Security Role Details

> Video has been removed from this PDF. Visit the BrightWork 365 knowledge base to view.

BrightWork 365 provides multiple security roles to choose from, each with a different purpose. The roles noted below are grouped by how they are used in the solution. For more granular security role details see the spreadsheet BrightWork 365 Security Roles.xlsx

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BrightWork 365 Privilege-Based Security Roles

Note

- The referenced security roles are additive, not cumulative, so you will need to assign users to multiple roles if you need them to have the corresponding combined privileges. An exception is the **BrightWork Request Submitter** role which should not be combined with any other BrightWork security role.
- The referenced security roles are only associated with the BrightWork 365 app and do not flow to other interface components such as Microsoft Teams and Teams Channels, SharePoint documents, Power BI dashboards, etc. Permissions for these other components need to be configured through their other respective non-BrightWork systems.
- When a user is removed from a security role, they are not removed from associated lookups on forms.

						BrightWork 365 Solution Roles					Dataverse Role
Dataverse Security Role	**Security Type**	**Basic Role**	**Custom Privileges**	**Lookup Role**	**Source**	**Requestor**	**Team Member**	**Project Manager**	**Senior Manager**	**PMO Manager**	**Administrator**
Basic User	Security Role	Yes	No	No	Dataverse	√	√	√	√	√	√
BrightWork Request Submitter	Security Role	No	No	No	BrightWork 365	√					√
BrightWork Team Member (including Request Submit)	Security Role	No	No	Yes	BrightWork 365		√	√	√	√	√
BrightWork Project Manager	Security Role	No	Can see Project Settings	Yes	BrightWork 365			√	√	√	√
BrightWork Stage Mover	Security Role	No	No	No	BrightWork 365			√*	√	√	
BrightWork PMO Manager	Security Role	No	No	No	BrightWork 365					√	
BrightWork Template Editor	Security Role	No	No	No	BrightWork 365					√	√
BrightWork Approvals Coordinator	Security Role	No	Can see Approvals tab	Yes	BrightWork 365					√	
BrightWork Request Receiver	Security Role	Yes	No	Yes	BrightWork 365					√	
System Administrator	Security Role	No	No	No	Dataverse						√

Caution BrightWork 365 out of the box security roles should not be customized. Create your own custom security role instead.

Basic User

All users of BrightWork 365 must be assigned the **Basic User** security role, in addition to

any other security role they are also assigned.

BrightWork Request Submitter

A Request Submitter uses a free BrightWork 365 license and will therefore only have access to the BrightWork Requests app, a limited version of the full BrightWork app. A Request Submitter will have access to much of the same Request functionality as found in the Requests section of the full BrightWork 365 app for paid users, but they will not see other links within the Projects area, nor will they see links to the other areas of the app such as the Portfolios or Reports areas.

A Request Submitter has access to their own requests but not those of others.

BrightWork Team Member

The BrightWork Team Member security role must be applied to any user who requires access to the full BrightWork 365 app. They can interact with all areas of the app with varying levels of privilege.

Users given the BrightWork Team Member security role will appear in the app's Admin area in:

- Users > BrightWork Team Members
- Users > BrightWork Users
- Users > BrightWork Project Sponsors

Privileges assigned to the BrightWork Team Member security role:

- Action: Create, Read, Write, Delete (only their own)
- Assignment: Create, Read, Write, Delete
- Cost: Create, Read, Write, Delete (only their own)
- Documents:
    - Projects created in BrightWork 365 versions 2025-1 and earlier: Create, Read, Write, Delete.
    - Projects created in BrightWork 365 versions 2025-2 and later: Depends on the user's access permissions to the associated SharePoint or Microsoft Teams document repository
- Global Settings: Read
- Issue: Create, Read, Write, Delete (their own)
- Lesson Learned: Create, Read, Write, Delete (their own)
- Location: Read
- Microsoft Team: Read
- Non-Working Days: Read
- Portfolio: Read, Write
- Program: Read, Write
- Project: Read, Write
- Project Exception Days: Read
- Project Settings: Read
- Project Task: Create, Read, Write, Delete

- Project Team Member: Read
- Project Template: Read
- Request: Create, Read, Write, Delete (their own)
- Request Template: Read
- Rich Text Attachment: Create, Read, Write (their own), Delete (their own)
- Risk: Create, Read, Write, Delete (their own)
- Status Report: Create, Read, Write, Delete (their own)

Only members of this security role will display as a user choice in the form lookup columns Assigned To, Project Sponsor, and the Approver column in the Actions module.

