BrightWork365

2026-1
Upgrade Guide

Contents

Published: February 25, 2026

Introduction – Please Read

This guide includes the steps to upgrade BrightWork 365 from multiple versions.

You should first complete the Steps for Pre-2024-2 Upgrades if you are upgrading from BrightWork 365 2024-1 or earlier.

All users should upgrade the BrightWork Solution and then run the upgrade handler, if necessary.

Finally, complete the Upgrade Steps section for the versions after your current version for example, if you are on BrightWork 365 1.8, start at v1.9 Release Upgrade Steps, and then work your way up the release versions.

Note: If you are upgrading from BrightWork 365 2025-2, there are no further update steps after upgrading the BrightWork solution.

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.


Steps for Pre-2024-2 Upgrades

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 or later, you can skip this section, as the steps in it will already have been performed.
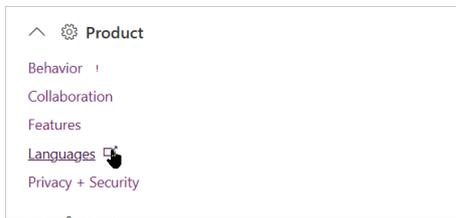
Enable French Language Pack

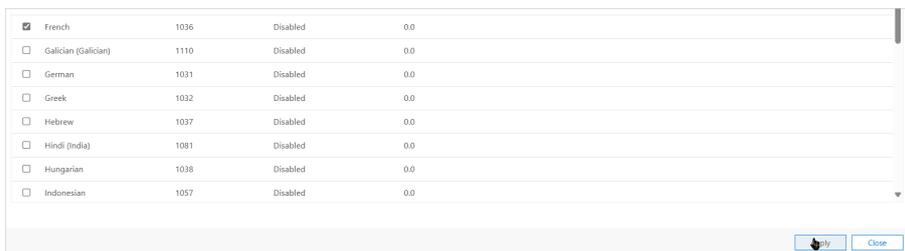This step is necessary even if you do not use the French language.

1. Navigate to https://admin.powerplatform.microsoft.com/environments.

2. Click the BrightWork 365 Environment.
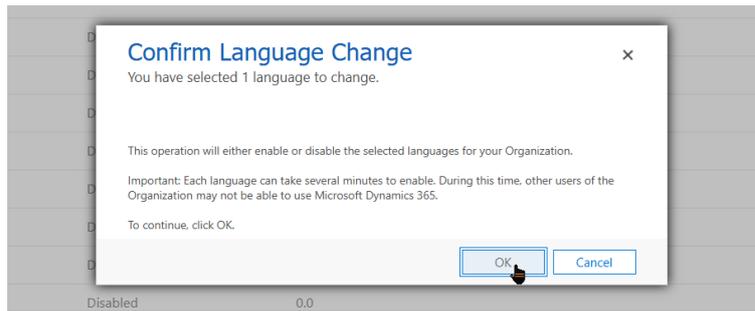
3. Click **Settings**.
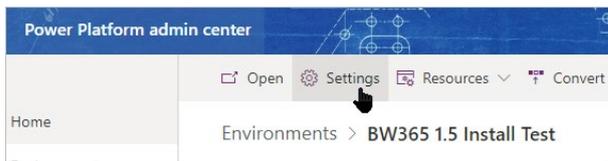
4. Expand **Product** and click **Languages**.

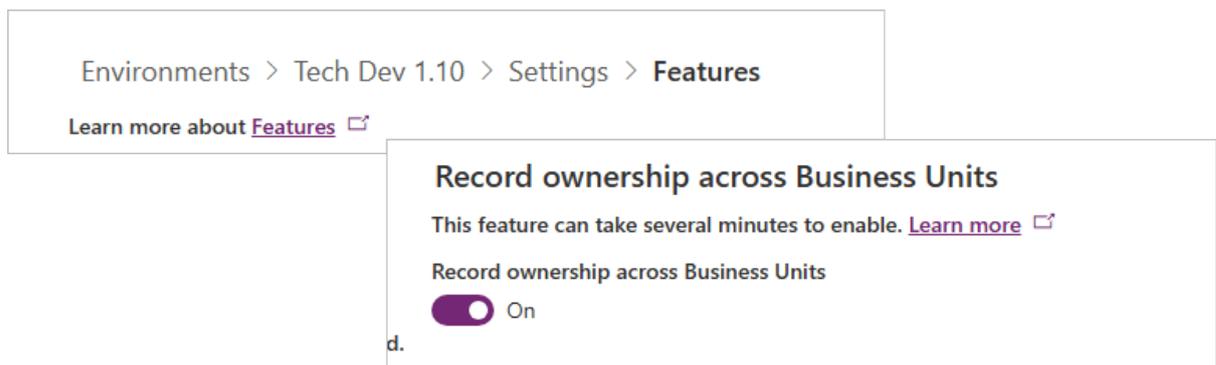5. Select **French** and click **Apply**.

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.
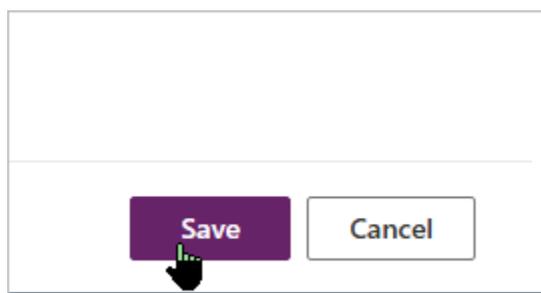
Update OrgSettings for your Environments

Some Power Platform environment settings are not available in the Power Platform Admin Center and must be set using an external tool.
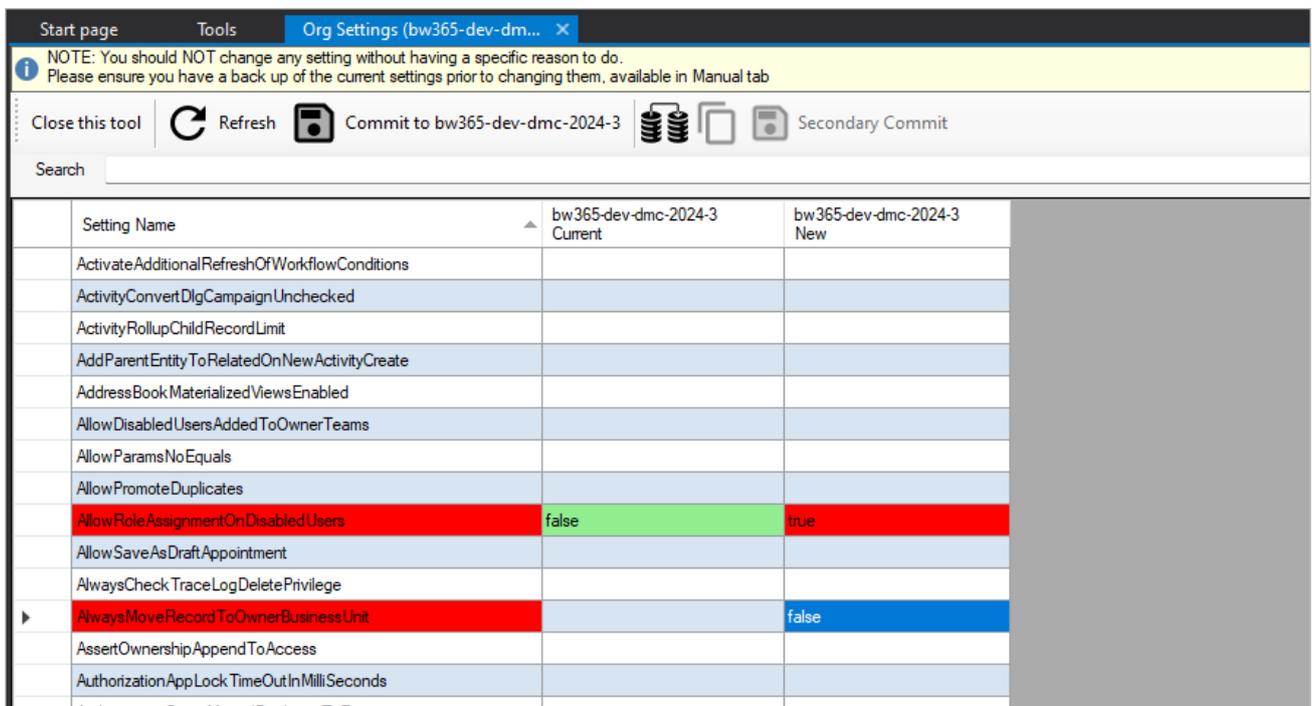
There are two ways to do this:

- 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.

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 Organization Settings Ed...

- 📄 Information
- ⚙ Configuration
- 🟦 Components
  - 📋 Entities
  - 📋 Option Sets
  - 📋 Client Extensions
  - 📋 Web Resources
  - 📋 Processes
  - 📋 Plug-in Assemblies
  - 📋 Sdk Message Processin...
  - 📋 Service Endpoints
  - 📋 Dashboards
  - 📋 Dialog Boxes
  - 📄 Reports
  - 📋 Connection Roles
  - 📋 Email Templates
  - 📋 Mail Merge Templates
  - 📋 Security Roles
  - 📋 Field Security Profiles
  - 📋 Model-driven Apps

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	KB2691237
ActivityConvertDigCampaignUnchecked	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

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.

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.
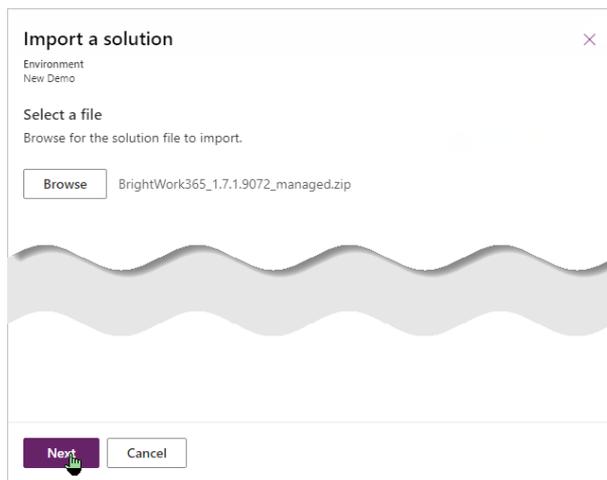
4. If you are upgrading from a release prior to the 2024-2 release, click **+Add new connection** for HTTP Local Environment.
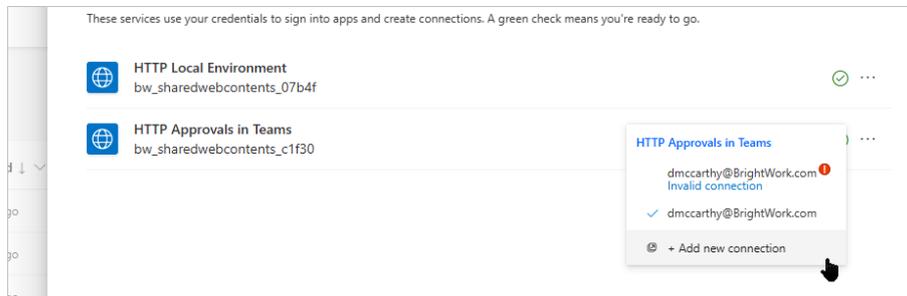
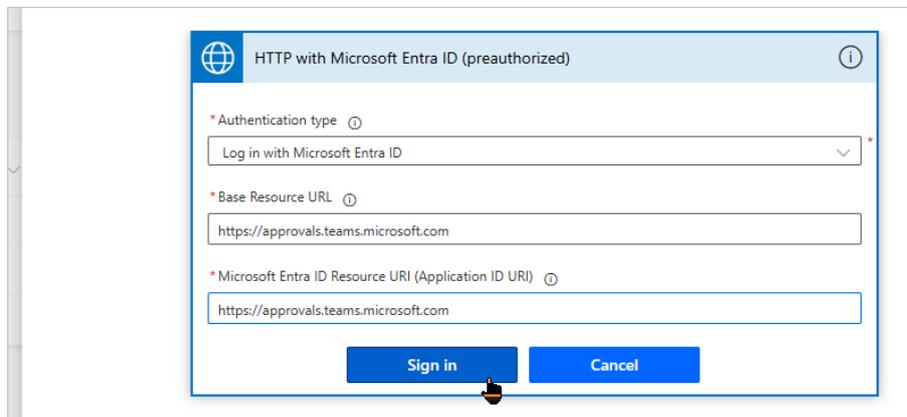   **Important**: You must do this, even if a green check shows.
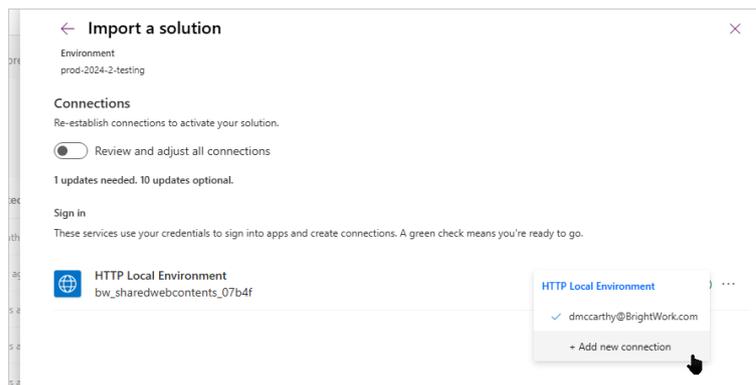
5. Paste in the Environment URL for your Dataverse environment (you can copy it from the Power Platform admin center home page for your environment).
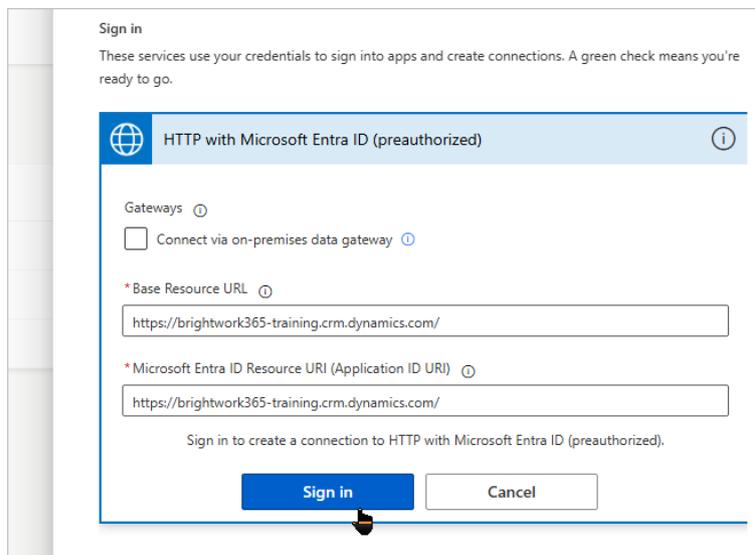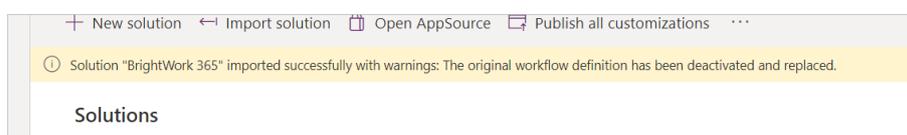
6. Sign in if asked.

