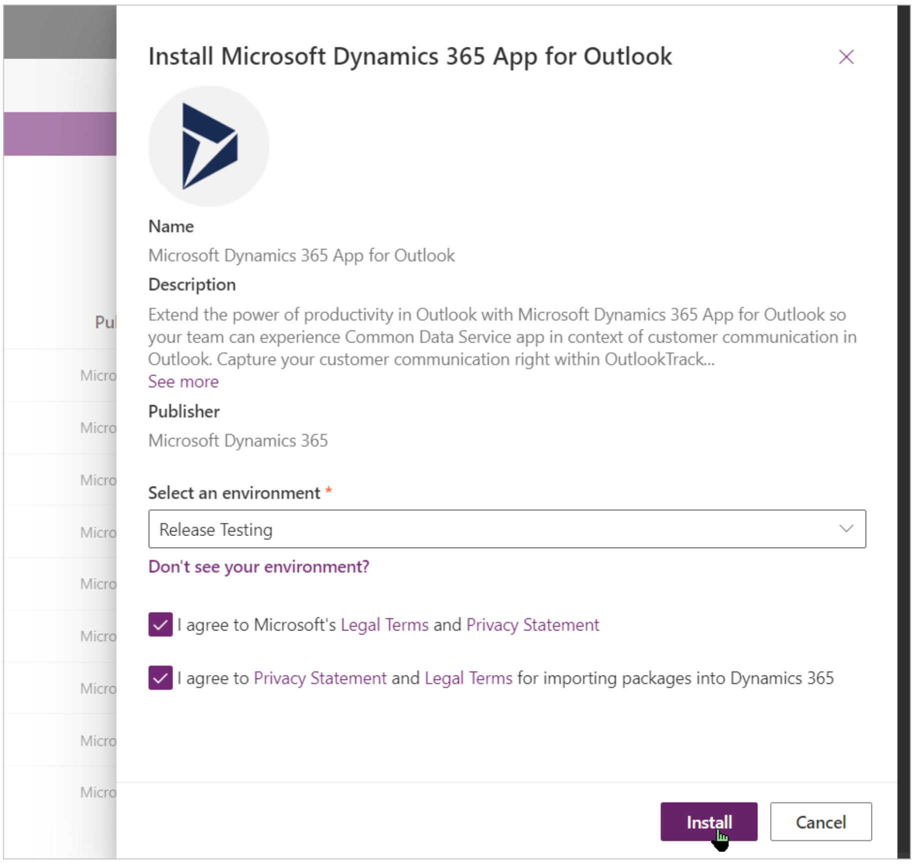
1. Navigate to https://appsource.microsoft.com/en-US/product/dynamics-365/mscrm.fa50aa98-e8bb-4757-83ce-6d607959b985?tab=Overview
2. Click **Get it now** on the Microsoft Dynamics 365 App for Outlook.



3. Sign in if asked.



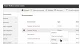
4. Select the destination environment, agree to the terms, and click **Install**.



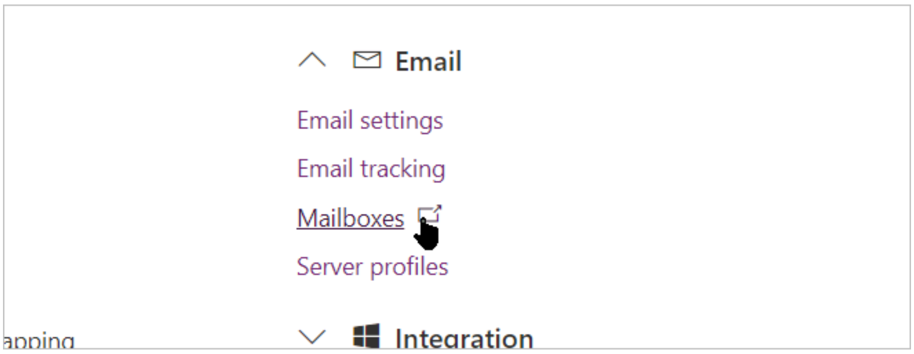
Approve Mailboxes

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

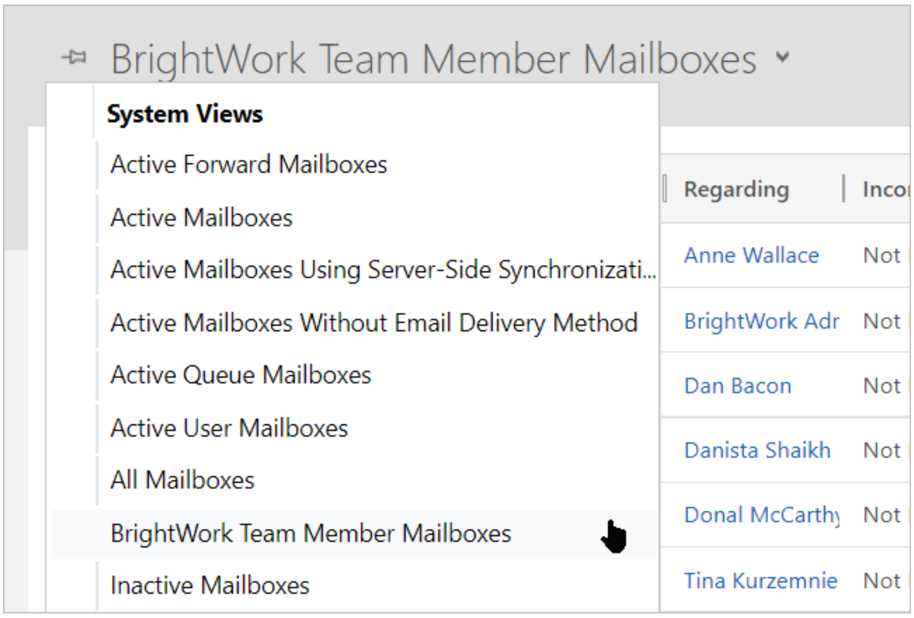
1. Login to https://admin.powerplatform.microsoft.com/environments and click **Settings** for the destination environment.



