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|  | |  | POWER PLATFORMapplication LIFECYCLE MANAGEMENT (ALM) AND SDLC THIS DOCUMENT PROVIDES THE ARCHITECTURE & DETAILED DESIGN OF THE FINTRAC COMPLICANCE CASE MANAGEMENT SYSTEM DEVELOPED WITHIN THE AGENCIES M365 POWER PLATFORM SUBSCRIPTION USING BOTH MODEL DRIVEN APPS FOR THE BACKEND AND THE POWER PAGES SITE FOR THE FRONT END (PORTAL FOR REPORTING ENTITIES TO DIGITALLY READ, SUBMIT AND INTERACT WITH FINTRAC BACK OFFICE EMPLOYEES). |

# VERSIONS

|  |  |
| --- | --- |
| **VERSION NUMBER** | **DESCRIPTION** |
| 1.0 | INITIAL DRAFT |
| 1.1 | UPDATE TO DEPLOYMENT PROCESS (PR’S) |
|  |  |
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INTRODUCTION

EXECUTIVE SUMMARY

Our solution is a modernization project designed to streamline the process of data collection and reporting for the Financial Transactions and Reports Analysis Centre of Canada (FINTRAC) and the financial institutions it oversees. The system is based on the Microsoft Power Platform, including Dynamics 365 and Power Apps portals, and is supported by a range of Azure services, including Azure B2C, Azure Storage, Azure Front Door (for CDN), and SharePoint Online.

Currently, FINTRAC collects data and reports from financial institutions manually, through methods such as email and file system portals. The new system will provide a portal front end and API endpoints for reporting entities (REs) to securely upload data directly, improving efficiency and accuracy. Mature REs will also have access to APIs to use their own systems to upload large amounts of data. All data will be stored in a single source hosted in the "Dataverse" environment, which integrates with the secure, on-premises and cloud-based "Org Master" data source.

The use of Azure B2C (OIDC) authentication ensures the security of the data, while the CRM platform, Dynamics 365, streamlines regulatory compliance activities for FINTRAC's internal staff. The Power Apps portals provide a seamless experience for external users, allowing them to easily meet their compliance reporting obligations.

Since the entire platform is based on Software as a Service (SaaS), the complexities of administering Infrastructure as a Service (IaaS) are abstracted, minimizing the burden on IT and ensuring that the systems are always up to date and secure. The use of Dynamics 365 server-side sync for email integration further enhances the efficiency associated with alerting RE’s and other employees (internally) of actions required in the process to achieve compliance with the questionnaire and other types of compliance cases. Email outside the organization however will mostly be alerts for RE’s to log into to the portal to review notifications in a notification center rather than providing the detailed content directly in the email as email is inherently insecure and should never contain protected / sensitive information.

Overall, this solution modernizes FINTRAC's process of regulatory compliance and provides a more efficient and user-friendly experience for both internal staff and external users.

This document focuses on the SDLC process and automated deployment configuration using the Agency’s Azure DevOps subscription by using GIT repositories, test plans and the pipelines feature. Currently the documentation for the system is authored in Word however the primary source of the documentation is to reside in DevOps in markdown format thus the documentation process and release process will include updates to the documentation rather than the two being separate operations. By doing so FINTRAC can be assured that the documentation they have is the latest and developers / release managers are forced to provide release notes and relevant documentation update to the build being released. The markdown documentation format is exportable to word and pdf thus can be shared widely to other stakeholders outside the build team however the extended teams or stakeholders must take note of the release number associated to the documentation they are referencing, and the release manager should keep RDIMS and or any IM repository up to date with the exported versions. This can be eventually automated once the Agency provides an endpoint to interface with RDIMS or moves to a more modern IM repository that ships with an API that can be invoked by DevOps through a service principle (e.g. App Registration) issued by Azure B2C and whose API is governed by APIM which aligns with the Agency’s current API process.