7. Again, if you are upgrading from a release prior to the 2024-2 release, click **+Add new connection** for the HTTP Approvals in Teams connection.

These services use your credentials to sign into apps and create connections. A green check means you're ready to go.

🌐 **HTTP Local Environment**
bw_sharedwebcontents_07b4f ✅ ⋯

🌐 **HTTP Approvals in Teams**
bw_sharedwebcontents_c1f30 ⋯

HTTP Approvals in Teams
dmccarthy@BrightWork.com ❗ Invalid connection
✓ dmccarthy@BrightWork.com
⊕ + Add new connection

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

🌐 HTTP with Microsoft Entra ID (preauthorized) ⓘ

*Authentication type ⓘ

Log in with Microsoft Entra ID ⌄

*Base Resource URL ⓘ

https://approvals.teams.microsoft.com

*Microsoft Entra ID Resource URI (Application ID URI) ⓘ

https://approvals.teams.microsoft.com

Sign in   **Cancel**

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

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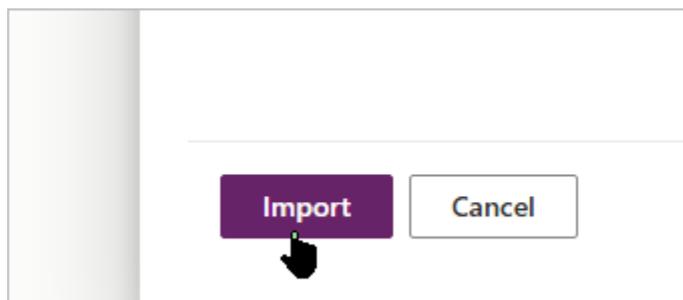
The upgrade process will take around 20 minutes. Wait until the upgrade completes and the bar goes yellow. It is safe to ignore any timeout messages you see during this time. It is also safe to ignore messages about workflows being deactivated and replaced.

＋ New solution   ←¹ Import solution   🗂 Open AppSource   🗔 Publish all customizations   ⋯

ⓘ Solution "BrightWork 365" imported successfully with warnings: The original workflow definition has been deactivated and replaced.

Solutions

10. Click **Managed** and **BrightWork 365**.
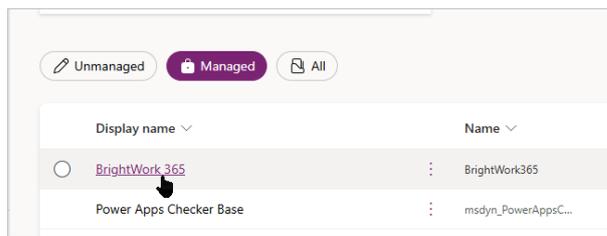
11. Click **Cloud Flows** and turn on any flows that are off – in particular, check the Create Project and Create Status Report flows.
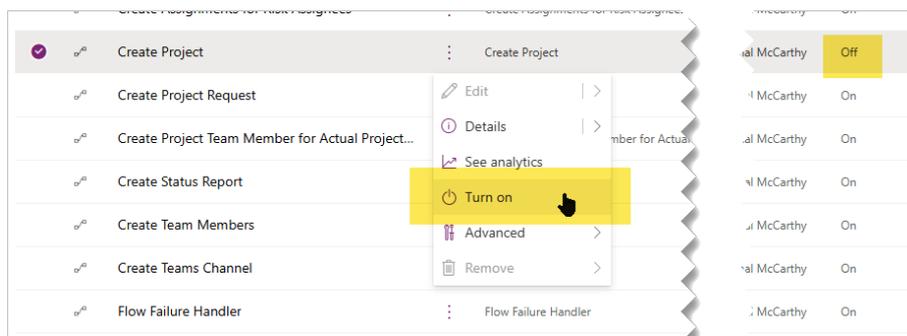
12. Repeat the above steps to import the updated version of your custom solution.

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

Run Upgrade Handler

Note: If you are upgrading from the 2025-2 release to the 2026-1 release, you can skip this section as no further updates are needed.

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). You must also run a command for every BrightWork release that needs one.