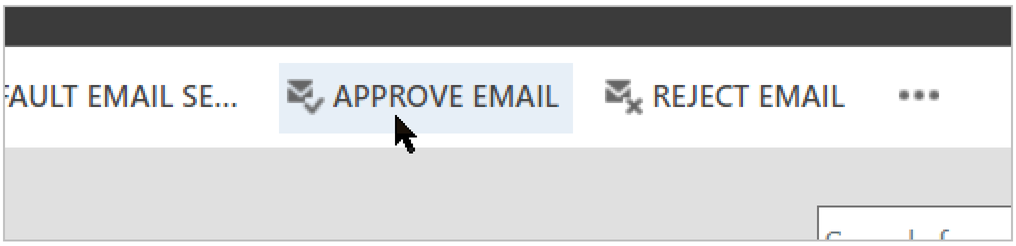
2. Expand **Email** and click **Mailboxes**.



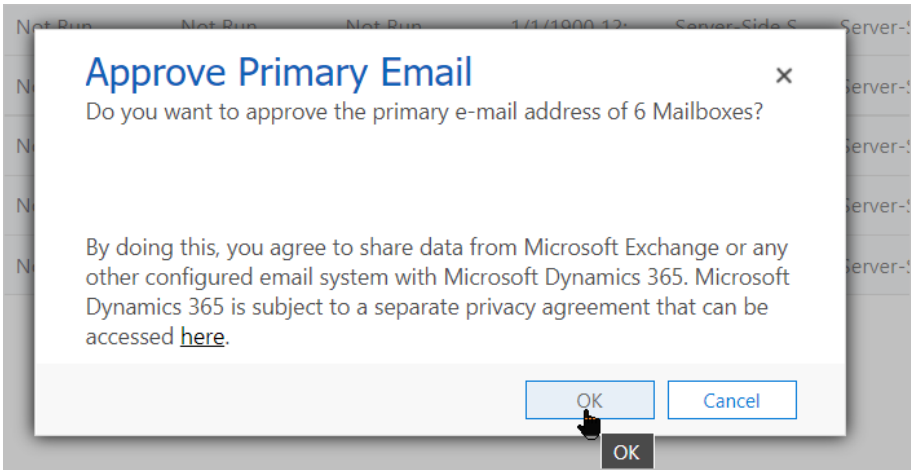
3. Select the **BrightWork Team Member Mailboxes** view.



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.