Software Architecture

The illustration below depicts the entirety of the Power Platform implementation and its supporting and integration services. This document will be organized such that a chapter will be dedicated to every technology depicted in this artefact and most important include the baseline configuration being implemented at FINTAC. It is important to note that this architecture is meant to service multiple verticas at FINTRAC. This document will fucus on the first implementation that leverages which technology called the “risk questionnaire” however this has been designed or reusability across the organization for virtually any use case that requires an external facing presence, internal process and data processing/automation & most importantly rely on its security implementations due to the sensitivity of the subject matter that this system address:

Diagram

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Applicatication lifecycle management (alm)

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The PowerPlatform CI/CD implementation is comprised of a script that provides the PowerPlatform build teams with the ability to check-in their Dataverse solutions, configuration data schema files, and portal code to the organizations primary repository hosting the source code and deployment artefacts that make up the Department’s grant funding system. This pipeline extension is built to be generic to any Power Platform implementation that is comprised of both Model-Driven-Apps and PowerApps Portals. Canvas Apps are not yet fully supported in this implementation, however support for these types of applications will be released in version 1.3. Since Canvas apps are typically stored in a solution, this pipeline automation extension can include Canvas Apps but will not include certain features like automated tests designed for these types of applications. Version 1.3 is scheduled to be released on June 28, 2022, along with an updated version of this document.

The illustration below depicts the pipeline automation for this implementation. It illustrates the features being used along with what kind of artefacts are being migrated as part of the pipeline.

Diagram

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## Continuous IntegratioN

For the organization to achieve stability, predictability and quality of their Dataverse application deployments, the build team needs to be equipped with tools that will automate the export for solutions, configuration data, and portal data and apply version control. In addition, members of the build team need the capability to deploy new features and or bug fixes frequently to minimize the complexities associated with less frequent and very large deployments. Having the ability to continuously release changes to the Dataverse applications will allow the developer to address issues such as missing dependencies, critical bugs, and potential misconfigurations or mis-interpreted requirements which can cause issues downstream. By catching these issues early, the team can resolve these issues and re-deploy. The deployment processes in the PowerPlatform can take a significant amount of time if executed manually which can cause overall productivity issues. Therefore, by implementing a robust continuous integration framework, developers can instead rely on the DevOps Pipelines feature to automate deployments which will not only provide overall productivity gains, but will also standardize the deployment processes, provide a facility for automated testing to ensure best practices are followed, validate that the solution, data and portal artefacts can be successfully deployed based on their latest changes etc. In this section, the extension for CI is described.

1: Developer invoked integration (DEV, STAGING, TEST, TEMP ENVs\*) – Continuous integration

Developers have the option of manually invoking a pipeline for which the developer will be supply a series of variable values in a specific sequence. Once the variables are defined, and the pipeline invoked, the extension will interpret the supplied variables and will deploy the developer’s solution(s), configuration data (from the schema), and (or) the portal configuration changes automatically. As part of this process, the extension will run the solution and portal checker APIs provided by the Dataverse build tools and will export the Dataverse resources informed by the variable(s) provided by the developer. These artefacts are stored in the DevOps project storage for future usage such as release to a downstream environment such as UAT and PROD.

*\*TEMP ENVs include sandbox environments, training environments – or any environment that needs to be spun up temporarily for a specific purpose. This may also include environments where we test “preview” features being released in future release waves*

2: Integration Automation (UAT, PRE-PROD & PROD) – Continuous Deployments

The organization can configure the pipeline to trigger automatically via Pull-Requests. In this scenario, pull-requests are invoked to a branch such as TEST which will automatically deploy the solutions, data files, and (or) portals using pre-defined variable values in both the variable group and run time variables. In this scenario developers will be responsible to move their solution components to the primary solutions set in the variable artefacts. The release manager will then issue a PR to the relevant branch will execute the pipeline, save the artefacts in preparation for a release to a downstream environment. The benefits of this approach include a reduction of effort associated with developers having to manually invoke pipelines. The downside will be less traceability of who made the changes and when as with this approach, changes are published by a single (or multiple) release managers for the sole purpose of deployment and generation of artefacts to deploy to downstream environments.

Summary

FINTRAC can opt to use a combination of the two options instead of picking one. In this scenario, developers will be responsible to commit their work, indirectly through the pipeline script in DevOps, and the cadence for option 2 would be that the release manager would run the same pipeline at specific time intervals during a release cycle to prepare the artefacts for a full release to UAT and Production. If FINTRAC opts to leverage only a single option, Option 1 would be more beneficial as it would align better with modern ALM standards whereby developers can test their own releases and receive feedback on any potential defects associated with their development artefacts through the automated test outputs provided by the pipeline so that when its time a full release, issues like missing dependencies, bugs and mis-configurations are minimized or eliminated resulting in a more reliable deployment process.

