

# Product Licenses, Installation & Upgrades

If you have product installation questions, please contact Support using the **Contact Us** link at the top of the Knowledge Base, or send an email to [support365@brightwork.com](mailto:support365@brightwork.com).

## Installation Instructions

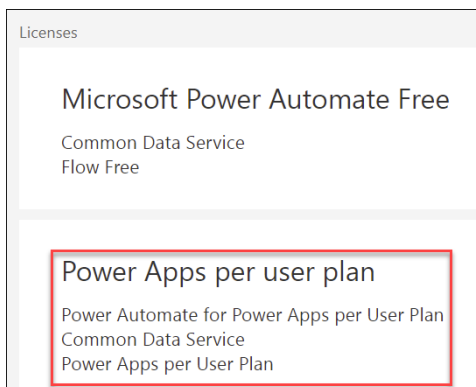
See the embedded installation instructions below, or for mobile viewing download [BrightWork 365 Install Guide.pdf](#) .

## License & Role Requirements for the Installation User

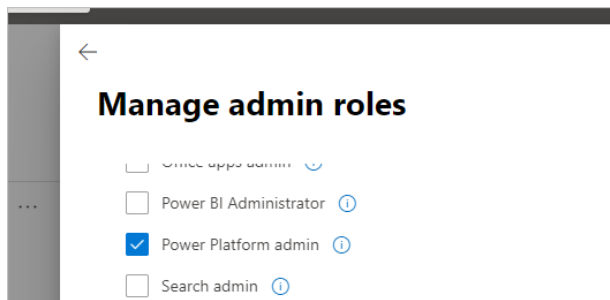
We recommend that a service account be used to install BrightWork 365 and the install be performed by a member of the organization's Microsoft 365 admin team. Upgrades must be done by the same account used for the original installation.

The Microsoft 365 account used to install BrightWork 365 must have the attributes listed below (licenses must not be removed from this user to ensure flows continue to function):

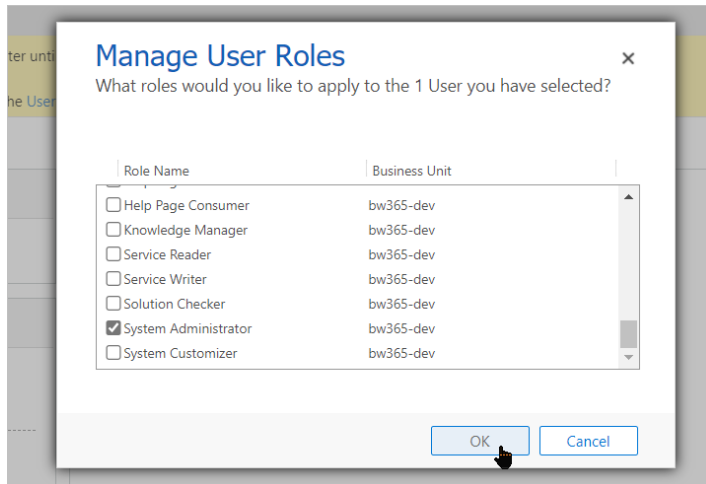
- **Power Apps Per User Plan license** . See "How to Check Which Microsoft 365 Licenses You Have" below for additional information. **Note:** The Power Apps and Power Automate for Office 365 licenses that are included with Microsoft 365 Business Standard are not sufficient as they do not provide the premium connectors necessary for BrightWork 365.



- **Power BI Pro or higher license:** Optional - this license is used to setup the Power BI dashboard to a common workspace.
- **Power Platform Admin role** in Microsoft 365.



- **Assigned the System Administrator role** in the destination environment.



- **Assigned the Power BI Administrator** role.
- **Assigned an Exchange mailbox** (e.g., a minimum of a Microsoft 365 E1 or equivalent license).
- If you intend to use email activities in projects, the install guide section "Setup Dynamics Email" will need to be completed by a user assigned the **Global Administrator** or **Exchange Administrator** role in Microsoft 365, and the **System Administrator** role in the Power Platform environment.

## About the Need for the Power Platform Admin Role

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

We further recommend that this user account be a service account, to ensure continuity of service should individuals leave the organization.

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

Providing this user with the Power Platform Admin role gives them access to all the Power Platform environments in the organization and to manage these environments. This is why we expect that the installation user will be a member of the Microsoft 365 Admin Team.

