

TFL Network Observation Solution Installation Guide

Prerequisites

1. [Setup Group in Microsoft Entra Admin Centre for Power Apps](#)
2. [Setup Group in Microsoft Entra Admin Centre for Observation Management App](#)
3. [Setup Exchange Server Profile](#)
4. [TFL Network Observation Solution Import Steps](#)
5. [Enable User Email Mail Box Profile](#)
6. [Setup Team for Canvas App Access](#)
7. [Setup Team for Observation Management App Access](#)
8. [Share Canvas App with AD Group](#)
9. [Enable Hierarchy security in Environment](#)

Prerequisites

- Environment must be provisioned with Dynamic 365 Customer Service module.
- User must have following license:
 - Dynamic 365 Customer Service Professional/Enterprise Edition
- User must have following security roles:
 - System Administrator

1. Setup Group in Microsoft Entra Admin Centre for Power Apps

Step - 1 - Navigate to [Microsoft Entra admin center](#)

Step - 2 - Fill following required fields and select owner of the group from list of users.

Group Name: TFL-Network-Observation-PowerApps-Users

Microsoft Entra admin center

Home >

New Group

Got feedback?

Group type * ⓘ
Security

Group name * ⓘ
TFL-Network-Observation-PowerApps-Users
Group name is not available.

Group description ⓘ
TFL-Network-Observation-PowerApps-Users ✓

Microsoft Entra roles can be assigned to the group ⓘ
Yes No

Membership type * ⓘ
Assigned

Owners
1 owner selected

Members
No members selected

Create

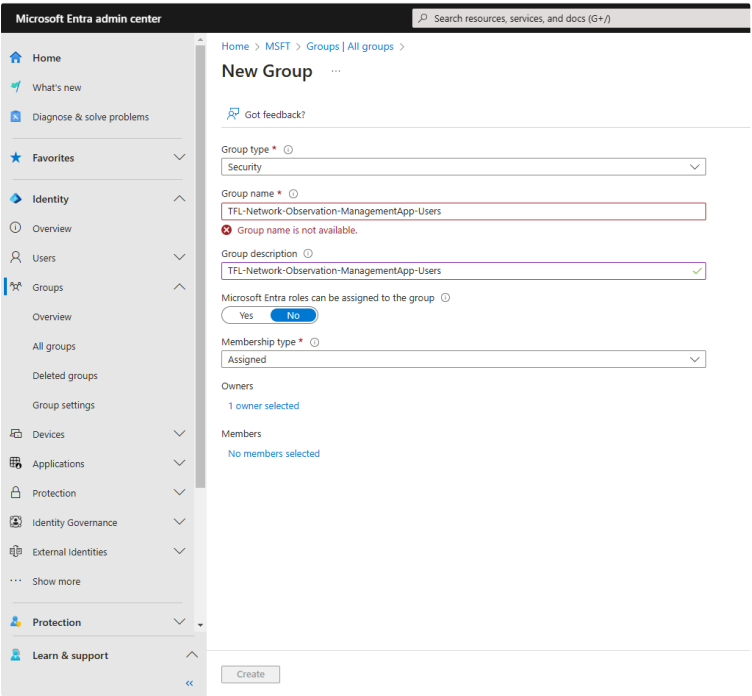
Step - 3 - Click on create.

2. Setup Group in Microsoft Entra Admin Centre for Observation Management App

Step - 1 - Navigate to [Microsoft Entra admin center](#)

Step - 2 - Fill following required fields and select group owner from list of users.

Group Name: TFL-Network-Observation-ManagementApp-Users

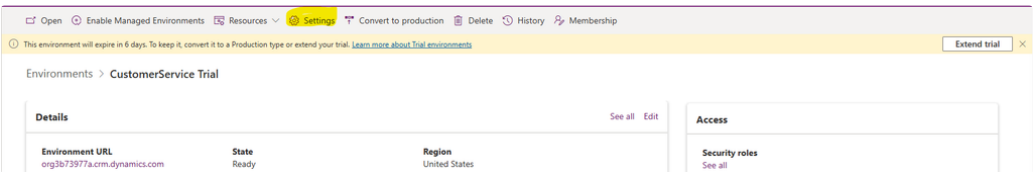


Step - 3 - Click on create.

3. Setup Exchange Server Profile

Step - 1 - Navigate to [Power Platform admin center](#)

Step - 2 - Navigate to **Environment** → **Settings**.



Step - 3 - Navigate to "Server Profile".

center

Environments > CustomerService Trial > Settings

Search for a setting

Product

Behavior, Collaboration, Features, Languages

Business

Business closures, Calendar, Connection roles, Currencies

Users + permissions

Application users, Business units, Column security profiles, Hierarchy security

Audit and logs

Audit settings, Audit summary view, Entity and field audit settings, System jobs

Templates

Access team templates, Article templates, Contract templates, Data import templates

Email

Email settings

Email tracking

Mailboxes

Server profiles

Integration

Document management settings, Synchronization, Teams integration settings, Yammer

Data management

Auto numbering, Automatic record creation policies, Bulk deletion, Data import wizard

Encryption

center

+ New server profile Go to legacy

Environments > CustomerService Trial > Settings > Server profiles

Server profiles connect your email provider to Dynamics 365. [Learn more](#)

Name	Type	State	Owner	Created on ↓
Microsoft Exchange Online (default)	Exchange Online	Active	SYSTEM	10/09/2024 9:50:08 PM

Step - 4 - Create new sever profile if **Microsoft Exchange Online** default profile does not exist.

