



v1.9

Upgrade Guide

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Published: March 6, 2024

Introduction

This guide includes the steps to upgrade BrightWork 365 from multiple versions. You should first Upgrade the BrightWork Solution and then start in the Upgrade Steps section for the version that you are upgrading to, i.e., if you are on BrightWork 365 1.6, start at the v1.7 Release Upgrade Steps.

Upgrade BrightWork Solution

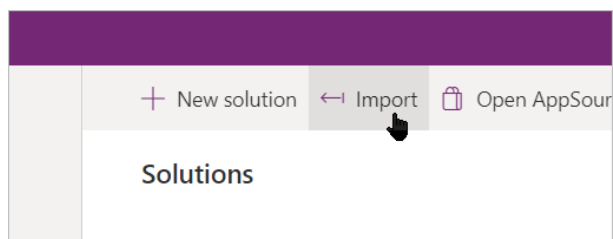
BrightWork 365 should only be upgraded with the account that was used to install BrightWork 365. To determine what account that was, go to the BrightWork 365 install environment and open the BrightWork 365 solution. Click **Cloud Flows** – the account that is listed as the Owner of the flows is the install account.

Managed ▾	Last Modif... ▾	Owner ▾	Status
Yes	1 month ago	BrightWork Admin	On
Yes	1 month ago	BrightWork Admin	On

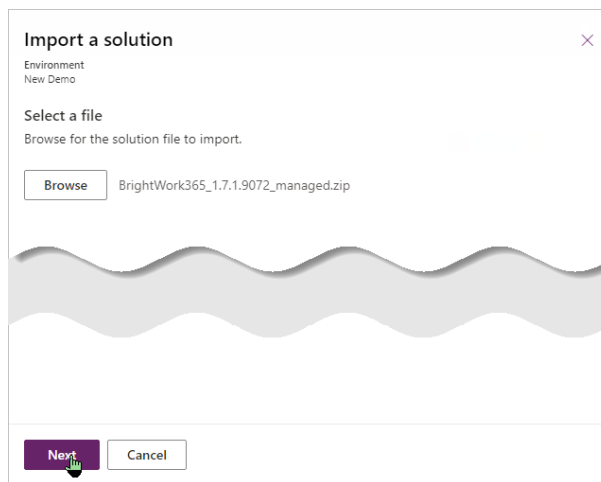
The upgrade will take around 60 minutes. During this time BrightWork 365 could become slow and unusable. You should upgrade BrightWork at a time when very few users will be accessing the system.

To upgrade BrightWork365:

1. Navigate to the Solutions folder in the BrightWork 365 install environment in your <https://make.powerapps.com/>
2. Click **Import**.



3. Select the BrightWork365 solution zip and click **Next**.



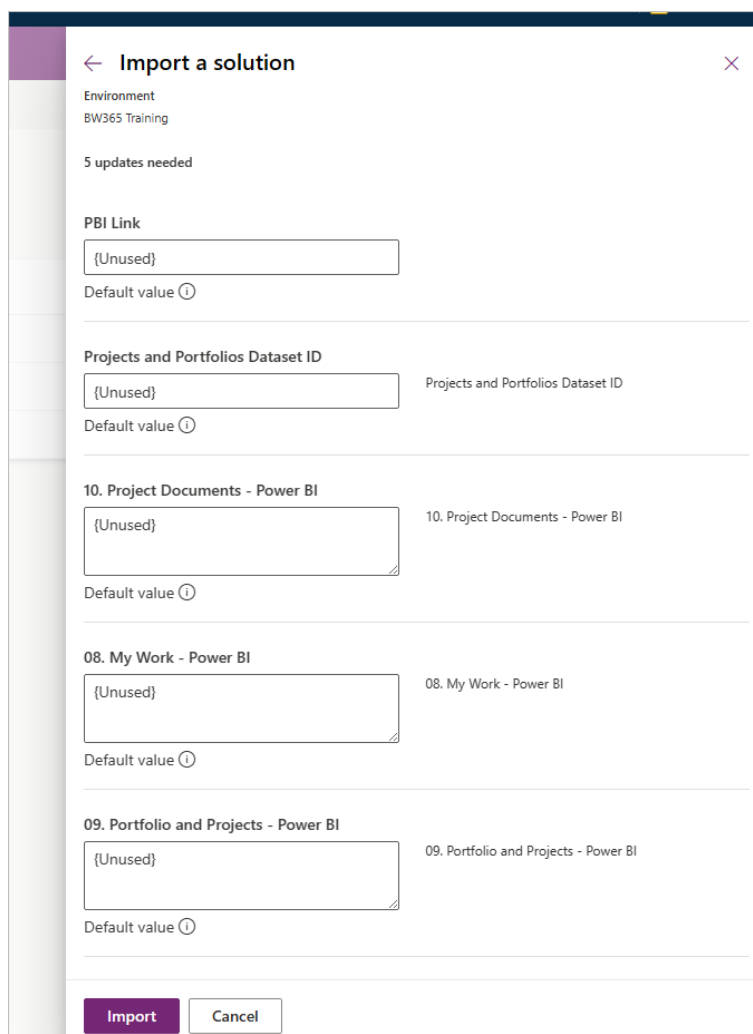
Import a solution ✕

Environment
New Demo

Select a file
Browse for the solution file to import.

BrightWork365_1.7.1.9072_managed.zip

4. Click **Import** – you don't have to do anything else here.



← **Import a solution** ✕

Environment
BW365 Training

5 updates needed

PBI Link

Default value ⓘ

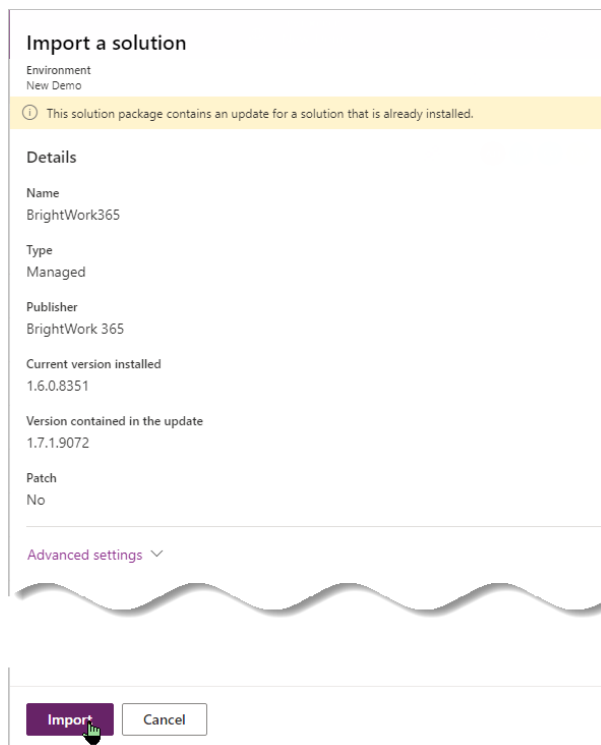
Projects and Portfolios Dataset ID
 Projects and Portfolios Dataset ID
Default value ⓘ

10. Project Documents - Power BI
 10. Project Documents - Power BI
Default value ⓘ

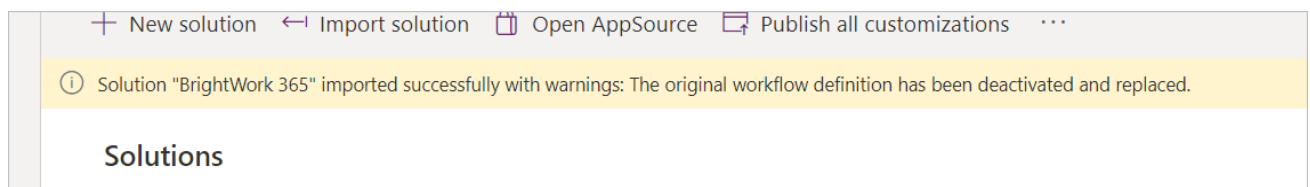
08. My Work - Power BI
 08. My Work - Power BI
Default value ⓘ

09. Portfolio and Projects - Power BI
 09. Portfolio and Projects - Power BI
Default value ⓘ

5. Click **Import**.



The import process will take around 60 minutes. Wait until the upgrade completes and the bar goes yellow. It is safe to ignore any timeout messages you see during this time. It is also safe to ignore messages about workflows being deactivated and replaced.



6. Repeat the above steps to import the updated version of your custom solution.

You should have received an updated version of your custom solution from BrightWork.

v1.9 Release Upgrade Steps

Update Custom Project Forms

The following steps need to be carried out on custom project forms. You will not need to do them if you are using one of the out of the box forms. Talk to your Customer Success Partner to determine what you need to do. This could be a good time to switch your custom forms to out of the box forms – that way you will get future form updates without having to make any changes to the form.

