



Microsoft Power Platform **CONFERENCE**

POWER BI

POWER AUTOMATE

POWER APPS

POWER VIRTUAL AGENTS

POWER PAGES

From Zero to Governance - One Organization's Journey To Implementing Power Platform Governance

Lindsay Shelton – lindsayshelton@gmail.com

Michael Roth - Michael.Roth@gezeitenbrand.de



PowerPlatformConf.com



@PowerPlatConf



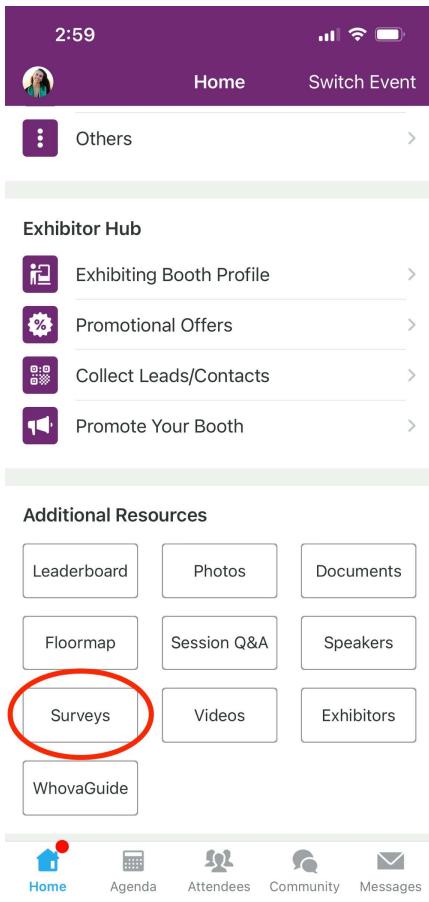
The official event app for the Microsoft Power Platform Conference – Fall 2023



Join the event app to access:

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**Event Invitation Code:
PPCFall2023**



Session Feedback Surveys

We really want to hear from YOU!

In the pursuit of making next year's Microsoft Power Platform Conference even better, we want to hear your feedback about this session.

Here's How -

- *Simply go to the Whova App on your smartphone*
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- *Click Session Feedback.*
- *Scroll down to find this session title.*
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It's just that easy!



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APRIL 30, MAY 1 & 2, 2024

• Workshops: April 28, 29 & May 3

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Swan & Dolphin Resort

FEATURING:



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President – Microsoft
Collaborative Apps and
Platforms, Microsoft



KARUANA GATIMU

Principal Manager, Customer
Advocacy Group Microsoft
Teams Engineering, Microsoft



ADAM HARMETZ

Vice President of Product
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ERIC BOYD

*Corporate Vice President AI
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AGENDA

- Lindsay's path from zero to governance
- Four Pillars of Governance
 - Environments
 - DLP
 - Security Roles
 - Center of Excellence Starter Kit
- Tips and Tricks

HELLO THERE!



LINDSAY SHELTON

She/her | Application
Programmer



Microsoft®
Most Valuable
Professional



@lshelton_tech | lindsaytshelton.com | linktr.ee/lindsaytshelton

Born and raised in Kansas City metro area

Proud cat mom

BizApps MVP and MCT

Spent 10 years as a teacher before switching careers

Works with everything from Power Platform adoption to SPFx
web parts to Azure APIM to Microsoft Shifts



MICHAEL ROTH

- Business Applications MVP
 - Mgr of Experience Tech
 - Power Platform Consultant
 - Solution Architect
- Governance and Administration
- Graphic Designer
- Amateur chef



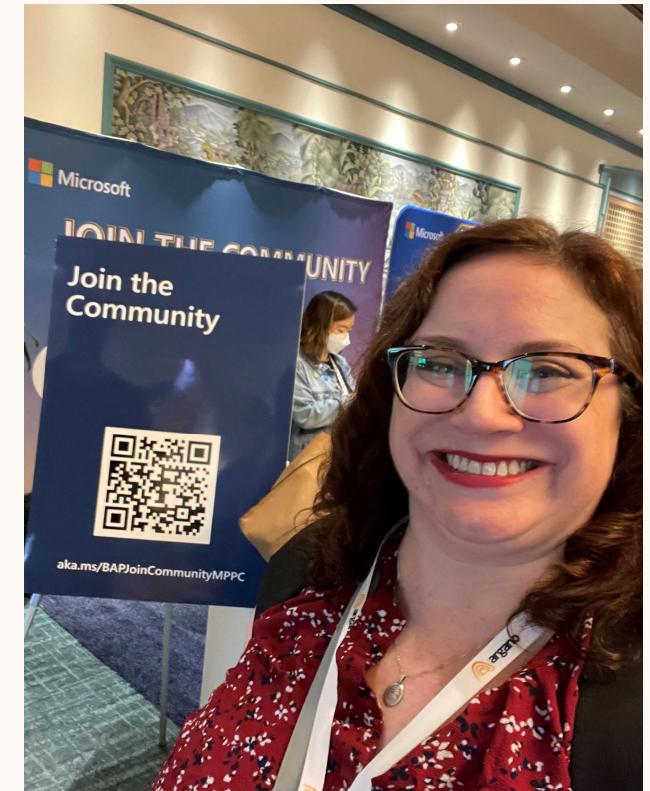
 @MichaelRoth42

 /michaelroth42/

 www.MichaelRoth42.com

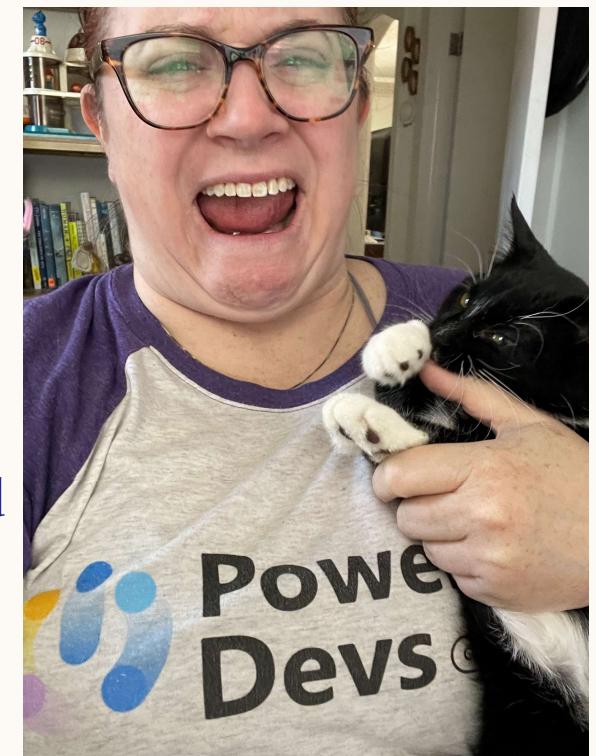
FLASH BACK TO SEPTEMBER 2022...