Set up server profile



Create a new connection between your email provider and Dynamics 365. [Learn more](#)

Email Server Type *

Exchange Online



Name *

Exchange Profile

Set as default profile for new mailboxes ⓘ

☐ Off

Authentication Type *

Server-to-Server Authentication (Same Tenant)



^ Advanced

State ⓘ

☒ Active

Process emails starting from * ⓘ

Select a date

Sat Nov 2, 2024



Select a time

Select or enter time



Move failed emails to undeliverable folder ⓘ

☐ Off

Description

Save

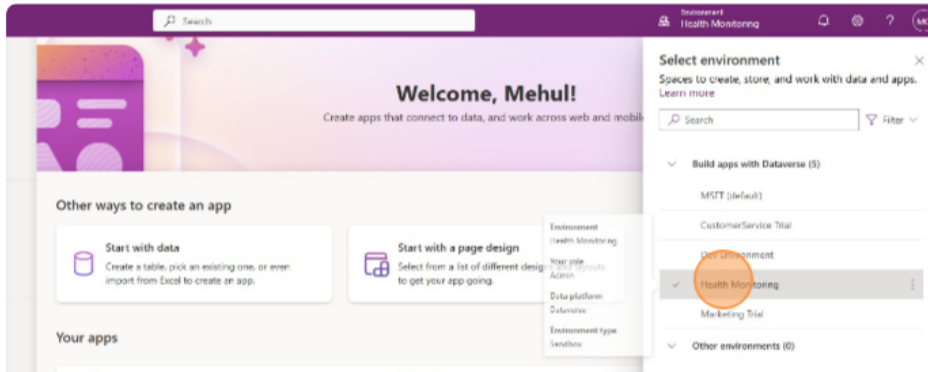
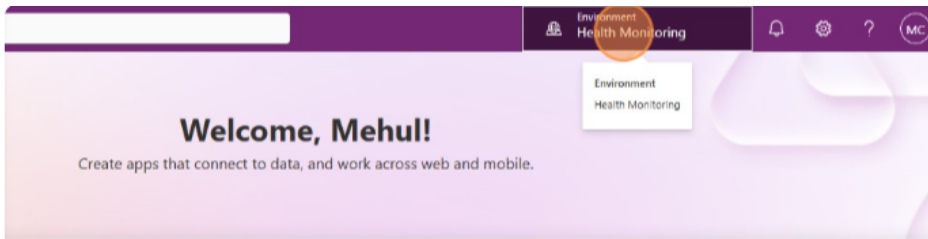
Cancel

Step - 5 - Click on save.

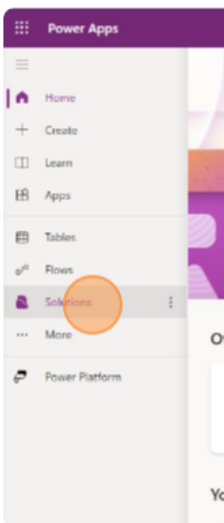
4. TFL Network Observation Solution Import Steps

Step - 1 - Navigate to <https://make.powerapps.com/>

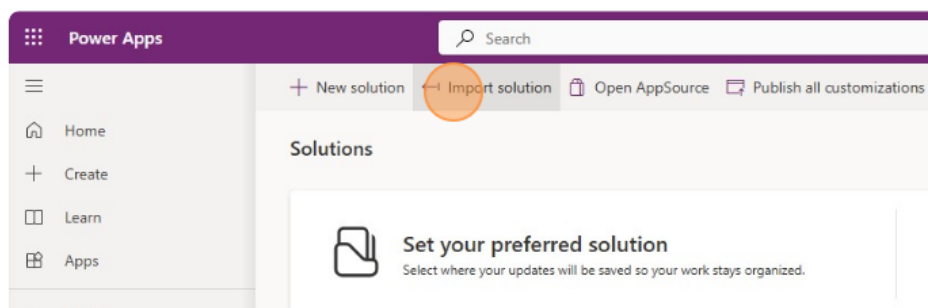
Step - 2 - Select correct environment from highlighted menu.

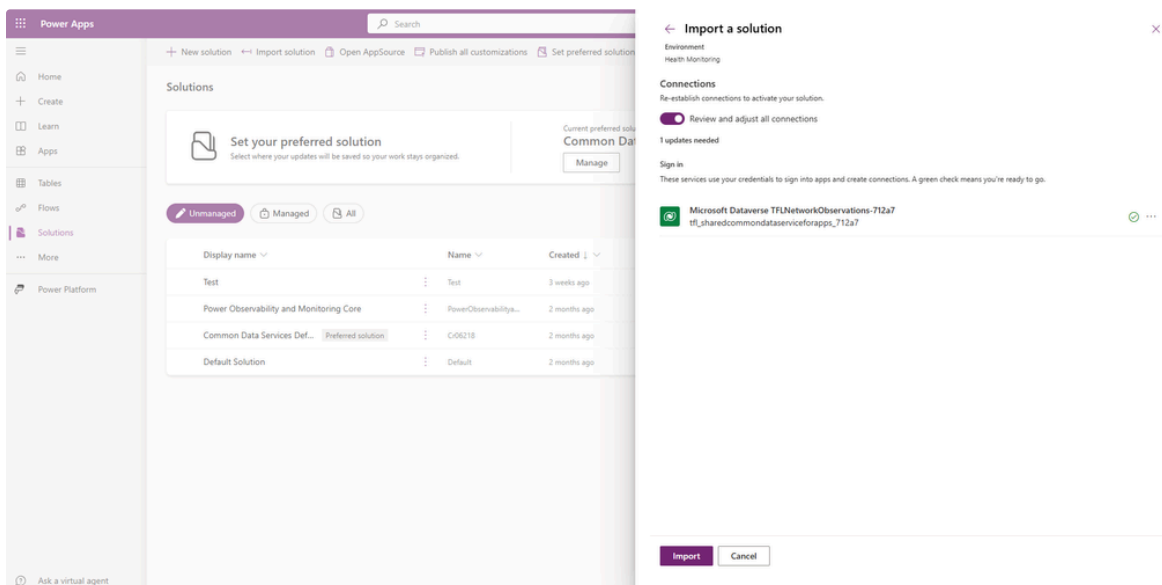
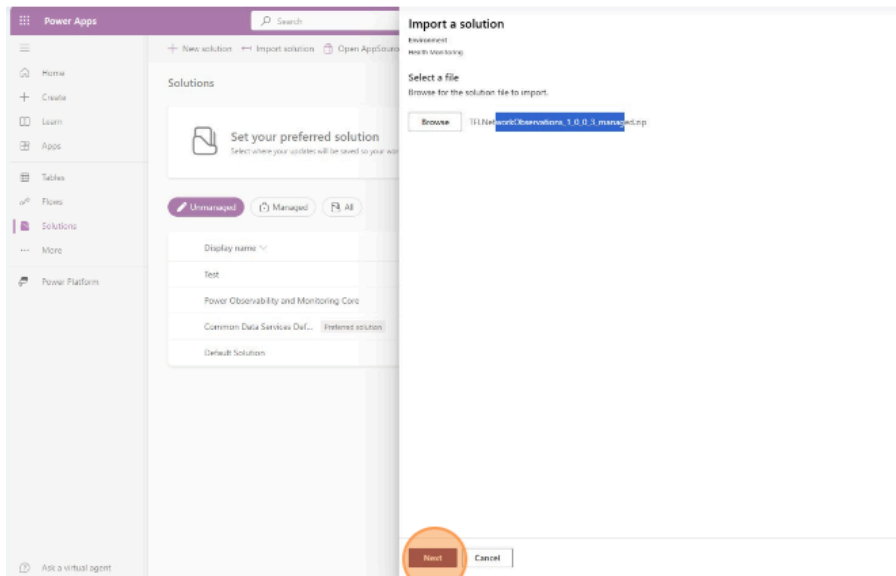
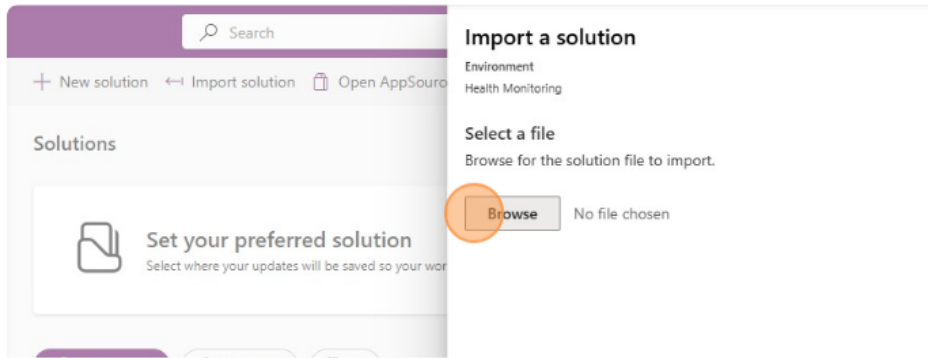


