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| Deployment and Use Guide:Storage Capacity Enforcement Solution |

Nov 2023

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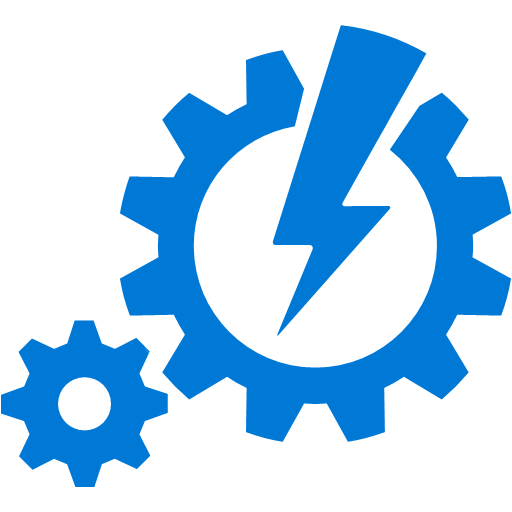
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# Solution Overview

This solution is intended to be used as an optional and complimentary set of components for the [Center of Excellence (CoE) Starter Kit](https://aka.ms/coestarterkit). It provides customers with the capability of enforcing storage capacity limits by automating the assessment of consumed capacity vs. approved capacity and placing environments that are over approved capacity into [Administration Mode](https://learn.microsoft.com/en-us/power-platform/admin/admin-mode). Dataverse environments in this state can only be accessed by those users who have System Administrator or System Customizer security roles assigned to their accounts. For further details on administration mode and how it impacts end user access, please see Appendix A.

## Notifications

* **Close to capacity emails:** Notify environment owner and CoE Admins when environment exceeds 80% (adjustable) and less than 100% of approved capacity
* **Enforcement applied/removed emails:** Notify environment owner and CoE Admins when environment has capacity enforcement enabled or disabled
* **Enforcement removal in-app notifications:** Notify CoE admin of environment status when running the manual Flow to disable capacity enforcement from CoE Power Platform Admin View app

## Automation

* **100% capacity – Disable environment:** Environment consumed capacity reaches 100% of approved for any capacity type (database, file or log), a scheduled flow will place the environment into admin mode
* **Disabled environment < 80% capacity – Enable environment:** Disabled environment consumption is below 80% of approved capacity for all defined capacity types, a scheduled flow will disable admin mode allowing users access
* **Remove admin mode – Manual Flow in Power Platform Admin View:** Provides CoE admins with the option to remove admin mode from specific environments, directly from the Power Platform Admin View app

## Reporting & Audit

* **Power Platform Admin View App - Environment Views:**

1. Environments Disabled by Capacity Enforcement
2. Environments Excused from Capacity Enforcement
3. Environments with No Storage Capacity Limits
4. Environments without Environment Owner

* **Disabled environments | Storage Capacity Enforcement Power BI:** Additional page added to the existing CoE Power BI dashboard providing details on disabled environments, including:
* Total disabled environment count
* Number of environments disabled in past 30, 90 days
* Count of disabled environments by environment type
* Top 10 environments - % of approved capacity used
* Datapoints for approved, consume and % used for database, file and log capacities per environment

# Pre-requisites

The following pre-requisites must be deployed and configured prior to deploying the Storage Capacity Enforcement solution.

* Install the [CoE Starter Kit: Core Components solution](https://learn.microsoft.com/en-us/power-platform/guidance/coe/setup-core-components)
* Enable [In-app Notifications](https://learn.microsoft.com/en-us/power-apps/developer/model-driven-apps/clientapi/send-in-app-notifications?tabs=clientapi#enable-the-in-app-notification-feature) for the **Power Platform Admin View** app in your CoE Starter Kit environment
* Azure Subscription
  + Create an [Azure Automation Account](https://learn.microsoft.com/en-us/azure/automation/quickstarts/create-azure-automation-account-portal). It’s recommended to create the Automation account in the same region as your CoE Starter Kit Dataverse environment.
  + **Tip:** To determine which region your environment is hosted in, you can use the [Synapse Link for Dataverse](https://learn.microsoft.com/en-us/power-apps/maker/data-platform/azure-synapse-link-synapse#connect-dataverse-to-synapse-workspace:~:text=Sign%20in%20to,New%20link.) setup wizard which provides this information on the initial setup page. **Please note that you don’t have to complete Synapse Link for Dataverse setup and can close the wizard once you’ve identified the region. This step is just to get the region/datacenter details.**