Three form changes need to be carried out:

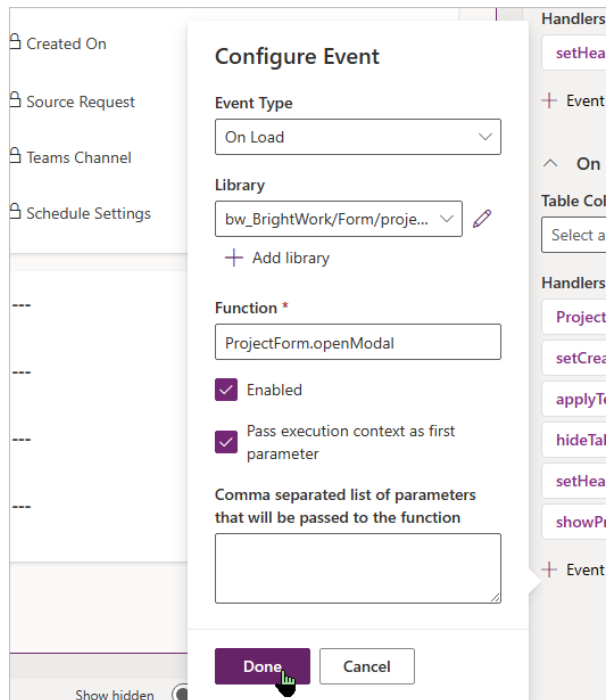
- The Schedule Settings column will need to be added to the Charter and the Project Settings tab.
- The My Work Subgrid on custom project forms will need to be updated to take advantage of the new Mark Assignment as Complete feature.
- The three instances of the Project Manager column need to be made read only, and a method added to them that will make them editable to users with the assign privilege on projects. This is because changing the project manager updates the project record owner to the same user.

You should make these changes in your Dev environment and migrate the solution to your UAT and Production environments.

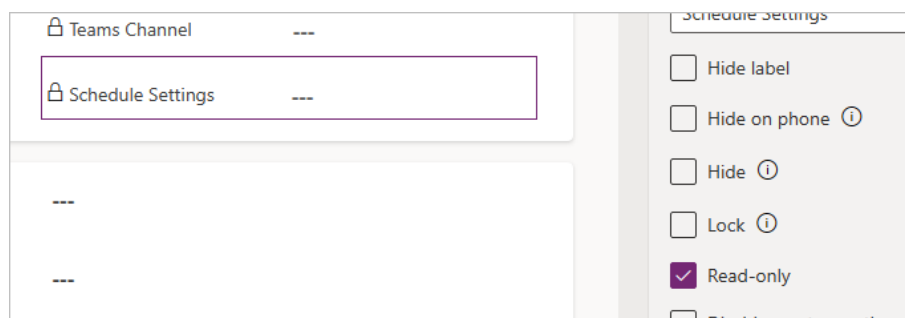
To upgrade the My Work Subgrid

1. Login to the <https://make.powerapps.com> area in your BrightWork 365 Dev environment.
2. Navigate to Tables | Projects | Forms.
3. Click on a custom form to open it.
4. Click the **Events** tab and add an On Load event.
5. Ensure **project.js** is the selected library.

6. Copy and paste ProjectForm.openModal into the function field, enable **pass execution context as first parameter**, and click **Done**.

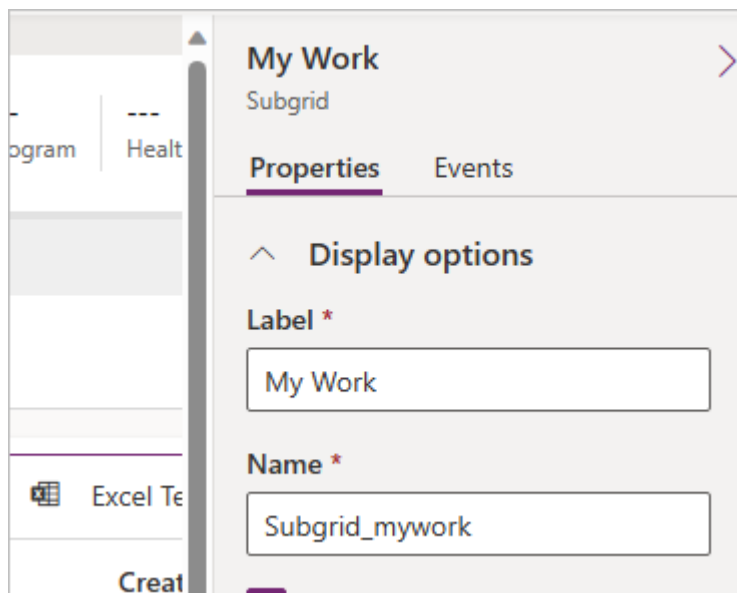


7. Add the Schedule Settings column under the Teams Channel and make it Read-only.

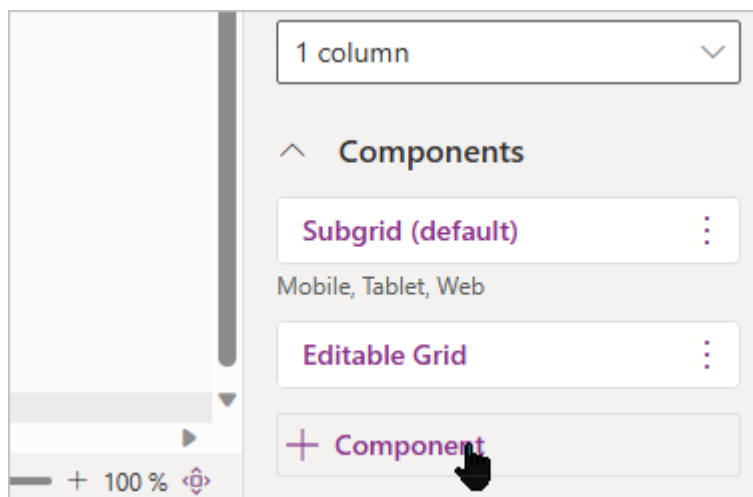


8. Click **Show hidden**, unselect **Show only unused table columns**, and add the **Schedule Settings** column under the Microsoft Team column on the Project Settings tab, and again make it Read-only.
9. Click the **My Work** tab and click on the **My Work** subgrid.

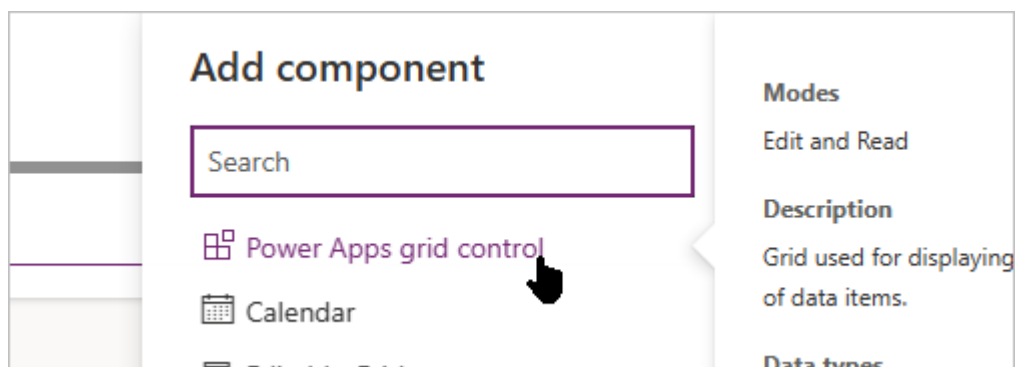
10. Change the name of the subgrid to Subgrid_mywork.



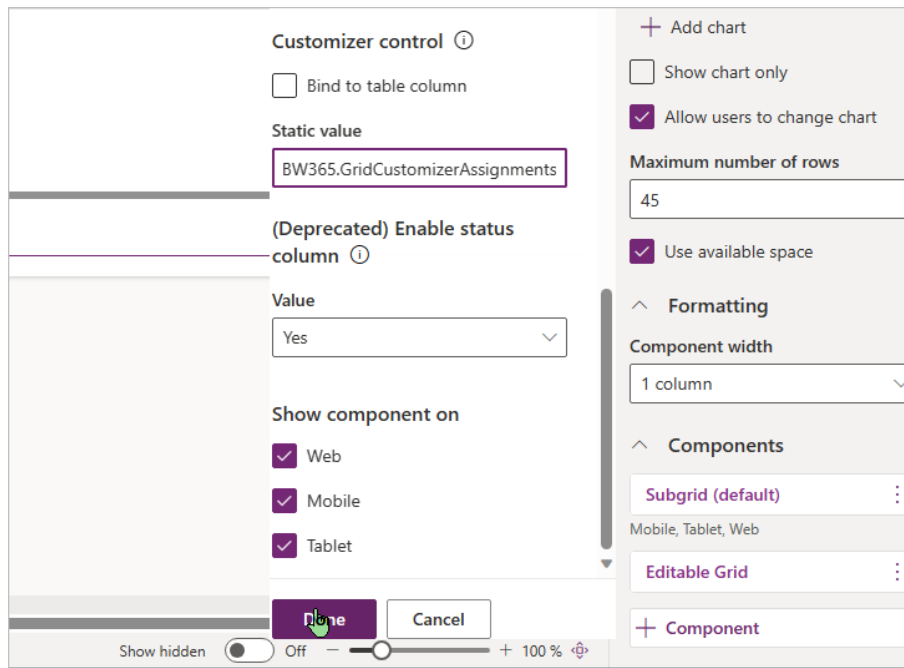
11. Scroll down to the end of the My Work pane and click the + **Component** button.