Step - 3 - Navigate to "Solutions" in left panel.



Step - 4 - Click "Import Solution" and follow steps as detailed below:to





Step - 4 - Please wait till Import is successfully complete.

5. Enable User Email Mail Box Profile

Step - 1 - Navigate to [Power Platform admin center](#).

Step - 2 - Navigate to “Environment → Settings”.

Environments > CustomerService Trial > Settings

Search for a setting

Product

Behavior, Collaboration, Features, Languages

Business

Business closures, Calendar, Connection roles, Currencies

Users + permissions

Application users, Business units, Column security profiles, Hierarchy security

Audit and logs

Audit settings, Audit summary view, Entity and field audit settings, System jobs

Templates

Access team templates, Article templates, Contract templates, Data import templates

Updates

App update settings (Preview)

Email

Email settings

Email tracking

Mailboxes

Server profiles

Integration

Document management settings, Synchronization, Teams integration settings, Yammer

Data management

Auto numbering, Automatic record creation policies, Bulk deletion, Data import wizard

Encryption

Data encryption

Resources

All legacy settings, Dynamics 365 App for Outlook

Step - 3 - Open users mailbox for approval and configure user mailbox.

NEW FORWARD MAILBOX

DELETE

EMAIL LINK

FLOW

EXPORT TO EXCEL

VIEW

NEW SYSTEM VIEW

SYSTEM VIEWS

My Active Mailboxes

	Name	Email Address	Regarding	Test Run Status	Incoming Email	Outgoing Email	Appointments	Mailbox Test C	Incoming Email	Outgoing Email	Appointments	Server Profile	Owner	Owning Business	Verbose Logging
	Contoso Coff...	contoso@coff...	Contoso Coffee	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Contoso Coff...	contoso@coff...	Contoso Coffee	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Customer Ser...	customerserv...	Customer Serv...	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Default Grou...	Default Group 1	Default Group 1	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Default indiv...	Default indivi...	Default indivi...	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Default voice...	Default voice q...	Default voice q...	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Fallback - cha...	Fallback - chat i...	Fallback - chat i...	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Fallback - voi...	Fallback - voice	Fallback - voice	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0
	Mahul Chandio	amul@10011	Mahul Chandio	Success	Success	Not Run	10/31/2024 1:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0	
	Smart brew 1...	Smart brew 100	Smart brew 100	Not Run	Not Run	Not Run	Not Run	1/1/1900 12:00:00	Server-Side S...	Server-Side S...	None	Microsoft Exchange	Mahul Chandio	org3673977a	0

Step - 4 - Setup Server Profile, Incoming Email and Outgoing Email.

Microsoft Dynamics 365 - Google Chrome

org3b73977a.crm.dynamics.com/main.aspx?etc=9606&pagetype=entityrecord&extraqs=%3fetc%3d9606%26id%3d%257b2658AA51-6B81-EF11-AC21...

FILE MAILBOX

Save Save & New Delete

Save Save & Close Deactivate Book

Sign In To Gmail Test & Enable Mailbox Apply Default Email Settings

Approve Email Reject Email Download Mailbox Details

Analytics

Mailbox : Information

Configuration Test Results

General

Notes

Related

Common

Alerts

Audit History

Mailbox

Mehul Chandroliya

By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed [here](#). Please consult the feature technical documentation for [more information](#).

Configuration Test Results

Incoming Email Status Success Outgoing Email Status Success

Appointments, Contacts, and Tasks Status Not Run Mailbox Test Completed On 10/31/20

General

Mailbox Information

Name * Mehul Chandroliya Owner * Mehul Chandroliya

Email Address admin@718s72.onmicrosoft.com Is Forward Mailbox * Yes No

Regarding Mehul Chandroliya Delete Emails after Processing Yes No

Credentials

Allow to Use Credentials for Email Processing Yes No

User Name Password

Synchronization Method

Server Profile Microsoft Exchange Online

Incoming Email Server-Side Synchronization or Email Router

Outgoing Email Server-Side Synchronization or Email Router

Appointments, Contacts, and Tasks None

Notes

Status Active

Step - 5 - Click "Save" button and Click on "Approve Email".