Example:

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Important: There is an additional cost associated with jobs executed using an Azure Automation Account. It’s recommended to work with your Microsoft Account Team for an estimate, but you can also review the [Process automation pricing](https://azure.microsoft.com/en-us/pricing/details/automation/#pricing) and use the [Azure Pricing Calculator](https://azure.microsoft.com/en-us/pricing/calculator/) to create a projected estimate. A single execution of the enable or disable runbook jobs averages 30 seconds of job run time but can take longer or shorter than this.

# Deployment Steps

## Setup Azure Automation

The steps below will provide you with details on how to create the Azure Automation Account credential and runbooks that support the PowerShell commands used to enable and disable admin mode for an environment.

### Add the PowerApps Administrative module

Prior to deploying the Azure Automation Runbooks, the PowerApps Administrative PowerShell module must be installed since the PowerShell cmdlets included with the runbooks leverage the commands in this module.

|  |  |
| --- | --- |
| * Login to the Azure portal * Browse to the Azure Automation Account that was created as part of the pre-requisites * Click **Modules** in the left navigation * Click **Add a module** |  |
| * + - Click **Browse from gallery** in the Upload a module file option     - For the PowerShell module file, click **Click here to browse from gallery** |  |
| * + - Type **PowerApps Administration** in the search bar     - Click on the **Microsoft.PowerApps.Administration.PowerShell** module |  |
| * Click **Select** |  |
| * Select **5.1** for the Runtime version * Click **Import** |  |

### Create the credential in the automation account

This section provides details on how to create the credential used to authenticate to Power Platform and run the enable and disable admin mode commands.

|  |  |
| --- | --- |
| * Click **Credentials** in the left navigation * Click **Add a credential** |  |
| * + - Add the credential for the service account that will be used to execute the enable/disable admin mode commands   Important: This account must have System Administrator rights for all environments that will be included in the Storage Capacity Enforcement solution. It’s recommended to use an account that has the Power Platform Administrator role assigned. Using the Center of Excellence account that was created to support the flows included with the CoE solutions is recommended since it requires the same level of access. |  |

### Import and Update Runbooks

|  |  |
| --- | --- |
| * Extract the **StorageCapacityEnforcement.zip** file in a folder location on your system * In the Azure Automation Account, locate the Process Automation section and click **Runbooks** * Click **Import a runbook** |  |
| * Validate **Browse for file** is selected * **Runbook file:** click **Select a file** and browse to the location where you exported the solution components * Select the **pp\_storage\_enforcement.ps1** file and click **Open** * **Name:** Provide a name for the runbook * **Runbook type:** Select **PowerShell** from the dropdown * **Runtime version:** Select **5.1** * **Description:** Provide a general description for the runbook   Ex. This runbook will be used to enable Power Platform environment admin mode for environments beyond approved capacity.   * Click **Import** to create the runbook |  |
| * In the runbook update the credential **Name** to match the name you defined * Update the **Endpoint** for your specific region   Regional Endpoint Values:   * + Public/Commercial region: prod   + GCC region: usgov   + GCC High region: usgovhigh   + DoD region: dod |  |
| * Click **Save** * Click **Publish** |  |
| * Repeat the import and update steps in this section for the **pp\_storage\_removeenforcement** runbook | |

### Optional: Runbook Validation

Use the optional steps below to validate that the enforcement and remove enforcement runbooks are working successfully.

