FAQs - Requests

Are there out of the box starter Request templates available?

Yes, BrightWork 365 comes with starter Request templates that are each associated with a type of project the requestor is interested in using, e.g., Project Tracker, Project Light, Project Standard, Project Structured, New Product Introduction, and Product Update. The Request templates come with customizable forms that include fields to capture relevant information approvers will need to make an approval decision. For additional details, see Project Request Approval Process.

Does a user require a paid license to submit a project request?

No, a user who is only submitting project requests into the system (with no additional interaction with the BrightWork 365 app) will be provided with a free BrightWork 365 license along with the paid licenses of your other users. Another option you can discuss with your Customer Success Partner is to enter project requests using a custom intake form your organization has built.

Which environment security roles are required for a user to submit a project request?

To submit a project request, at a minimum the user will need the security role Basic User and either the BrightWork Request Submitter security role if only accessing the limited Requests app, or BrightWork Team Member security role if accessing the full BrightWork 365 app.

Can I add multiple approvers as part of the approval process?

Yes, you can add multiple approvers to the request approval process via the Request **Approvals** tab.

Can I use Microsoft Teams to approve a request?

Users can take action on approval requests with the Microsoft Teams Approvals app. See Approvals in Microsoft Teams.