



2025-2

Upgrade Guide

## Contents

Introduction .....	3
Pre-upgrade Steps .....	4
Enable French Language Pack.....	4
Enable Ownership Across Business Units.....	5
Update OrgSettings for your Environments .....	6
Turn off Move Records to New Business Unit.....	6
Turn on Allow Role Assignment on Disabled Users.....	6
Upgrade BrightWork Solution .....	8
Run Upgrade Handler .....	12
Prepare the Command.....	12
Run the Command .....	13
2025-2 Release Upgrade Steps .....	14
Set Up BrightWork 365 Graph Client App.....	14
Add the App .....	14
Add Environment to the App.....	18
Update Global Settings .....	19
Refresh Power BI Reports .....	20
v1.9 Release Upgrade Steps .....	22
Refresh Projects with Assignments .....	22
v1.8 Release Upgrade Steps .....	25
Update Form, Project, and Request Templates .....	25
Update Form Template. ....	25
Update Project Templates.....	25
Update Request Templates .....	27

Published: September 15, 2025

# Introduction

This guide includes the steps to upgrade BrightWork 365 from multiple versions. You should first Upgrade the BrightWork Solution and then start with the Upgrade Steps section for the version that you are upgrading to, i.e., if you are on BrightWork 365 1.7, start at v1.8 Release Upgrade Steps, and then work your way up the release versions.

If you have custom project forms (i.e. Save As forms) you will likely need to carry out upgrade steps on these forms. The steps depend on the version you are upgrading from.

See the [Custom Forms Upgrade Guide](#) for the necessary steps.

---

**Note:** We strongly recommend that you use a combination of one of our out-of-the-box forms and the form configurator. That way you will get future form updates without having to make any changes to the form. Talk to your Customer Success Partner to determine what you need to do.

---

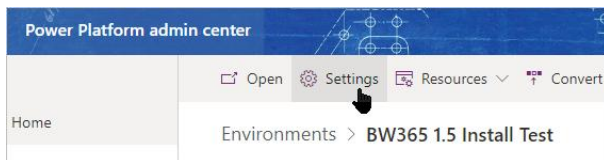
# Pre-upgrade Steps

If you are upgrading from a release prior to the 2024-2 release, you will have to perform these pre-upgrade steps. If you are upgrading from the 2024-2 release, you can skip this Pre-upgrade Steps section, as it will already have been performed.

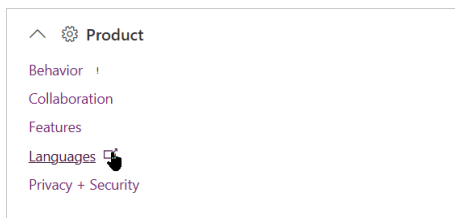
## Enable French Language Pack

This step is necessary even if you do not use the French language.

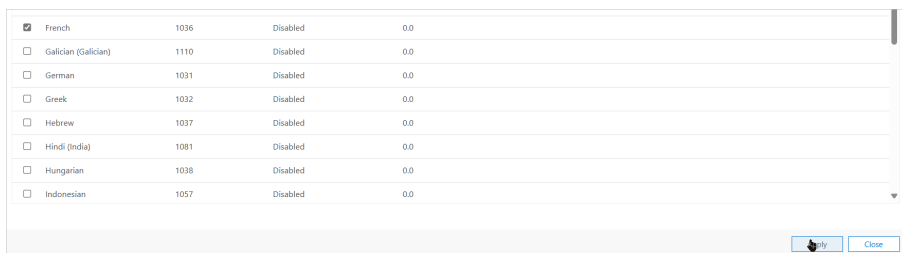
1. Navigate to <https://admin.powerplatform.microsoft.com/environments>.
2. Click the BrightWork 365 Environment.
3. Click **Settings**.



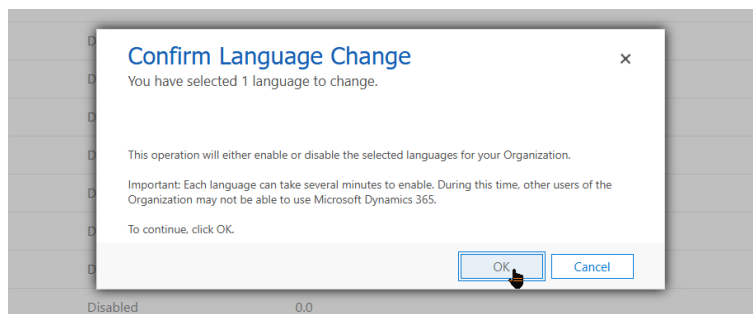
4. Expand **Product** and click **Languages**.



5. Select **French** and click **Apply**.

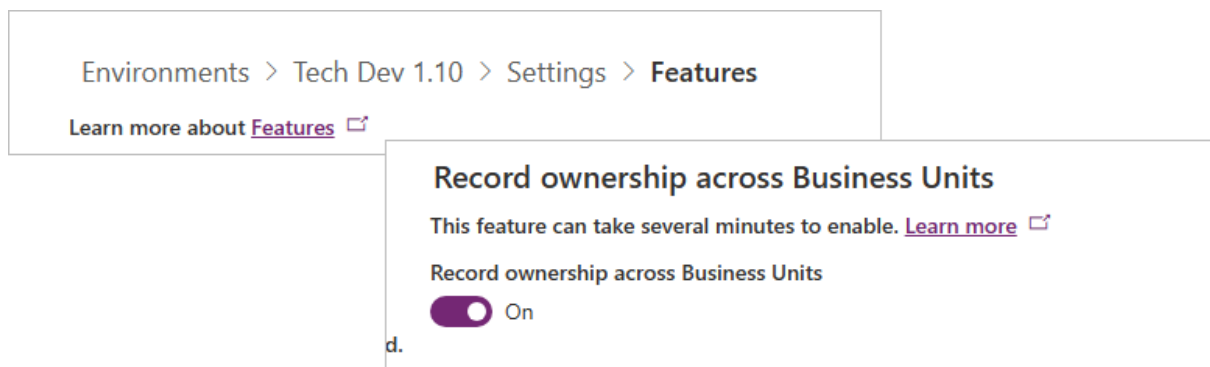


6. Click **OK** and wait for the install to complete (it can take 10 minutes to complete).

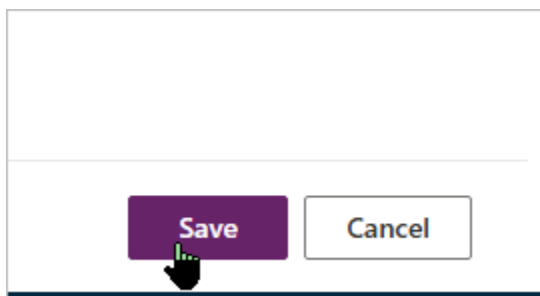


## Enable Ownership Across Business Units

1. Login to <https://admin.powerplatform.microsoft.com/> and go to the Settings page for the relevant environment.
2. Expand Product and click **Features**.
3. Enable **Record ownership across Business Units**.