Lindsay arrives home from
the first inaugural Microsoft
Power Platform Conference

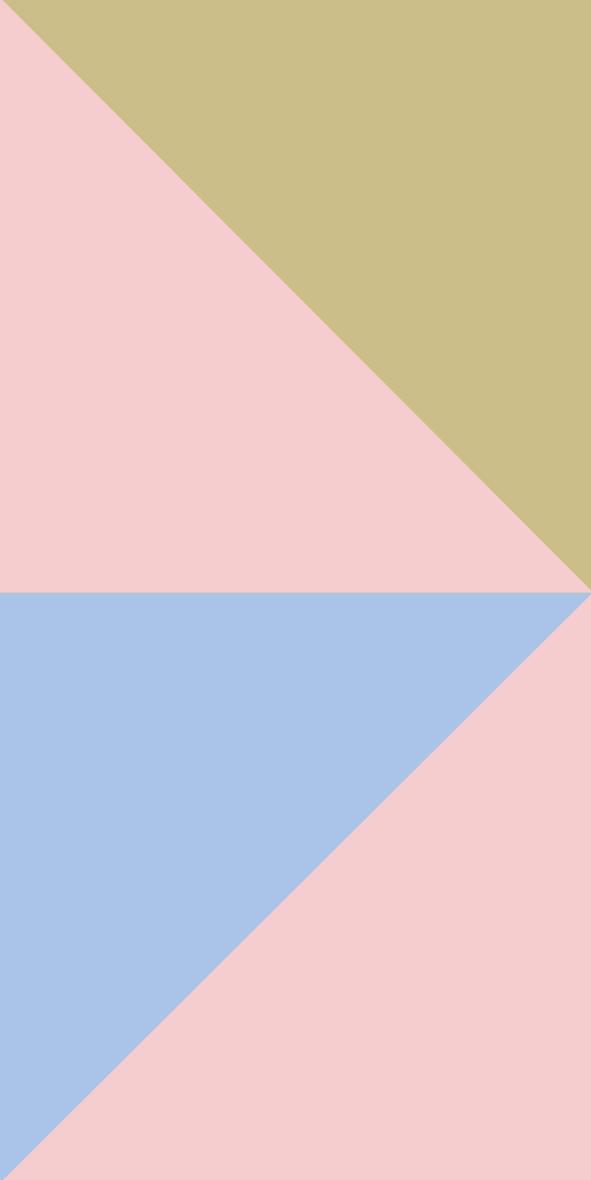


FLASH BACK TO OCTOBER 2022...

Lindsay logs into her work computer, does some research, and begins to react in horror as she realizes that there's a zero state of governance in her organization







WHAT IS A ZERO STATE OF GOVERNANCE?

ZERO STATE OF GOVERNANCE



SHADOW IT

Power users could be creating mission-critical items that IT knows nothing about; excessive use of resources like licenses



A MESS!

Users who leave are creating orphaned flows and apps; wild creation of environments and apps



SECURITY CONCERNS

Sensitive company data could be leaking through unvetted connectors; people could be accessing apps that you don't want

STOWERS INSTITUTE FOR MEDICAL RESEARCH

- Medical research non-profit
- 600ish users
- Somewhat Microsoft reluctant, depending on the lab or department



Stowers
Institute

SO, WHAT WAS GOING ON AT STOWERS?



SHADOW IT

The biggest problem we had, and we didn't know it until months after the primary power user had left



A MESS!

Only a handful of orphaned apps and flows, but no way to help users when someone left without off-boarding



SECURITY CONCERN

Luckily, there were no leaks that we know of, though this was probably only due to low adoption



**WHERE DO YOU GO
WHEN THERE'S
NOTHING IN
PLACE?**

Anywhere you want!



HOW I GOT STARTED



LEWIS BAYBUTT

@lowcodelewis



MICHAEL ROTH (YES, THAT GUY PRESENTING WITH ME)

@MichaelRoth42



TWITTER

#SharingIsCaring



MICROSOFT LEARN

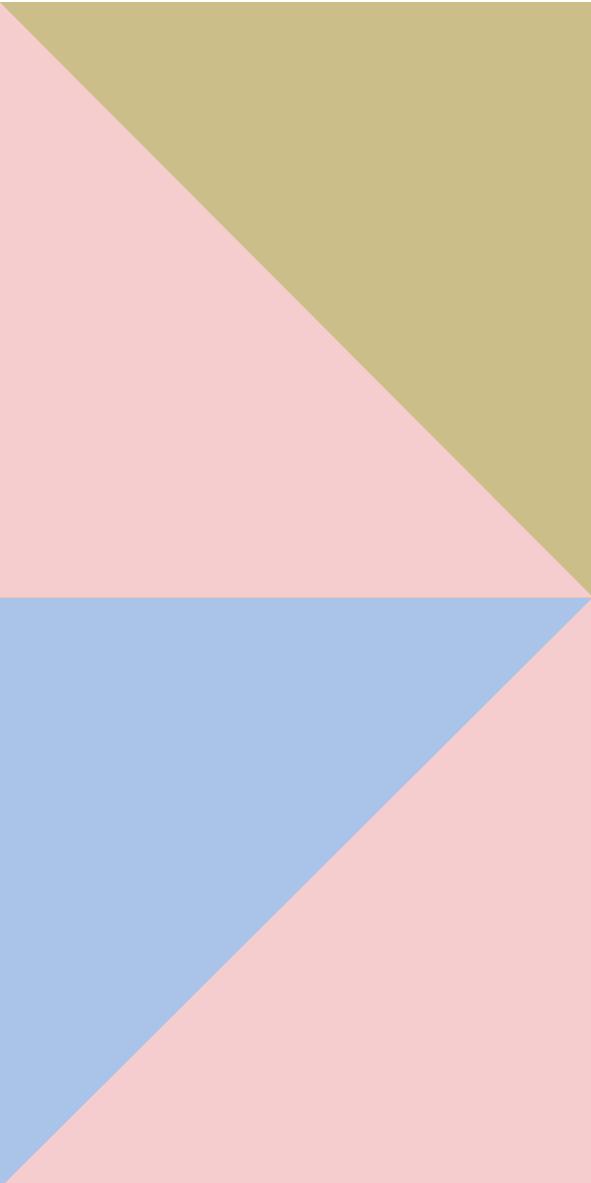
No, really!

BIGGEST SOURCE OF HELP – THE COMMUNITY!

- Don't be afraid to ask and reach out to people!
- You aren't a burden and people want to help.
- Pay it forward once you've been helped.