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
```

Note: The command does not need to be ran for the 2026-1 release.

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**.
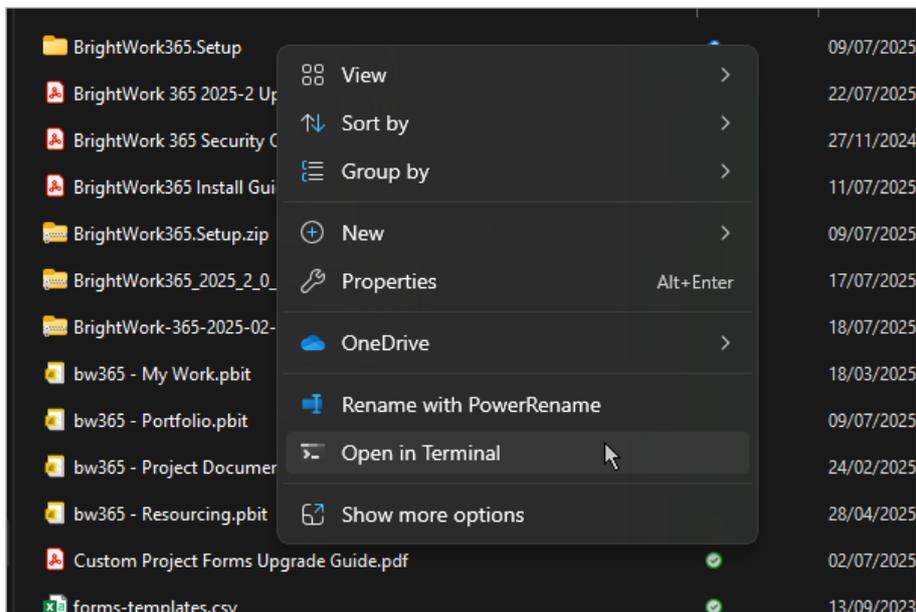
3. Paste in the command and click return on your keyboard.
4. Login to the authentication window that should open in a browser.

   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.

2026-1 Upgrade Steps

Hide Lessons Learned Tab

The Lessons Learned table was introduced in BrightWork 2026-1. While we appreciate that this new process is not appropriate to all scenarios, we are unable to hide it in existing Project Templates as we would run the risk of overwriting your form configurator customizations.
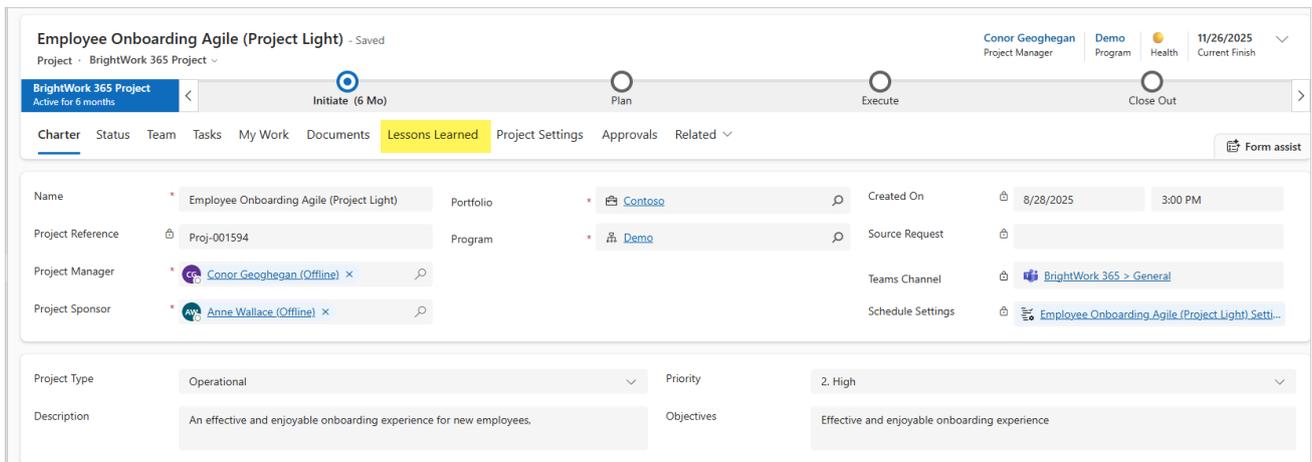
Follow the step below to hide the Lessons Learned tab in existing projects:

1. Open the BrightWork 365 app and click **Templates Area** on the area switcher.
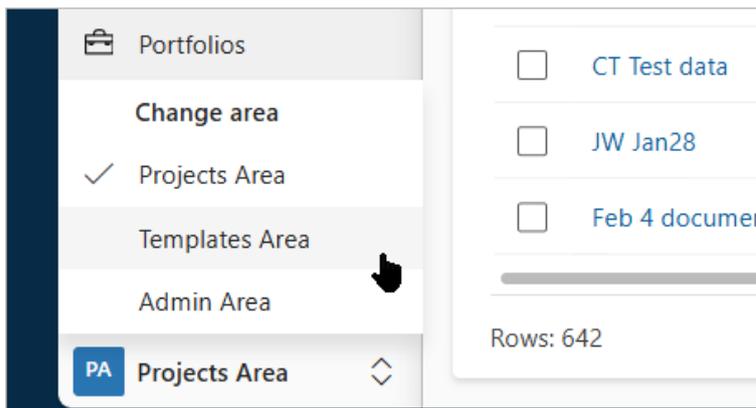
2. Click **Project Templates** and open the Project Template you want to edit.
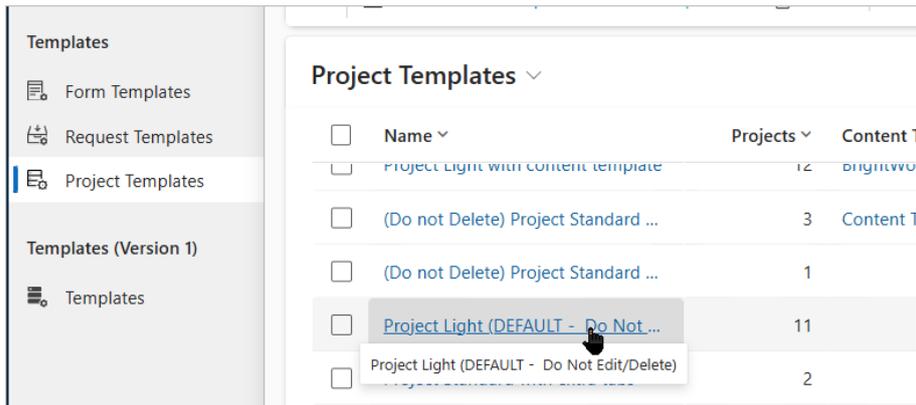
3. Click **Form Configurator**, unselect **Lessons Learned** and click **Save**.
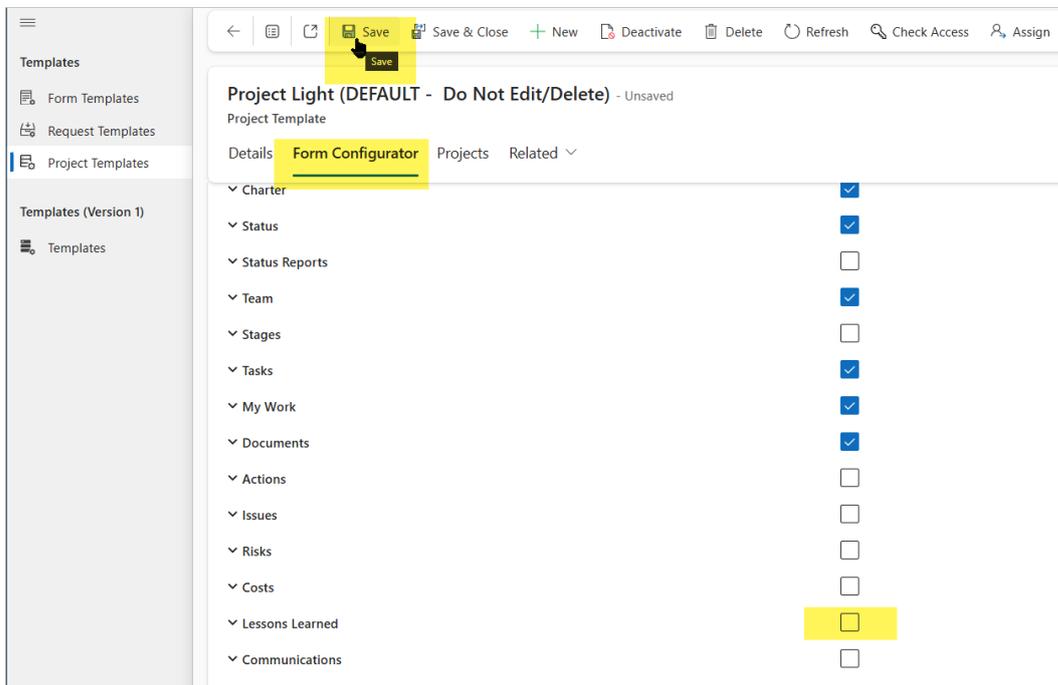
4. Repeat for the remaining project templates for which you want to hide Lessons Learned.

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**.
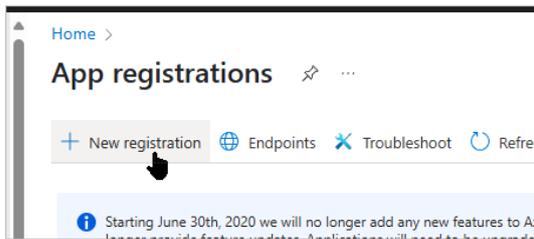
4. Enter 'BrightWork 365 Graph Client' in the Name field.

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**.
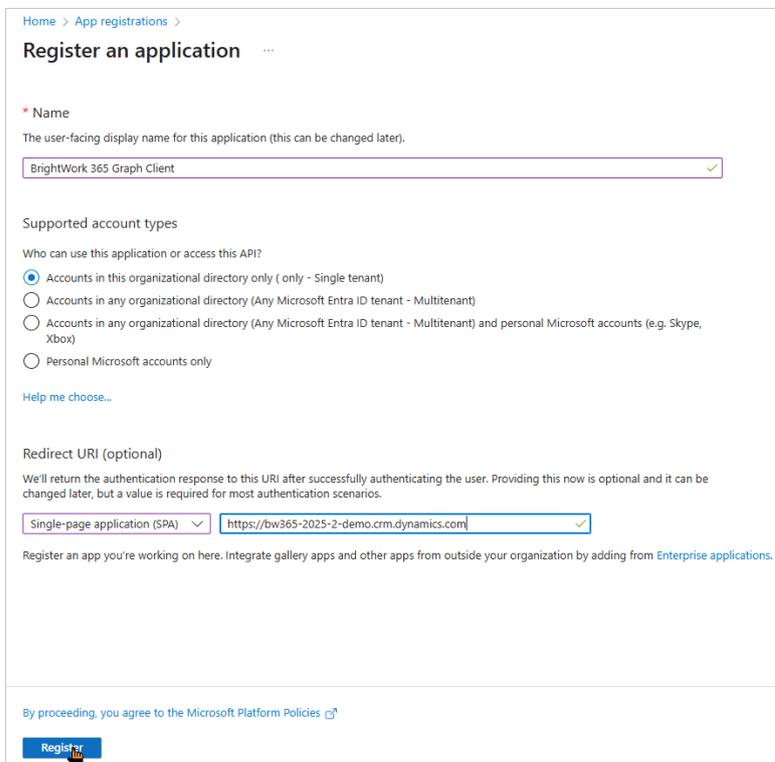
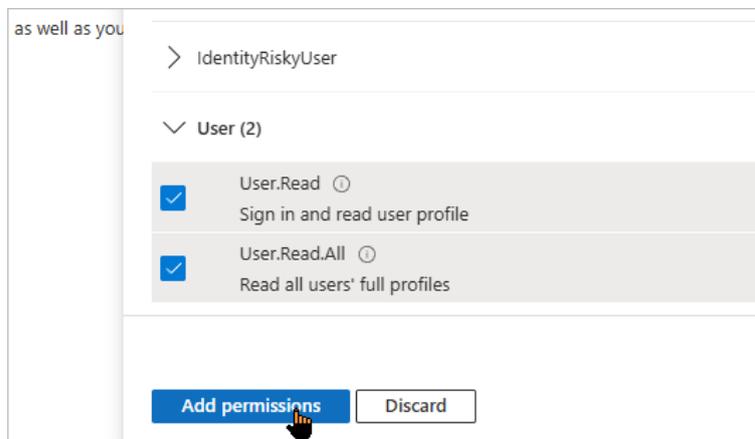8. Click **API Permissions | + Add a permission**.
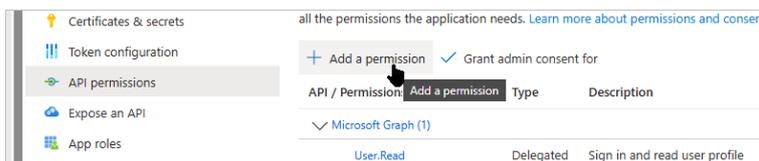
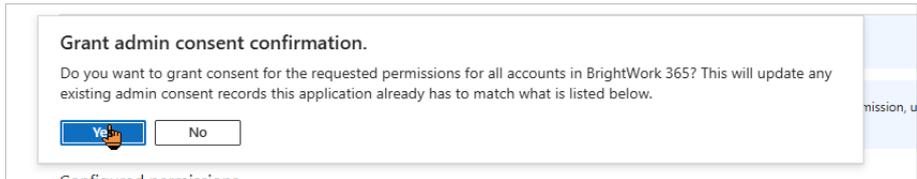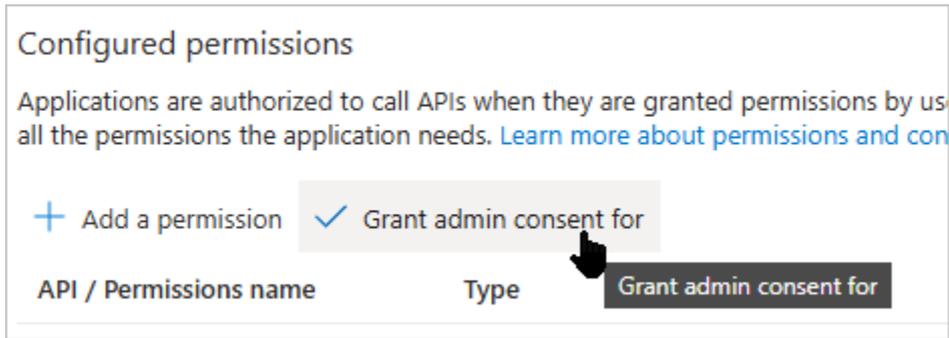9. Click **Microsoft Graph**.