Mailbox: Mehul Chandroliya - Microsoft Dynamics 365 - Google Chrome

org3b73977a.crm.dynamics.com/main.aspx?etc=9606&pagetype=entityrecord&extraqs=%3fetc%3d9606%26id%3d%257b2658AA51-6B81-EF11-AC21...

FILE MAILBOX

Save Save & New Delete

Save Save & Close Deactivate Book

Sign In To Gmail Test & Enable Mailbox Apply Default Email Settings

Approve Email Reject Email Download Mailbox Details

Analytics

Mailbox : Information

Configuration Test Results

General

Notes

Related

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Alerts

Audit History

Mailbox

Mehul Chandroliya

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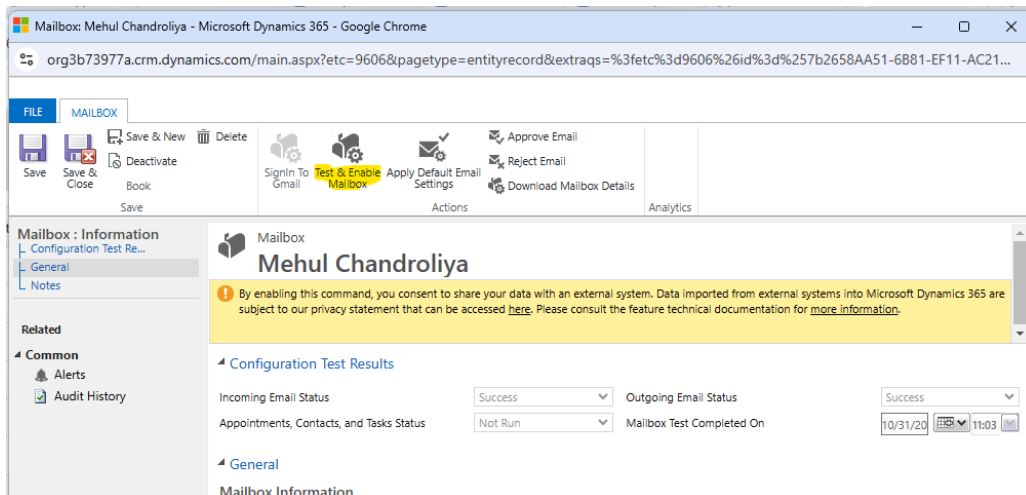
Configuration Test Results

Incoming Email Status Success Outgoing Email Status Success

Appointments, Contacts, and Tasks Status Not Run Mailbox Test Completed On 10/31/20 11:03

General

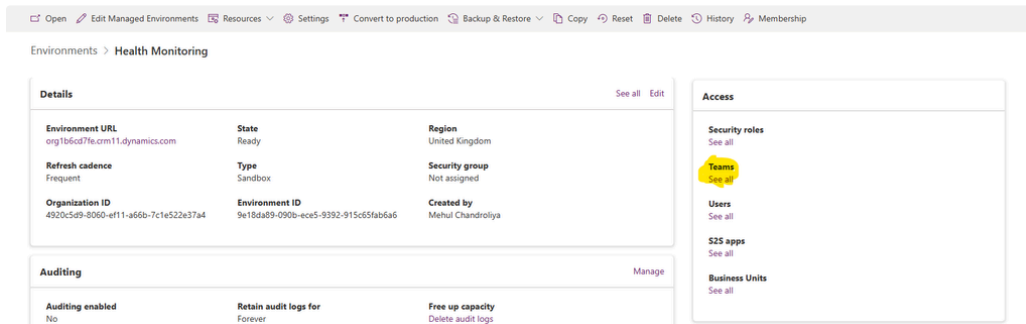
Step - 6 - Click on "Test & Enable Profile"



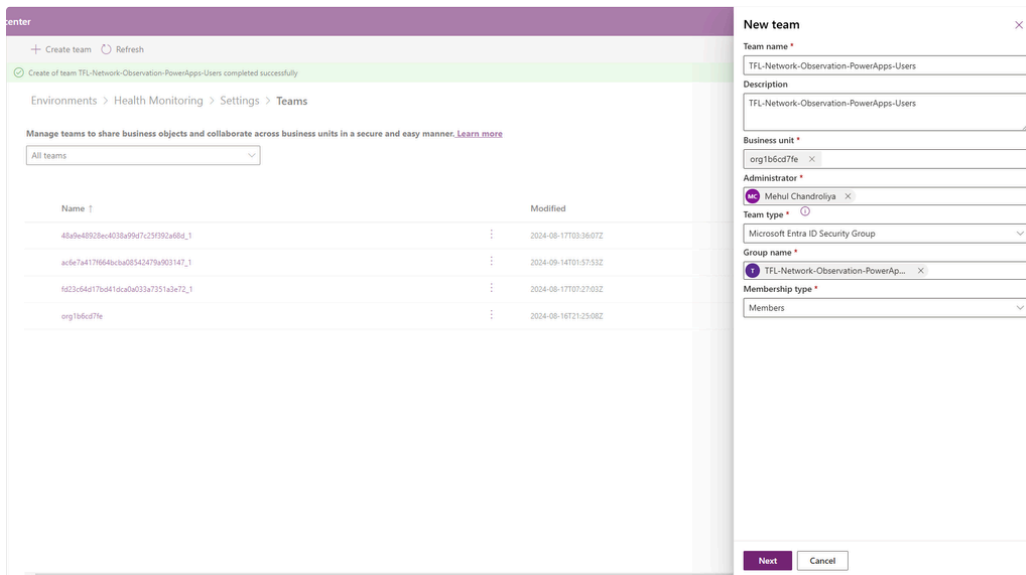
6. Setup Team for Canvas App Access

Step - 1 - Navigate to [Power Platform admin center](#)