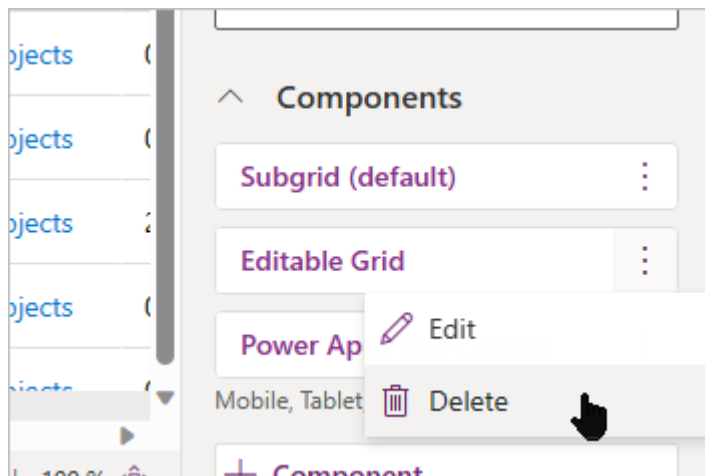
12. Click **Power Apps grid control**.



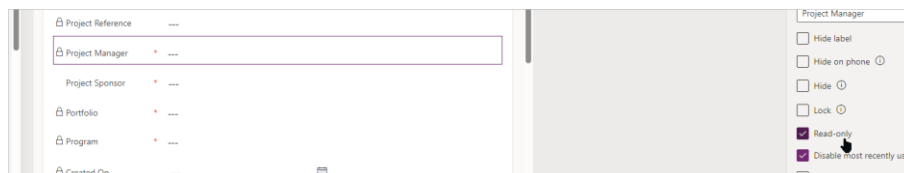
13. Scroll down and paste `bw_BW365.GridCustomizerAssignments` into the Customizer control field and click **Done**.



14. Delete the Editable Grid if it is on the form.

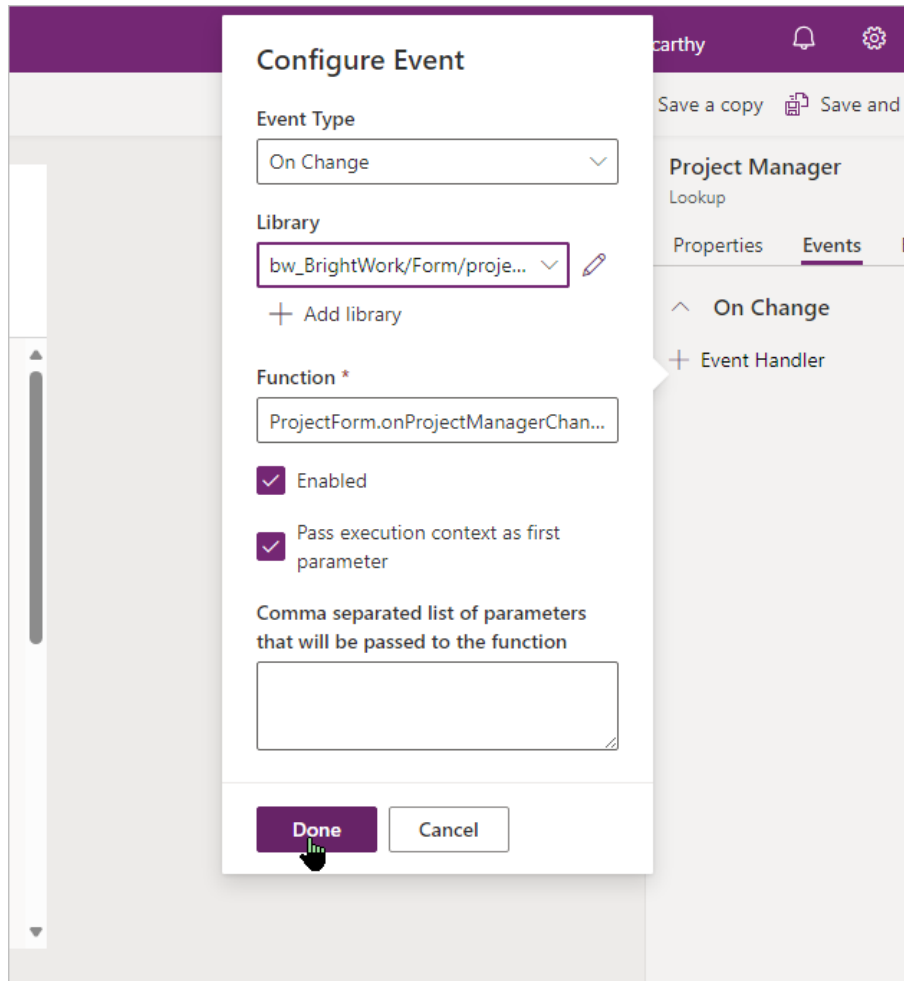


15. Click the **Project Manager** column on the Charter tab and select the **Read-only** checkbox.



16. With the Project Manager column still selected, click the **+ Event Handler** button and ensure **project.js** is the selected library.

17. Copy and paste ProjectForm.onProjectManagerChange into the function field, enable **Pass execution context as first parameter**, and click **Done**.



18. Make the Project Manager column on the Team tab and on the form header read-only.
19. **Save and publish** the form.
20. Repeat all the above steps for each of your custom project forms.

Run Upgrade BrightWork Process

With the BrightWork 365 1.9 release, we are introducing a BrightWork365.setup console application that automates the record creation and updates that are required for this and subsequent releases.

The following upgrade steps will be automatically completed by the BrightWork365.setup console app:

1. Create and setup Global Settings record.
2. Make Project Manager owner of relevant project.
3. Create and setup Project Settings record per project.

To use the console application, you need to have Power Platform Admin and be a system administrator on the relevant environment. You should also be reasonably comfortable with using the Power Shell Console.

Essentially, you must open PowerShell and run a command for each BrightWork environment that needs to be upgraded (e.g., Dev, UAT and Prod).

Prepare the Command

It is probably easiest to prepare the commands that will need in a text editor, such as Notepad++.

Compile a list of the URLs of the environments that you need to upgrade. Just include the first part of the URL, for example, <https://bw365-contoso-dev.crm.dynamics.com>.

Running the below command would upgrade the environment. Just replace the URL with the URL of your environment.

```
.\BrightWork365.setup --service https://bw365-contoso-  
dev.crm.dynamics.com --version 1.9
```

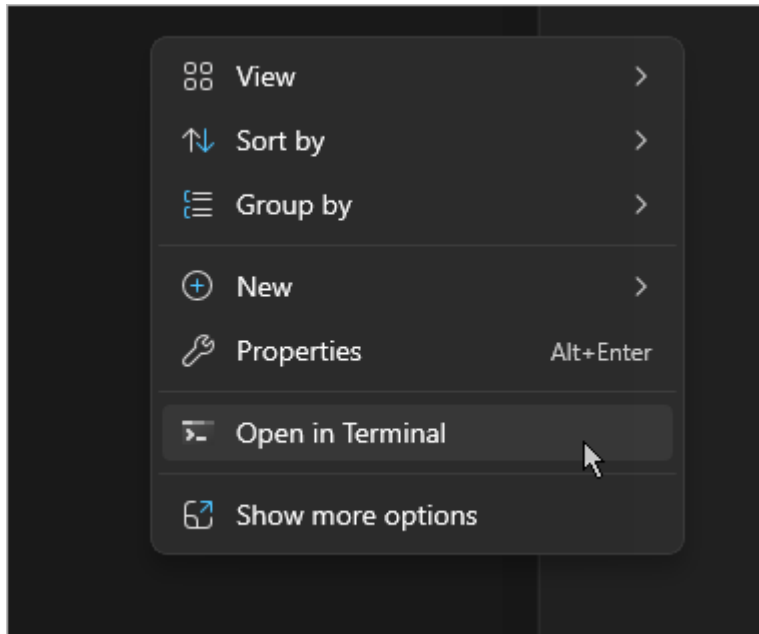
If you want to see a preview of the updates that will be made, add --report at the end of the command, e.g.

```
.\BrightWork365.setup --service https://bw365-contoso-  
dev.crm.dynamics.com --version 1.9 --report
```

Run the Command

To use the BrightWork365.setup console:

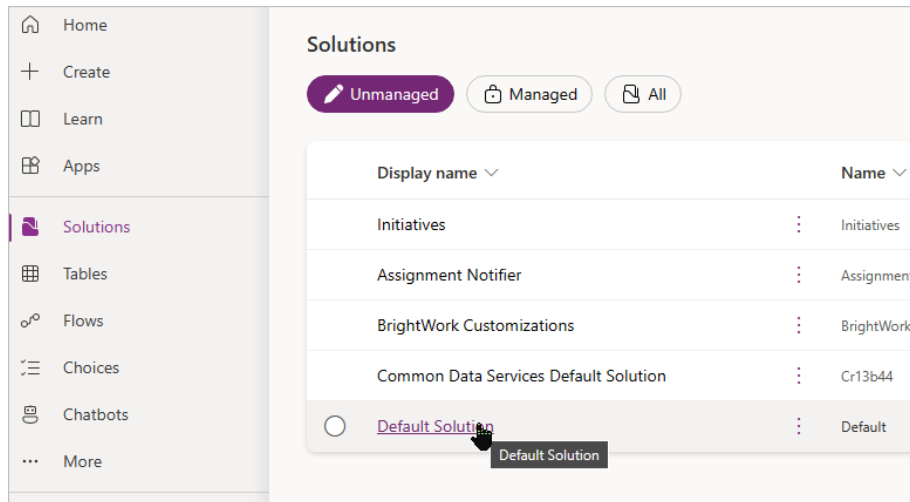
1. Navigate to the install files folder and unzip and enter BrightWork365.Setup.zip.
2. Right-click in the folder and click **Open in Terminal**.