|  |  |
| --- | --- |
| * Login to Power Platform Admin Center * Click to open an environment that’s safe to place into admin mode * Copy the **Environment ID** value |  |
| * In the Azure Automation Account runbook page, click **Start** to execute the runbook * Paste the **Environment ID** into the ENVIRONMENTNAMEparameter field and click **OK** | Graphical user interface, text, application, chat or text message  Description automatically generated |
| * Click the **Refresh** button in the command bar to see the updated status * On the **Output** tab, you should see a 200 Success code once the job is completed | Graphical user interface, text, application  Description automatically generated |
| * You can validate the environment is in Admin Mode, by opening the environment details in Power Platform Admin Center. You should see a message across the top as seen in the screenshot here. | Text, application  Description automatically generated |

## Deploy the Storage Capacity Enforcement solution

This section provides you with the steps to deploy and configure the Storage Capacity Enforcement solution.

### Update existing CoE Starter Kit Core solution flows

There are some small updates needed for the existing Core solution flows which will prevent metadata and email records included with the Storage Capacity Enforcement solution from being accidentally deleted.

|  |  |
| --- | --- |
| **Update Admin|Sync Template v3 CoE Solution Metdata**   * Login to the Power Apps Maker Portal * Ensure you’re in the environment which contains the CoE Starter Kit Core Solution components installed (see pre-requisites) * In the Solutions menu, click to open the **Center of Excellence – Core Components** | Graphical user interface, text, application, email  Description automatically generated |
| * Open the **Admin | Sync Template v3 CoE Solution Metadata** flow * **Edit** the flow | Graphical user interface, text, application  Description automatically generated |
| * Click to expand **Add or update data > Flows** * Expand the **Cleanup Deleted – Flows** action * In the Filter Rows field, add the following text at the end of the field:   **and not contains(admin\_objectname,'Storage Capacity Enforcement')** | Graphical user interface, text, application, email  Description automatically generated |
| * Click **Save** and close the flow   Important: Making changes to this flow will add an unmanaged layer. When updating the CoE Starter Kit core solution with a new release, you’ll need to remove this unmanaged layer and reapply the changes outlined here in order to get the latest solution update for this flow. |  |
|  |  |
| **Update Admin|Sync Template v3 Configure Emails**   * Open the **Admin | Sync Template v3 Configure Emails** flow * **Edit** the flow | Graphical user interface, text, application, chat or text message  Description automatically generated |
| * Click to expand **Configure All or One Email > see if all or one email > If yes > CleanUp Deleted Mails** * Expand the **List mails not updated recently** action * In the Filter Rows field, add the following text at the end of the field:   **and not contains(admin\_flowname,'Storage Capacity Enforcement')** |  |
| * Click **Save** and close the flow   Important: Making changes to this flow will add an unmanaged layer. When updating the CoE Starter Kit core solution with a new release, you’ll need to remove this unmanaged layer and reapply the changes outlined here in order to get the latest solution update for this flow. |  |

### Import the solution

Follow the steps below to import the Storage Capacity Enforcement solution and run the initial setup flows.