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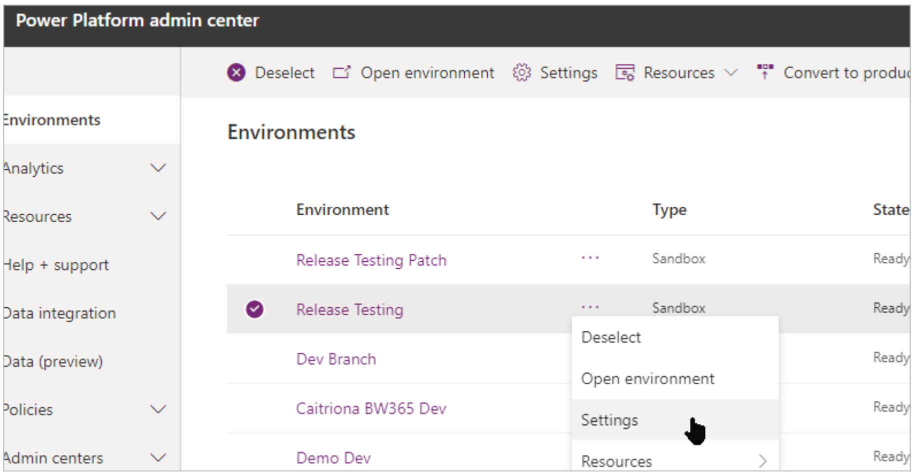
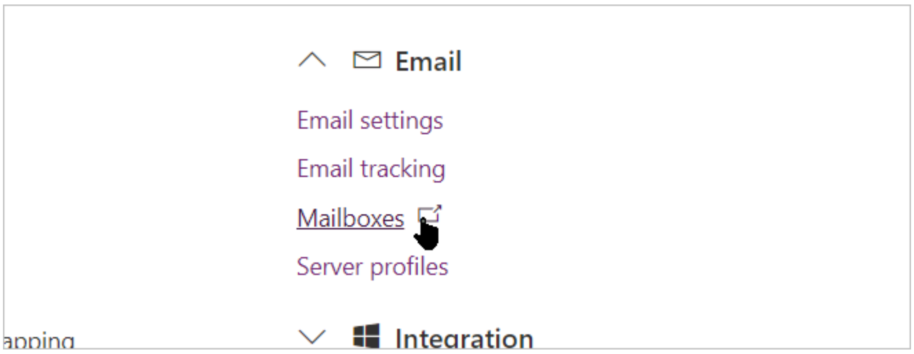
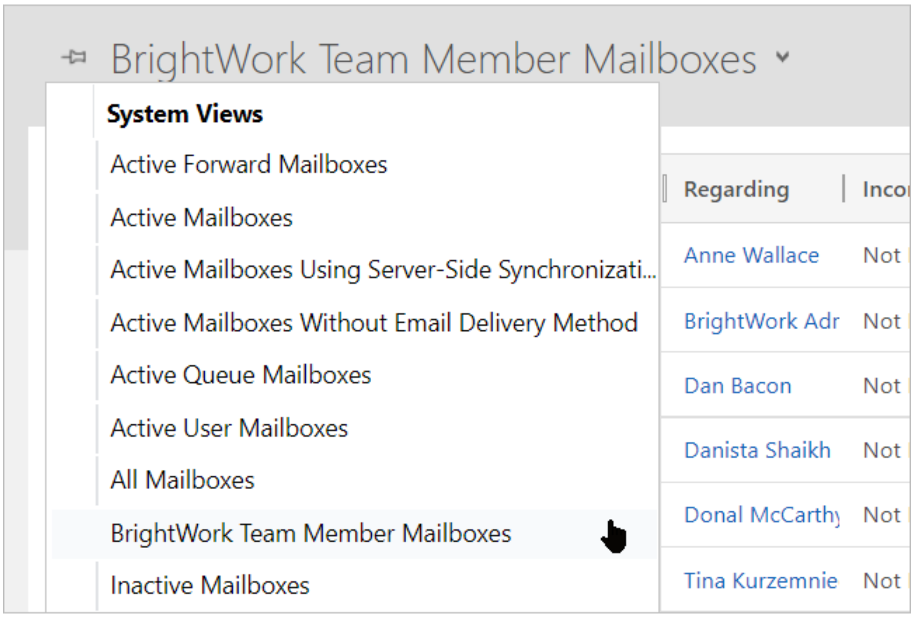
1. Login to https://admin.powerplatform.microsoft.com/environments and click **Settings** for the destination environment.



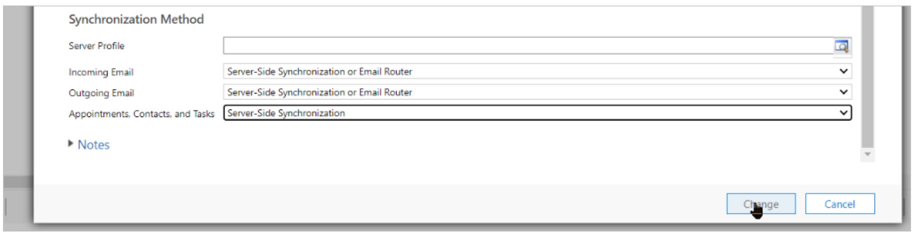
2. Expand **Email** and click **Mailboxes**.



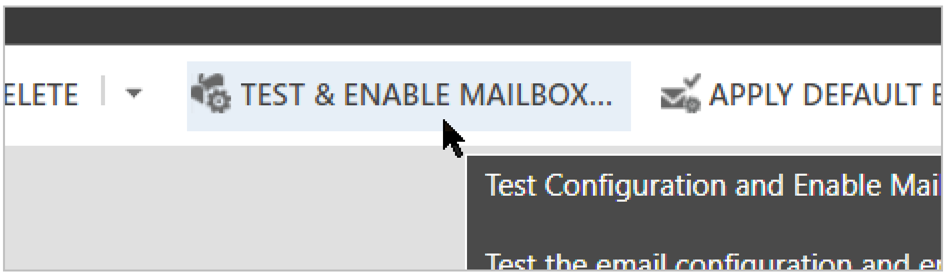
3. Select the **BrightWork Team Member Mailboxes** view.