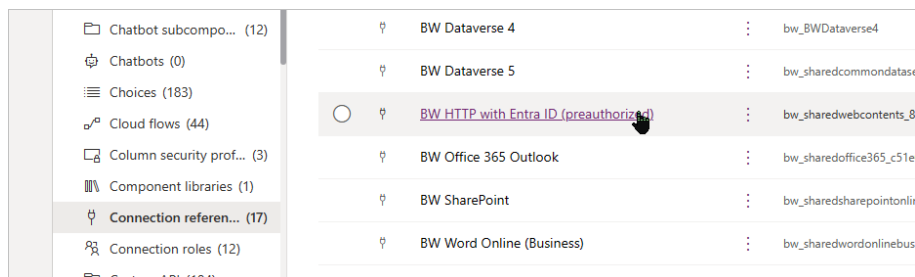
3. Paste in the command and click return on your keyboard.
4. Login to the authentication window that should open in a browser.
Keep an eye out for the authentication window as you can't go any further until you login.
The upgrade will run and update your existing projects.

Fix HTTP with Microsoft Entra ID Connection

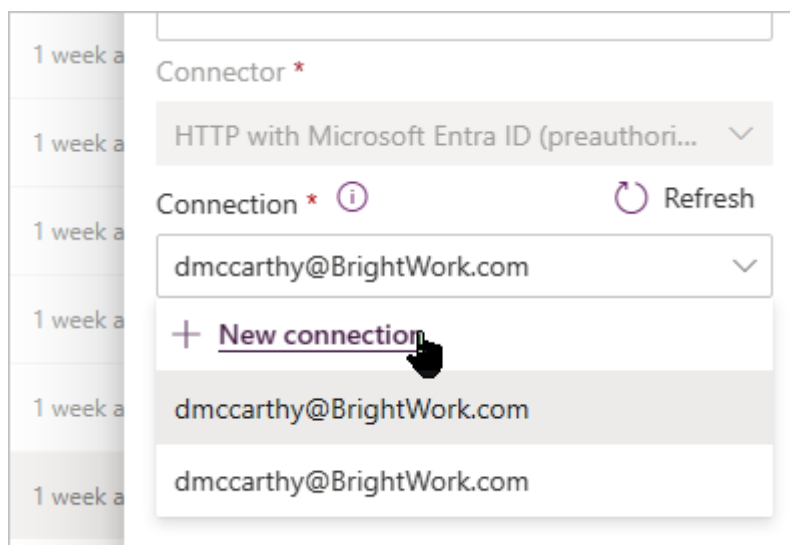
1. Login to the <https://make.powerapps.com> area in your BrightWork 365 Production environment.
2. Click **Solutions** on the left navigation and click **Default Solution**.



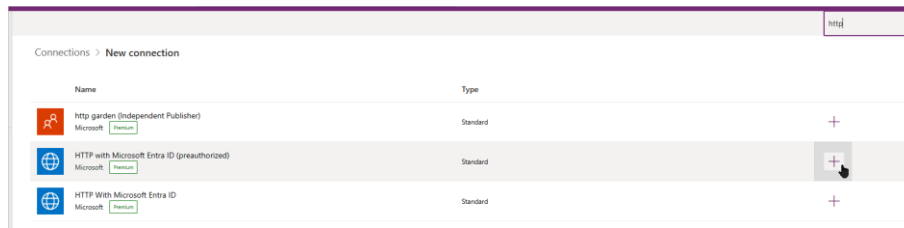
3. Click **Connection references | BW HTTP with Entra ID (preauthorized)**.



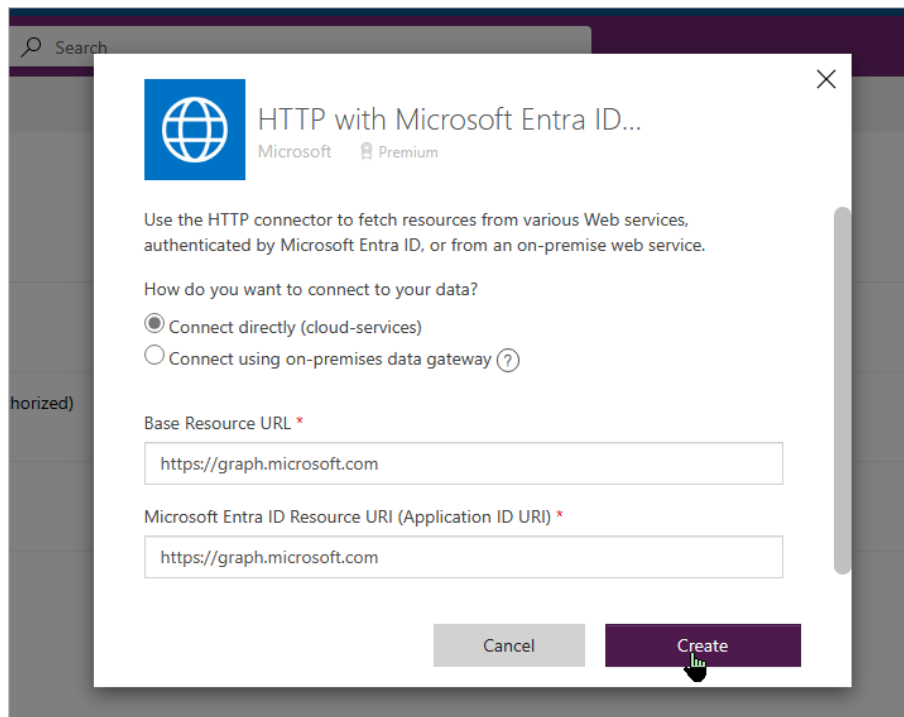
4. Expand the Connection menu and click **+ New connection**.



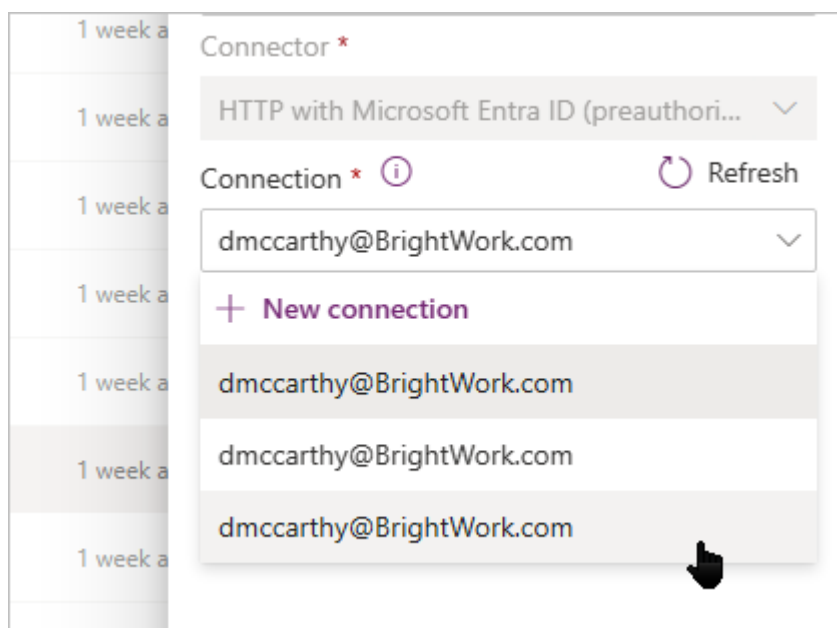
5. Search for http and select the **HTTP with Microsoft Entra ID (preauthorized)** connection.



