

Installing BrightWork 365 & License Notes

Note

- See also Pre-Install Power Platform Environment Instructions.
- Prior to installing or upgrading BrightWork 365 please contact [BrightWork Support](#) to schedule a technical consultation to ensure all prerequisites are in place for a successful installation.

Requirements for the Installation User

Caution

- The BrightWork 365 installation user must have a Power Apps Premium (Power Apps per user) license. Do not proceed with the installation if the installation user does not have this license.
- Post installation, after the BrightWork security roles have been created, the installation user account must also be given the **Basic User** security role and all other "**BrightWork**" named security roles except for **BrightWork Request Submitter**.
- Whenever the installation account's password is changed, the BrightWork 365 related Power Apps Connections will need to be reset in all affected BrightWork 365 environments. See the [Troubleshooting](#) section at the bottom of this article.

We recommend the install be performed by a member of the organization's Microsoft 365 admin team in consultation with a BrightWork Customer Success person, and that a service account be used to install BrightWork 365 to ensure continuity of service should individuals leave the organization. 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 licenses and permissions noted below - licenses must not be removed from this user to ensure flows continue to function. 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.

- **Power Apps Premium license.** See "How to Check Your Microsoft 365 License Status" 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.
- **Microsoft 365 E1 license** (with a mailbox and Microsoft Teams access).
- **Power BI Pro license - if using Power BI:** This license is used to setup the Power BI dashboard to a common workspace.

- **System Administrator role** in the relevant Power Platform environment (not general sys admin access; this is only for the Power Platform environment).
- **SharePoint admin role** - this may not be required depending on the site creation settings within your organization; the account needs to have permission to create a new site.
- 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.

End User BrightWork 365 License Requirements

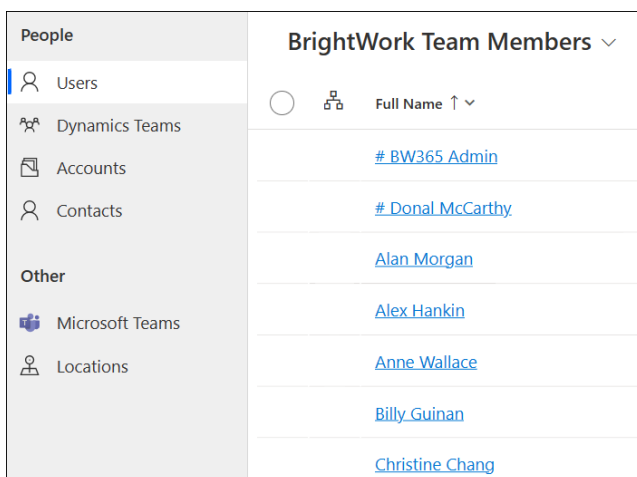
Paid BrightWork licenses are required and will automatically be assigned to all users that have the [BrightWork Team Member](#) security role assigned. A free BrightWork 365 license will automatically be provided to users that only have the **Basic User** and **BrightWork Request Submitter** security roles that only permit them to enter project requests into the system (with no additional interaction with the BrightWork 365 app). For additional **BrightWork 365 license requirement** details see our [Pricing](#) and [Licensing](#) website pages.

BrightWork 365 License Audit

The annual BrightWork 365 license audit is a count of all unique named users throughout the organization that have been given the **BrightWork Team Member** security role (which gives them access to the full BrightWork 365 app). For the smooth running of the account, customers need to ensure they are in compliance with the BrightWork 365 Software License and Service Agreement. BrightWork will contact you when it is time for your annual license audit.

To complete the license audit:

1. Navigate to **Admin Area > Users > BrightWork Team Members** .



People	BrightWork Team Members ▾
Users	○ Full Name ↑ ▾
Dynamics Teams	# BW365 Admin
Accounts	# Donal McCarthy
Contacts	Alan Morgan
Other	Alex Hankin
Microsoft Teams	Anne Wallace
Locations	Billy Guinan
	Christine Chang

2. Count the number of unique users in the view.

3. Use this [link](#) to submit your audit.

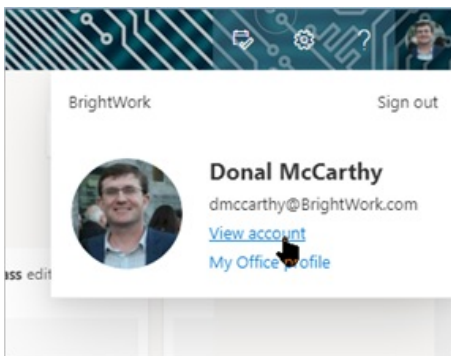
End User Microsoft License Requirements

In addition to any required BrightWork 365 licenses, users will also need one of the following licenses from Microsoft in order to use the BrightWork 365 solution: Power Apps Premium/Power Apps per user, Power Apps per app, or Dynamics (only applies if you are installing BrightWork 365 into the same environment as a Dynamics install).

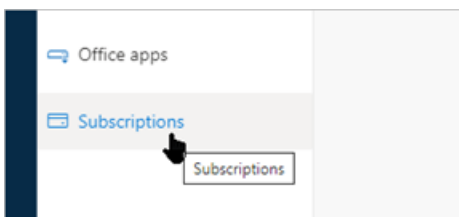
How to Check Your Microsoft 365 License Status

To check your Microsoft 365 licensing status.