4. Click **Save** and wait for the procedure to complete – do not close the 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](#)

### *Turn off 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 you will be able to maintain historical context in projects with users that have left your organization.

Start page Tools Org Settings (bw365-dev-dm... X			
NOTE: You should NOT change any setting without having a specific reason to do. Please ensure you have a back up of the current settings prior to changing them, available in Manual tab			
Close this tool	Refresh	Commit to bw365-dev-dmc-2024-3	Secondary Commit
Search			
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			
AuthorizationGrantMixedPrivilegesToDelegatedUsers			

File
Close
Show Dependencies
Actions

Solution: Organization Settings Editor (Dynamics 365)
Information

! You cannot directly edit the components within a managed solution. If the managed properties for solution components are set to allow customization, you can edit them in the Customizations area or from another unmanaged solution.

Solution Organization Settings Editor

Click a setting row for more details at the bottom of the page. NOTE: you should not change any setting without having a specific reason to do so.

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

# Upgrade BrightWork Solution

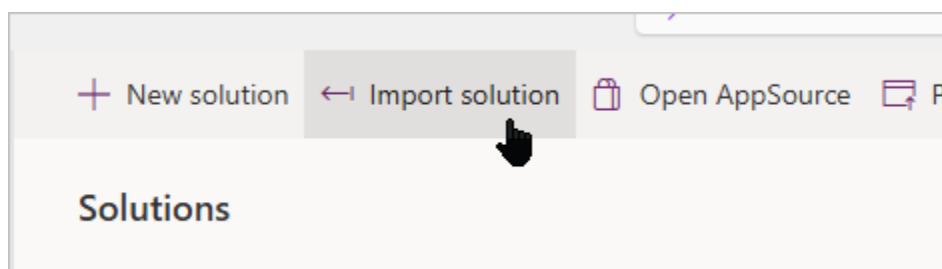
**NOTE:** BrightWork 365 should only be upgraded with the account that was used to install BrightWork 365. To determine what account that was, go to the BrightWork 365 install environment and open the BrightWork 365 solution. Click Cloud Flows – the account that is listed as the Owner of the flows is 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 20 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.

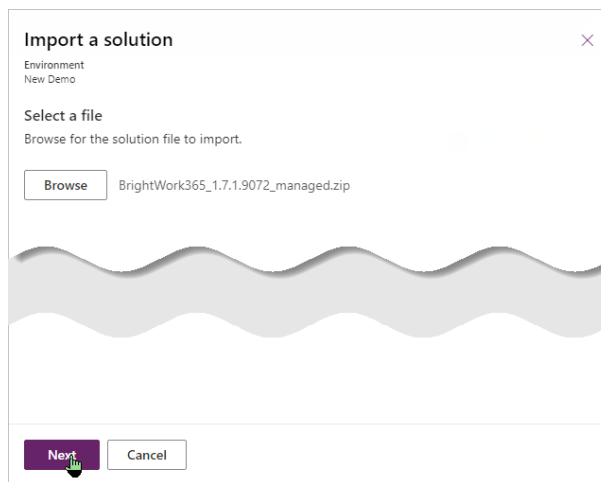
To upgrade BrightWork365:

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



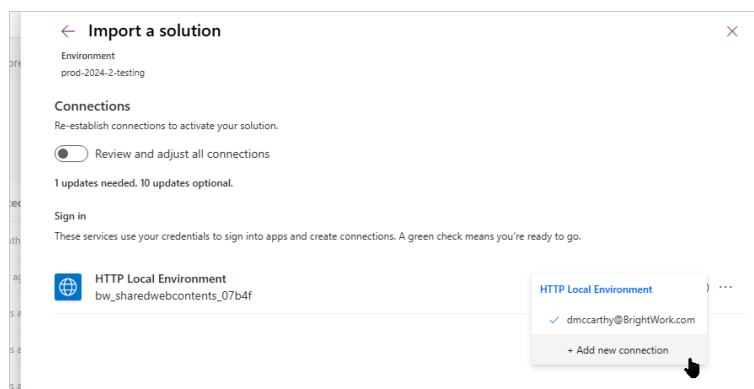


3. Select the BrightWork365 solution zip and click **Next** and **Next** again.

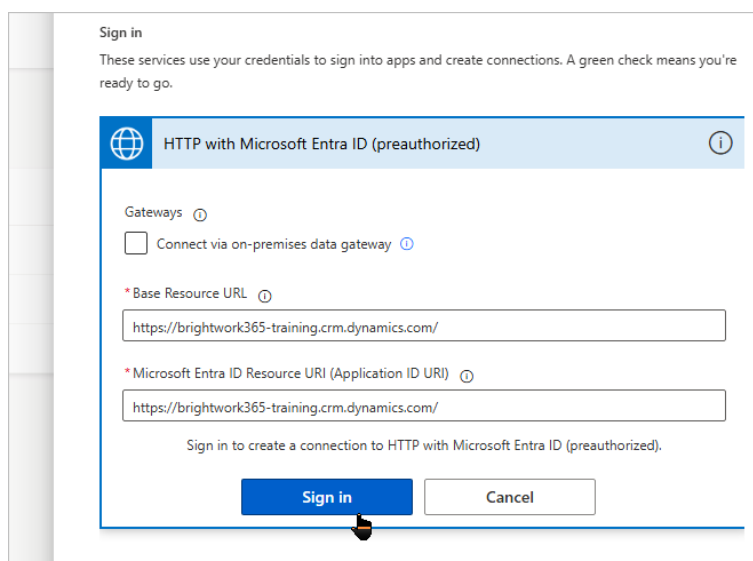


4. If you are upgrading from a release prior to the 2024-2 release, click **+Add new connection** for HTTP Local Environment.

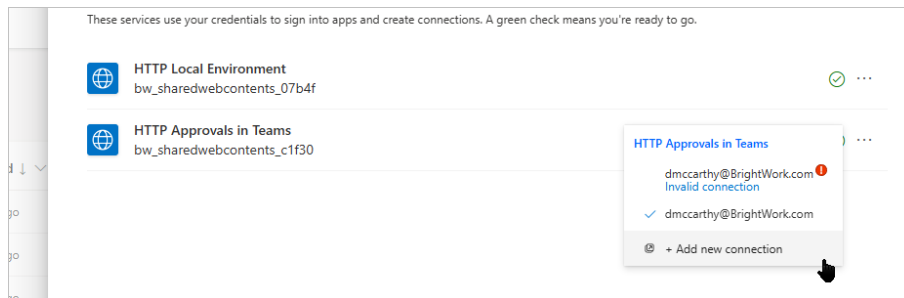
**Important:** You must do this, even if a green check shows.



