

P11: Configuring Dynamics 365 Apps in Power Platform Admin Center

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Context

Item	Detail
Tag	Vertical Patterns Power Platform Admin Center
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Version Control	V1.0
Application Use Case	Configure and install Dynamics 365 apps in a Power Platform environment
Reference Usage	Setting up Dynamics 365 apps in Power Platform

Story Behind The Pattern

Item	Detail
The Problem	Dynamics 365 apps in a Power Platform environment may be unconfigured or not installed, preventing users from accessing required functionality.
The Solution	Use the Power Platform Admin Center to configure existing Dynamics 365 apps, check their status, and install additional apps.
Dependencies	Power Platform Admin Center access, permissions to manage environments and Dynamics 365 apps.

The Pattern

Method: Configuring Dynamics 365 Apps in Power Platform Admin Center

Here's a step-by-step guide to configure and install Dynamics 365 apps in the Power Platform Admin Center:

1. Access the Power Platform Admin Center
 - o Log in to the Power Platform Admin Center (admin.powerplatform.microsoft.com) using your admin credentials.
 - o Ensure you have the necessary permissions to manage environments and Dynamics 365 apps
2. Navigate to Environments
 - o Use the navigation menu on the left sidebar to go to the Environments section.
 - o Expand the Environments section to view sub-options such as Environment groups and Data policies.
 - o Select the environment where you want to configure Dynamics 365 apps (e.g., "DQ FACTORY - DFSA - Primary DEV").
3. View Dynamics 365 Apps
 - o In the main section of the selected environment, locate the Dynamics 365 Apps tab (often under "Resources" or directly in the environment overview).
 - o Review the list of Dynamics 365 apps, which may include:
 - Dynamics 365 for Sales
 - Dynamics 365 for Customer Service
 - Dynamics 365 Guides
 - Dynamics 365 HR Integration to URS
 - o Note the configuration status of each app (e.g., "Enabled" or "Not Configured").

4. Check Configuration Status
 - Review the status of each app in the list:
 - Enabled: The app is already configured and ready for use (e.g., Dynamics 365 for Sales).
 - Not Configured: The app requires setup before it can be used (e.g., Dynamics 365 HR Virtual Tables).
 - Identify apps that need configuration or installation.
5. Configure an App
 - Select an app with a "Not Configured" status (e.g., Dynamics 365 HR Virtual Tables).
 - Click on the app name to open its configuration settings.
 - Follow the on-screen instructions, which may include:
 - Setting up connections to data sources (e.g., Dataverse or external systems).
 - Defining data policies (e.g., access control, data retention).
 - Enabling specific features (e.g., enabling virtual tables for HR data integration).
 - Complete all required fields and steps as prompted.
6. Save and Apply Changes
 - After configuring the app, click Save to apply your changes.
 - Verify that the app's status changes to Enabled in the Dynamics 365 Apps list.
 - If the status does not update, revisit the configuration steps to ensure all requirements are met (e.g., missing connections or permissions).
7. Navigate Using the Sidebar
 - Use the sidebar to access other sections for additional management tasks:
 - Home: Return to the admin center overview.
 - Resources: Manage other environment resources.
 - Analytics: View usage and performance reports.
 - Help + Support: Access documentation or request support.
 - Settings: Adjust environment settings, such as security or policies.
 - Use these sections to troubleshoot or explore related configurations if needed.
8. Complete Configuration
 - Repeat Steps 5-6 for all desired Dynamics 365 apps that need configuration.
 - Once all apps are configured, click Next to proceed to the next task (e.g., user assignment or testing).
 - If you need to cancel the configuration process at any point, click Cancel to discard changes.
9. Install Dynamics 365 HR Integration to URS
 - From the Dynamics 365 Apps list, locate the Dynamics 365 HR Integration to URS app.
 - Click the Install button to open the installation pop-up window.
 - Review the package details in the pop-up:
 - Name: Dynamics 365 HR Integration to URS
 - Version: Note the version number (e.g., 1.0.0.0)
 - Publisher: Confirm the publisher (e.g., Microsoft)
 - Check the box to agree to the terms of service.
 - Click Install to begin the installation process.
 - Monitor the installation progress and wait for confirmation that the app is installed successfully.
10. Test and Validate Configuration
 - After configuring or installing apps, test their functionality:
 - For configured apps (e.g., Dynamics 365 for Sales), log in as a user and verify access to features.
 - For the installed app (e.g., Dynamics 365 HR Integration to URS), check if HR data integration works as expected (e.g., virtual tables are accessible).
 - If issues arise, revisit the configuration or installation steps to troubleshoot (e.g., check for missing dependencies or incorrect settings).