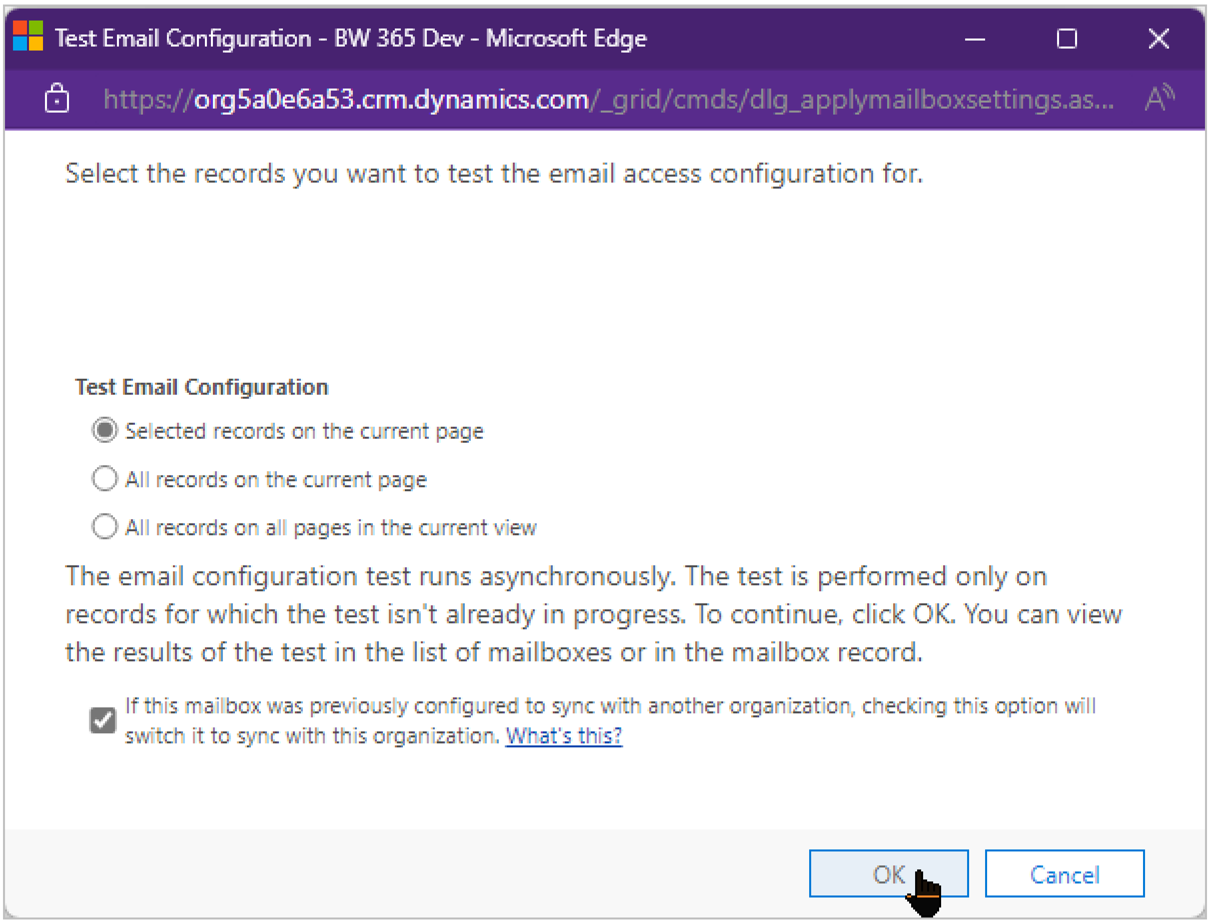
4. Select all the BrightWork users you want to enable and click **Edit**.
5. Ensure **Server-Side Synchronization** is the selected method for all three options and click **Save & Close**.