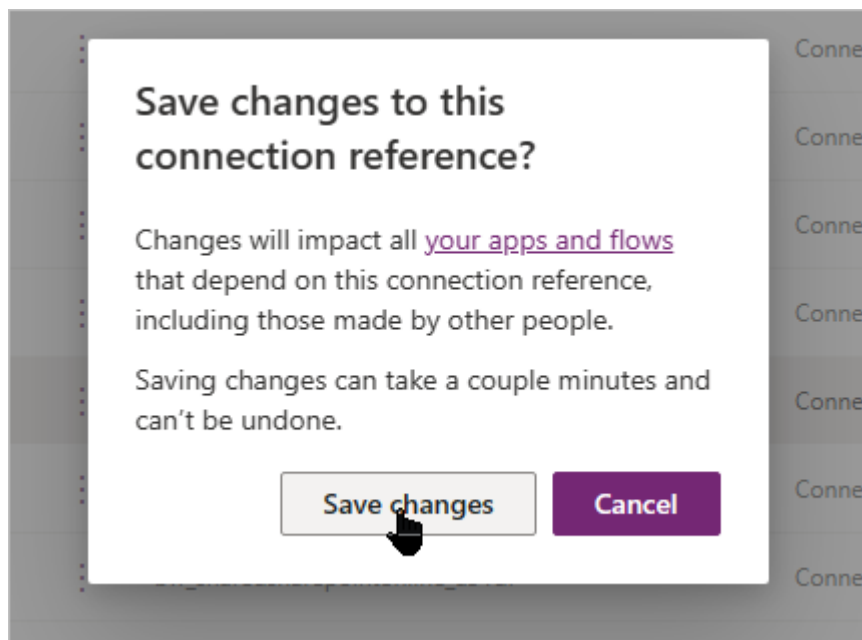
6. Enter <https://graph.microsoft.com> in both fields and click **Create**.



7. Click Ctrl-W on your keyboard to close this tab and return to the other tab.
8. Click Refresh and Select the connection at the bottom of the list.



9. Click Save and Save Changes.



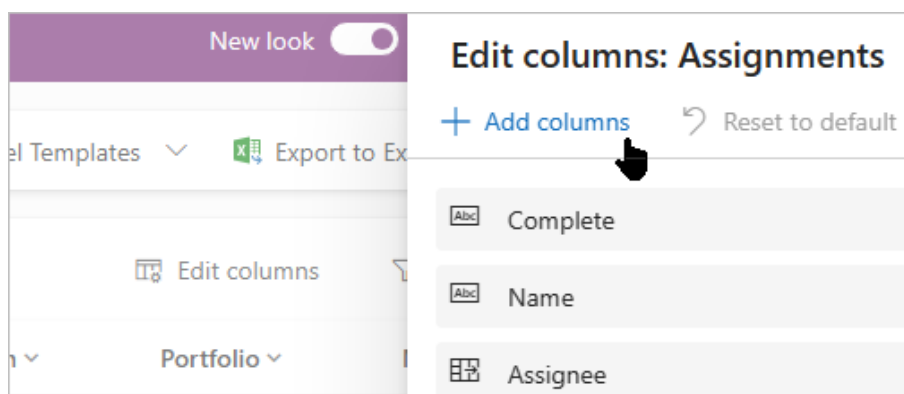
Setup New Resource Report

BrightWork 365 1.9 includes an updated Power BI resource report that leverages the flexible calendaring introduced in this release. If you want to use the new report, carry out the below steps.

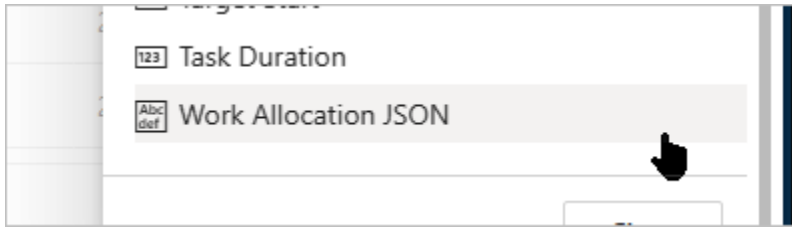
Refresh Projects with Assignments

First you must create a My Work view and ensure that all the relevant assignments have JSON data in them. The way to do this is to open each project once and click on the Gantt tab, this updates all the assignments associated with that project with the JSON data. The easiest way to do it is to create a My Work view and open the projects from there.

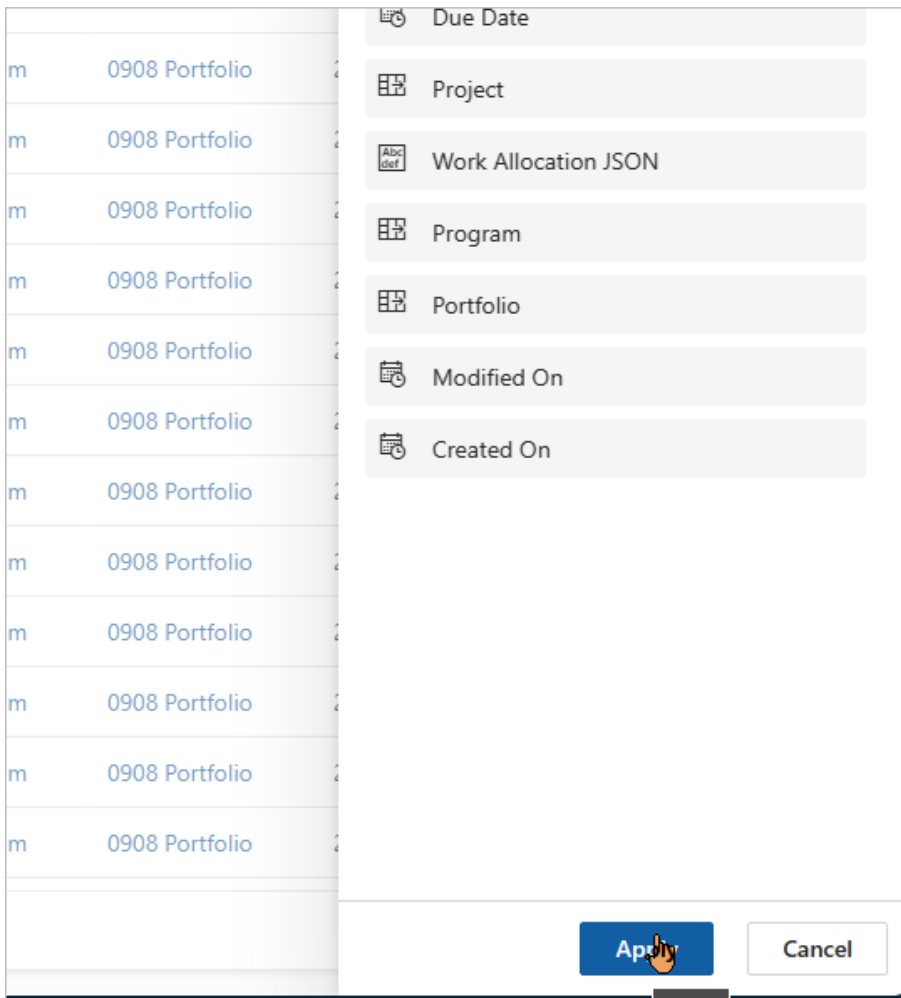
1. Click **My Work** and select the **1. All Work** view.
2. Click Edit Columns and then + **Add columns**.



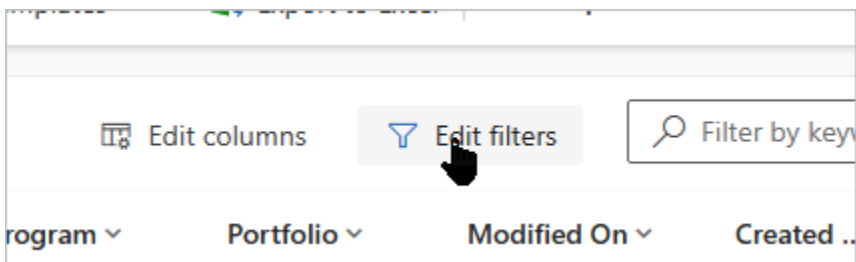
3. Select the **Work Allocation JSON** column and click **Close**.