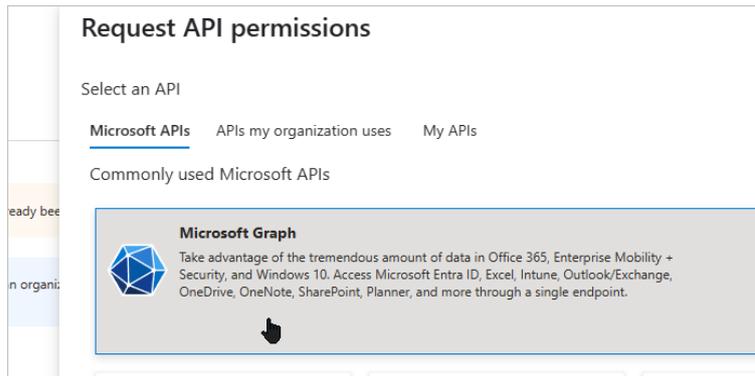
10. Click **Delegated permissions**.
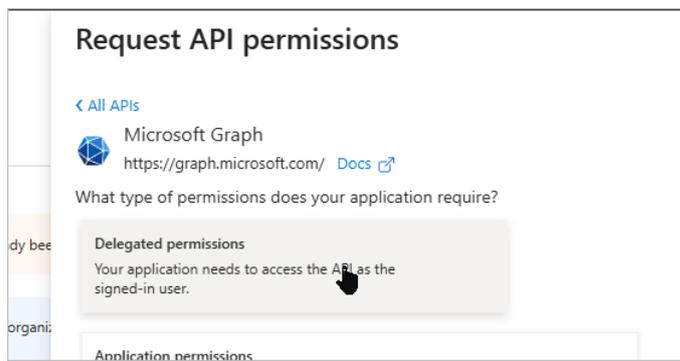
11. Enter User.Read in the filter, select **User.Read** and **User.Read.All** and click **Add permissions**.

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.

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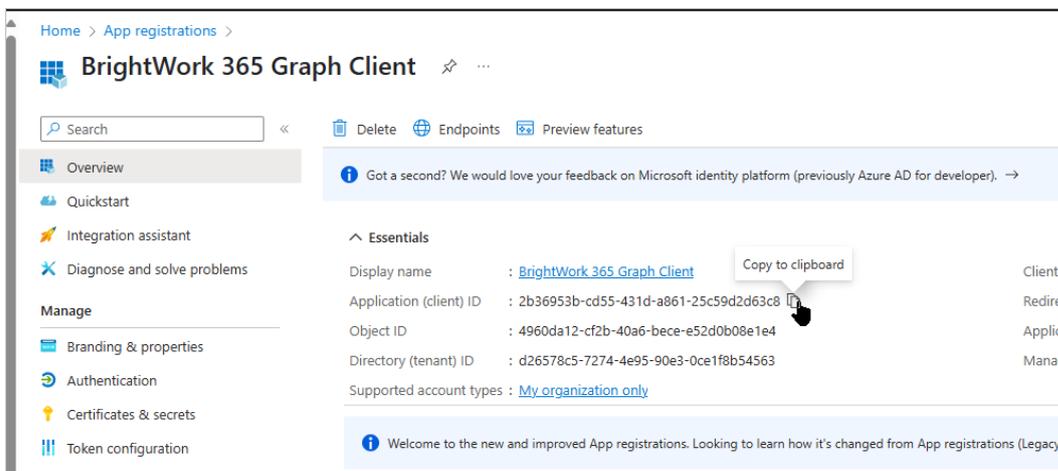
15. Bookmark this page.

Add Environment to the App

Every BrightWork 365 Environment in which you want to use the app must be added to the app.
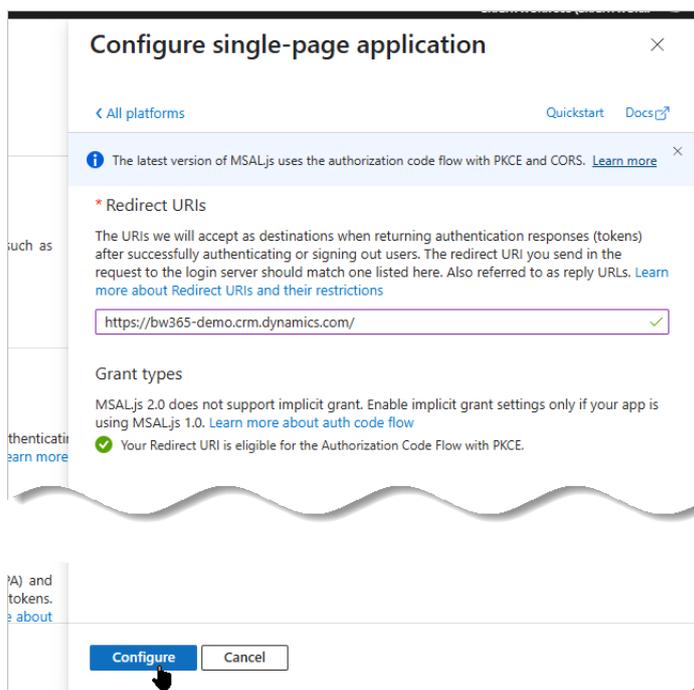
1. Navigate to the BrightWork 365 Graph Client app registration home page.

2. Click **Authentication** on the navigation.

3. Click **+ Add a Platform**. You may need to switch to the 'old experience' to see this option.
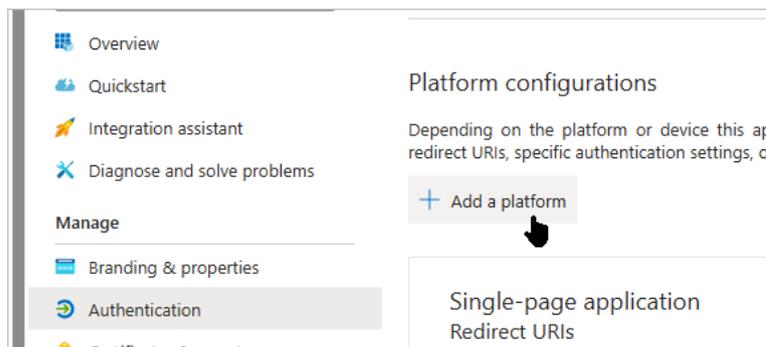

4. Click Single-page application.