THE COMMUNITY HELPING ME

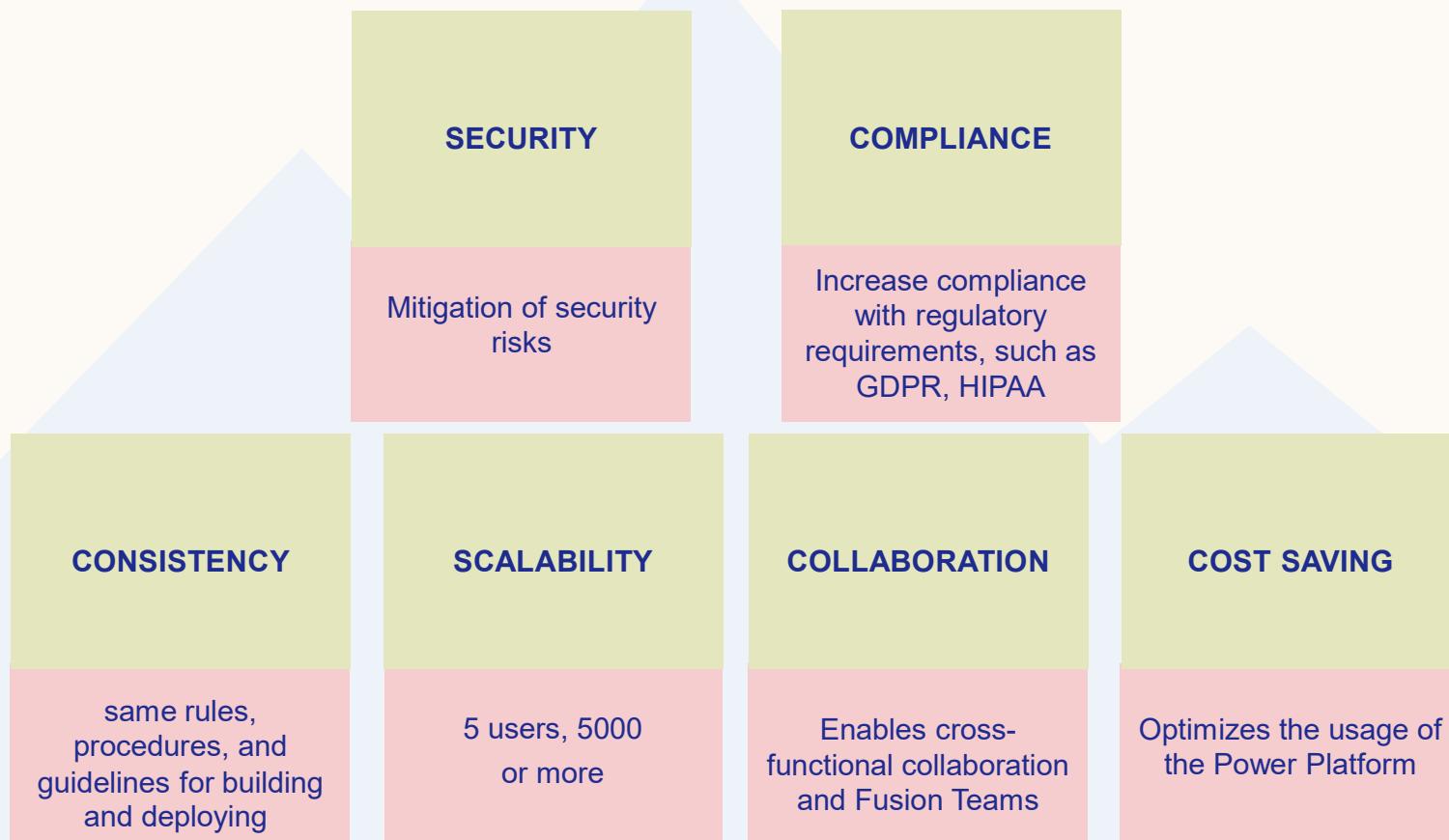




LINDSAY'S GOVERNANCE PHILOSOPHY

- After governance is in place... Empower users to create by encouraging adoption
- Allow your dedicated/trained makers a bit more freedom with DLP policies
- Develop relationships with your power users; they can become your evangelists
- Users can't break anything or screw anything up too badly with good governance
- Better to be safe than sorry

BUT WAIT, GOVERNANCE IS MORE..





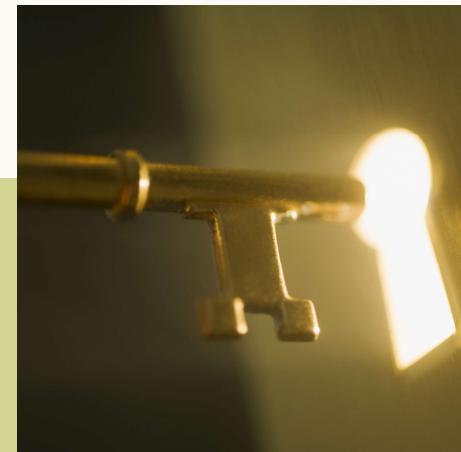
FOUR PILLARS OF GOVERNANCE



ENVIRONMENTS



DATA LOSS
PREVENTION (DLP)



SECURITY ROLES

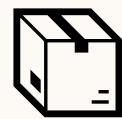


CENTER OF
EXCELLENCE

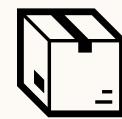
ENVIRONMENTS

Space to store and manage data, apps, flows and keep them separated from each other

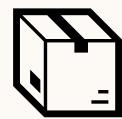
Basically, big boxes



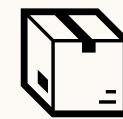
Default



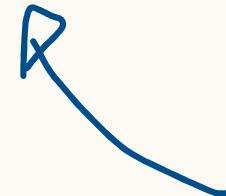
Development
North America



Testing
Spain



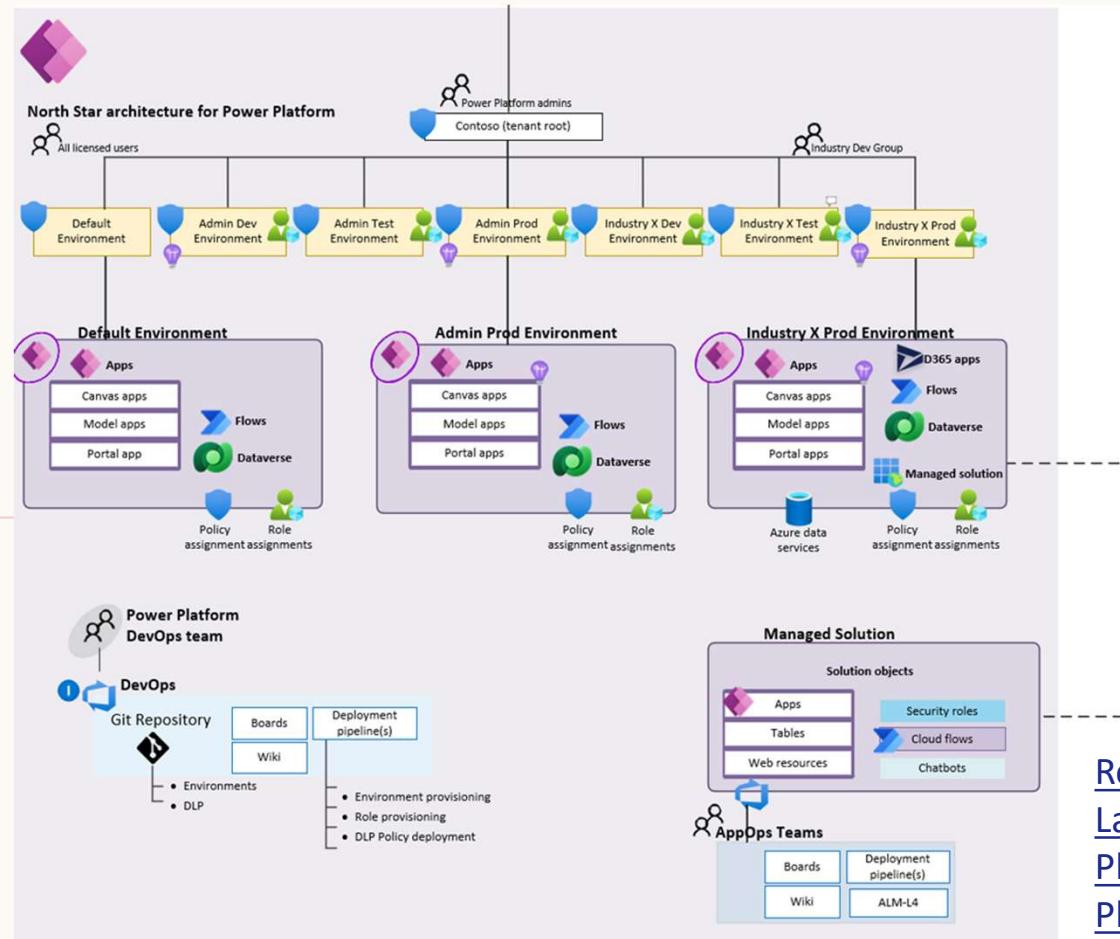
Production
Nigeria



💡 That's the foundation
of ALM (Application
Lifecycle Management)