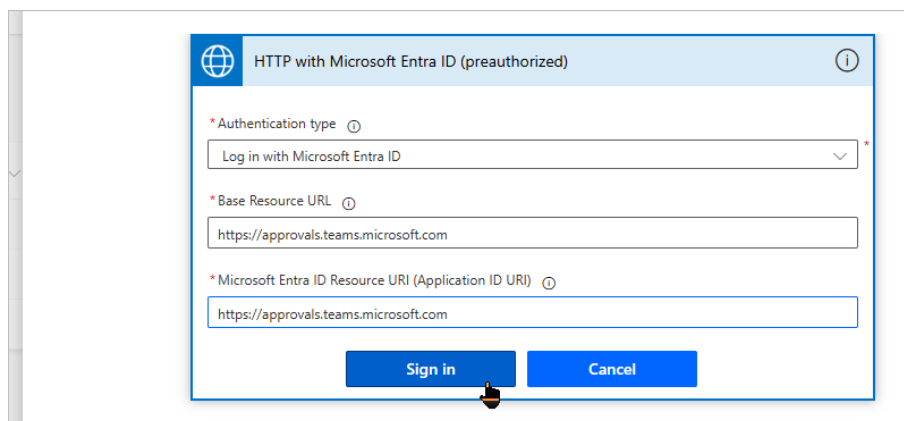
5. Paste in the Environment URL for your Dataverse environment (you can copy it from the Power Platform admin center home page for your environment).



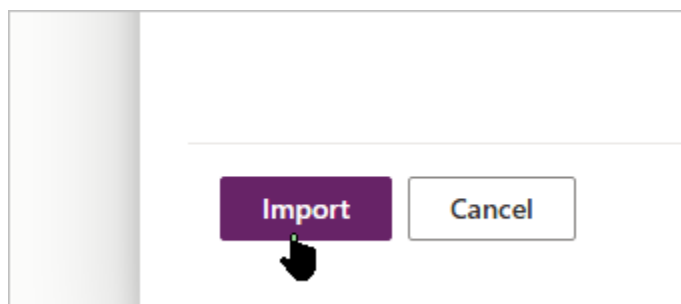
6. Sign in if asked.
7. Click + Add new connection. for the HTTP Approvals in Teams connection.



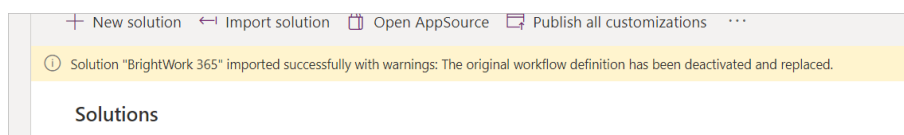
8. Copy and paste in <https://approvals.teams.microsoft.com> the two bottom fields and click Sign In.



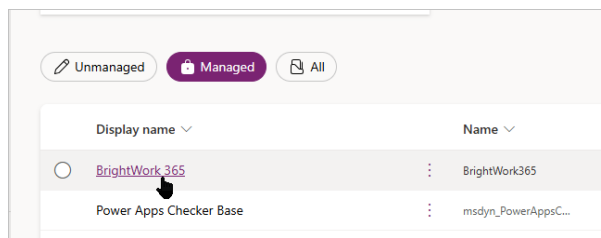
9. Click **Import** – do not change the default value of the Email HTML Placeholder environment variable.



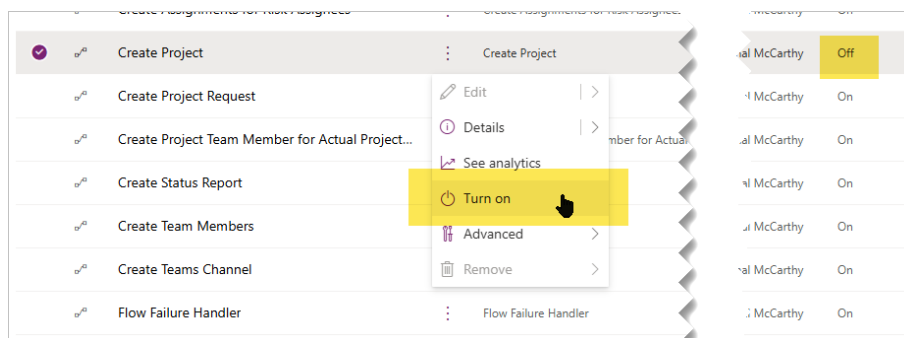
The upgrade process will take around 20 minutes. Wait until the upgrade completes and the bar goes yellow. It is safe to ignore any timeout messages you see during this time. It is also safe to ignore messages about workflows being deactivated and replaced.



10. Click **Managed** and **BrightWork 365**.



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



12. 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.

# Run Upgrade Handler

The BrightWork365.setup console application (Upgrade Handler) automates the record creation and updates that are required for this and previous releases.

See [here](#) for changes the upgrade handler makes for each release.

To use the console application, you need to have the Power Platform Administrator security role 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>.

You start with the command for the version right after the version you are upgrading from, then continue running all subsequent version commands until the latest version. If you are upgrading from BrightWork 365 1.8 or earlier, you must first run the upgrade handler for BrightWork 365 1.9, then run the upgrade handler for BrightWork 365 1.10, then run it for the 2025-1 command, and then continue with all subsequent version commands until the latest version.