4. Drag the column up between Project and Program and click **Apply**.



5. Click **Edit filters**.



6. Update the filter so it has the following conditions:
 - a. Work Allocation JSON Does Not Contain Data



- b. Assignment Type equals Project Deliverable, Project Stage, Project Task
- c. Related Entity: Project Task
 - i. Is Milestone Equals No
 - ii. Is Summary Task Equals No

7. Click **Apply**.

8. Sort the view by Project.

9. Save the view.

10. Ctrl-click on the first project in the view to open it in a new tab.

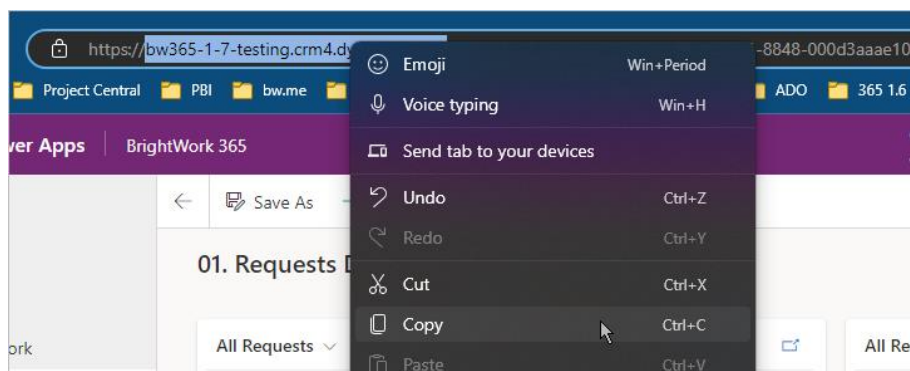
Task Assignments to be JSONed ▾						
<input type="checkbox"/>	Name ▾	Assignee ▾	Resource Utilizat... ▾	Assignm... ▾	Project ▾	Work...
<input type="checkbox"/>	New Task2	 Alex Han...	100.00	Not Sta...	DMC 1	
<input type="checkbox"/>	New Task2	 Anne Wal...	100.00	Not Sta...	DMC 1	

11. Navigate to the new tab, click the Gantt tab in the project and wait for it to load.
12. Click **Ctrl-w** on your keyboard to close the tab and return to the view.
13. Refresh the view to make all task assignments from that project disappear.
14. Click the next project in the list and repeat steps 10-13 until the view is empty.

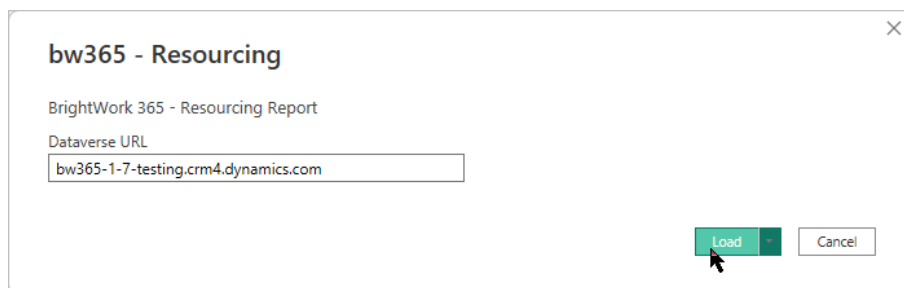
Update the Resource Report and the Project Portfolio Report

1. Copy the URL of your BrightWork 365 app up to and including 'dynamics.com'.

Do not include https:// in the copy!



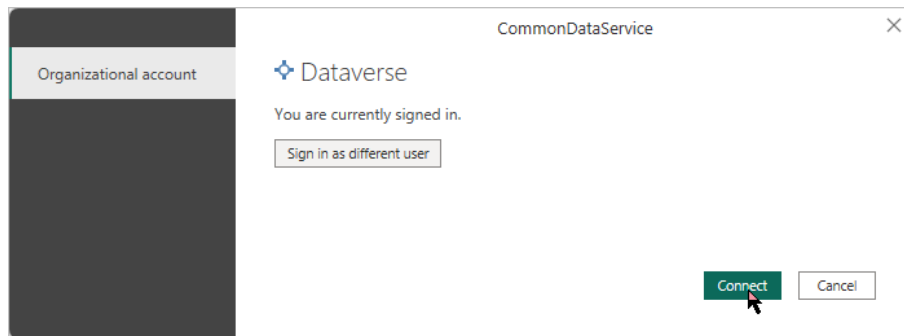
2. Return to the download folder and open the **bw365 - Resourcing.pbit** file.
A window will open requiring you to enter content.
3. Paste the copied URL into the Dataverse URL field and click **Load**.



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

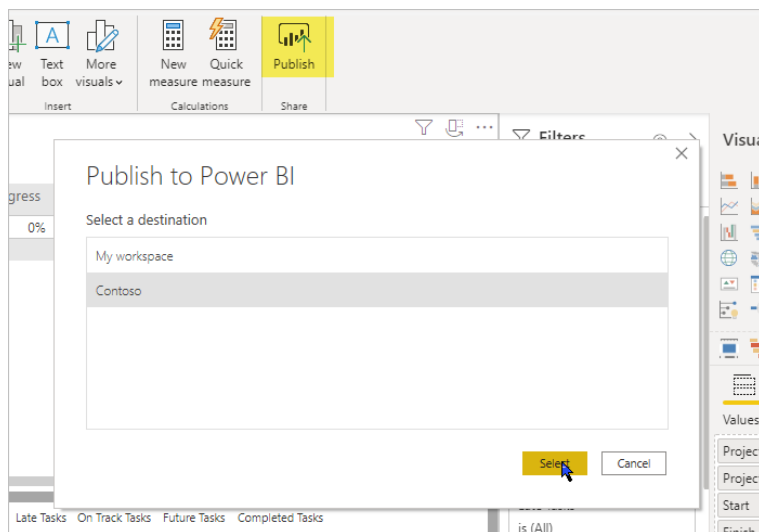
4. You will be prompted to sign into Dataverse.

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

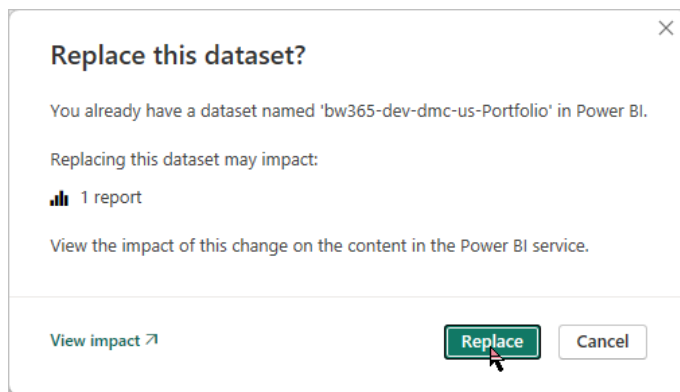


The report should load and display whatever data exists in your BrightWork 365 environment. If you experience errors that prevent the data from loading, this might be caused by a network adapter setting. In the settings of your computer's active network adapter, uncheck 'Internet Protocol Version 6 (TCP/IPv6)'.

5. Click **F12** on your keyboard and save the PBIX file over the old PBIX Resource report file.
6. Click **Publish** and login if prompted.
7. Select the Workspace into which the reports were previously published and click **Select**.



8. Click **Replace**.



9. Repeat the above steps for the Portfolio report.

v1.8 Release Upgrade Steps

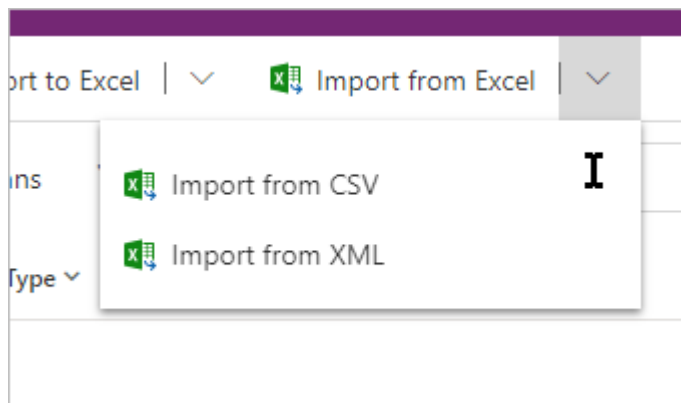
Update Form, Project, and Request Templates

Update Form Template.

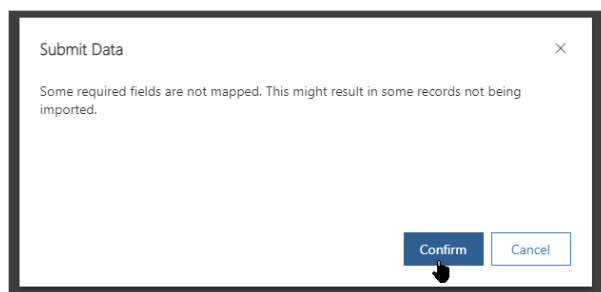
1. Navigate to the Templates Area and click **Form Templates**.
2. Rename the 'Project Standard (v2.0)' form template to 'BrightWork 365 Project'.

Update Project Templates

1. Click **Project Templates** on the navigation in the Templates Area.
2. Click **Project Standard** and rename it to Project Structured.
3. Click **Import from Excel | Import from CSV**.