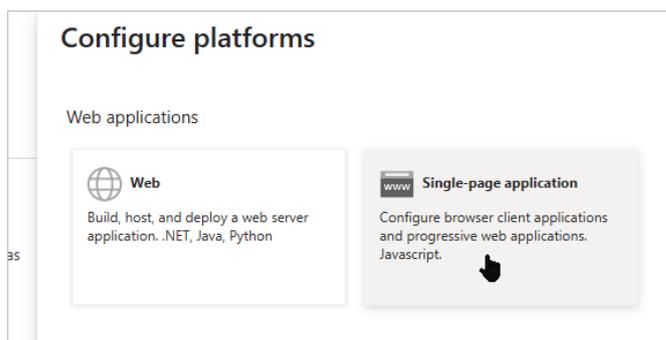
5. Paste the environment URL in and click **Configure**.

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.
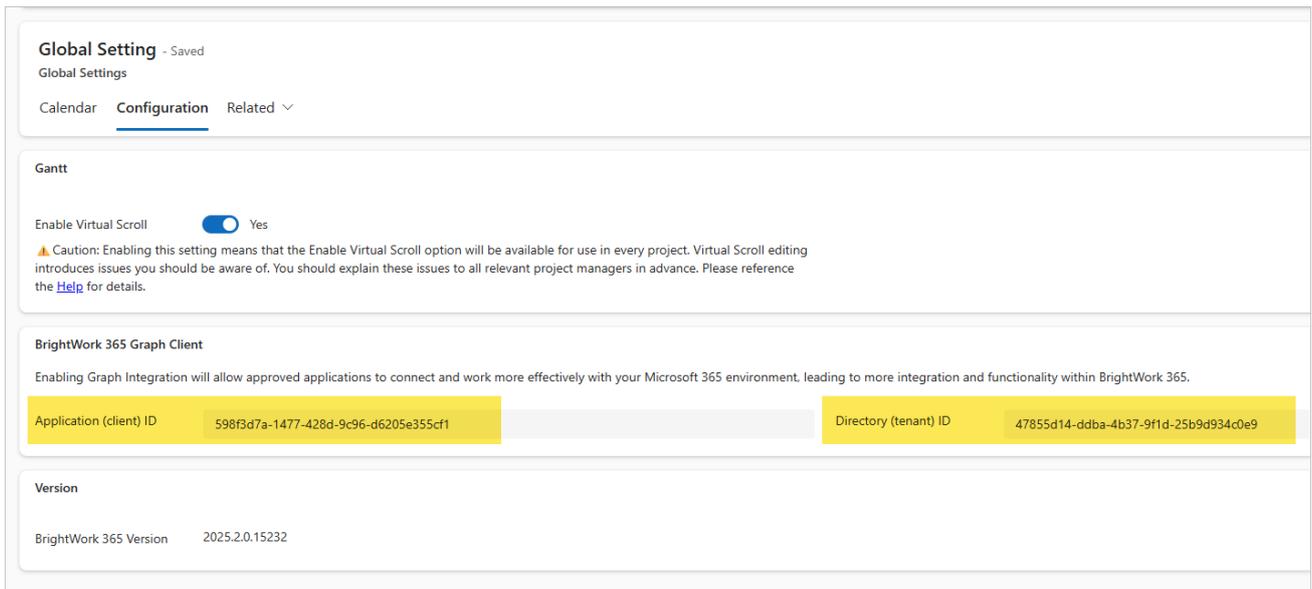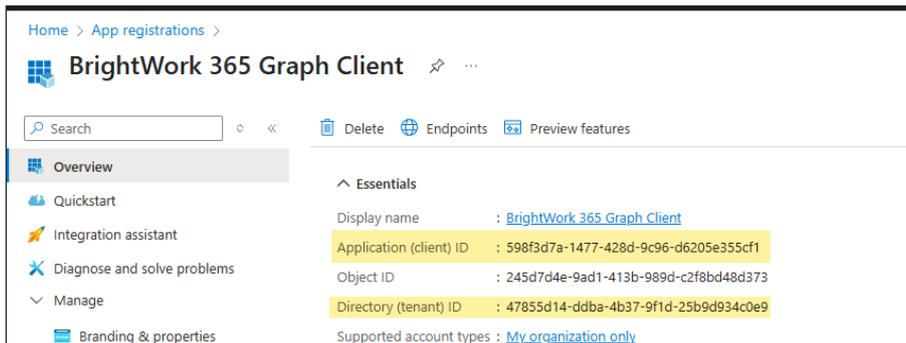
Refresh Power BI Reports

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.pbit 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.
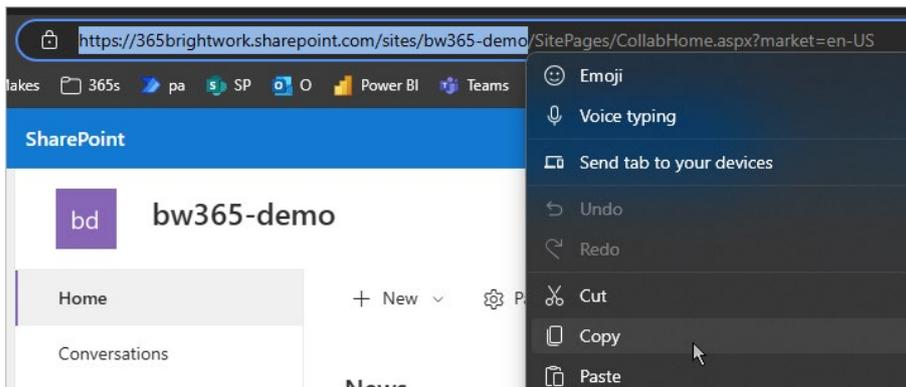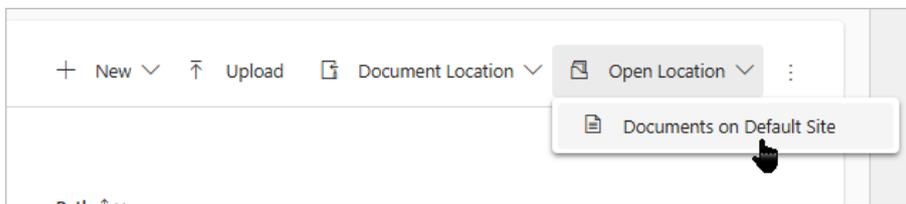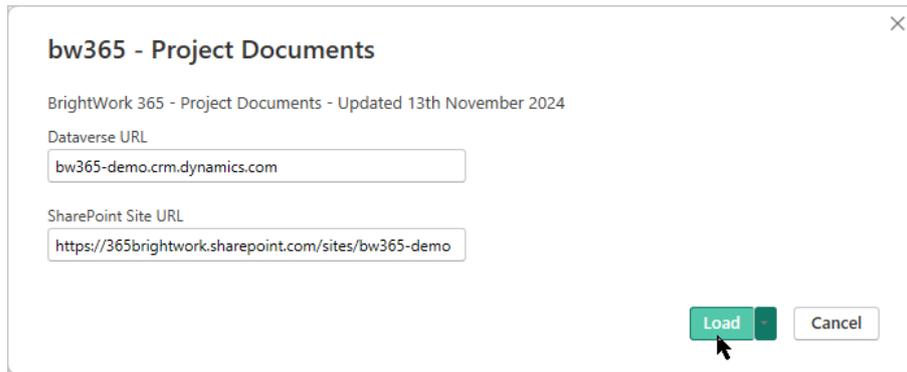

3. Copy your BrightWork 365 URL, up through 'dynamics.com'.

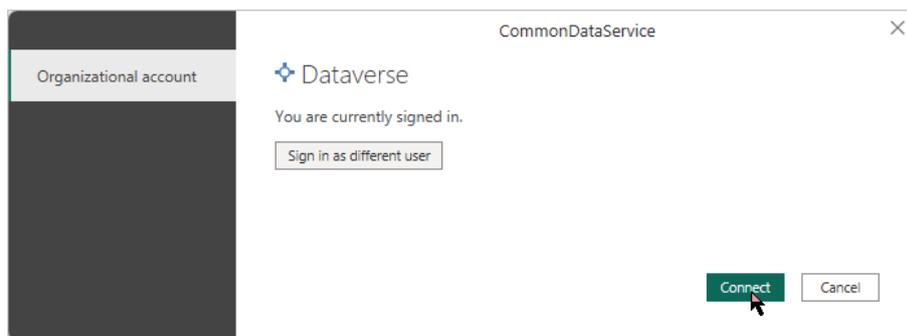   Do not include https:// in the copy!
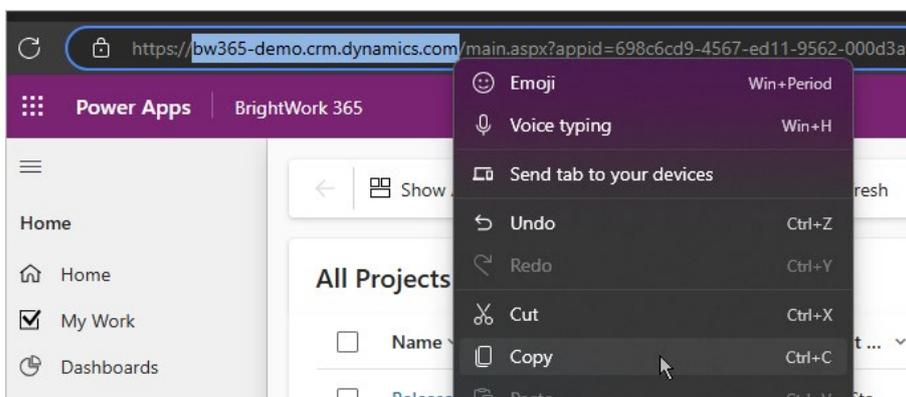
4. Paste the URL into the Dataverse URL field and click **Load**.

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

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

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