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

```
.\BrightWork365.setup --service https://bw365-contoso-  
dev.crm.dynamics.com --version 1.10
```

```
.\BrightWork365.setup --service https://bw365-contoso-  
dev.crm.dynamics.com --version 2025.1
```

```
.\BrightWork365.setup --service https://bw365-contoso-  
dev.crm.dynamics.com --version 2025.2
```

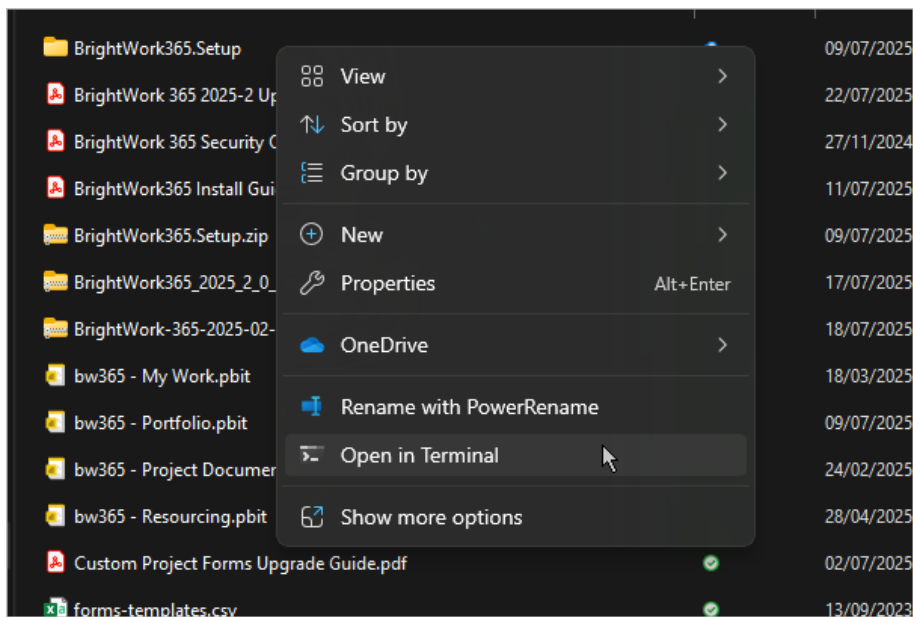
If you want to see a preview of the updates that will be made, add `--report` at the end of the command, e.g.

```
.\BrightWork365.setup --service https://bw365-contoso-  
dev.crm.dynamics.com --version 2025.1 --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 on the unzipped 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.

# 2025-2 Release Upgrade Steps

## Set Up BrightWork 365 Graph Client App

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

The files tab in this channel then becomes the document location for the project, program, or portfolio. Alternatively, users can select another SharePoint document library folder to use as the document location for the project, program, or portfolio. Users do this via pickers that use a Microsoft Graph API to only return the Teams and SharePoint locations to which the logged-in user has access.

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*

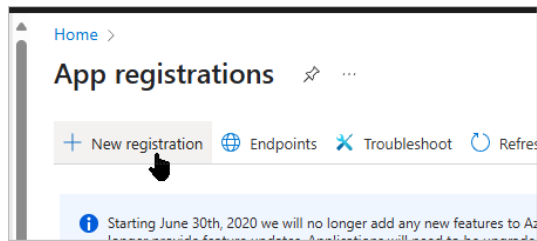
---

**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.

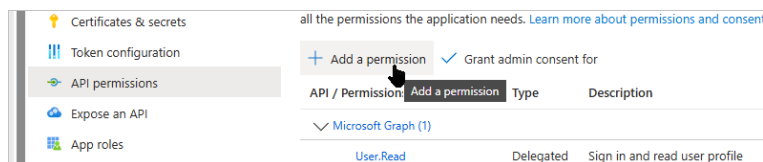
5. Select **Accounts in this organizational directory only (Single tenant)**.

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

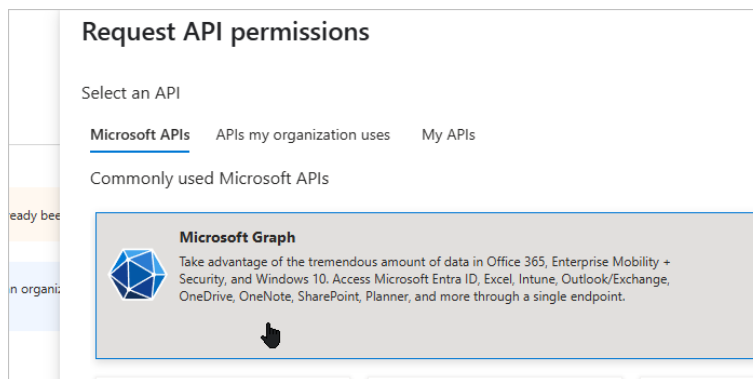
7. Click **Register**.

A screenshot of the 'Register an application' form in the Azure portal. The form is titled 'Register an application' with a breadcrumb 'Home > App registrations >'. It has a red asterisk next to the 'Name' field, which is labeled 'The user-facing display name for this application (this can be changed later)'. The 'Name' field contains 'BrightWork 365 Graph Client' with a green checkmark. Below this is the 'Supported account types' section, titled 'Who can use this application or access this API?'