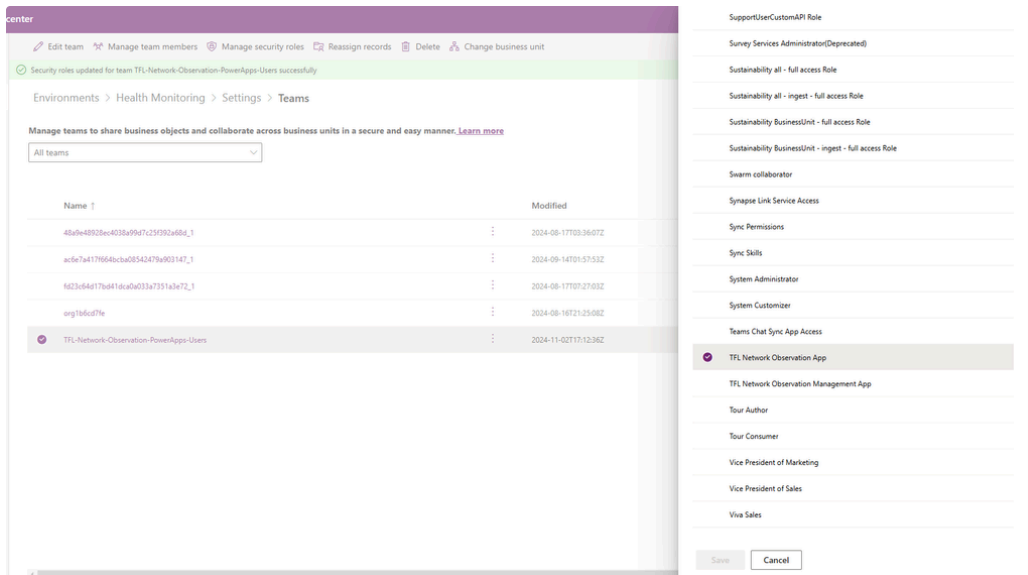
Step - 2 - Navigate to environment and click on "Teams".



Step - 3 - Click on "Create Team".



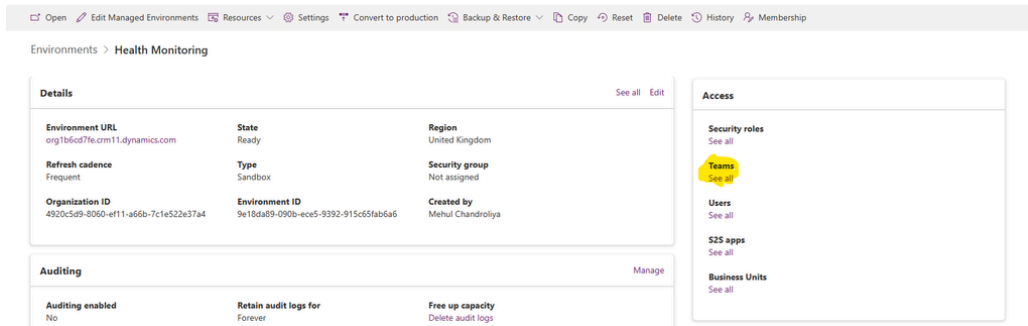
Step - 4 - Select appropriate security role.



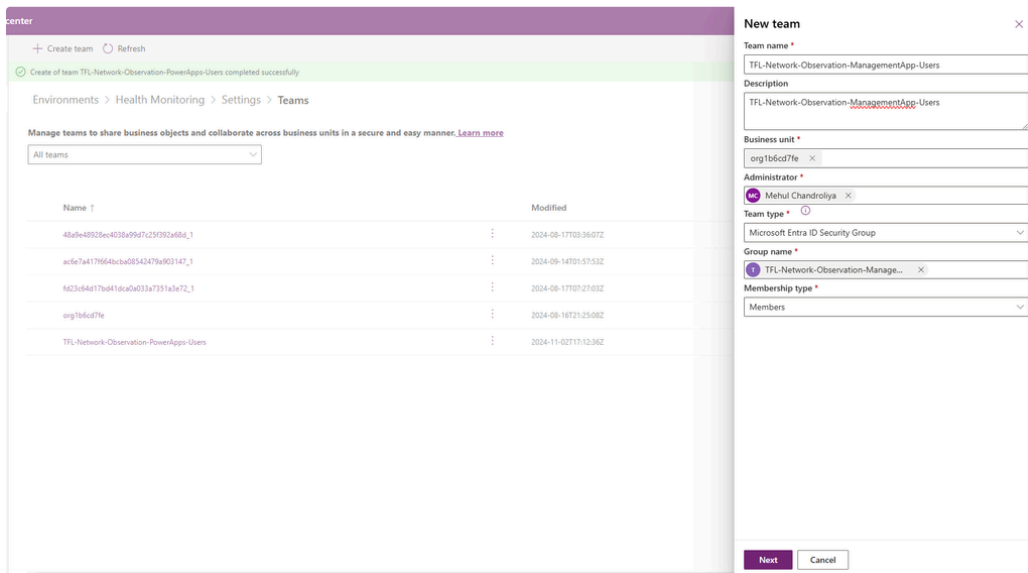
7. Setup Team for Observation Management App Access

Step - 1 - Navigate to [Power Platform admin center](#)

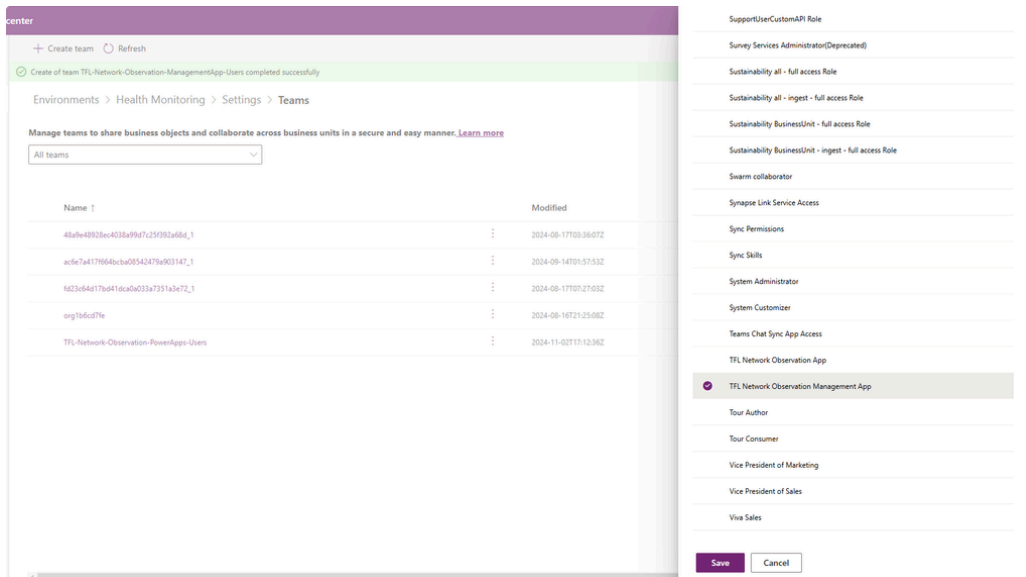
Step - 2 - Navigate to environment and click on “Teams”.