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

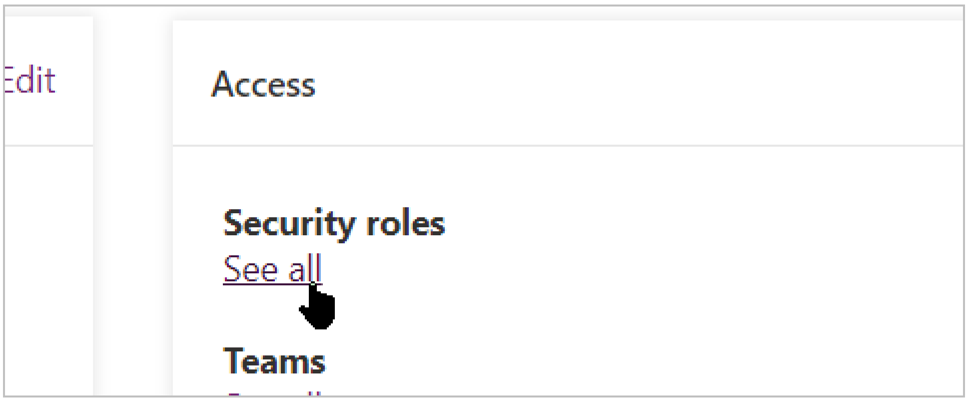


7. Click **OK**.

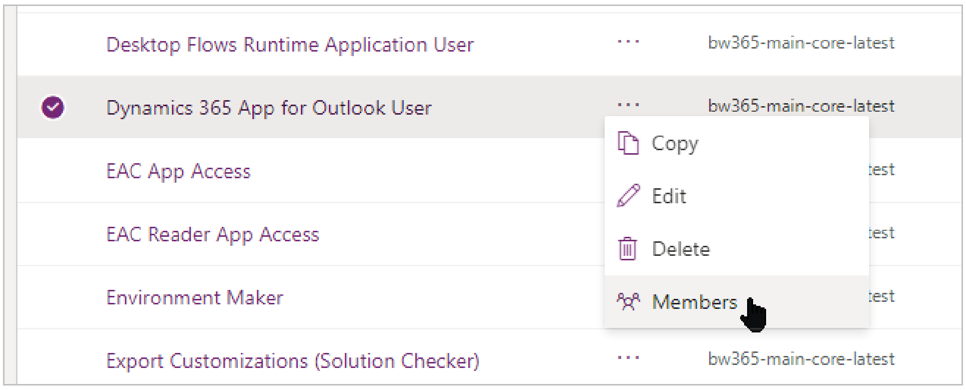

Test Email Configuration - BW 365 Dev - Microsoft Edge
https://org5a0e6a53.crm.dynamics.com/_grid/cmds/dlg_applymailboxsettings.as...
Select the records you want to test the email access configuration for.
Test Email Configuration
Selected records on the current page
All records on the current page
All records on all pages in the current view
The email configuration test runs asynchronously. The test is performed only on records for which the test isn't already in progress. To continue, click OK. You can view the results of the test in the list of mailboxes or in the mailbox record.
If this mailbox was previously configured to sync with another organization, checking this option will switch it to sync with this organization. What's this?
OK
Cancel

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

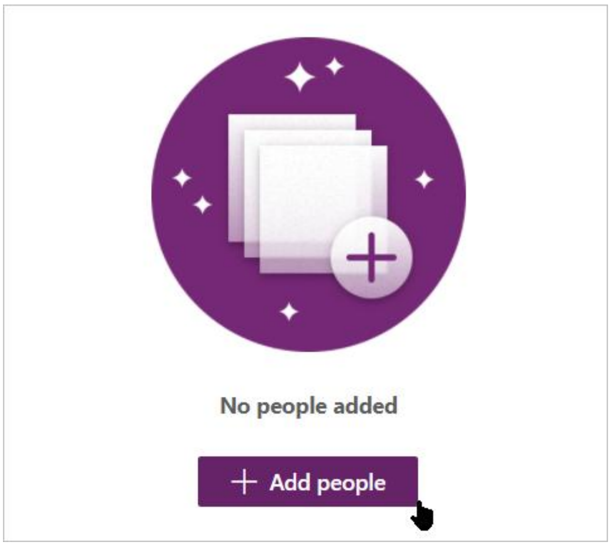
1. Login to the https://admin.powerplatform.microsoft.com/ and click into the destination environment.
2. Click **Security Roles | See all**.



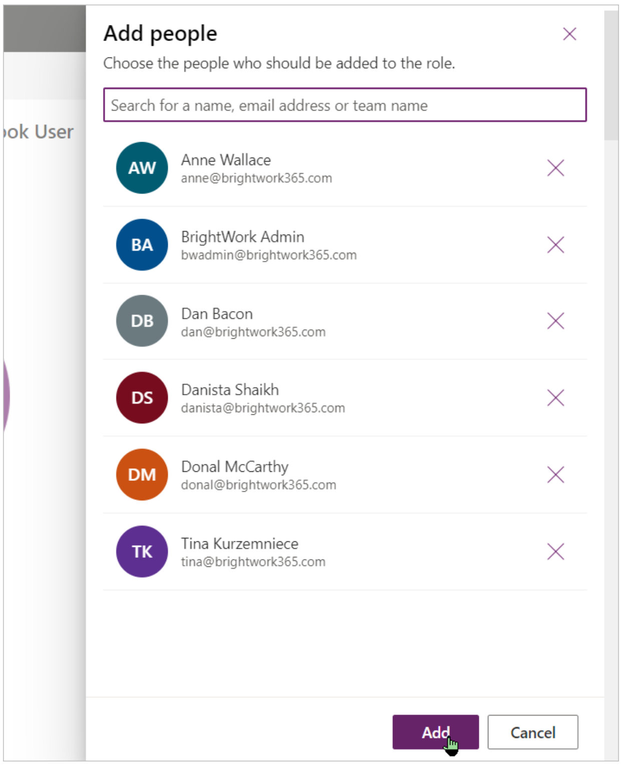
3. Click **Members** on the **Dynamics 365 App for Outlook User** role menu (if you do not see this option, turn off the option 'Display only parent security roles.'