. It has four radio button options: 'Accounts in this organizational directory only (only - Single tenant)' (selected), 'Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)', 'Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)', and 'Personal Microsoft accounts only'. There is a 'Help me choose...' link. Below this is the 'Redirect URI (optional)' section, titled 'We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.' It has a dropdown menu set to 'Single-page application (SPA)' and a text input field containing 'https://bw365-2025-2-demo.cm.dynamics.com' with a green checkmark. Below this is a note: 'Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from Enterprise applications.' At the bottom, there is a link 'By proceeding, you agree to the Microsoft Platform Policies' and a blue 'Register' button with a mouse cursor hovering over it.

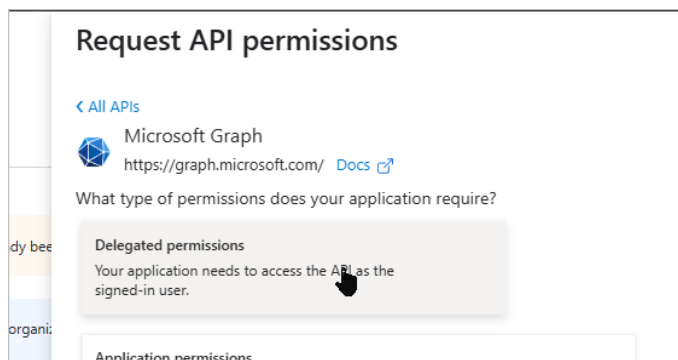
8. Click **API Permissions | + Add a permission**.



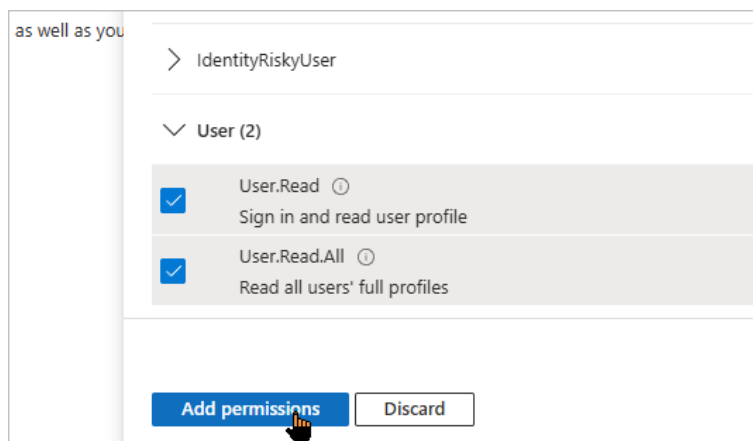
9. Click **Microsoft Graph**.



10. Click **Delegated permissions**.



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

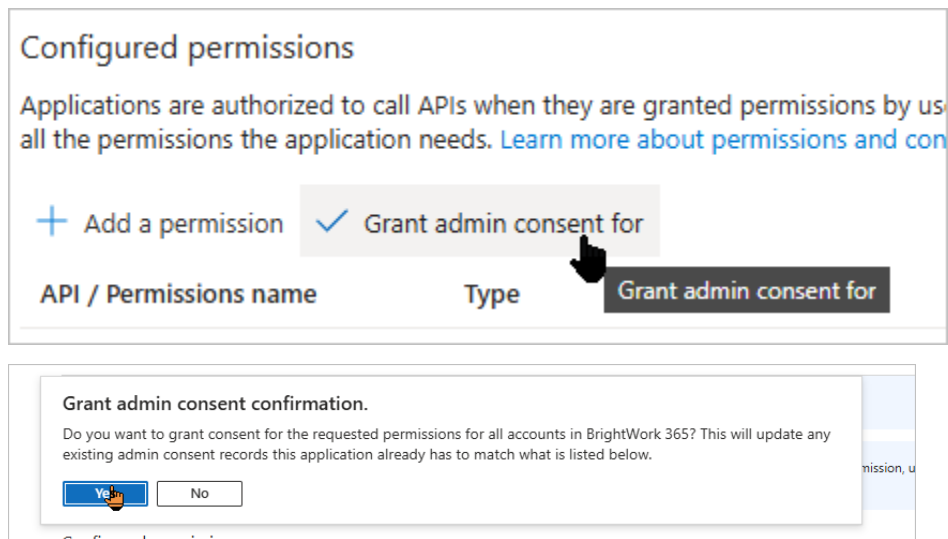


12. Repeat these steps for the following permissions:

- 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



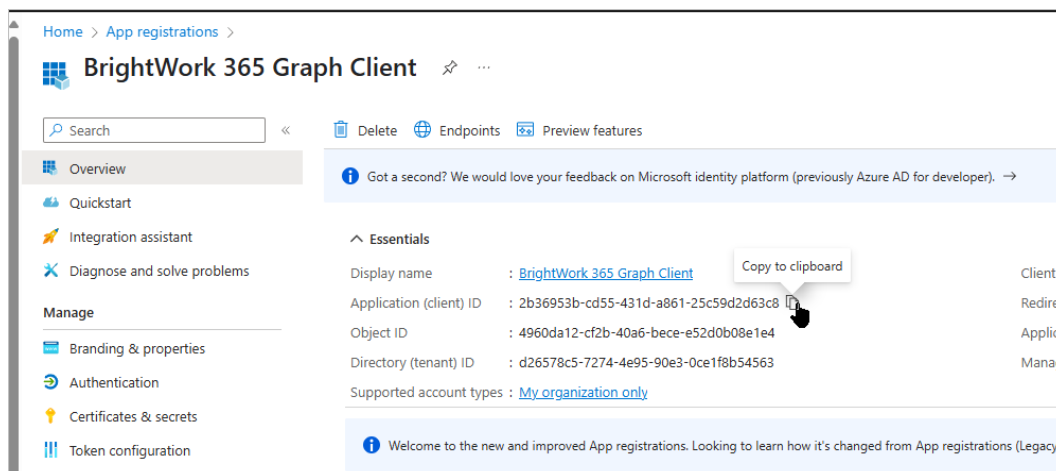
13. Click **Grant admin consent** for and then **Yes** to confirm.



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. <a href="#">Learn more about permissions and consent</a>					
+ 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.

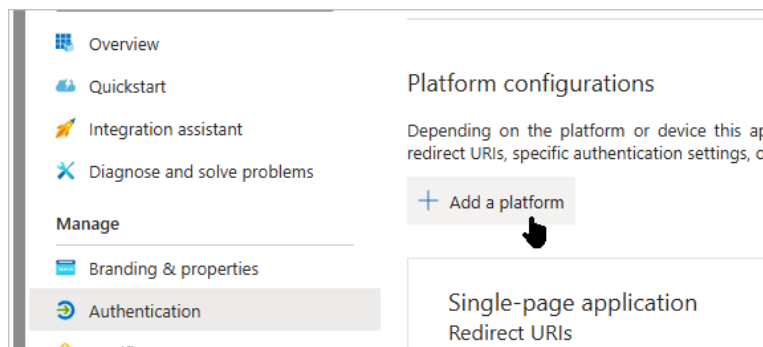


15. Bookmark this page.

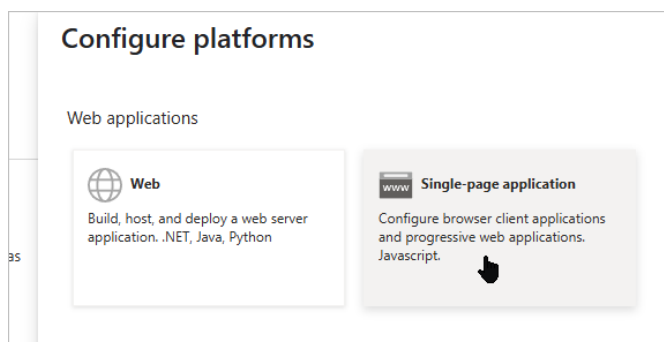
## Add Environment to the App

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

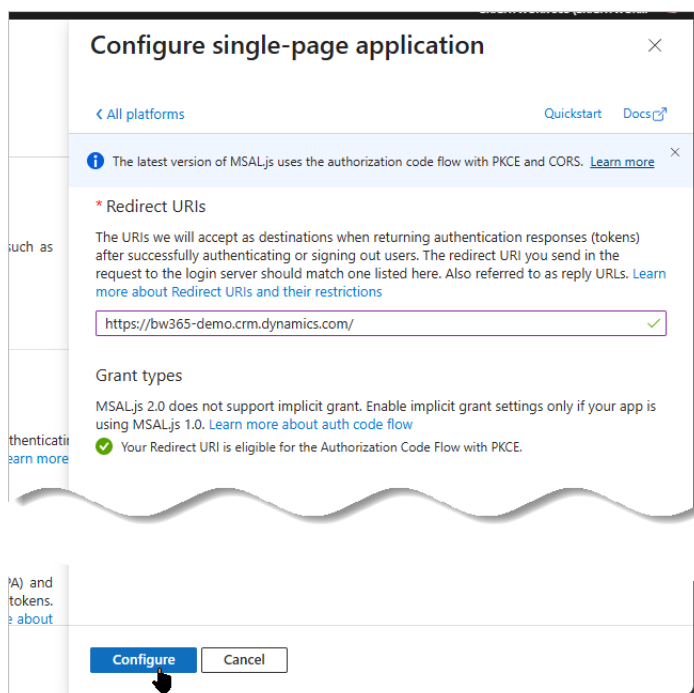
1. Navigate to the BrightWork 365 Graph Client app registration home page.
2. Click **Authentication** on the navigation.