## Continuous Deployments

This pipeline extension includes a release pipeline targeted to UAT and PRODUCTION environments. Releases are invoked by release managers who will have the ability to select any successful and issue a release to UAT and PROD using that build’s artefacts. The script is identical to the build integration script and will use the same variable group. The only delta is that the release pipeline script will loop through its source build integration artifacts and set the runtime variables automatically so that the release manager does not need to re-set these variables at run time. When referring to sanity tests, note that there is a combination of both automated and manual testing. The goal is to have a suite of automated tests using selenium that is part of the release pipeline tasks (steps) therefore ensuring that the “baseline” configuration of the system is not altered in a way that would break critical functionality. In addition, humans will be testing functionality mostly for usability purposes rather than trying to find bugs. If bugs are found that can be converted into a test script, the test suite will be amended with this new check, whereas bugs deemed more as functional such as a feature that should work a different way, the build is simply rejected or returned to the team for refactoring and the cycle continues.

QA Process

The release pipeline can be invoked manually by a release manager from any build or from the release’s menu in DevOps. Developer builds are staged into the staging environment where they are tested by developers and when ready to deploy further downstream, the team issues a PR to the TEST branch which triggers the pipeline to issue a particular release to the TEST environment enabling the QA team to perform their tests in advance to official UAT.

UAT, PRE-PROD and PRODUCTION Process

Once the QA team has approved a build, a pull-request is executed to the UAT environment which triggers a pipeline to release the successful build to UAT whereby the client can perform their own testing (functional) in preparation for a production release. If successful, the release manager will then issue a PR to the PRE PROD environment which is configured to mirror the production configuration to similuate the production release and perform sanity tests to validate the release’s stability. If all tests pass, the PR to PROD is issued and this tiggers the overnight pipeline which issues the full release at 3 AM EST (TBD).

## Implementation

This section provides the detailed implementation of the automate release pipeline for this implementation. As a security measure, we’ve removed privileged assess to environments beyond dev and apply a mature automated test suite to minimize errors and efforts associate with mundane testing

Pipeline Security

Only build administrators can modify the pipeline and execute the full release pipeline. Contributors (developers) can execute the build integration pipeline. This baseline implementation also restricts any modifications to the variable group that is linked to the pipelines. Only build administrators can modify these groups. However, if FINTRAC employs a developer environment strategy, it is recommended that the variable groups are cloned, and that each developer will have access to the build integration pipeline within their own branch and these would be tied to a variable group whose source and target would reflect their developer environment and point to the consolidated dev environment.

This current version of the scripts supports OOB variable groups and variable secrets but assumes that the DevOps projects is not linked to a KeyVaults. If FINTRAC links the project to a KeyVaults, the variable group values will be updated to include the KeyVaults name and secret IDs instead of using “masked” secrets.

## Service Connections

The table below includes the service connections required for this extension. In addition to service connections, since this extension is leveraging the community version of the build tools, connecting strings must also be configured. However, the connection strings are automatically generated by other variables (e.g., the SPN – App Registrations/App User’s TenantID, URL, ClientID and Secret all of which are concatenated within the source and target connection strings for each environment. These variables, including the service connections (Target and SourceSPN-{ENV} variables are available in the Variable Group (Connection-Parameters).

A service connection should be created for each environment that will service as a source and target environment for the integration and deployment pipelines. All connection parameters should be pre-defined in the connection parameters variable group.

## Variables & Variable Groups

The table below lists all variables and groups and describes their purpose and usage.

