Post Install Verification Checklist

It is a recommended best practice to run through a series of tests to verify that an installation has completed successfully in your environment. This article outlines some initial tests that can be performed to assist with this verification.

Prerequisites

It is a prerequisite that all the steps in the BrightWork 365 Product Installation Guide have completed successfully and without error.

All items on the checklist should pass. If any items fail, please check your Power Platform logs for issues and if necessary, contact BrightWork 365 Support.

Requests

1. Go to the **Requests** section on the main nav and create a new request.
2. Verify that all notification emails are received, and that a project was created successfully from the request.

Projects

Open the project created in the previous section and complete the following steps:

1. Verify project details were carried over from the request correctly. Add any additional required field values and save the changes.
2. Click the Tasks tab and add at least one task for each of the available task types, e.g., Stage, Task, and Deliverable.
3. Assign yourself to at least one task.
4. Set initial **Start** and **Finish** dates. Save the changes, wait a few seconds, and click **Refresh**.
5. View the **Status** tab in the project and verify the **Start** and **Finish** dates match the values in the Gantt.
6. Click the **Project Settings** tab, select **Reset Target Dates** to reset the Baseline, and click **Save**.
7. Refresh the page and click on the **Gantt** tab.
8. Click **Baseline** and confirm it has been updated to match current Gantt dates.
9. Click the **Status** tab and confirm the Target Dates updated to match the dates in the Gantt.
10. Click the **Team** tab and verify you have been added as a team member.
11. Click the **My Work** tab and verify that your task is displayed in My Work with the correct Start and Finish dates.
12. Click the **Status** tab. Make some changes in the Indicators section of the Status tab and save.
13. Click the **Status Reports** tab and click **+ New Status Report**. Enter status details and select **Email Report to Sponsor** and **Complete Status Report**, and then click **Save & Close**. The Status report should be presented in the next screen.
14. Open the Status report and verify it matches what was updated.

15. Verify the Project Sponsor receives an email with the same report details.
16. Click the **Documents** tab, add a document, and save and close the document.
17. Verify you can reopen the document without error.

Power BI Dashboards (if applicable to your organization)

1. Confirm that at least one project with Gantt tasks and assignments has been created and saved, and that the Power BI refresh cycle has run.
2. Click **Dashboards** on the main nav.
3. View all the dashboards and confirm the data is presented as expected.

Document Management

Configure Document Management and test functionality.

Microsoft Teams (if applicable to your organization)

Configure Microsoft Teams and test functionality.