3. Click **+ Add a Platform**. You may need to switch to the 'old experience' to see this option.



4. Click Single-page application.



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



## Update Global Settings

Navigate to the Global Settings record (located in the Admin area in the BrightWork 365 app) for each environment added to the app in the previous section and paste the Application (client) ID and Directory (tenant) ID into the corresponding columns in the Configuration tab.

Note this needs to be done in every environment in which you want to use the BrightWork 365 Graph Client app.

The screenshot shows the 'BrightWork 365 Graph Client' configuration page. The left sidebar contains navigation links: Overview, Quickstart, Integration assistant, Diagnose and solve problems, Manage, and Branding & properties. The main content area is titled 'Essentials' and lists the following configuration details:

- Display name : [BrightWork 365 Graph Client](#)
- Application (client) ID : 598f3d7a-1477-428d-9c96-d6205e355cf1
- Object ID : 245d7d4e-9ad1-413b-989d-c2f8bd48d373
- Directory (tenant) ID : 47855d14-ddba-4b37-9f1d-25b9d934c0e9
- Supported account types : [My organization only](#)

The screenshot shows the 'Global Setting - Configuration' tab. It includes a 'Gantt' section with a toggle for 'Enable Virtual Scroll' set to 'Yes'. Below this is a 'BrightWork 365 Graph Client' section with a description: 'Enabling Graph Integration will allow approved applications to connect and work more effectively with your Microsoft 365 environment, leading to more integration and functionality within BrightWork 365.' The configuration details are as follows:

Field	Value
Application (client) ID	598f3d7a-1477-428d-9c96-d6205e355cf1
Directory (tenant) ID	47855d14-ddba-4b37-9f1d-25b9d934c0e9

At the bottom, the 'Version' section shows 'BrightWork 365 Version' as 2025.2.0.15232.

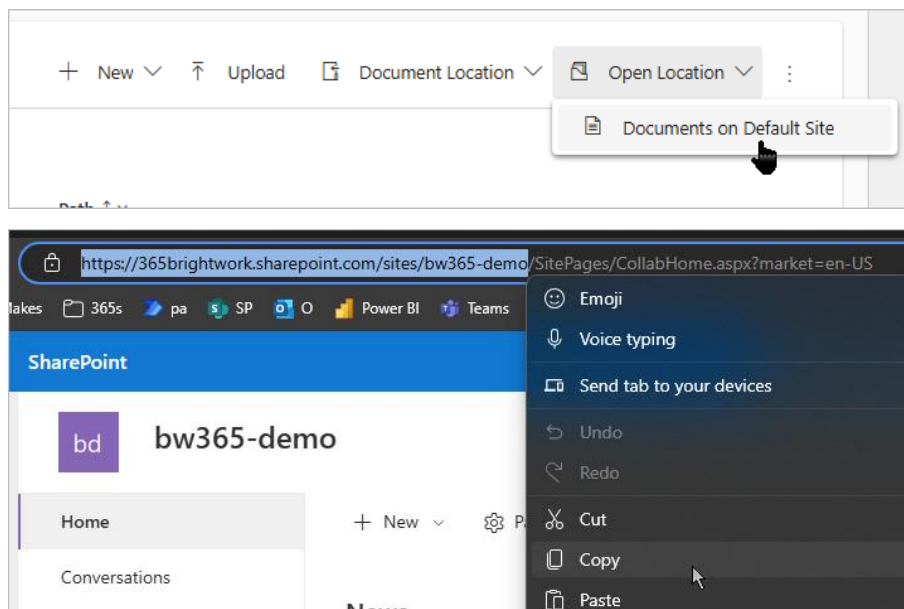
# Refresh Power BI Reports

The four Power BI reports need to be refreshed and republished with the latest versions in the download zip. You should save the reports over the existing PBIXs, as this means you only have to publish the reports to replace the existing ones.