4. Click **Add People**.

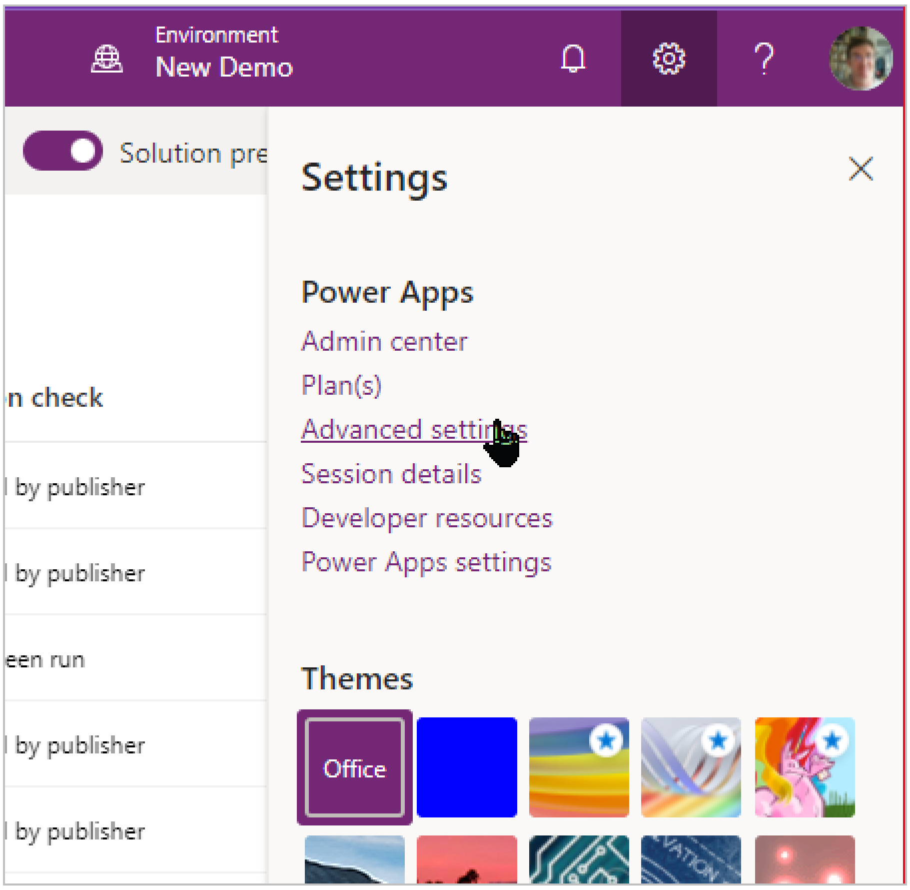


5. Add the users and click **Add**.

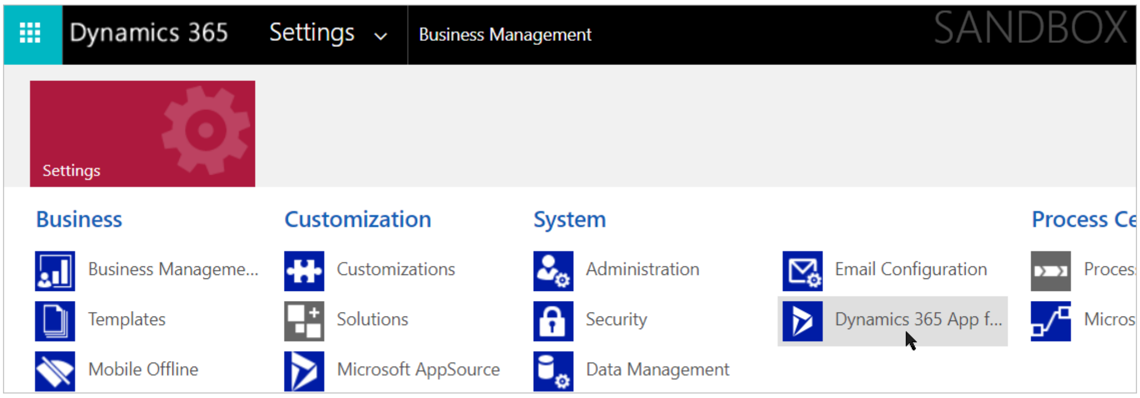


Install the Microsoft Dynamics 365 App for Outlook for Users

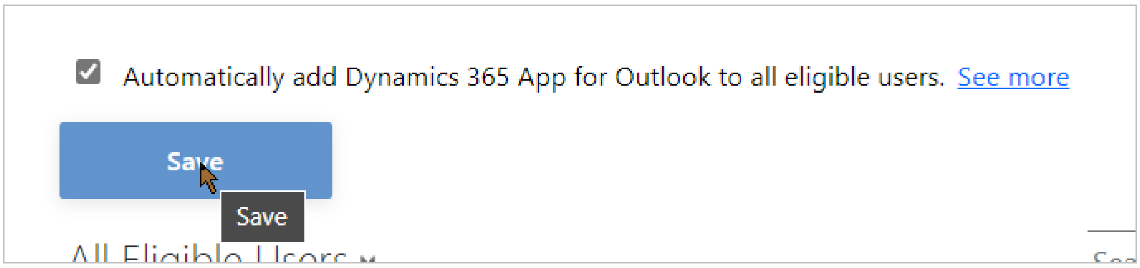
1. Login to https://make.preview.powerapps.com/ for your environment and click **Settings | Advanced settings** for the destination environment.



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

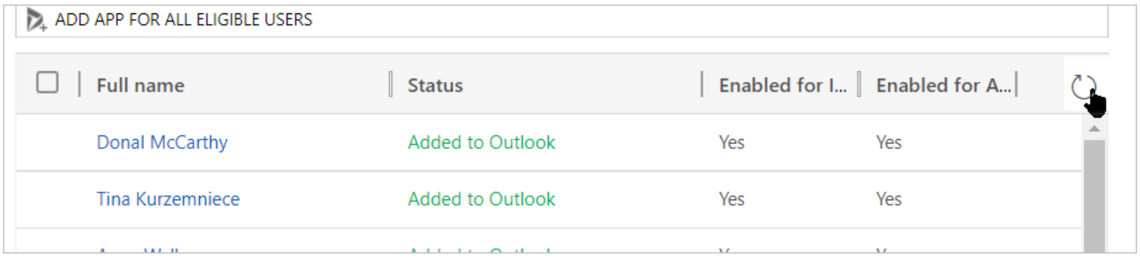


3. Select **Automatically add Dynamics 365 App for Outlook to all eligible users** and click **Save**.



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.