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



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



Check a Specific User's Microsoft 365 Licensing Status

Go to the Users page for the Environment, select the user, and click Run Diagnostics.

Check Microsoft 365 Power Apps per app License Usage for an Environment

Go to <https://admin.powerplatform.microsoft.com/resources/capacity#add-ons>. Note the quantity of Power Apps per app licenses listed in the **App passes** column. Power Apps per app licenses get consumed and assigned once a user accesses an environment. These assignments last for a year. Any user that has accessed both the full BrightWork 365 app and the BrightWork 365 Request app will have consumed two licenses. For additional

details see [About Power Apps per App Plans](#).

Desktop System Requirements

For optimal usability we strongly recommend the following:

- Outlook for Microsoft 365 (not the standard desktop version of Outlook)
- Newest version of Internet browser (Microsoft Edge preferred)


For more information see <https://learn.microsoft.com/en-us/power-apps/limits-and-config>.

Login Issues While Using Browser Tracking Protection

If you are having issues logging into BrightWork 365 while using some form of browser tracking protection, i.e., Firefox Enhanced Tracking Protection, this can typically be remedied by disabling this setting for the BrightWork 365 site. See [Enhanced Tracking Protection in Firefox for desktop | Firefox Help \(mozilla.org\)](#) for steps to disable it for Firefox.

Installation Instructions

Note

- Also see [Pre-Install Power Platform Environment Instructions](#).
- After reviewing the license and role related details in this article, see the embedded installation instructions below, or for mobile viewing download the [BrightWork 365 Install Guide.pdf](#) .
- If you import a solution into a managed environment, the Power Platform Solution Checker automatically runs. This means that environment Sys Admins will likely get an email indicating that many high severity issues were found. These are false positives as they relate to rules not relevant to the BrightWork 365 code.

BrightWork 365 Install Guide

Environment Recycle Bin

By default, deleted projects are permanently removed and cannot be restored. However, Microsoft has added an optional Recycle Bin feature to Power Platform environments that must be manually enabled by an admin. Note this feature may still be set to Preview status by Microsoft in your Microsoft 365 tenant - Preview features are not meant for production use and may have restricted functionality. For more information, see [Restore deleted Microsoft Dataverse table records \(preview\) - Power Platform | Microsoft Learn](#).

To enable the Recycle Bin feature:

1. Sign in to the [Power Platform admin center](#) as an admin (Dynamics 365 admin or Microsoft Power Platform admin).
2. Select **Environments** and open the environment you want.
3. Select **Settings > Product > Features**.
4. Scroll down to view the **Recycle Bin** settings.
 - Turn **On** the **Recycle Bin** setting.
 - Specify the time interval, to be able to restore table records. You can restore table records up to 30 days after the record was deleted.

To learn how to restore deleted projects, see [Restore Deleted Projects](#).

Importing Custom Solutions Supplied by BrightWork

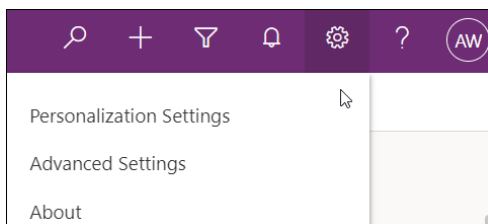
If your organization worked with the BrightWork team to create a custom solution, then you will also need to read these [additional import instructions](#).

Organization System Settings

Organization system settings, including **Regional Options** such as currency, number, time and date formats (not time zone), can be configured through Power Platform [System Settings](#).

Personalization Settings

We recommend users check the settings of their personal options upon first use and update them as necessary. To configure 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.

Set the time zone you are in

Time Zone (GMT+00:00) Dublin, Edinburgh, Lisbon, London

Select a default currency (GMT-12:00) International Date Line West

Currency (GMT-11:00) Coordinated Universal Time-11

(GMT-10:00) Hawaii

(GMT-10:00) Aleutian Islands

(GMT-09:30) Marquesas Islands

(GMT-09:00) Alaska

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 [BrightWork User Management](#) and [BrightWork Security Roles Details](#) articles for more information.

Troubleshooting

Disconnected BrightWork 365 Power Apps Connections

If the password changes for the account used to install BrightWork 365, the BrightWork Power Apps Connections will need to be reset in all BrightWork 365 environments.

1. Go to the Power Apps Make area (i.e., make.powerapps.com).
2. Select the BrightWork 365 environment.
3. In the left navigation menu, click **More**, then select **Connections**.
4. In the connections list, click on the connection labeled Microsoft Dataverse.
5. Click the **Switch Account** button in the top menu.
6. Do this for all the connections that have a status of Disconnected.
7. Go to the Power BI Admin Area (i.e., app.powerbi.com).
8. Click **Workspaces** in the left navigation menu.
9. Select the relevant workspace.
10. For each Semantic Model, click the ellipse (...) and click **Settings**.
11. Expand the **Data Source Credentials** menu.
12. Click on the **Edit Credentials** link (or links, if more than one).
13. Enter the new password and fulfill any MFA.

14. Do this for all the Semantic Models in all Brightwork Power BI workspaces.