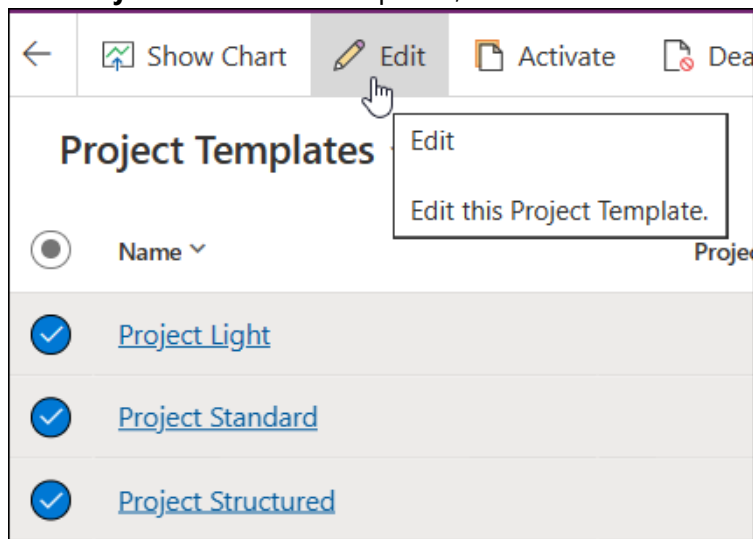


4. Click **Choose File**, select the project-templates-upgrade.csv file and click **Next**.
5. Click **Review Mapping**.
6. Click **Finish Import**. It is ok to ignore messages about unmapped fields.
7. Click **Confirm**.



8. Click **Track Progress**, click **OK**, wait for the import to complete, and then click **Done** on the original import screen.

- On the Project Templates screen, click **Refresh**, select the **Project Light**, **Project Standard**, and **Project Structured** templates, and click **Edit**.



- Select yourself as the Approvals Coordinator, select a Portfolio and Program, and select yourself as Project Manager and Project Sponsor, and click **Save**.

The screenshot shows the 'Form Project Template' interface. The 'Details' tab is selected. The form contains two main sections: 'Details' and 'New Project Defaults'. The 'Details' section has the following fields:

Field	Value	Field	Value
Name	---	Available in Requests	---
Approvals Coordinator	AVL Anne Wallace (Available in Projects	---
Form Template	---	Reference Type	---
Business Process Flow	---	Create Copy	---

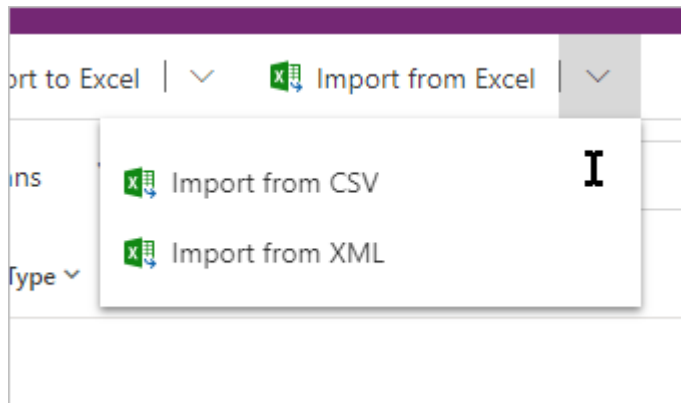
The 'New Project Defaults' section has the following fields:

Field	Value	Field	Value
Content Template	---	Project Manager	AVL Anne Wallace (Off)
Portfolio	Contoso Proje...	Project Sponsor	AVL Anne Wallace (Off)
Program	IT	Project Type	Strategic

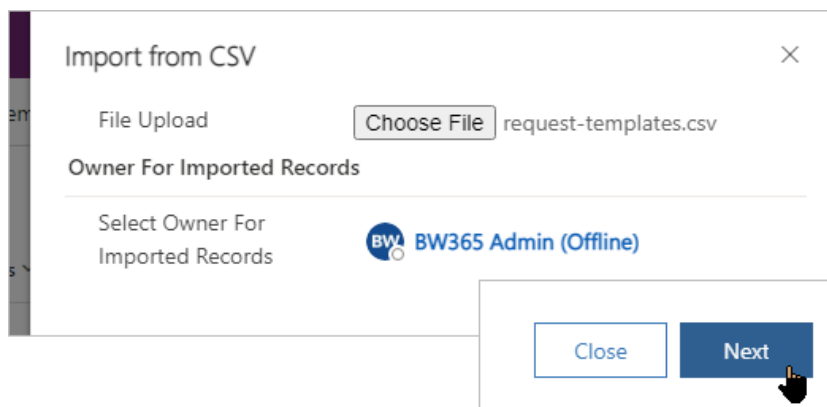
At the bottom right, there are 'Save' and 'Cancel' buttons. A hand cursor is pointing at the 'Save' button.

Update Request Templates

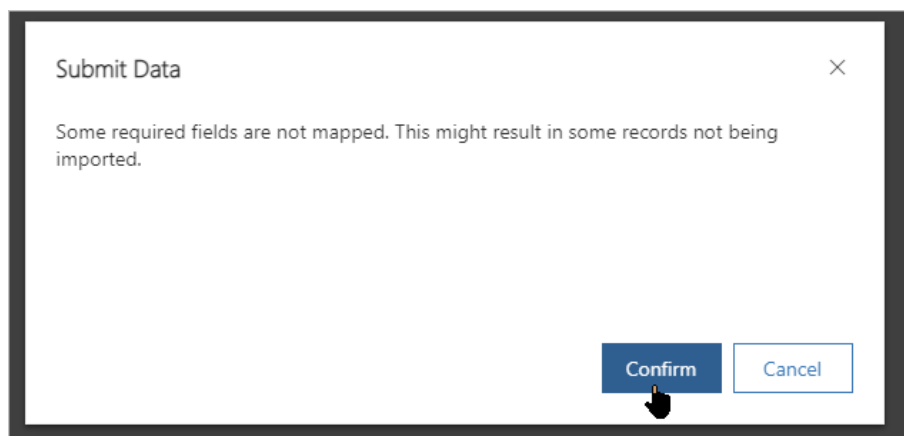
1. Click **Request Templates** on the navigation in the Templates Area.
2. Open the Project Standard Request Template and rename it to Project Structured.
3. Click **Save & Close**.
4. Click **Import from Excel | Import from CSV**.



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



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



9. Click **Done** and wait for the import to complete (you can check the Tracking page that was opened earlier).
10. On the Request Templates view, click **Refresh**, select the Project Standard and Project Light templates, and click **Edit**.
11. Make yourself the Approvals Coordinator and click **Save**.
12. You will also need to update the Approvers selections in the new Request Templates.

v1.7 Release Upgrade Steps

Update Power BI

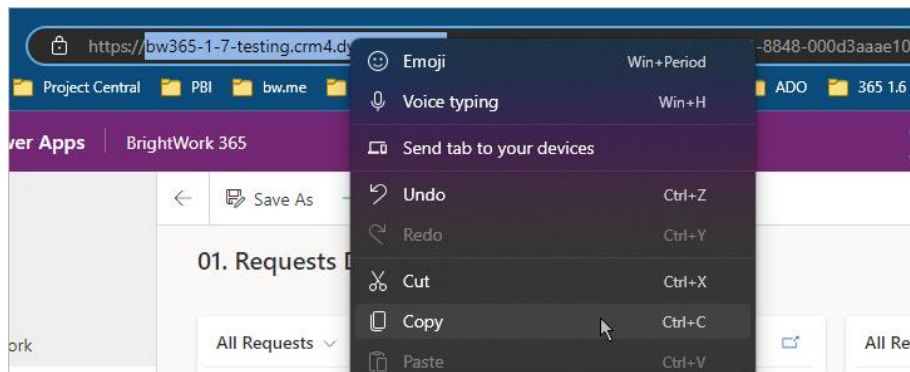
BrightWork 365 1.7 includes a new Power BI report for Resource Utilization.

All the other reports have also been updated and should be republished. This should be done by a user with access to the published PBIXs.

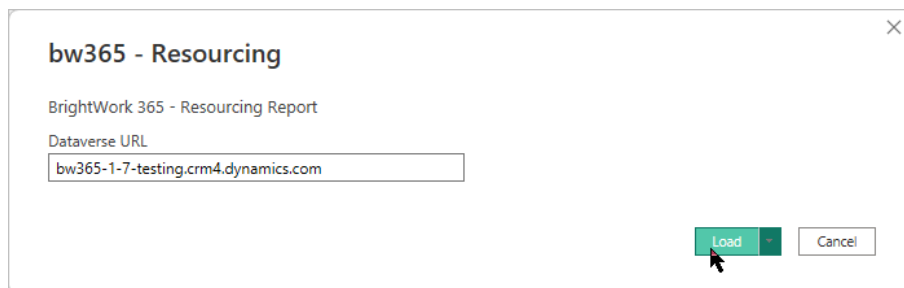
Add the Resource Report

1. Copy the URL of your BrightWork 365 app up to 'dynamics.com'.

Do not include https:// in the copy!