Step - 3 - Click on “Create Team”.



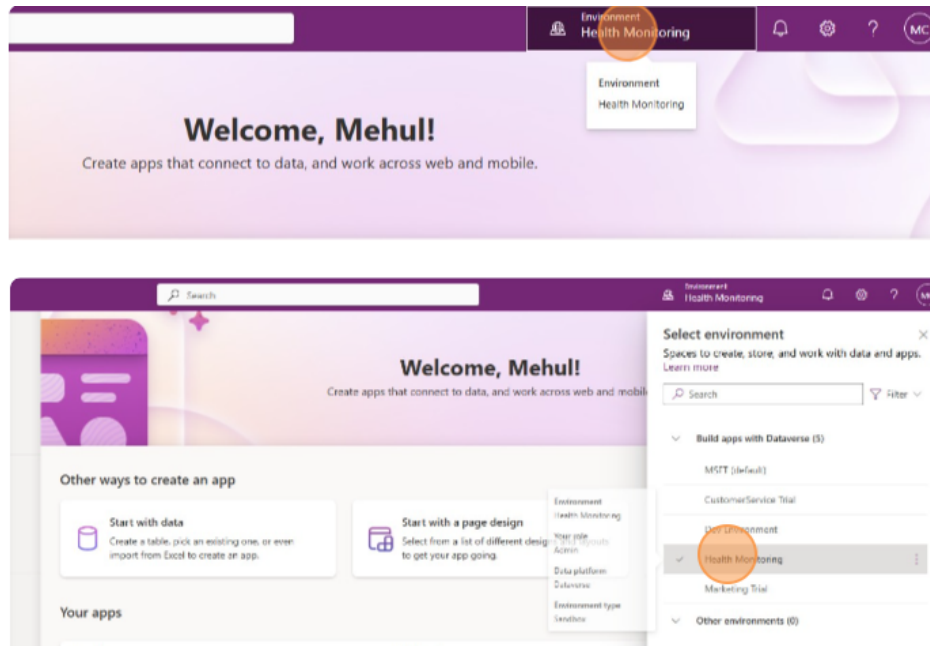
Step - 4 - Select appropriate security role.