|  |  |
| --- | --- |
| * Login to the Power Apps Maker Portal * Ensure you’re in the environment which contains the CoE Starter Kit Core Solution components * Browse to the Solutions area * Import the **StorageCapacityEnforcement\_1\_0\_0\_4\_managed.zip** file |  |
| * Create a connection for the Storage Capacity Enforcement – Azure Automation account   **Note:** You can use either OAuth or Service Principal authentication, but the account must have permissions to the Azure Automation Account created as a pre-requisite.  Important: For GCC customers, the Azure Automation connector only authenticates with Azure Government subscriptions. Azure Commercial subscriptions are not currently supported. |  |
| Configure the environment variables   * **Storage Capacity Azure Subscription ID:** Enter the [subscription ID](https://learn.microsoft.com/en-us/azure/azure-portal/get-subscription-tenant-id#find-your-azure-subscription) for the Azure subscription * **Storage Capacity Azure Resource Group:** Enter the name of the Azure Resource Group that’s hosting the Azure Automation Account * **Storage Capacity Azure Automation Account Name:** Enter the name of the Azure Automation Account * **Storage Capacity Azure Runbook Enforcement:** Enter the name of the enforcement runbook created to enable admin mode * **Storage Capacity Azure Runbook Remove Enforcement:** Enter the name of the remove enforcement runbook created to disable admin mode |  |
| * In the Solutions menu, click to open the **Center of Excellence – Storage Capacity Enforcement** solution once the import has completed |  |
| * Click on the **Admin | Storage Capacity Enforcement – Sync CoE Solution Metadata** cloud flow (Turn on if flow if currently off) * Click **Run** to execute the flow and wait for it to complete   Note: This flow is executed only during initial setup to create the underlying solution metadata. If you cannot turn on/run flow – edit the flow and check/add connections. Then try to turn on and run. |  |
| * Go back to the solution and open the **Admin | Storage Capacity Enforcement - Configure Emails** cloud flow * Click **Run** to execute the flow and wait for it to complete   Note: This flow is executed only during initial setup to create the emails that support the solution |  |

### Optional: Exclude environments from capacity enforcement

**❗Important:** Before proceeding to the next step, if there are environments you would like to exclude from the Storage Capacity Enforcement solution, you should do so in this step. This will ensure those environments are not impacted. If you are currently using the [CoE Starter Kit Capacity Alerting solution](https://learn.microsoft.com/en-us/power-platform/guidance/coe/capacity-alerting#add-approved-capacity-and-business-unit-information-to-an-environment) to define approved storage limits, those environments will be included as a part of the Storage Capacity Enforcement Solution and could be potentially impacted.

|  |  |
| --- | --- |
| For any environment that you want to exclude, please use the **Excuse from Environment Storage Capacity Enforcement** option located in the Environment > Settings area of the **Power Platform Admin View** app.  Additional details can be found [here](#_Settings). | Graphical user interface, text, application, email  Description automatically generated |

### Turn on the Storage Capacity Enforcement Flows

Follow the steps below to enable the storage capacity enforcement flows. These are scheduled to run weekly but can be adjusted as necessary.

|  |  |
| --- | --- |
| Go back to the solution and turn on the following flows:   * **Admin | Storage Capacity Enforcement – Close to Capacity Alerts** * **Admin | Storage Capacity Enforcement – Manual Turn Off Admin Mode** * **Admin | Storage Capacity Enforcement – Turn OFF Admin Mode** * **Admin | Storage Capacity Enforcement – Turn ON Admin Mode**   Note: You do not have to run these flows manually after turning them on. These flows are triggered either by a weekly schedule or manually from the Power Platform Admin View app. | Table  Description automatically generated |

### Optional: Adjust the approved capacity thresholds

There are environment variables included with the solution which you can adjust to your preference:

**Storage Capacity Alert Threshold** - This is used in the *Admin | Storage Capacity Enforcement - Close to Capacity Alerts* flow and defines the percentage of consumed capacity compared to approved capacity of which any capacity type must be less than, otherwise the environment owner and CoE admins will receive an email alert letting them know the environment is close to 100% of approved capacity. The default value is 80% (or 0.8).

