Post Installation 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.

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.

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 on the Gantt tab and add at least one task for each of the available task types, e.g., Stage, Task, and Deliverable.
3. Set initial **Start** and **Finish** dates. Save the changes, wait a few seconds, and click **Refresh**.
4. View the **Status** tab in the project and verify the **Start** and **Finish** dates match the values in the Gantt.
5. Go to **Project Settings** and select **Reset Target Dates** to reset the Baseline. Wait approx. 10 Seconds. Click on the Gantt and select Refresh in the toolbar. Click **Baseline** and confirm it has been updated to match current Gantt dates.
6. Confirm the **Target Dates** updated in the **Status** tab 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 Indicators section of the Status tab and save.
4. Click on 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. Open the Status report and verify it matches what was updated. Verify the Project Sponsor receives an email with the same report details.

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.
2. Click **Dashboards** on the main nav.
3. From the Dashboard drop-down select **Portfolio and Projects - Power BI**.
4. Click into the various sections of the Power BI dashboard and confirm data is presented as expected.

Microsoft Teams (if applicable to your organization)

1. Create a new Team in the Microsoft Teams app.
2. In BrightWork 365 go to **Programs** on the main nav, click into the program associated with the project you created earlier.
3. Click **Program Settings**.
4. Click **Update Teams List**.
5. Wait a short time and click the **Statement** tab.
6. Start typing the name of your new Team, select the Team, and click **Save**.
7. Open the project you created earlier.
8. Configure the project for Microsoft Teams by clicking into the **Project Settings** tab and selecting **Create Teams Channel**.
9. After waiting for the associated flow to run, click the **Charter** tab of the project and verify the Channel is displayed in the **Teams Channel** field.