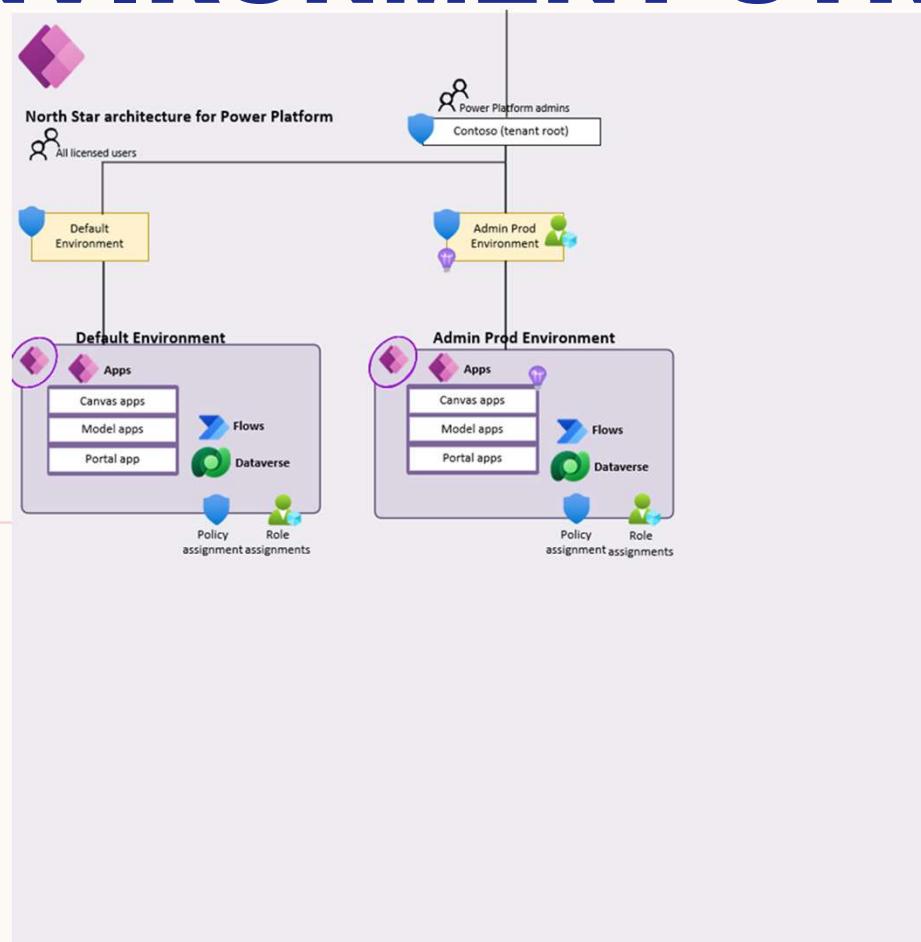


ENVIRONMENT STRATEGY

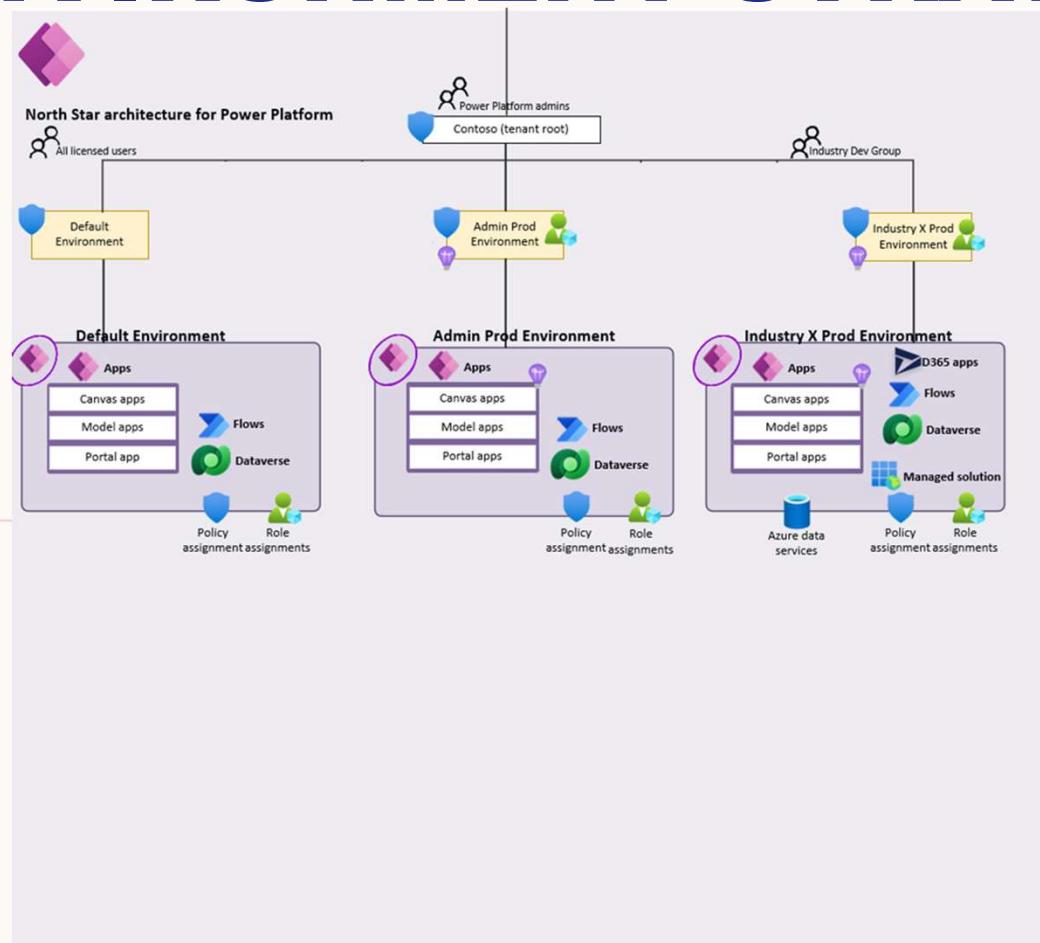


[Reference Architecture and Landing Zones for Power Platform - Microsoft Power Platform Blog](#)