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

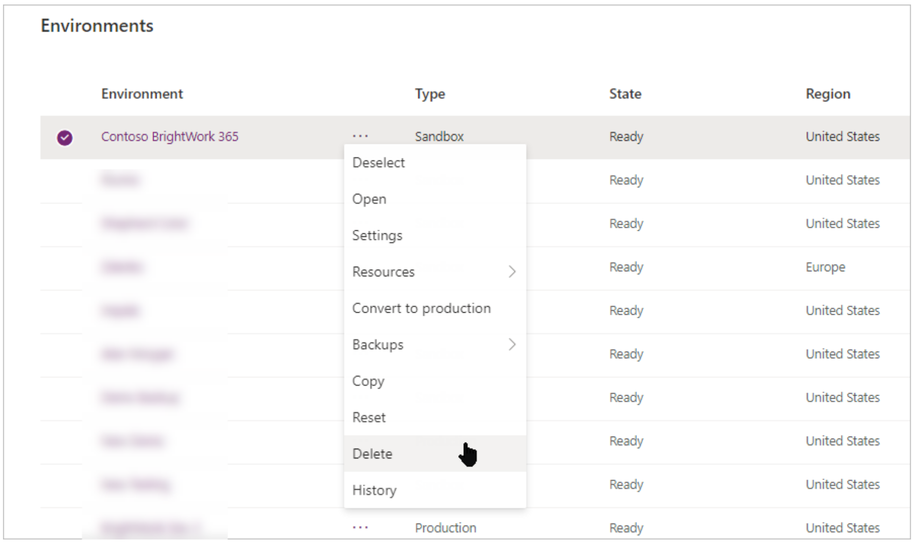
Delete the BrightWork 365 Environment

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

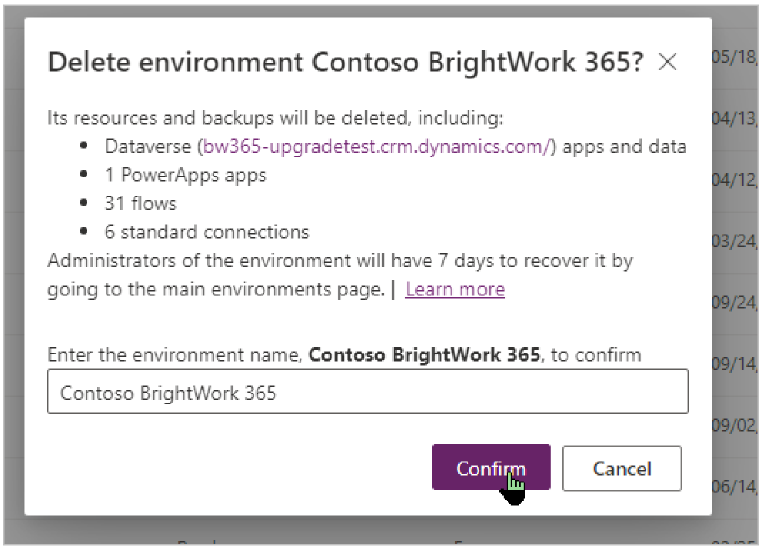
Note: You need to be a Power Platform Administrator to carry out this step. Clearly, it should be done with caution.

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**.

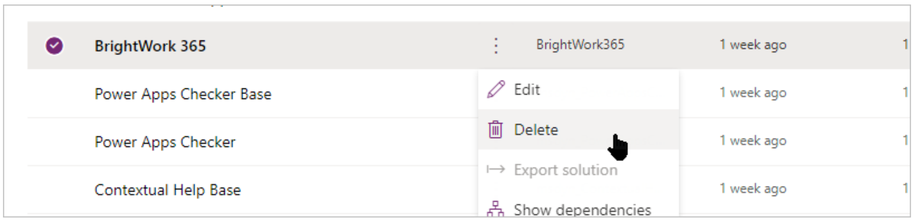


Delete the BrightWork 365 Solution

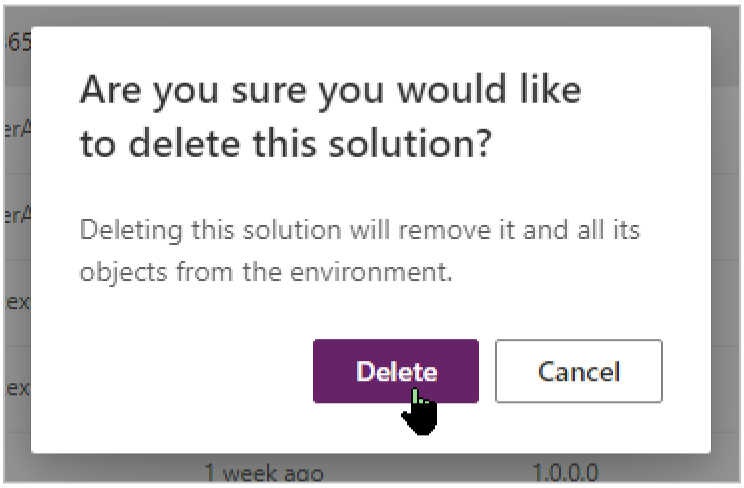
If you want to keep the environment, you can also delete BrightWork 365 from the environment. If you have a custom managed solution for BrightWork 365, on top of the main BrightWork 365 solution, you must delete this custom managed solution first.