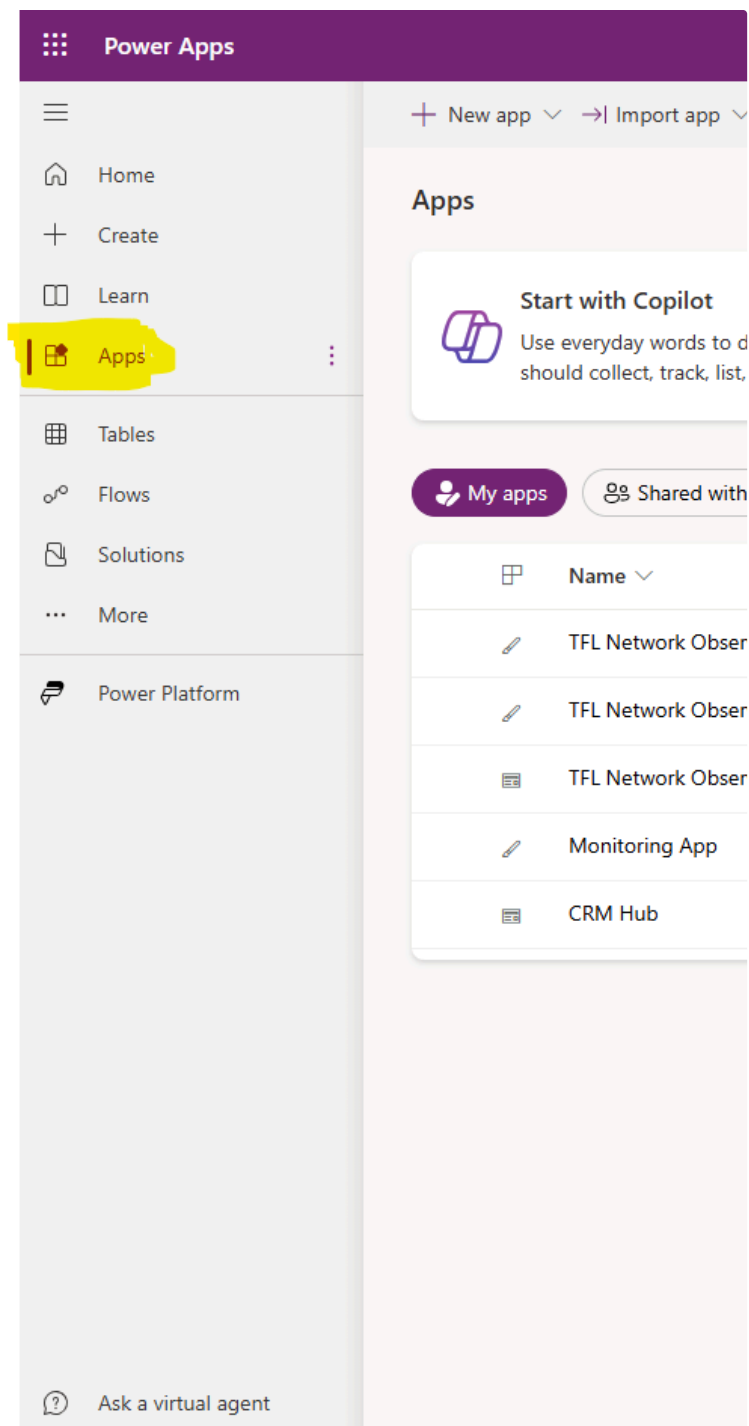
8. Share Canvas App with AD Group

Step - 1 - Navigate to Power Apps

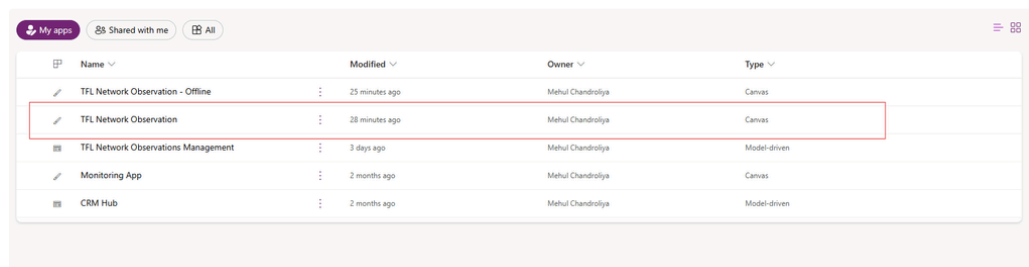
Step - 2 - Select correct environment.



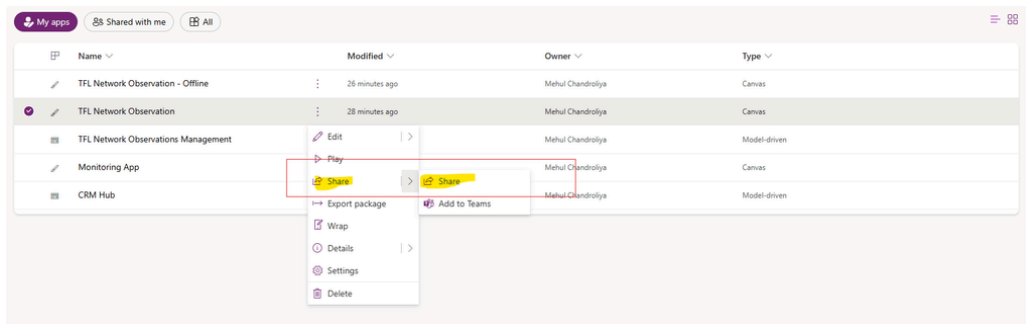
Step - 3 - Select "Apps" in Left Panel.



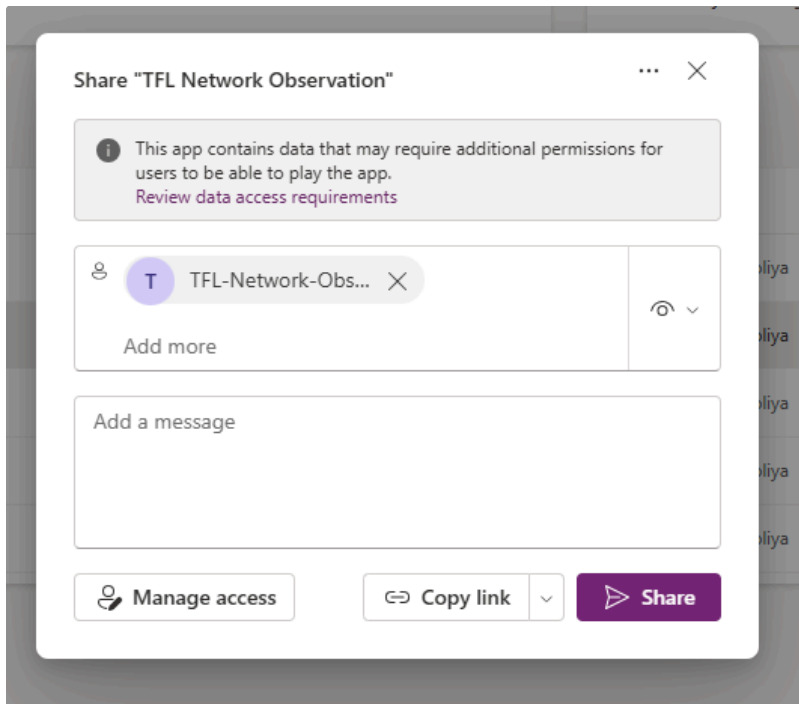
Step - 4 - Find Canvas App “TFL Network Observation”.



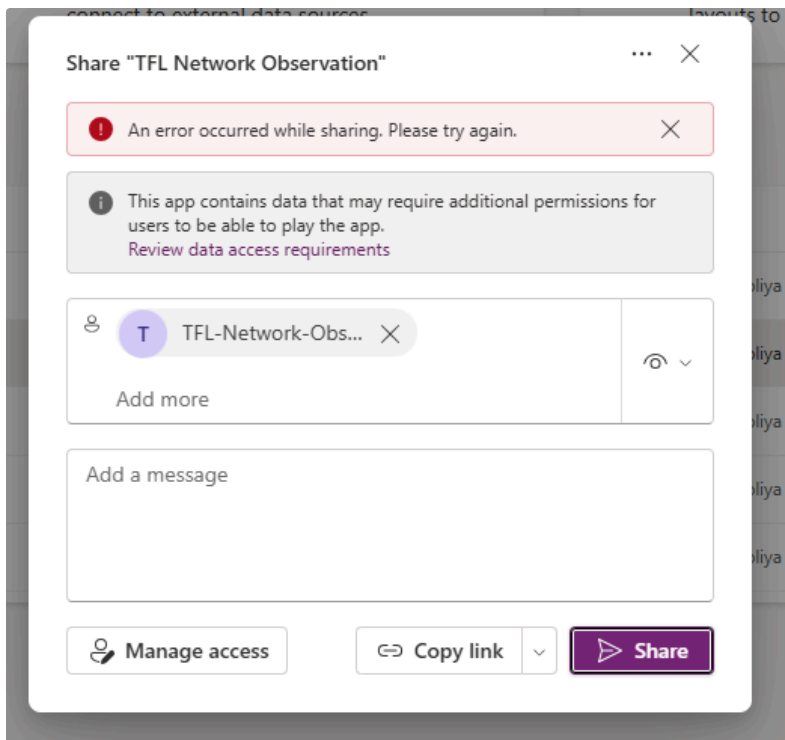
Step - 4 - Click on **Share** as highlighted below.