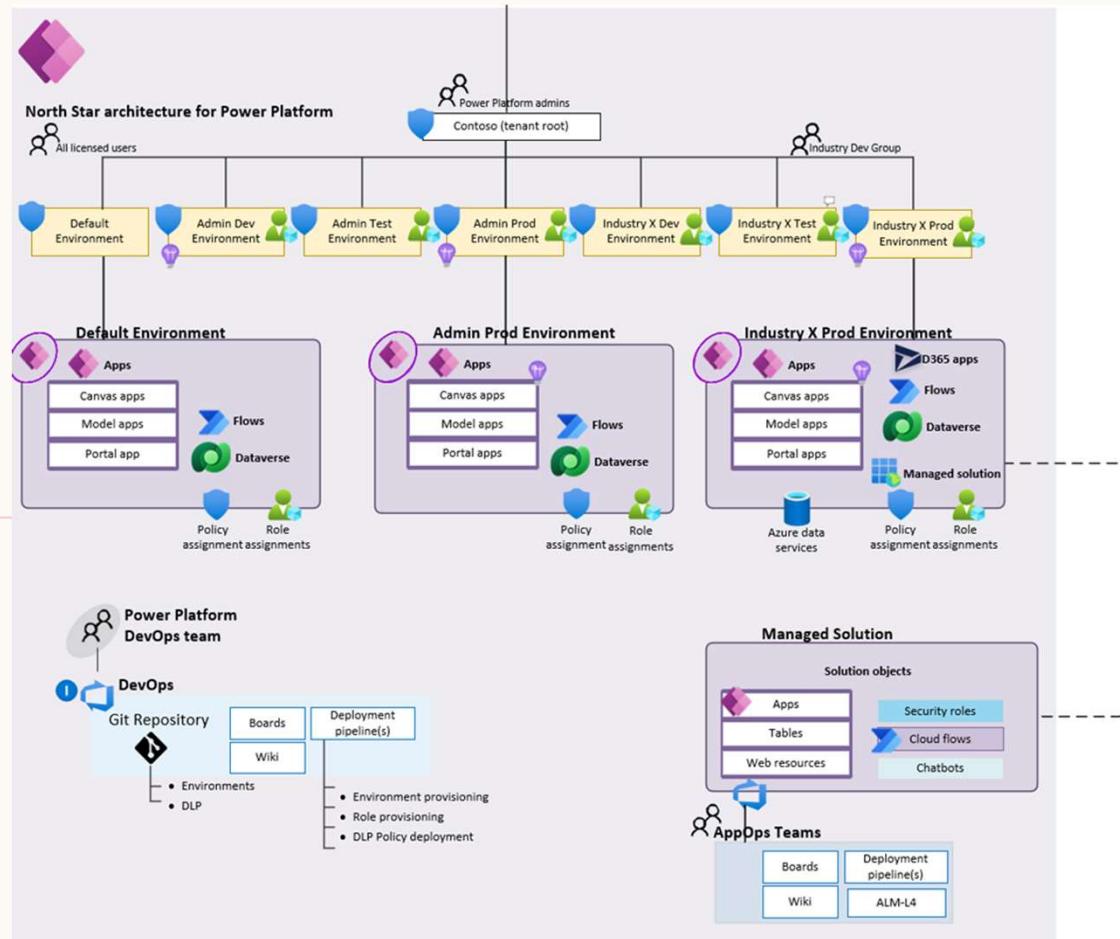
ENVIRONMENT STRATEGY



ENVIRONMENT STRATEGY



ENVIRONMENT STRATEGY





WHAT ARE DATA LOSS PREVENTION (DLP) POLICIES?

- Rules that you can set up that block or permit certain data connectors (mainly for canvas apps and Power Automate)
- Can also govern which connectors can be used together
- Can be configured for one environment, groups of environments, or the whole org

TYPES OF DLP CATEGORIES



BUSINESS CONNECTORS

- Can only be used with other business connectors
- For sensitive data



NON-BUSINESS CONNECTORS

- Cannot be used with Business connectors
- For non-sensitive data
- Non-blockable Microsoft connectors can go here



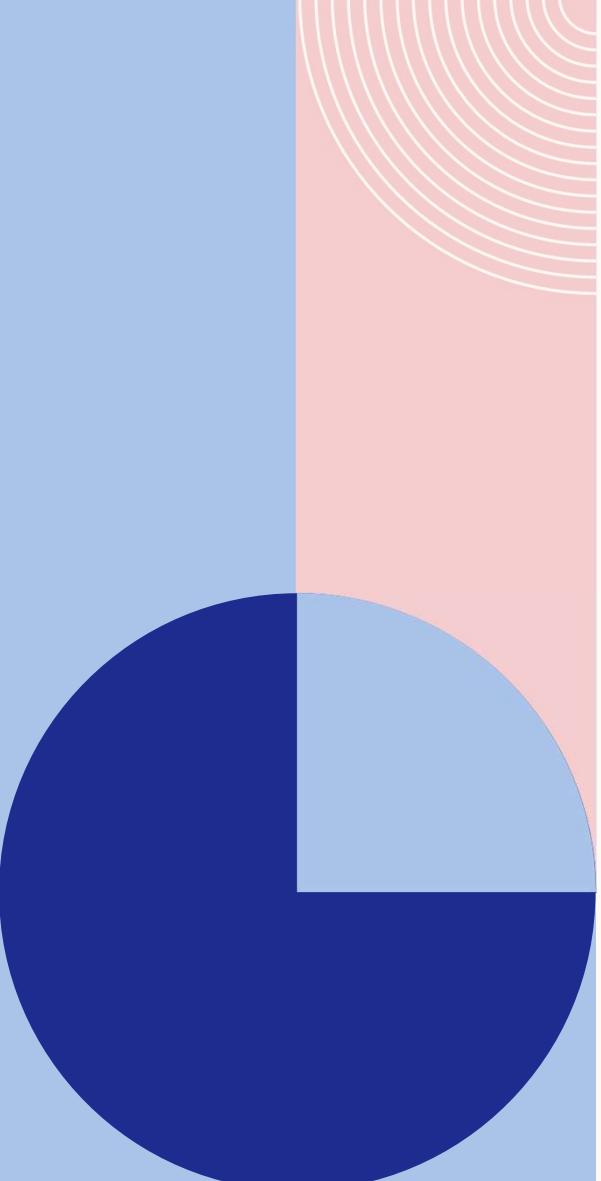
BLOCKED CONNECTORS

- Cannot be used at all by anyone
- Can set this to be the default for new connectors in your default environment

So if...

SharePoint and Salesforce are in **Business**
Outlook.com is in **Non-Business**
Facebook is in **Blocked**

Connector Matrix	SharePoint	Salesforce	Outlook.com	Facebook
SharePoint	✓	✓	✗	✗
Salesforce	✓	✓	✗	✗
Outlook.com	✗	✗	✓	✗
Facebook	✗	✗	✗	✗



WHAT ARE SECURITY ROLES?

- Security roles are assigned to users based on their responsibilities and needs.
- By assigning roles, administrators can manage user privileges efficiently, ensuring that users have appropriate access to resources while safeguarding sensitive information from unauthorized access.