**Variable Group**: Connection-Parameters-CI -> used by continuous integration pipeline

|  |  |
| --- | --- |
| Variable Name | Description |
| ClientID | App Registration’s ClientID (ApplicationID – SPN for Dataverse Environments’ App User (assumes 1 SPN for multiple environments) |
| DeploymentProfile-Source | Portals -> PROD Global settings (located in Deployment-Profiles folder in repository – prod.deployment.yml |
| DeploymentProfile-Target | Portals -> TEST Global settings (located in Deployment-Profiles folder in repository – test.deployment.yml |
| Secret | App Registration’s Client Secret (SPN for Dataverse Environments’ App User (assumes 1 SPN for multiple environments) |
| SourceConnection | Value is populated by ClientID, Secret, Source and Target URLs, and TenantID – this is for data transfers |
| SourceSPN | Service Connection name for DEV (Source environment) |
| SourceURL | Source URL for UAT (feeds Source Connection variable) |
| TargetConnection | Value is populated by ClientID, Secret, Source and Target URLs, and TenantID – this is for data transfers (source environment connection string) |
| TargetSPN | Service Connection name for UAT (Target environment) |
| TargetURL | Target URL for PROD (feeds TargetConnection variable) |
| TenantID | Azure tenant ID hosting App registration record |

**Variable Group**: Connection-Parameters-{ENV} -> used by release pipeline

|  |  |
| --- | --- |
| Variable Name | Description |
| ClientID | App Registration’s ClientID (ApplicationID – SPN for Dataverse Environments’ App User (assumes 1 SPN for multiple environments) |
| DeploymentProfile | Portals -> Global settings (located in Deployment-Profiles folder in repository – {env}.deployment.yml -> used to override deployment settings specific to the target environment such as site settings |
| Secret | App Registration’s Client Secret (SPN for Dataverse Environments’ App User (assumes 1 SPN for multiple environments) |
| TargetConnection | Value is populated by ClientID, Secret, Source and Target URLs, and TenantID – this is for data transfers (source environment connection string) |
| TargetSPN | Service Connection name for UAT (Target environment) |
| TargetURL | Target URL for PROD (feeds TargetConnection variable) |
| TenantID | Azure tenant ID hosting App registration record |

Runtime Variables: These variables are provided by the developer or release manager at the time of execution (so when the pipeline is invoked manually). Some of these are pre-populated each sprint and a pipeline is configured for each developer PATCH; HOWEVER, the developer can opt to use an existing pipeline to specify their patch or solution in the artefact variable(s).

|  |  |
| --- | --- |
| Variable Name | Description |
| Artefact1 | Provide the name of a solution (doesn’t need to be in the repository, the pipeline will perform the export and commit etc.) or configuration migration xml file (must be in the data directory in the repo) |
| Artefact1-Auth-Profile | Name of the Service Connection used to export and import the solution. For Flows, the user identity connection must be used rather than the ClientID/Secret otherwise the connection reference won’t activate in the target once the solution is installed. The default value is the ClientID/Secret SPN, but users can override. |
| Artefact2 | Provide the name of a solution (doesn’t need to be in the repository, the pipeline will perform the export and commit etc.) or configuration migration xml file (must be in the data directory in the repo) |
| Artefact2- Auth-Profile | Name of the Service Connection used to export and import the solution. For Flows, the user identity connection must be used rather than the ClientID/Secret otherwise the connection reference won’t activate in the target once the solution is installed. The default value is the ClientID/Secret SPN, but users can override. |
| Artefact3 | Provide the name of a solution (doesn’t need to be in the repository, the pipeline will perform the export and commit etc.) or configuration migration xml file (must be in the data directory in the repo) |
| Artefact3- Auth-Profile | Name of the Service Connection used to export and import the solution. For Flows, the user identity connection must be used rather than the ClientID/Secret otherwise the connection reference won’t activate in the target once the solution is installed. The default value is the ClientID/Secret SPN, but users can override. |
| Artefact4 | Provide the name of a solution (doesn’t need to be in the repository, the pipeline will perform the export and commit etc.) or configuration migration xml file (must be in the data directory in the repo) |
| Artefact4-T Auth-Profile | Name of the Service Connection used to export and import the solution. For Flows, the user identity connection must be used rather than the ClientID/Secret otherwise the connection reference won’t activate in the target once the solution is installed. The default value is the ClientID/Secret SPN, but users can override. |
| Deploy Portal? | If set to yes, the pipeline will export the portal via CLI and commit to source. It will also deploy the portal to the target environment (using SourceURL and TargetURL) |
| Comments | Used to issue the git comments when the pipelines automatically commit your artefacts |
| Project Name | Optional, provides project context |
| Variable-Group | Name of the variable group that is linked to the pipeline to leverage. The group must have the same variable names (and types) as the “Connection-Parameters” variable group. This is useful to isolated dev environments with specific Dataverse environments that fall outside the main dev stream. |

DevOps Project can be access here. To obtain access you must request an invitation of an existing user and must have at minimum the basic + test D365/M35 licenses.

