P12: Managing Business Units 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	Manage business units in a Power Platform environment to organize teams and permissions
Reference Usage	Structuring organizational hierarchy in Power Platform environments

Story Behind The Pattern

Item	Detail
The Problem	Without proper business unit management, organizing teams, permissions, and data access in Power Platform can lead to inefficiencies or security issues.
The Solution	Use the Power Platform Admin Center to view, create, and manage business units, ensuring proper organizational structure and access control.
Dependencies	Power Platform Admin Center access, permissions to manage environments and business units.

Introduction to Business Units

Business Units in Power Platform and Dynamics 365 are organizational structures that help manage and segment data, security, and processes within an organization. They represent different parts of an organization, such as departments, divisions, or teams, and are used to control access to data and functionality.

The Pattern

Method: Managing Business Units in Power Platform Admin Center

Here’s a step-by-step guide to manage business units in the Power Platform Admin Center, including viewing existing units and creating new ones:

1. Access the Power Platform Admin Center
    - Log in to the Power Platform Admin Center (admin.powerplatform.microsoft.com) using your admin credentials.
    - Ensure you have the necessary permissions to manage environments and business units.

2. Navigate to Environments
    - Use the navigation menu on the left sidebar to go to the Environments section.
    - Select the desired environment from the list in the main section (e.g., "DSFA - DEV - REBUILD A").

3. View Environment Details
    - Review the detailed information about the selected environment to confirm you’re working in the correct context:
        - Environment URL: The URL for accessing the environment.
        - Region: The geographic region of the environment.
        - Type: The type of environment (e.g., Sandbox, Production).
        - Organization ID: The unique ID for the organization.

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        - State: The current state (e.g., Ready, Provisioning).
        - Refresh cadence: The data refresh schedule (e.g., None, Daily).
        - Security group: The associated security group (if any).
        - Creator name: The name of the user who created the environment.
    - Confirm the environment aligns with your business unit management needs.

4. Navigate to Settings
    - Use the navigation menu on the left sidebar to go to the Settings section.
    - Under the Settings section, select Business Units to access business unit management.

5. View Active Business Units
    - In the Business Units section, use the dropdown menu labeled Active Business Units to view the list of active business units.
    - Review the table below the dropdown, which displays columns such as:
        - Name: The name of the business unit.
        - Applications: The applications associated with the business unit.
        - Main Phone: The primary contact number.
        - Website: The website URL for the business unit.
    - Identify existing business units and their details to understand the current organizational structure.

6. Create a New Business Unit
    - Click Create new business unit to open the creation form.
    - Fill out the required fields in the form:
        - Name: Enter the name of the new business unit (e.g., "Sales Division A").
        - Division: Specify the division the business unit belongs to (e.g., "Sales").
        - Parent business unit: This field is pre-filled with the ID of the parent business unit (e.g., "org7f29b3e1"). Adjust if necessary by selecting a different parent unit.
        - Website: Enter the website URL (e.g., " https://example.com").
        - Main phone: Provide the main phone number (e.g., "+1-555-123-4567").
        - Other phone: Provide an additional phone number if applicable (e.g., "+ 1-555-987-6543").
        - Email: Enter the email address for the business unit (e.g., "salesdivision@example.com").
    - Double-check all fields for accuracy.

7. Save the New Business Unit
    - Click Save to create the new business unit and add it to the environment.
    - Verify that the new business unit appears in the Active Business Units list with the correct details.
    - If you need to cancel the creation process, click Cancel to discard changes.

8. Test and Validate the Business Unit
    - Assign users to the new business unit (refer to the "Managing Users in Power Platform Admin Center" solution pattern for user assignment steps).
    - Test data access and permissions for users in the new business unit to ensure proper segregation (e.g., users in "Sales Division A" can only access relevant records).
    - If issues arise, revisit the business unit settings or parent unit assignment to troubleshoot.