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

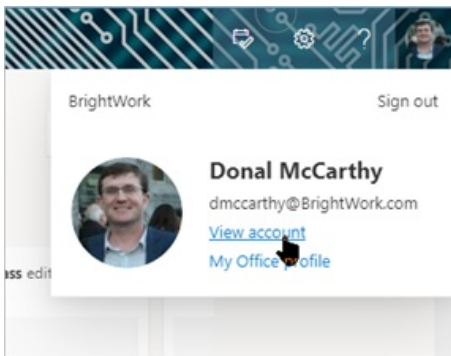
# End User Microsoft License Requirements

BrightWork 365 users will need one of the following licenses from Microsoft in order to use the BrightWork 365 solution: Power Apps per User, Power Apps per App, or [Power Apps pay-as-you-go](#).

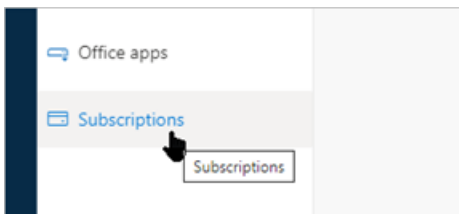
## How to Check Which Microsoft 365 Licenses You Have

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

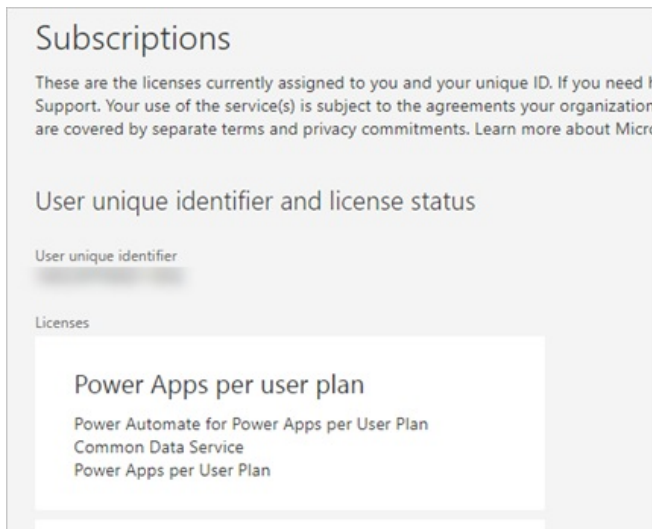
1. Log in to <https://www.office.com>.
2. Click **View account** on your profile menu.



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



4. For installation users: If the **Power Apps per user plan** is not listed, do not proceed with the installation. Contact your organization's Microsoft 365 admin to add a Power Apps per User license to your Microsoft 365 account.



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## Upgrades

### Release Notes

Prior to upgrading please read through the installation guide and also see the [Release Notes](#) section of this Knowledge Base for additional information.

### Solution Flows

- BrightWork 365 solution upgrades need to be installed by the Owner of solution Flows as set during the initial installation.

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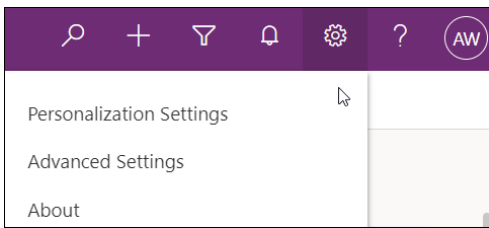
## Organization System Settings

Organization system settings, including **Regional Options** can be configured through Power Platform [System Settings](#).

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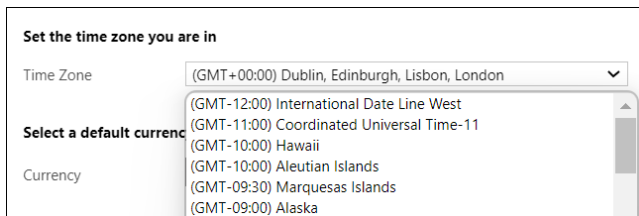
## Personalization Settings

We recommend users check the settings of their personal options and update them as necessary. To change personal options, click the settings wheel in the top right area of the app and choose Personalization Settings.



The personal time zone setting should be changed to avoid timing related issues including incorrect Created and Modified dates. To change the personal time zone setting:

1. Click into Personalization Settings as noted above.
2. Change the time zone and click OK.



## Post Installation Steps

### Verification Checklist

After completing the installation or upgrade steps as described in the guide, we recommend running through the [post installation](#) or [post upgrade](#) verification checklist.

### User Management

Confirm that users have been added to the Power Platform environment that contains the BrightWork 365 solution and have also been assigned relevant BrightWork 365 security roles; if this is not done, users will not be able to access BrightWork 365. See the [User Management](#) article for detailed information.

## BrightWork 365 Install & Upgrade Guide