To complete this section, you will need the URL of your SharePoint site and the URL of your BrightWork 365 app.

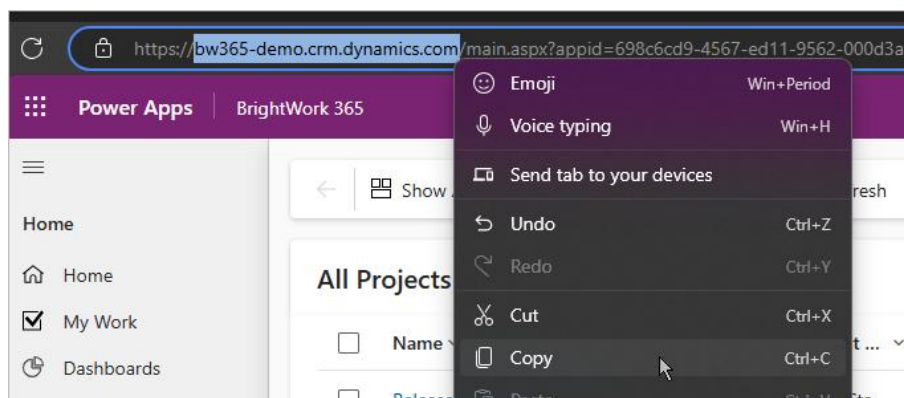
1. Open the bw365 - Project Documents.pbix file.
2. Paste the URL from your SharePoint site into the SharePoint Site URL field.

To get the URL, expand the Open Locations menu on a Documents tab and click on the link.

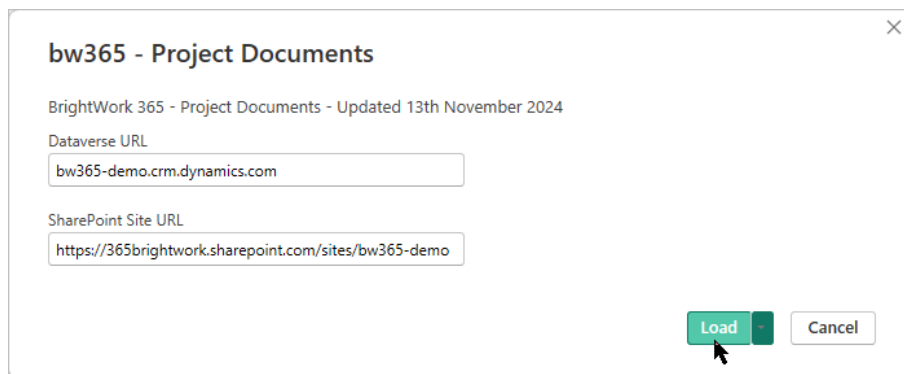


3. Copy your BrightWork 365 URL, up through 'dynamics.com'.

Do not include https:// in the copy!



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



**bw365 - Project Documents**

BrightWork 365 - Project Documents - Updated 13th November 2024

Dataverse URL  
bw365-demo.crm.dynamics.com

SharePoint Site URL  
https://365brightwork.sharepoint.com/sites/bw365-demo

**Load** **Cancel**

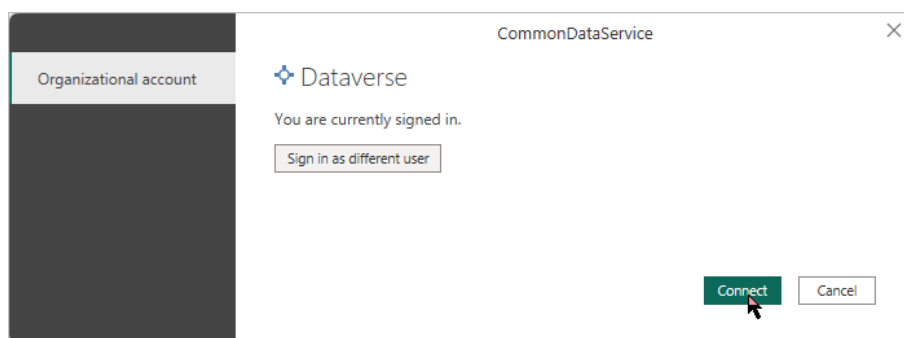
---

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

---

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

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



CommonDataService

Organizational account

**Dataverse**

You are currently signed in.

Sign in as different user

**Connect** **Cancel**

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

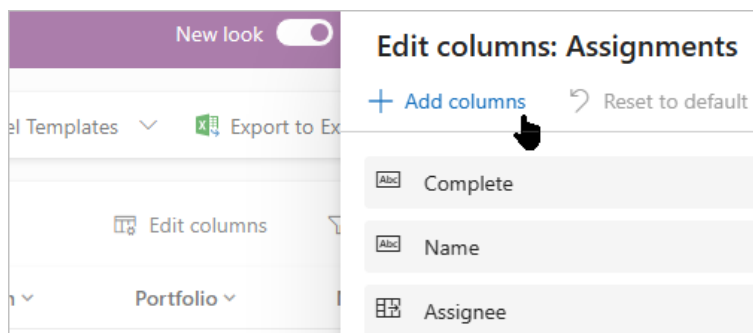
6. Click **F12** on your keyboard and save the PBIX file over the existing PBIX file that matches the name of the PBIT, for example, as BrightWork365 – Documents.pbix.
7. Click **Publish** and login if prompted and publish the report to the relevant workspace.
8. Repeat for the bw365 - Portfolio.pbit, bw365 - Resourcing.pbit and the bw365 - My Work.pbit – you will not be required to set up the SharePoint connection for these reports.

# v1.9 Release Upgrade Steps

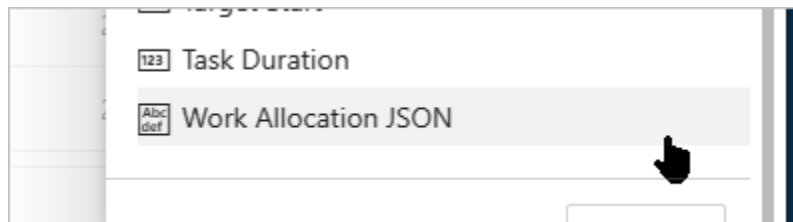
## Refresh Projects with Assignments

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.

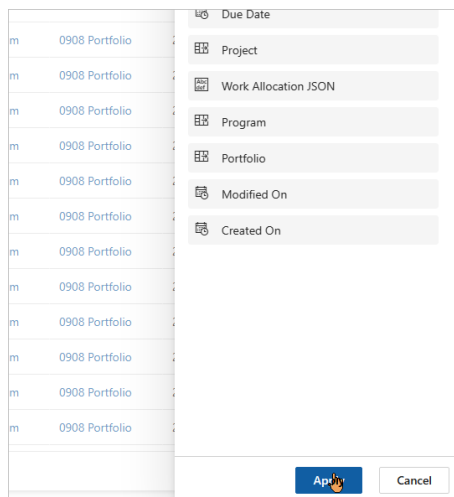
1. Click **My Work** and select the **1. All Work** view.