ALL YOU NEED

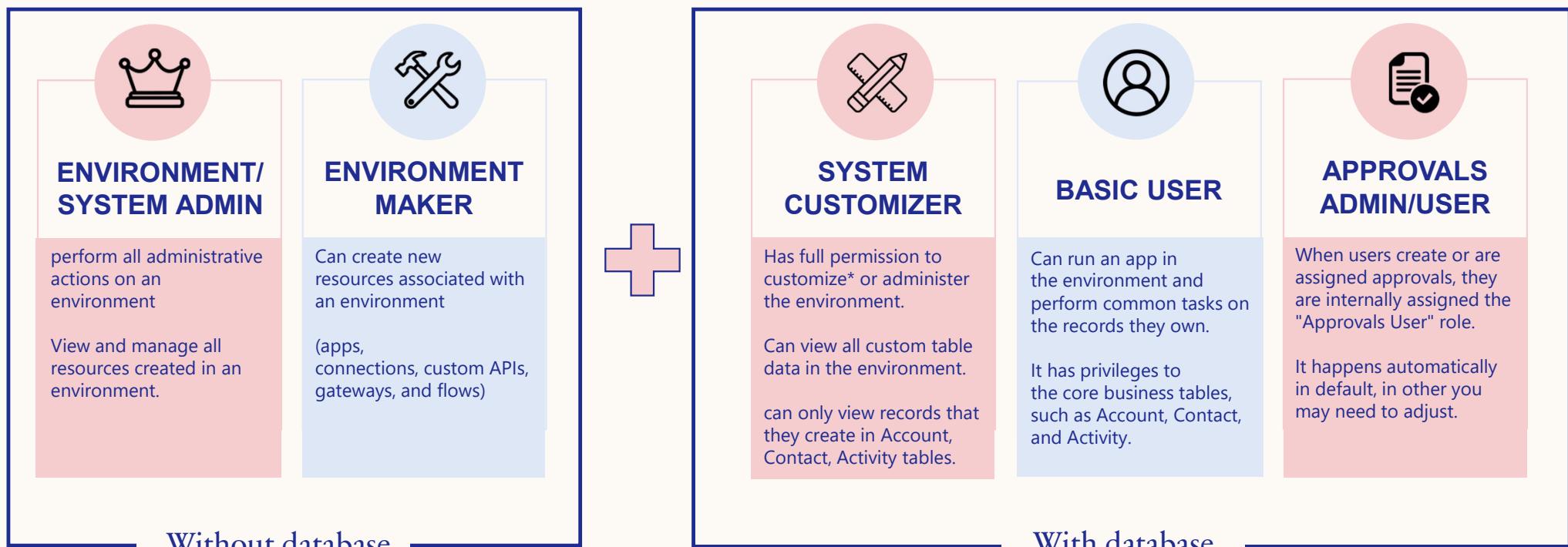
	ENVIRONMENT/ SYSTEM ADMIN	perform all administrative actions on an environment View and manage all resources created in an environment.
	ENVIRONMENT MAKER	Can create new resources associated with an environment (apps, connections, custom APIs, gateways, and flows)
	SYSTEM CUSTOMIZER	Has full permission to customize or administer the environment. Can view all custom table data in the environment. can only view records that they create in Account, Contact, Activity tables.
	BASIC USER	Can run an app in the environment and perform common tasks on the records they own. It has privileges to the core business tables, such as Account, Contact, and Activity.
	APPROVALS USER	When users create or are assigned approvals, they are internally assigned the "Approvals User" role. It happens automatically in default, in other you may need to adjust.

ALL YOU NEED

* ability to create or edit tables, relationships, fields, views, charts, dashboards in Dataverse 35

💡 access to the environment

💡 access to the database

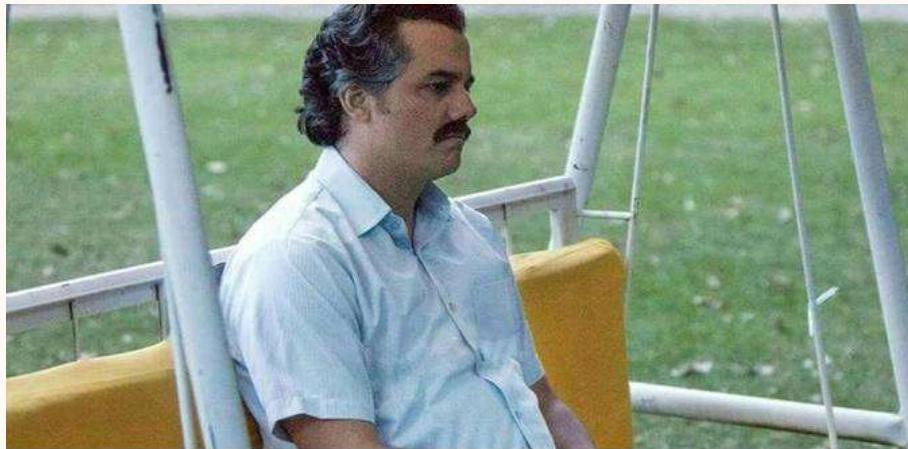


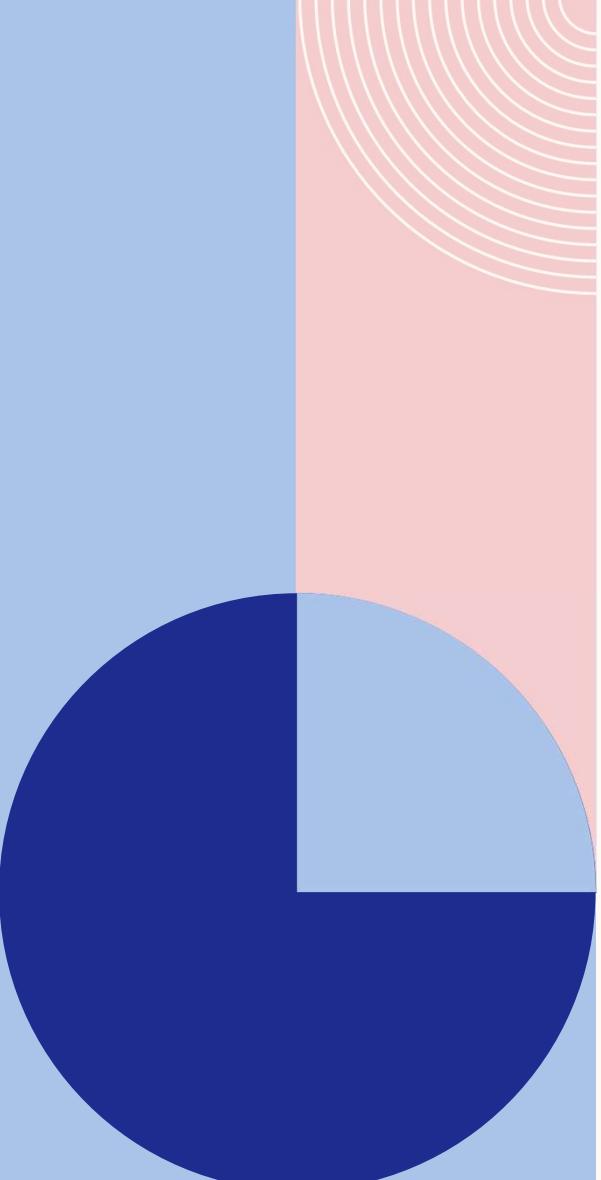


WHAT EXACTLY IS THE CENTER OF EXCELLENCE (COE) STARTER KIT?

- At its essence, it's a bunch of apps and flows that other people built already for you that help you see what is going on in your Power Platform environments
- It comes bundled in a solution for a relatively easy install
- You can expand on the basic solution – the starter kit or core components – with add-ons

ONLY DOWNSIDE – TAKES A WHILE TO INSTALL.





WHY NOT JUST USE THE POWER PLATFORM ADMIN CENTER?