**Storage Capacity Turn OFF Admin Mode Threshold** - Used in the *Admin | Storage Capacity Enforcement - Turn OFF Admin Mode* flow and defines the percentage of consumed capacity compared to approved capacity of which all capacity types for an environment must be less than in order to have admin mode disabled. The default value is 80% (or 0.8).

|  |  |
| --- | --- |
| * Login to the Power Apps Maker Portal * Ensure you’re in the environment which contains the CoE Starter Kit Core Solution components * Browse to the Solutions area * Open the **Default Solution** |  |
| * Click **Environment variables** in the left navigation * Type **Storage Capacity** in the search to filter just the storage capacity solution environment variables * Click on the environment variable you’d like to change   + Storage Capacity Alert Threshold   + Storage Capacity Turn OFF Admin Mode Threshold * Add your desired value in the **Current Value** field (this overrides the Default Value)   + Ex. Set the value to **0.9** if you’d like the threshold to be 90% of approved capacity * Click **Save** * Once the environment variable has been updated, you’ll need to open the related Flow, turning it off and then back on for the changes to take effect |  |

## Deploy the Power BI Dashboard

This section provides you with the steps to configure and publish a customized version of the CoE Starter Kit Power BI Dashboard. This version includes a *Disabled Environments* *| Storage Capacity Enforcement* page as well as customizations to the *Environment Capacity* page.

|  |
| --- |
| Use the steps outlined [here](https://learn.microsoft.com/en-us/power-platform/guidance/coe/setup-powerbi#configure-the-production-and-governance-power-bi-dashboard) to configure and publish the Power BI **CoE Dashboard – Storage Capacity Enforcement.pbit** fileincluded with the solution. |

Note: This is the end of the solution deployment steps.

# Solution Components

This section provides further details on the different components included with the Storage Capacity Enforcement solution. Please review to get an understanding on how the solution works and how to configure it to meet your enforcement requirements.

## Azure Automation

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* **Runbook: Enable Admin Mode** – Used to execute the PowerShell script which places an environment into admin mode.

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* **Runbook: Disable Admin Mode** – Used to execute the PowerShell script which disables admin mode for an environment.

## App – Power Platform Admin View

This solution includes additions and changes to the original CoE Starter Kit [Power Platform Admin View](https://learn.microsoft.com/en-us/power-platform/guidance/coe/core-components#power-platform-admin-view) model-driven application. These new UI enhancements will show up automatically once the solution is imported. See highlights below.

### Capacity and Add-ons

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1. **Storage Capacity Enforcement area** – This section provides you with the latest admin mode status and includes the date/time stamp for when admin mode was last enabled or disabled.
2. **% of Approved Capacity in use** – This column provides you with the percentage of the approved capacity that is currently consumed for that capacity type.

### Settings

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* **Excuse from Environment Storage Capacity Enforcement setting** – This setting allows you to exclude specific environments from the storage capacity enforcement process so they will not be placed into admin mode, even if they go beyond the approved capacity limits.

### Views

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1. **Environments Disabled by Capacity Enforcement** – List of environments currently in admin mode due to storage capacity overage.
2. **Environments Excused from Capacity Enforcement** – This view provides the environments which have been marked as excluded from the capacity enforcement processes.
3. **Environments with No Storage Capacity Limits** – Lists the environments which have no approved storage capacity limits defined and are not set to be excluded from the capacity enforcement solution.
4. **Environments without Environment Owner** – Provides a list of the environments that do not have an environment owner defined. The Environment Owner field is used when sending emails with the solution. If no environment owner is defined, only the CoE Admin team will receive the email notifications.

### Manual Flow

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* **Admin | Storage Capacity Enforcement – Manual – Turn OFF Admin Mode** – This flow allows a CoE admin to quickly remove admin mode for an environment, by selecting the Flow dropdown menu and clicking on the flow to execute it. It will run in the context of the current environment record that is being viewed and shortly after present an in-app notification.