2. Click Edit Columns and then **+ Add columns**.



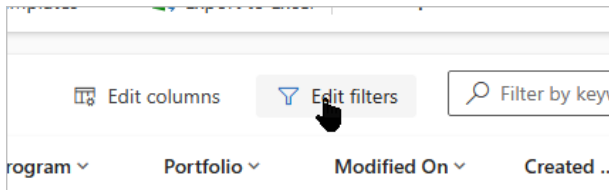
3. Select the **Work Allocation JSON** column and click **Close**.



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



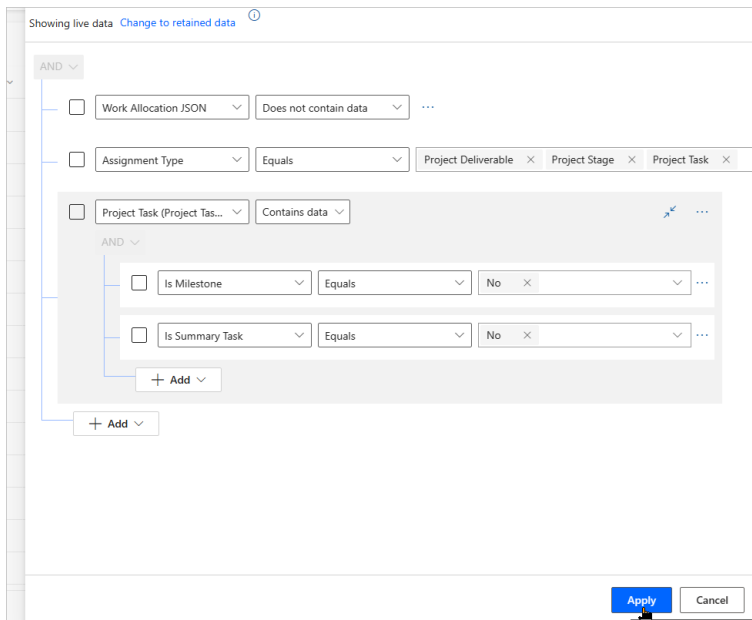
5. Click **Edit filters**.



6. Update the filter so it has the following conditions:

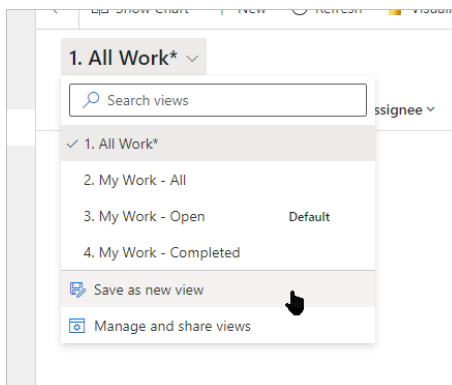
- a. Work Allocation JSON Does Not Contain Data
- b. Assignment Type equals Project Deliverable, Project Stage, Project Task
- c. Related Entity: Project Task
  - i. Is Milestone Equals No
  - ii. Is Summary Task Equals No

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"/>	<a href="#">New Task2</a>	 Alex Han...	100.00	Not Sta...	<a href="#">DMC 1</a>	
<input type="checkbox"/>	<a href="#">New Task2</a>	 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.



# v1.8 Release Upgrade Steps

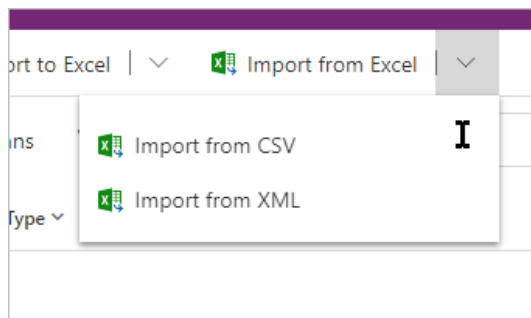
## Update Form, Project, and Request Templates

### *Update Form Template.*

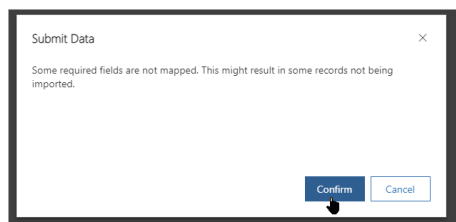
1. Navigate to the Templates Area and click **Form Templates**.
2. Rename the 'Project Standard (v2.0)' form template to 'BrightWork 365 Project'.

### *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**.



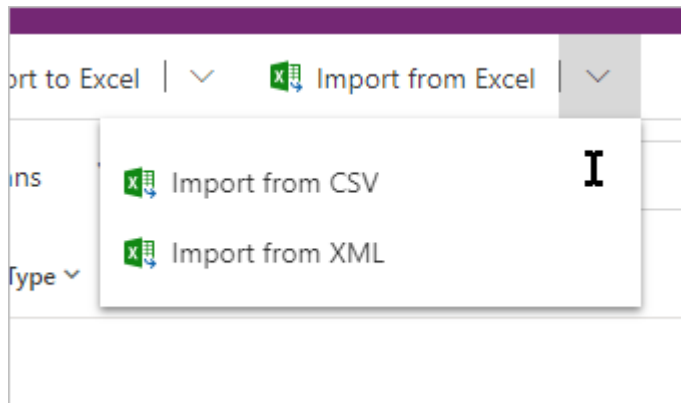
8. Click **Track Progress**, click **OK**, wait for the import to complete, and then click **Done** on the original import screen.

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

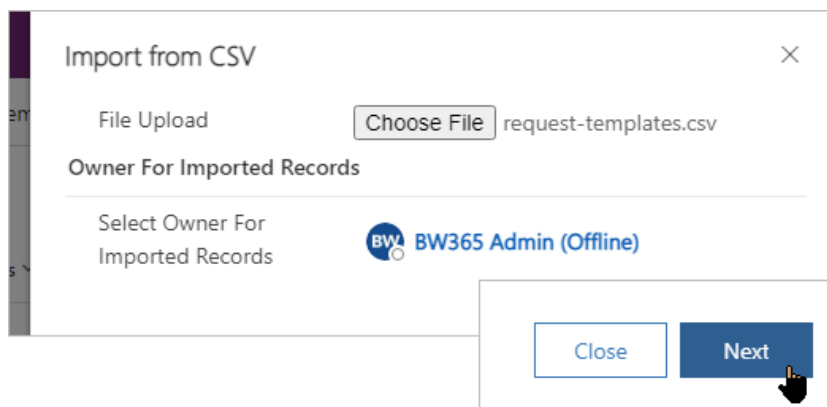
- Select yourself as the Approvals Coordinator, select a Portfolio and Program, and select yourself as Project Manager and Project Sponsor, and click **Save**.

## Update Request Templates

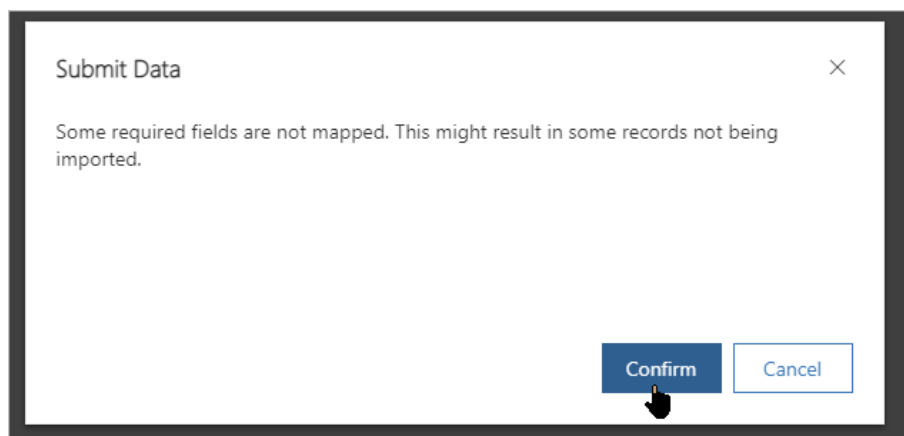
1. Click **Request Templates** on the navigation in the Templates Area.
2. Open the Project Standard Request Template and rename it to Project Structured.
3. Click **Save & Close**.
4. Click **Import from Excel | Import from CSV**.



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.