Step - 5 - Select "TFL-Network-Observation-PowerApps-Users".

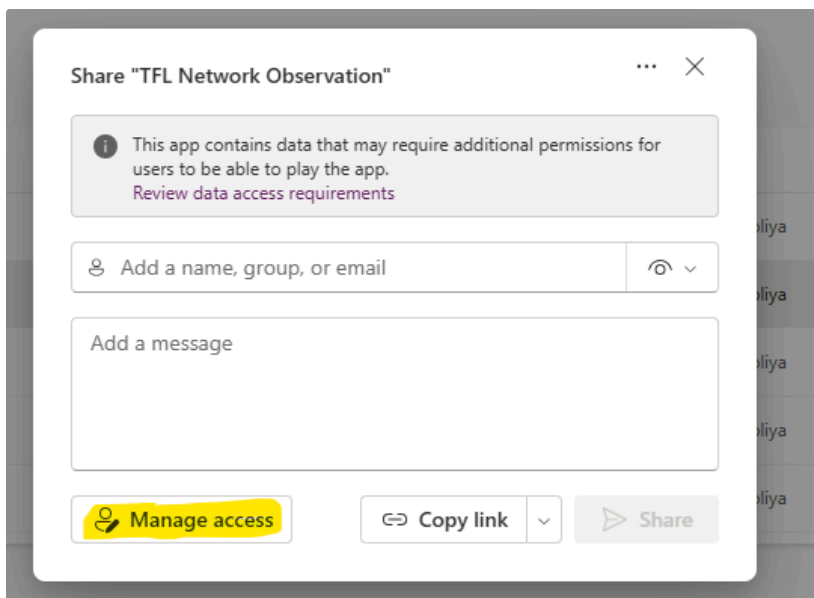


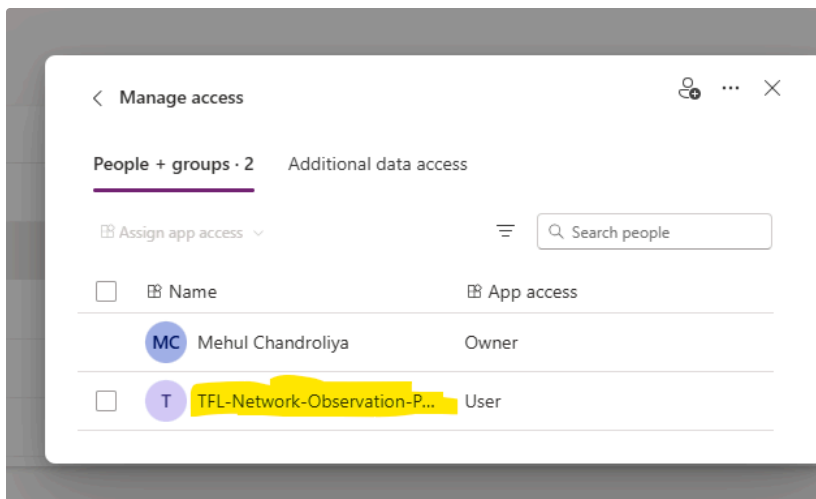
Step - 6 - Please ignore if any error (it is expected behavior from the product).



Step - 7 - Close the dialog box.

Step - 8 - Open share window and click on "Manage Access".

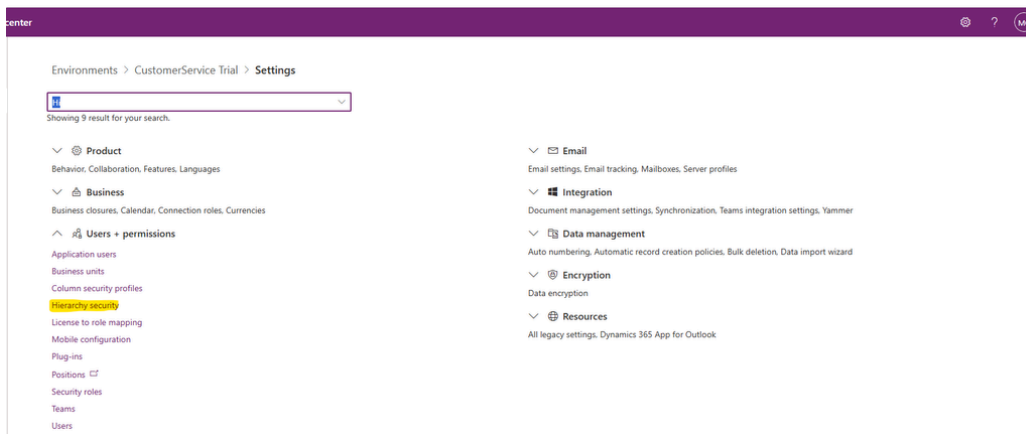




9. Enable Hierarchy security in Environment

Step - 1 - Navigate to [Power Platform admin center](#)

Step - 2 - Navigate to **"Environment → Settings"** and select **"Hierarchy security"** under **"Users + Permissions"**.



Step - 3 - Select **"Enable Manager hierarchy security"** and Depth as **"10"**.

- Make sure **"Observation"** and **"Observation Attachment"** must selected

Power Platform admin center

Home

Environments

Environment groups

Advisor

Security

Analytics

Billing

Settings

Copilot

Resources

Help + support

Data integration

Data (preview)

Policies

Admin centers

Save

1

Environments > CustomerService Trial > Settings > Hierarchy security

Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the tables to e

Hierarchy model

☐ Disable hierarchy modeling

☒ Enable Manager hierarchy Model [Configure](#)

☐ Enable Position hierarchy Model [Configure](#)

Depth

10

Hierarchy Table Management

Select tables to include/exclude in the above selected hierarchy model.

Obsr

Show included tables

Note: Tables with a check against them are included in the hierarchy.

☒ Name ↑

☒ Observation

☒ Observation Attachment

Step - 4 - Click on "Save".