## Processes / Flows

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Admin | Storage Capacity Enforcement – Sync CoE Solution Metadata** | **Admin | Storage Capacity Enforcement – Configure Emails** | **Admin | Storage Capacity Enforcement – Close to Capacity Alerts** | **Admin | Storage Capacity Enforcement – Turn ON Admin Mode** | **Admin | Storage Capacity Enforcement – Turn OFF Admin Mode** | **Admin | Storage Capacity Enforcement – Manual – Turn OFF Admin Mode** |
| Manually run during install, creates solution metadata to support Flow execution state (success/failures) for easy administrative insight | Manually run during install, creates email templates used to send the email notifications | Runs weekly, checks actual storage capacity consumption against approved capacity and emails CoE admins and environment owner if consumed capacity is between 80-100% | Runs weekly, checks actual storage capacity consumption against approved capacity and places environment into admin mode if > 100% allocated; sends email to environment owner and CoE admins | Runs weekly, checks actual storage capacity consumption against approved capacity for environments with admin mode enabled, if all capacity types are less than 80% of approved, admin mode is disabled; sends email to environment owner and CoE admins | Manually executed from the Power Platform Admin View app, provides CoE admins with option to disable admin mode for specific environments |
| Table:  CoE Solution Metadata | Table:  Customized Email | Table:  Environment | Table:  Environment | Table:  Environment | Table:  Environment |

## Power BI Dashboard

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* **Disable Environments | Storage Capacity Enforcement** – This page includes details on the environments in your tenant which have been disabled through the Storage Capacity Enforcement solution. Some of the key metrics include:
  + Total number of disabled environments
  + Environments disabled in the past 30, 90 days
  + Total number of production, sandbox environments disabled
  + List of disabled environments including environment name, ID, date/time admin mode was enabled as well as the environment owner email address
  + List of environment-level storage capacity details broken down by Database, File and Log capacity types
  + Chart visualization highlighting the top 10 environments which have the highest amount of approved capacity overage

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* **Environment Capacity** – The Storage Capacity Enforcement solution includes additional fields on the *Environments Capacity Overview* table, including:
  + Excused from Capacity Enforcement
  + Environment Disabled
  + Environment Owner

# Appendix A

## Administration Mode FAQs

**What is administration mode?**

Administration mode or “admin” mode is an optional setting at the Power Platform environment level which can be configured for sandbox, production or trial environments. Enabling admin mode prevents end users (non-admins) from accessing model-driven or Dynamics 365 apps in a Dataverse environment. Users with the System Administrator or System Customizer security roles can still access the environment and perform the same functions that their roles support whether admin mode is enabled or not.

**Can standard (non-admin) users access model-driven apps or Dynamics 365 apps when the environment is in admin mode?**

No, standard users will not be able to access model-driven or Dynamics 365 apps if the environment is in admin mode. If the user is attempting to access these apps using the Power Apps portal, they will not be listed in the Apps area (only canvas apps will be listed). If they attempt to access the app directly through the URL, they will receive a message similar to the following:

A screenshot of a computer

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**Can standard (non-admin) users access canvas apps if an environment is in admin mode?**

Yes, canvas app access is configured through [app sharing](https://learn.microsoft.com/en-us/power-apps/maker/canvas-apps/share-app) and does not take Dataverse security roles or permissions into consideration for access to the app itself. If a canvas app is using a Dataverse connector which connects to the Dataverse environment that has admin mode enabled, then any components surfacing data through that connector (ex. gallery, chart, etc.) will not show data in the canvas app. If there are other components and screens in the canvas app that connect to non-Dataverse resources such as SharePoint or SQL Server, those components will continue to work as expected.

**Can standard users create canvas apps if an environment is in admin mode?**

Yes, assuming the user could create canvas apps prior to admin mode being enabled, they’ll be able to create new canvas apps when the environment is in admin mode since it doesn’t impact the canvas app create and access capabilities.

**Can standard users create flows if an environment is in admin mode?**

Yes, assuming the user could create flows prior to admin mode being enabled, they’ll be able to create new flows when the environment is in admin mode since it doesn’t impact the flow create and access capabilities.

**Will flows in the environment continue to execute if an environment is in admin mode?**

Flow execution behavior with admin mode can vary. Flows that have Dataverse triggers may be impacted when an environment is in admin mode. Otherwise, flows that are scheduled, instant or triggered by non-Dataverse actions will most likely continue to execute whether admin mode is enabled or not.