   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.
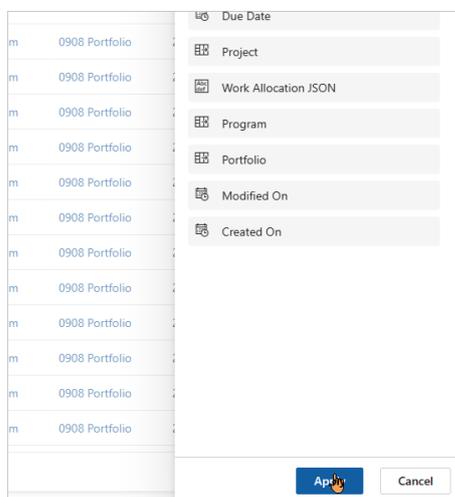
1. Click **My Work** and select the **1. All Work** view.
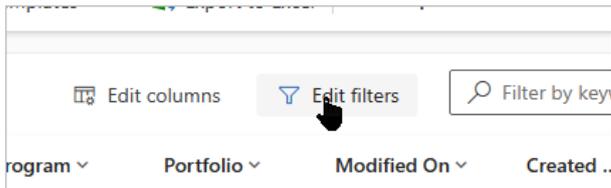2. Click Edit Columns and then **+ Add columns**.
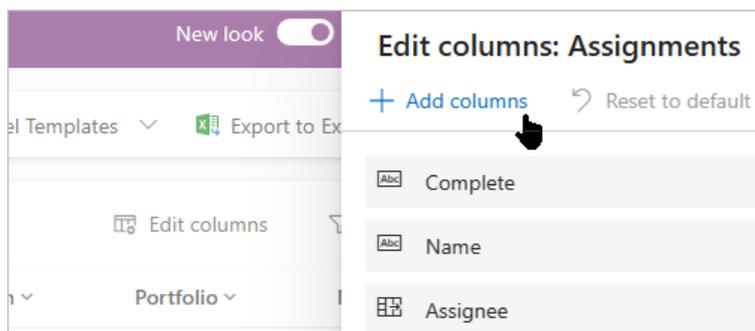
3. Select the **Work Allocation JSON** column and click **Close**.
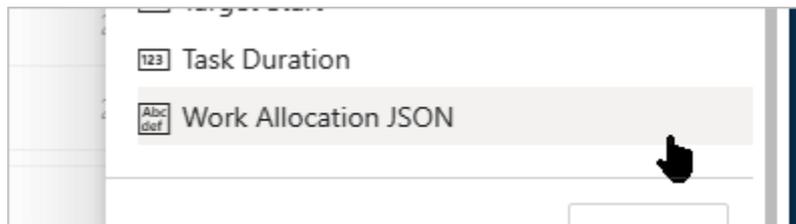
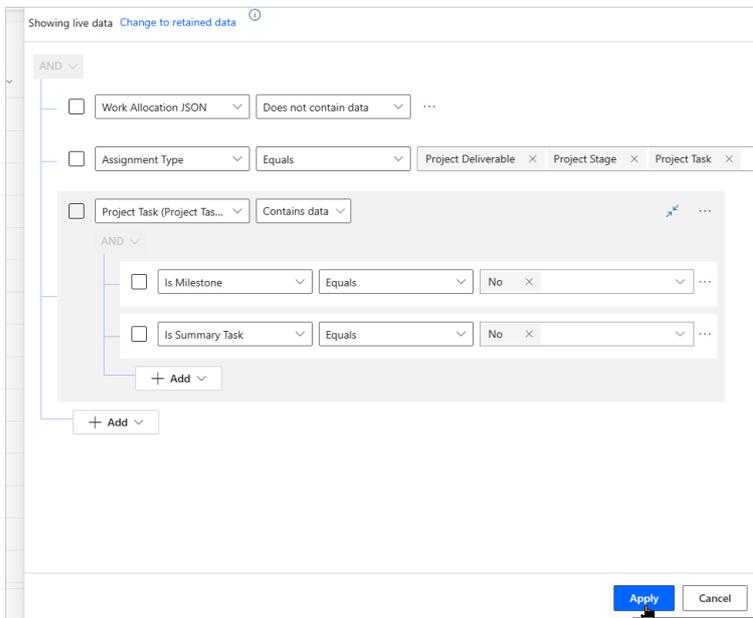4. Drag the column up between Project and Program and click **Apply**.

5. Click **Edit filters**.

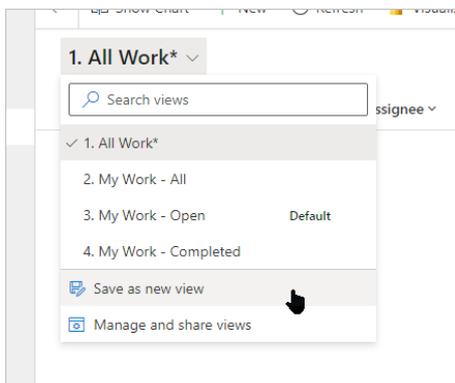6. Update the filter so it has the following conditions:

    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

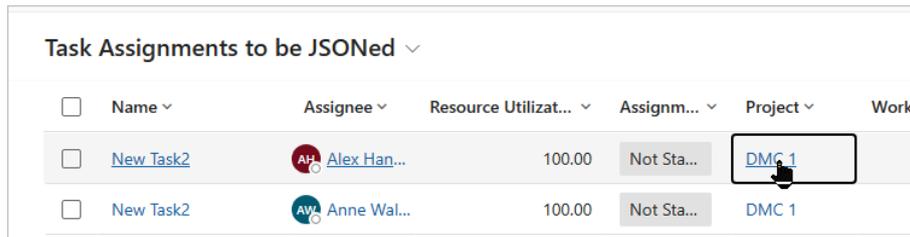   ii. Is Summary Task Equals No

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.

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.