POWER PLATFORM ADMIN
CENTER

COE STARTER KIT



Power Apps | Power Platform Admin View

Save As New Set As Default Refresh All

Power Platform Dashboard ▾

All Makers

App Makers

Display Name

Display Name	Sum (Number Of Apps)
COE-Admin	97
Shelton, Lindsay	22
	4
	3
	2
	2
	2
	1
	1

Sum (Number Of Apps)

Active Environments

Environments

Sum (Number Of Apps) Sum (Number Of Flows)

Display Name	Sum (Number Of Apps)	Sum (Number Of Flows)
COE	51	56
Dev CoE	50	62
Personal Prod...	37	195
Development	7	22
Production	3	18
Test	1	2
Maker Space	1	1

Display Name

All Makers

Flow Makers

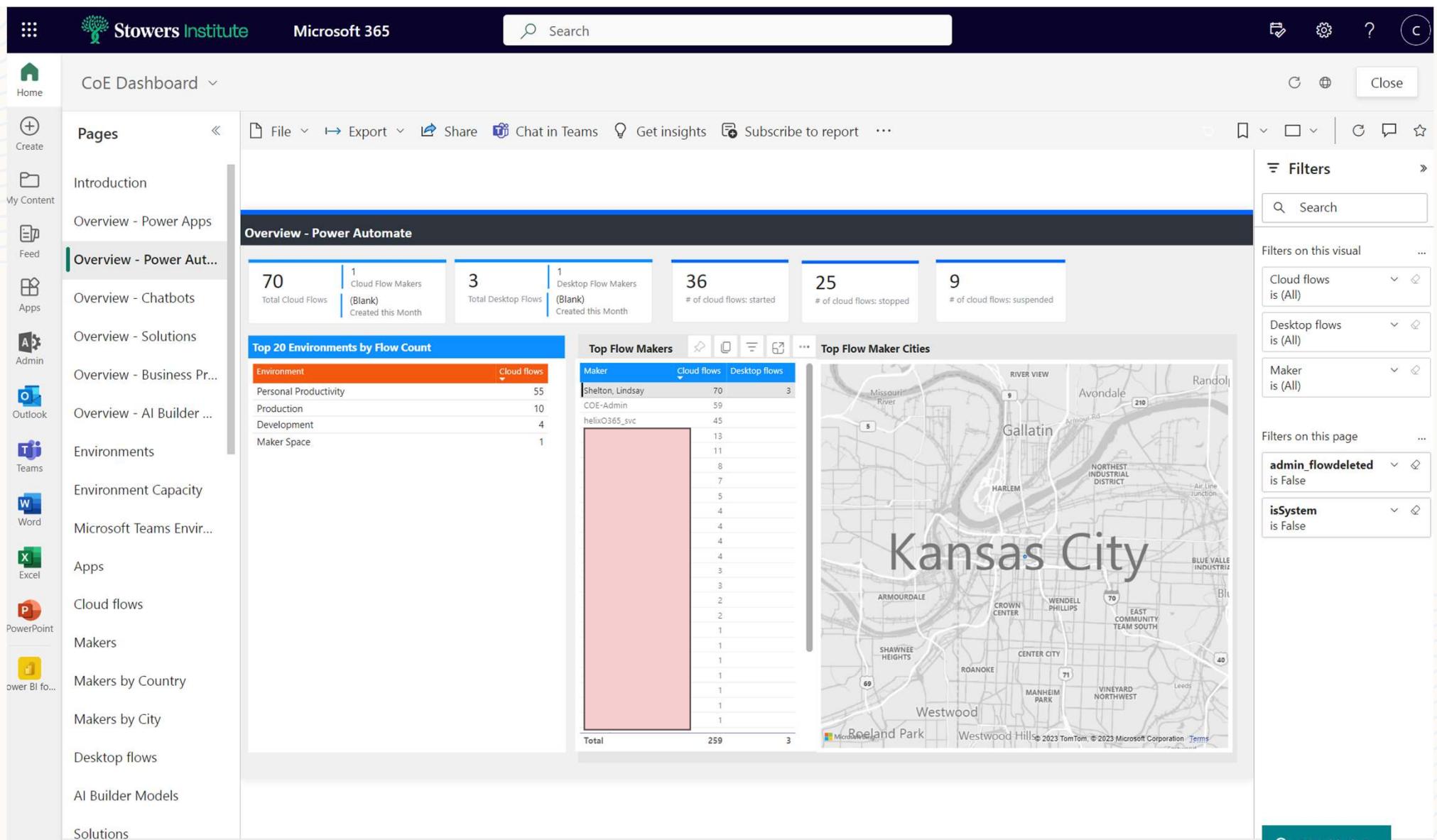
COE-Admin 117

Sum (Number Of Flows)

Apps

App Display Name	App Owner	App Modified On	App Last Launched
Solution Health Hub	---	12/10/2022 8:42 AM	---

Refresh



Stowers Institute Power Apps | Set Flow Permissions Microsoft

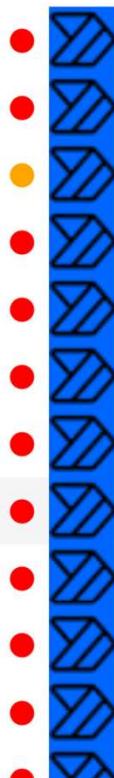
Admin - Flow Permission Center

ENVIRONMENT OWNER ORPHANED FLOW

	FLOW DISPLAY NAME	OWNER	FLOW ID (NAME)	Add Permissions
COE	ApiConnection -> HTTP	1	0a3ba045-f304-4c76-acfd-893eb4976568	
Dev CoE	DigSign - Carousel API Get and Push Bulletin with SharePoint	2	127535e9-184b-47b5-e6d2-50178b3f3cc5	
Development	DigSign - Send Uploaded Image to Carousel	2	5b77dba6-8862-ef9a-b499-9cdf1e3f2029	
Maker Space	FE-Approval Flow	2	dcdb242c-69b9-158f-6a10-643cd7cceab2	
Personal Productivity	FNDS-DigSign - Approval Flow for Submitted Items 2.0	2	30676503-b426-fd52-163d-32bf69ece3cf	
Production	FNDS-Email Communications for Other Requests	2	28d3749e-3ae6-9242-51b7-14b7aafea505	
Test	FNDS-Featured News - Approval Flow for Submitted Items 2.0	2	e6a3adce-50d0-65bf-e7dc-d4cf5ffed70a	
	Helix-DigitalSign-Notifications	2	749d3e40-02fe-1de6-0660-bc5971cae425	
	Jira Notifications - Atlassian Team	3	0198b06e-5ceb-4a18-a9c7-62ec442f6005	

Search flows ...

DLP Policies > Update Policy

Policy Name
Impacted apps and flows
Export impacted apps and flows to CSV
Connectors
Analyzed Apps: 37
Analyzed Flows: 195


2022 roadmap - Untitled row - ebe49e3e-187e-47f3-87bb-8f0c2eeeb1ca

Personal Productivity

2022 roadmap - Untitled row - b78b0ec6-81e5-407e-915f-149a4a270b7e

Personal Productivity

When a file is modified, complete a custom action

Personal Productivity

Helix - New event

Personal Productivity

CPR Initiation Form

Personal Productivity

ListSNKnowledgeRecords

Personal Productivity

RSS feed news to Yammer

Personal Productivity

Office 365 Calendar sync to Google Calendar

Personal Productivity

2022 roadmap - Untitled row - 02fe7373-7f1e-4842-8655-af048cf4962e

Personal Productivity

When a new response is submitted -> Get response details,Create file

Personal Productivity

ListSNIIncidentRecords

Personal Productivity

Http -> Put a message on a queue (V2),List

Personal Productivity

Office 365 Calendar sync to Google Calendar

Owner



Modified

Jan 23 2019

Flow ID

5fd4ff41-31b5-4230-a16d-...

