Post Installation Verification Checklist

It is a recommended best practice to run a set 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.

Prerequisite

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

Post Installation Checklist

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.

Request and Project Tests

1. Go to the Requests area and create a new request.
2. Verify that all notification emails are received, and that a project can be created successfully from the request.
3. Verify project details are correct after the project is created. Add a name for the Project Sponsor field and save.

Project Tests

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

1. Click on the Gantt tab and add at least one task for each task type of Stage, Task, and Deliverable.
2. Set initial Start and Finish dates. Save at the project level, wait a few seconds, and click Refresh.
3. View the Status tab in the project and verify the Start and Finish dates match the values in the Gantt.
4. Go to Project Settings and select Reset Target Dates. Wait approx. 10 Seconds. Click on The Gantt and select Refresh in the Gantt. Confirm that the Baseline is now updated to match current Gantt dates.
5. Confirm Target Dates are updated in the Status tab to match those in the Gantt.

Assign yourself as a resource on a task in the Gantt and complete the following steps.

1. Click on the Team tab and verify you have been added as a team member.
2. Click on the My Work tab and verify that your task is displayed in My Work with the correct Start and Finish dates.
3. Click on the Status tab. Make some changes in the Indicator section of the Status tab and save.
4. Click on + New Status Report. Enter status details and select Email Report to Sponsor before saving. Wait a few seconds and click Refresh. The Status report should be presented. Open the Status report and verify it matches what was updated. Verify the Project Sponsor receives an

email with the same report details.

Microsoft Teams Tests (if applicable to your organization):

1. Create a new Team in the Microsoft Teams app.
2. In BrightWork 365 go to Programs > Program Settings and update the Teams List flow. This will add the Team you created earlier to the list of Teams available.
3. Open the program associated with the project created earlier.
4. If the program already has a Team, remove it. Start typing the name of your new Team, select the Team and save.
5. Open the project you created earlier.
6. Configure the project for Microsoft Teams by clicking into the Project Settings tab and selecting Create Teams Channel.
7. After waiting for the associated flow to run, click on the Charter tab of the project and verify the link for the Team you created is displayed in the Teams Channel field.
8. Click on the Team link. Teams should open in a new tab with the related project page open (Project Name - Project ID), displayed as a child under the Team.