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Installation Guide

EGCS Starter Portal

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Introduction

This installation provides the step-by-step instructions to install the EGCS Starter Portal to a Dataverse environment. With the emergence of Protected B cloud in the Government of Canada, your department now has access to SaaS and PaaS solutions such as PowerApps, Dynamics 365 SaaS, Azure B2C and Azure DevOps with advanced reporting and monitoring services to provide you with a secure, performant, and reliable service that is maintained by Microsoft M365 and Azure thereby abstracting the complexities of hosting on premise custom portal and back-office CRM solution and spreadsheets. Hence, leveraging the EGCS Starter Portal as an accelerator to administer Grants & Contributions in your Department’s Cloud subscription together with an external facing portal that is configured with WET, you are empowered to provide modern services to both internal staff and external users applying for G&C.

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Configuring your Environment

## PRE-REQUISITES

You must perform the steps in this section as an Azure Global Administrator, OR a user with the following azure roles: Dynamics 365 Administrator, PowerPlatform Administrators, Application Administrator.

## STEP 1: NAVIGATE TO THE POWERPLATFORM ADMIN CONSOLE AND CREATE A NEW ENVIRONMENT

<https://admin.powerplatform.microsoft.com/>

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Once saved, the environment will take several minutes to provisioned. Once provisioned, proceed to step 2

## STEP 2: GO TO THE POWERAPPS ADMIN CONSOLE AND CREATE A PORTAL FOR YOUR NEW ENVIRONMENT

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Once created, the provisioning may take several minutes. Once fully provisioned, proceed to Step 3.

## STEP 3: REMOVE FILE RESTRICTIONS FROM DATAVERSE (CRM)

The portal import includes files such as JS, CSS and other file types that are not allowed when importing into the Dataverse. This feature also has file size limits which also need to be updated to allow the portal file imports to work. Once the import is completed, the restrictions should be re-added.

### Open the Advanced Settings in the same Environment

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### In the site map, expand Settings, select Administration and System Settings and Navigate to the General tab

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Scroll down and “cut” all the file extension restrictions (paste it somewhere else to re-add these post import).

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In the email tab raise the File Size (kb) to 100000 (remember the original value and re set it to the original post import).

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## STEP 4: IMPORT THE CRM SOLUTION

### Expand Settings and go to Solutions

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### Press the Import Solution Button and ***Import the EGCSModelDS*** Solution

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Once completed proceed to the next step.

### Press the Import Solution Button and ***Import the EGCS Portal Accelerator/PT*** Solution

Choose the unmanaged or managed version of the solution. In this example we are using the managed version.

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Press “Publish All Customizations” if you’ve imported the unmanaged version.

## STEP 5: IMPORT THE PORTAL

Download the EGCS Portal from the GITHUB Repository: <https://github.com/Cloudstrucc/EGCS> (egcs-portal-accelerator)

Download the CLI and Visual Studio Code (optional). Configure the CLI using the official Microsoft documentation: <https://docs.microsoft.com/en-us/power-apps/developer/data-platform/powerapps-cli>

Once the above is complete, in your Visual Studio Code, create a terminal session in the same project / folder that you’ve open the egcs-portal-accelerator folder downloaded from GITHUB and run the following commands

pac auth create --url "https://***subdomainofyourneworganizationinpowerplatform***.crm3.dynamics.com" --applicationId "***GUID-OF-YOUR-APP-USER"*** --tenant "***YOUR AZURE TENAND ID***" --clientSecret "***YOUR ADD USER SECRET***"

pac paportal upload -p ./pathoftheprotalfiles

### Next go the PowerApps admin console to update the binding and restart the portal

<https://make.powerapps.com>

Select your environment, click on Apps on the left menu, select the Portal App that you provisioned then press the ellipsis and select “Settings”

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Once the modal is displayed on the right, press Administration

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### Select the EGCS Portal Accelerator under the Website Binding dropdown (if not already selected)

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### Restart the portal and Test the Installation

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**Once restarted (this can take a few minutes), navigate to the Portal URL to validate that the following page appears. If so, the installation is successful.**

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### Validate that the CRM Model Driven App has been Successfully Installed

Go to <https://make.powerapps.com> and select your environment. Verify that the following application exists:

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