State

Stopped

Business data only

Office 365 Outlook

Non-business data
Blocked

Google Calendar

Content Conversion

Back
Next

REQUIREMENTS FOR THE COE

- Licenses (the biggest hurdle for my non-profit)
 - Each acct that works with the CoE's apps needs Power App/Automate Per User license OR each separate CoE app needs Power Apps Per App license
- Admin Requirements
 - Power Apps/Automate Per User License (no trials)
 - M365 license
 - Power Platform service admin, global tenant admin, or Dynamics 365 service admin (NOT behind PIM)
 - Be mailbox enabled

COE SETUP

- If you are nervous about setting up the CoE, there are YouTube videos of people setting it up and going through every single step!
- There is now a Setup Wizard! Yay!
- There are usually monthly updates to deploy, but it's mostly just importing new solutions

Center of Excellence Setup Wizard

A setup wizard provides a guided step by step experience to configure the CoE Starter Kit.

- Confirm pre-requisites
- Configure communication methods
 - Configure mandatory settings
 - Configure inventory data source
 - Run setup flows
 - Run inventory flows
 - Share apps
 - Publish Power BI dashboard
 - Finish

Confirm pre-requisites

The CoE Starter Kit requires access to your tenant's Power Platform environments. Therefore, the identity you set up the CoE Starter Kit prerequisites before continuing:

Requirement	Status
Microsoft Power Platform service admin, global tenant admin, or Dynamics 365 service admin.	⚠ Verify manually
Power Apps Per User (non-trial) license	✓ Success
Microsoft 365 license	✓ Success
Power Automate Per User (non-trial) license	 ⓘ Fail
eMail enabled	✓ Success



TIPS AND TRICKS (AND PITFALLS)

POWER PLATFORM HUB

This site is a one-stop shop for makers to find out everything they need about getting started with Microsoft Power Platform.

Power Apps | Home | Microsoft 365 | Power Platform Hub - Home | List Settings | Dev Playground - Projects - All | +

https://avanadeasgstudio.sharepoint.com/sites/powerplatformhub/

SharePoint

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Following Share

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Welcome to the Power Platform communication site

You made it here and we love you for it. The Power Platform embodies our vision to empower you, and our philosophy is that we want to support citizen and team development within our tenant, meeting that goal while keeping our companies' assets safe.



Others

Hear directly from champions across our organization on how Power Platform has enabled them to work better, faster and more

Yammer Community

View all

Share thoughts, ideas, or updates



Start a conversation

Have a learning, question, or anything else on your mind?
Be the first to share it

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Help & learning

- Guided learning
- Consultation & development
- Internal communities
- Support

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Power Platform at ASG Studio

- Environments
- Data Loss Prevention (DLP) Policies
- Moving resources
- Requesting a premium license

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SharePoint

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News & success stories

Success stories Champion of the week

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The image shows a Microsoft SharePoint site interface. At the top, there's a navigation bar with several tabs: 'Power Apps', 'Home | Microsoft 365', 'Power Platform Hub - Home', 'List Settings', and 'Dev Playground - Projects - All'. Below the navigation is a search bar and a ribbon menu with icons for 'Home', 'Getting started', 'Help & learning', 'Power Platform at ASG Studio', 'News & success stories', 'Events', and 'Edit'. On the left, there's a vertical ribbon with icons for 'New', 'Page details', and 'Analytics'. The main content area features a large banner with three people looking at a screen, followed by the text 'Accelerate innovation and amplify your productivity with Power Platform'. Below this, there's a section for 'News & success stories' with links to 'Success stories' and 'Champion of the week'. To the right, there's a 'Yammer Community' section with a placeholder for sharing thoughts and starting conversations. The overall theme is professional and collaborative.

Power Apps | Home | Microsoft 365 | Power Platform Hub - Home | List Settings | Dev Playground - Projects - All | +

https://avanadeasgstudio.sharepoint.com/sites/powerplatformhub/

SharePoint

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Events

Hackathons Office hours

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Start a conversation

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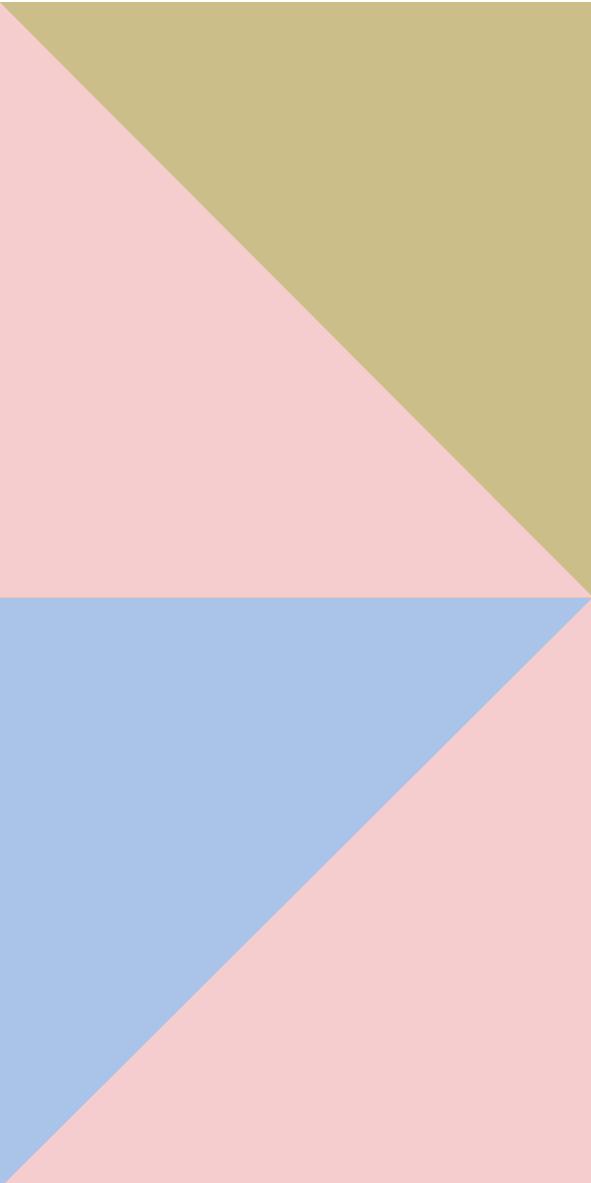
Hear directly from champions across our organization on how Power Platform has enabled them to work better, faster and more

AVOID PITFALLS



1. CLEANING UP CAN BE A LOT
2. THINK BEFORE YOU CLICK
3. ENVIRONMENT OVERLOAD
4. DO A GOOD JOB





BIGGEST TAKEAWAYS A YEAR LATER

- Once the governance is set up and set up right, there's not much else that you need to do on a daily basis with it other than review your dashboards (depending on size of org and adoption)
- Adoption can be a slow, but rewarding, process
- Make sure you have an open point person for makers to reach out to

LINKS





**CHECK OUT
MICHAEL'S SESSION
“ENHANCE THE
ADMIN CENTER WITH
THE COE STARTER
KIT” NEXT!**

In BLVD Ballroom 163!