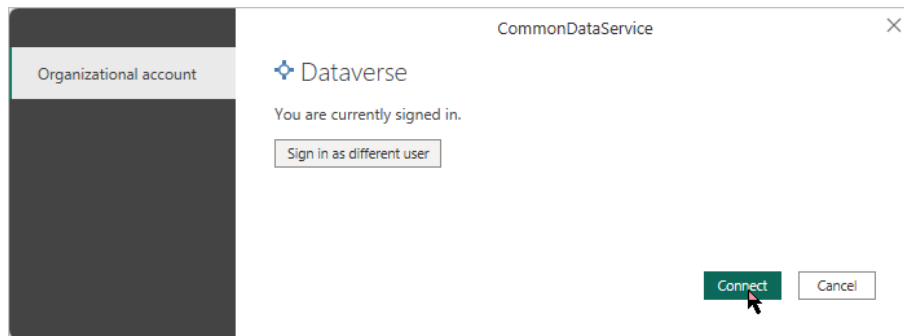


2. Return to the download folder and open the bw365 - Resourcing.pbix file.
A window will open requiring you to enter content.
3. Paste the copied URL into the Dataverse URL field and click **Load**.



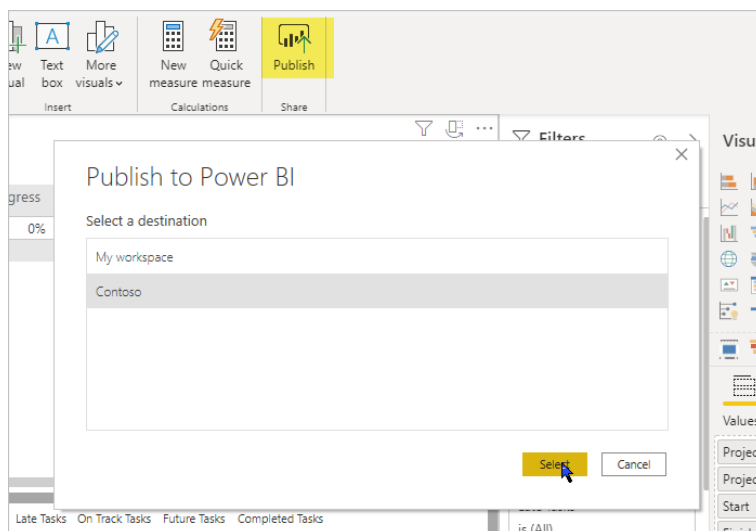
Note: The Dataverse URL should not have the HTTPS element in the URL.

4. You will be prompted to sign into Dataverse.
Use your Microsoft 365 credentials and click **Connect**.

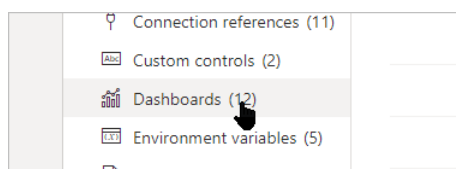


The report should load and display whatever data exists in your BrightWork 365 environment.

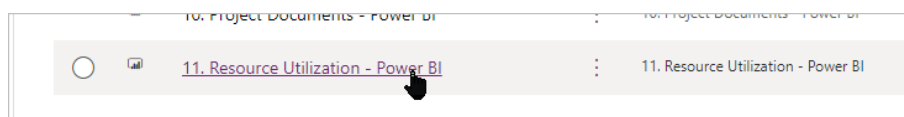
5. Click **F12** on your keyboard and save the PBIX file, for example, as BrightWork365 – Resourcing.pbix.
6. Click **Publish** and login if prompted.
7. Select the Workspace into which you want to publish the report and click **Select**.



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

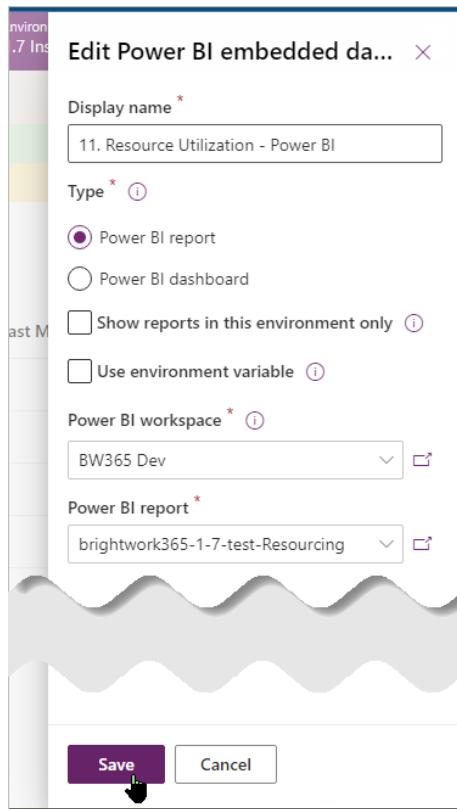


9. Click **11. Resource Utilization – Power BI**.



10. Select the Power BI workspace into which you published the PBIXs.

11. Select the Resourcing report and click **Save**.



Environment: .7 Ins

Edit Power BI embedded dashboard ✕

Display name *
11. Resource Utilization - Power BI

Type * ⓘ
☒ Power BI report
☐ Power BI dashboard

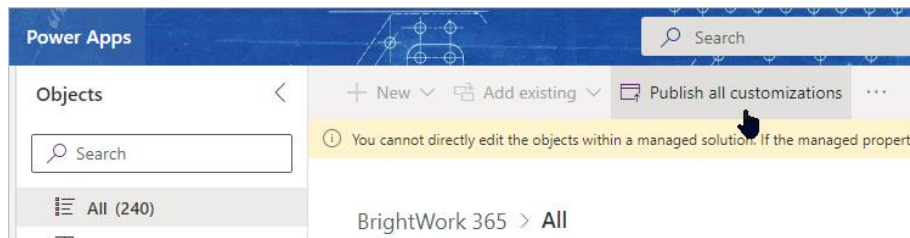
☐ Show reports in this environment only ⓘ
☐ Use environment variable ⓘ

Power BI workspace * ⓘ
BW365 Dev

Power BI report *
brightwork365-1-7-test-Resourcing

Save Cancel

12. Click **All | Publish all customizations**.



Update the My Work and Project Documents Reports

Repeat the above steps for the My Work.pbit, and the bw365 - Project Documents.pbit files. You will also need the URL of the SharePoint documents site. If you have access to the PBIXs used to publish the reports, save over them before publishing, and publish to the same location – this will save you having to carry out steps 8 to 12.

Add Zero Approvals Template

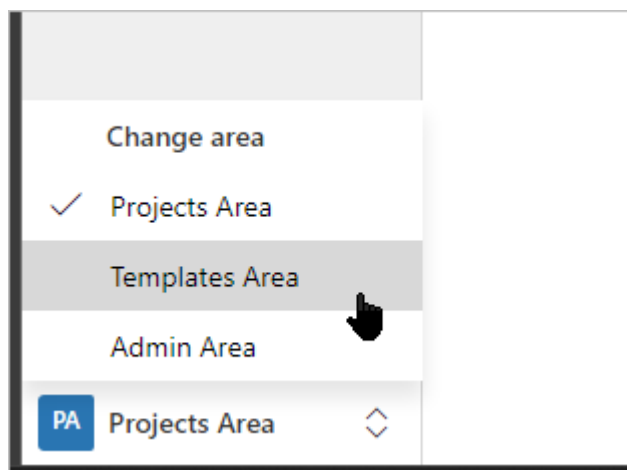
The Zero Approval Template is useful for organizations that do not require all projects to be approved but would still like to record project creation in the same place as projects that do require approval.

BrightWork 365 1.6 introduced Request Templates; however, a Zero Approval Template (available with version 1 of templates) was not included. This is now available.

If you are upgrading from BrightWork 365 1.5, you will get the template in your new CSVs. If you are upgrading from BrightWork 365 1.6 and would like to use the Zero Approvals Template, follow the steps below to add it to your organization.

Note: You will need to have the BrightWork Template Editor security role to complete the below task.

1. Login to BrightWork 365 and navigate to the Templates Area.



2. Click + **New** and create a form template as below:
 - Name: {enter your desired name for the Form Template}
 - Table: Request
 - Templates Version: Version 2
 - Form GUID: 1318ff88-4acd-ed11-b597-000d3a34e82d

3. Click **Save and Close**.

Project Request No Approval - Saved
Form Template

General

Name	*	Project Request No Approval
Table	*	Request
Templates Version	*	Version 2
Form GUID	*	1318ff88-4acd-ed11-b597-000d3a34e82d

4. Create a new Request Template that uses the new Form Template and the Project Request No Approval Business Process Flow.

Project Request No Approval - Saved
Request Template

Details Related ▾

Details

Name	*	Project Request No Approval	Reference Type	*	Automatic
Approvals Coordinator	*	Donal McCarthy	Auto-create Project		<input checked="" type="checkbox"/>
Form Template	*	Project Request No Approval	Available in Requests		<input checked="" type="checkbox"/>
Business Process Flow	*	Project Request No Approval	Create Copy		<input type="checkbox"/> No
Project Template	*	Project Standard			

Approval Labels

Customize Approval Labels ☐

Approve Reject Back to Draft

Add the Microsoft Team Column to Your Project Forms

If you want your project managers to be able to select a Microsoft Team before clicking Create Teams Channel, add the Microsoft Team column to your project forms. Talk to your BrightWork Consultant about getting this done.