> **Note** If the Team Member security role is removed from a user, they will no longer be assigned to tasks they previously were assigned to, including completed tasks (they will still display in non-Grid/Gantt Assignment views). Additionally, the Gantt scheduling may not be updated until someone edits the previously assigned task's Assigned To field to reset it.

BrightWork Project Manager

A user with the BrightWork Project Manager security role can interact with most areas of the app, with varying levels of privilege per area. Only members of this security role will display as a user choice in the Project Manager column of a project.

Privileges assigned to the BrightWork Project Manager security role:

- Action: Delete
- Assignment: Create, Read, Write, Delete
- Business Process Flow: Allowed to manually move projects to stages that do not require approvals to progress to the next stage.
- Cost: Delete
- Documents:
  - Projects created in BrightWork 365 versions 2025-1 and earlier: Create, Read, Write, Delete.
  - Projects created in BrightWork 365 versions 2025-2 and later: Depends on the user's access permissions to the associated SharePoint or Microsoft Teams document repository
- Global Settings: Read
- Issue: Delete
- Lesson Learned: Delete
- Microsoft Team: Read
- Non-Working Days: Read
- Project: Create, Read, Write, Delete (their own)
- Project Exception Days: Create, Read, Write (their own), Delete (their own)
- Project Settings: Read, Write (their own), Delete (their own)
- Project Task: Delete
- Project Team Member: Create, Read, Write (their own), Delete (their own)
- Risk: Delete

BrightWork PMO Manager

The BrightWork PMO Manager role has the highest level of additional user-related privileges (not system administrator-related privileges) throughout the entire BrightWork 365 app.

Privileges assigned to the BrightWork PMO Manager security role:

- Account: Delete
- Action: Create, Read, Write, Delete
- Assignment: Create, Read, Write, Delete
- BrightWork Approval: Read, Write
- Business Process Flow: Allowed to manually move projects to stages that do not require approvals to progress to the next stage.
- Contact: Delete
- Cost: Create, Read, Write, Delete
- Documents:
  - Projects created in BrightWork 365 versions 2025-1 and earlier: Create, Read, Write, Delete.
  - Projects created in BrightWork 365 versions 2025-2 and later: Depends on the user's access permissions to the associated SharePoint or Microsoft Teams document repository
- Form Template: Create, Read, Write, Delete
- Global Settings: Read, Write
- Issue: Create, Read, Write, Delete
- Lesson Learned: Create, Read, Write, Delete
- Location: Create, Read, Write, Delete
- Microsoft Team: Create, Read, Write, Delete
- Non-Working Days: Create, Read, Write, Delete
- Portfolio: Create, Read, Write, Delete
- Program: Create, Read, Write, Delete
- Project: Create, Read, Write, Delete
- Project Exception Days: Create, Read, Write, Delete
- Project Settings: Read, Write, Delete
- Project Task: Create, Read, Write, Delete
- Project Team Member: Create, Read, Write, Delete
- Project Template: Create, Read, Write, Delete
- Request: Create, Read, Write, Delete
- Request Template: Create, Read, Write, Delete
- Rich Text Attachment: Create, Read, Write, Delete
- Risk: Create, Read, Write, Delete
- Status Report: Create, Read, Write, Delete

BrightWork Approvals Coordinator

Privileges assigned to the BrightWork Approvals Coordinator security role:

- View the Approvals tab in Requests and Projects.
- Can be nominated as an Approvals Coordinator in Requests and Projects.
- Can change the Requestor value in Project Requests.

BrightWork Stage Mover

Privileges assigned to the BrightWork Stage Mover security role:

- Business Process Flow: Allowed to manually move projects from stages that do not require approvals to progress to the next stage.

BrightWork Template Editor

Privileges assigned to the BrightWork Template Editor security role:

- Templates Area > Templates: Create, Read, Write.
- Templates Area > Project Templates > Form Configurator: Read, Write.

Optional Lookup Column Security Roles

The security roles noted below are not in use out of the box. These roles provide the option to be more granular than what is offered by the more generic **Senior Managers Dynamics Team** when specifying the users that can be chosen within the associated user lookup columns. To activate this functionality you will need to edit the corresponding system view in the Users section of the Admin area within a custom solution, and apply the role to any user you would like to appear as a choice in the column. Contact your Customer Success Partner if you require additional configuration information.

- BrightWork Group Manager
- BrightWork Portfolio Manager
- BrightWork Portfolio Sponsor
- BrightWork Program Manager
- BrightWork Program Sponsor

Deprecated Security Roles

These Deprecated roles were retained for backward compatibility, but these roles were only required for customers leveraging our v1 request process from releases before 1.6 (Feb 2023).

In 2025-1, we finally deprecated these roles as they have no impact on the current product.

- BrightWork Request Approvers
- BrightWork Request Reviewer