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.

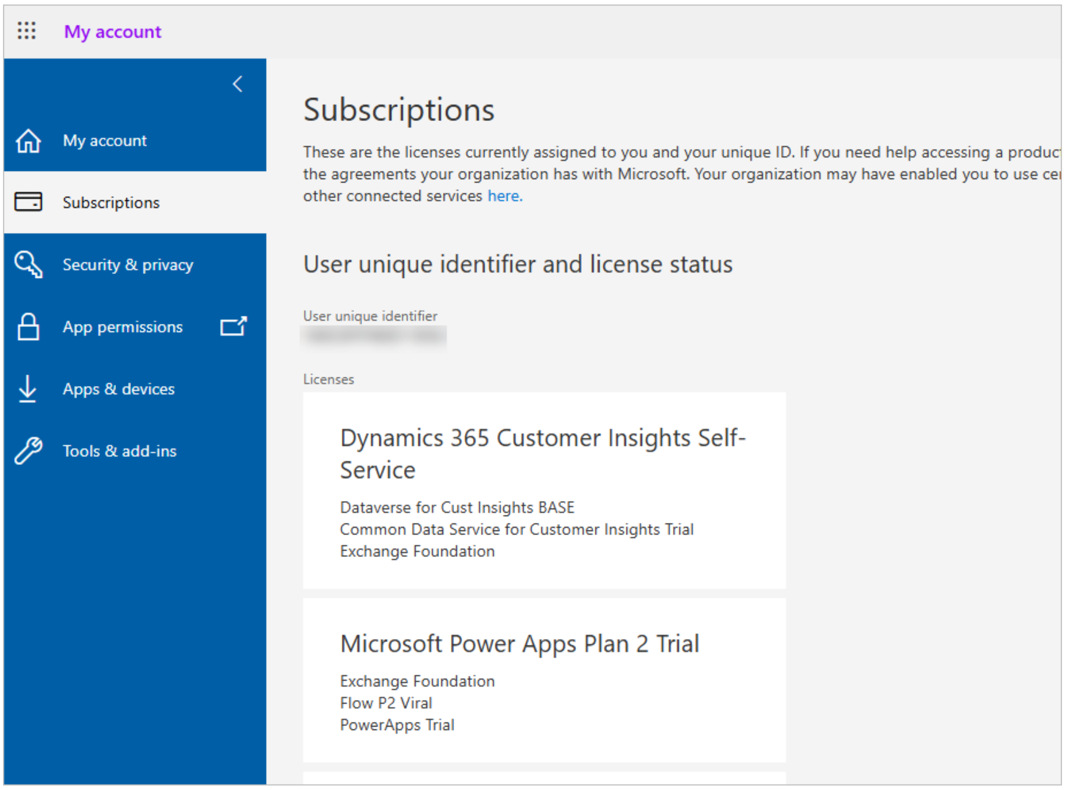


Appendix

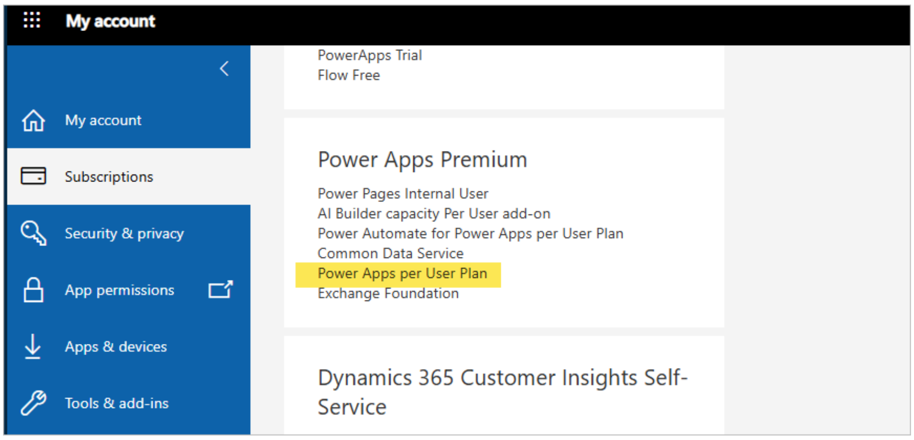
What Microsoft 365 Licenses do I have?

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

1. Login into https://portal.office.com/account/?ref=Harmony#subscriptions



2. If the 'Power Apps per user plan' is not listed, do not proceed with the installation. 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)

POWER APPS US GOVERNMENT SERVICE URLS

Commercial version URL	US Government version URL
https://app.powerbi.com	https://app.powerbigov.us (GCC) https://app.high.powerbigov.us (GCC High) https://app.mil.powerbigov.us (DoD)