## .NET/NuGET Libraries / Marketplace (Dependencies)

The following marketplace plugins and NuGet packages are leveraged in this extension. The goal is to reduce the number of marketplace plugins and slowly transition towards using the CLI exclusively coupled with Dataverse API calls to reduce dependencies.

|  |  |  |
| --- | --- | --- |
| Name | Type | Purpose |
| PowerPlatform Build Tools | DevOps Marketplace Plugin | First Party (MS) Helper YAML extensions for pipelines |
| Power DevOps Tools | DevOps Marketplace Plugin | Third Party (open source) Helper YAML extensions for pipelines |
| PowerPlatform CLI | NuGet Package | Official Microsoft CLI for PowerPlatform |

\*Note, with Power Platform Build Tools Version 2.0x, the third party NuGet package is no longer required as the new version of the build tools addresses some of the missing features that were addressed by the community version. Moreover, the CLI can be used exclusively to manage the entire ALM process however will need to be built from scratch using either BASH or PS scripting thus adding additional maintenance and complexity to the solution. In the current pipeline implementation, the CLI is being leveraged to migrate the portal between environments.

## Developer initiated multi-stage RELEASER ipeline

The process below illustrates the typical process for which a developer will execute the build integration pipeline. In this example, the developer is transferring Organizations and Contacts from developed to a staging environment before transferring the solution as this solution has workflow dependencies relying on Organization and Contact lookup values being populated. At the same time, the user wants to deploy his/her latest portal changes to the staging. \*NOTE\* to enable CI, you can opt to have this pipeline trigger when a PR issued to a specific branch. However, the process below is recommended as it provides the build team with the ability to check-in their work and automatically deploy and commit their changes and generate the artefacts and test logs. If you decide to employ full automation, simply update the trigger of this pipeline to a specific branch and ensure that the runtime variables configured are pre-defined (see variables section) – the variable group is already pre-defined so not additional configuration required there.

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If successful, each stage (1 per artefact specified in the variables), will store its artefact in the Agent’s Artefact Staging Directory for a release to a UAT, PRE-PROD and PROD environment. The pipeline execution’s success means that the source developer environment artefacts provided in the variables will be deployed on the target staging environment (or test environment, depending on your deployment strategy for build integration). The solutions are deployed as managed, and the portal is deployed using the CLI and only delta portal changes are also deployed to the target staging environment (or build environment).

To view the artefacts, click on the artefact anchor in one of the stages. You can then view the download the artefacts and the solution and portal checker log files for review. Note that this is the happy path. If any of the stages fail, the pipeline will exit to ensure that no subsequent solutions, data files or portal is deployed. In this case, you can click on the failed stage(s) to view the detailed log of the failure.

Below demonstrates the artefact storage structure. Notice that the folder names will include an integer as a suffix which informs the eventual release of the sequence for which to deploy these artefacts to downstream environments.

\**Note that as you add additional tests to this CI/CD extension, you should consider adding your test report(s) to the artefacts instead of just in the GIT repository so that in the future, you can leverage other pipeline tasks to send these report artifacts to another IM repository such as SharePoint, or RDIMS*

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In the event the pipeline execution fails, you can view the logs by clicking on any failed stage to view the details. In the example below, the TargetSPN was misspelled in the variable group resulting in a connection issue to the target environment for the data import.

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## Release Manager multi-stage release

The process below illustrates the typical process for which a release manager will execute a full release to UAT and invoke the PROD release manually only once UAT is completed. This is useful because, once the artefacts are deployed to UAT, the client can test against the acceptance criteria and if everything is ok, the release manager can return to this release and execute the production stage knowing that the same artefacts deployed to UAT successfully will be used to deploy to production.

Using the example build from the previous section, the release manager can navigate to the successful build, select the ellipsis and press “Release”

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When creating the new release, ensure to select the “Production Deployment Stage” as a stage to run “Manually”. This ensures that the artefacts will only be deployed to your UAT environment to allow for client UAT. You will execute the production deployment stage once UAT is completed in a subsequent step.

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Once created, the release anchor will be displayed just below the breadcrumb, but you can also view the progress of the release under the releases menu.

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In the release details, you will notice that the UAT deployment is being exectuted whereas Production is not being deployed. In addition, the artefacts from the release are those that were generated by the successful build.

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Once succeeded you should see the following.

\**Note that if you would like to re-deploy the same artefacts but to a different environment, the UAT stage below relies on the same variable group used in the build integration pipeline. To do so you could update the TargetURL-UAT, TargetSPN-UAT, ClientID and Secret (if the App User is different in the new target) OR simply clone the Connection-Parameters variable group, re-run the same build (in this case \_20220616.3) and edit the Variable-Group variable to your new group name and re-run the build integration pipeline and issue a new release. The latter would be recommended to avoid any disruption from updating connection parameters of your main development stream. IN summary, if you would like to employ the same release pipeline deployment strategy to another set of downstream environments(s), simply clone the Connection-Parameters variable group, everything else an remain the same as this CI/CD extension allows you to specify a variable group at runtime to give you control over which environments you would like to apply CI/CD to*

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Once UAT has been successfully completed, and you are ready to deploy to production. Navigate to the release that deployed the UAT artefacts that resulting in the successful UAT testing cycle and execute the production deployment

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## CONFIGURING THE CI/CD PIPELINE

This section describes how to deploy and configure the CI/CD artefacts to your DevOps project. You can clone the following [repository](https://dev.azure.com/cloudstrucc/_git/PowerPlatform-CIDC) to your own or follow the steps below to create one from scratch.

Pre-Requisites

* Commit the following [Pipeline Automation YAML File](https://github.com/Cloudstrucc/PowerPlatformCICD/blob/main/PowerPlatform-CI.yml) to your repository’s root directory
* Commit the following [PowerShell script](https://github.com/Cloudstrucc/PowerPlatformCICD/blob/main/PortalMigration.ps1) to a folder named “Pipeline-Scripts” in your repository’s root directory
* Download the [release-pipeline JSON file](https://github.com/Cloudstrucc/PowerPlatformCICD/blob/main/PowerPlatform-Deployment.json)
* Create a Solutions folder in your repository’s root directory
* Create a Data folder in your repository’s root directory
* Create a ExportedData folder in your repository’s Data folder (created in the previous step)
* Create a Portals folder in your repository’s root directory
* Create a Logs folder in your repository’s root directory
* Create a Deployment-Profiles folder in your repository’s Profile directory
* Create a folder that matches the name of your PowerApps Portals website record in your repository’s Portals folder. In that folder, create a deployment-profiles folder and include your dev, test, uat, and prod YAML profile files (e.g. test.deployment.yml <- where test is the CLI parameter flag that will inform the CLI which deployment profile to use for your portal deployments.

The example below demonstrates the above folder structure implemented in a DevOps repository to leverages this extension

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Install the following marketplace plugins

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Create Pipeline

This section demonstrates the steps to create the build integration pipeline.

Create the Pipeline

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Select the CI/CD YML File provided for this extension, which needs to hosted in your repository’s root directory. You can also choose the branch for which the YML file exists.

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Next create all the following variables and make sure to set the variable group name to “Connection-Parameters” or whichever name you will use for your variable group you will create in the next section. Once completed, press the drop down next to the blue run button and press Save **(Do not attempt to run the pipeline at this point)**

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Create Variable Group & Link to Pipeline

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When creating the group ensure that the variable names match those listed in the [Variable Group section of this document](#_Variables_&_Variable)

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**The pipeline is not fully configured and can be executed at anytime**

Create The Release Pipeline

Even though the pipelines can be used to also release to UAT and PROD environments, the recommended method to release to these environments is to use the releases feature of DevOps. The steps below demonstrate how to configure the release pipeline so that release managers can issue releases based on builds that were ran by the build integration pipeline (CI).

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Select the PowerPlatform-Deployment JSON file provided with this extension and press “OK”

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Once imported you will be asked to specify your agent pool. You can select “Azure Pipelines” or your own custom pool and “windows-latest” as the agent specifications (for both UAT and PROD)

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Once specified, return to the release pipeline and the errors should be gone. You’re release pipeline is now ready for use.

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