*Module 1: Configuring Dynamics 365*

# Practice 1.1: *Configure Business Units, Users, and Teams*

#### Before you Begin.

All of the labs in this course are designed to walk you through the process of building and customizing a completed Microsoft Dynamics 365 environment. The tasks that you will be asked to do in each module will often require that you have completed all of the task in previous modules. We highly encourage you work through each modules lab in order to ensure that labs further on will work appropriately.

#### Scenario

You are working for an organization that has configured a development or test environment alongside their live Microsoft Dynamics 365 system. You are configuring this development system in order to test changes that are required before transferring them to the live system.

You have three users who will be acting as representatives and will be supporting customers testing product prototypes. They will eventually need different levels of access to Entities such as cases.

You need to setup your organization for the customizations that you will be making as we continue through the course. This will include the creation of Business Units, User Accounts, and a Team that will be used to demo specific concepts. This will also include the creation of several business units in the application.

##### Exercise Scenario

To properly test the changes you will be making to the system, you need to replicate the production environment, on a limited scale. Three users, Alan Jackson, Connie Watson and Ben Burton will be performing much of the user acceptance testing (UAT) so we need to add them to our environment and ensure that they are in the same the appropriate Business Unit based on their role and function so that moving forward the roles and privileges assigned to them are tested properly.

***Task 1****: Add Users to your Office 365 Trial Subscription*

##### High Level Steps

1. Create user accounts for Alan Jackson, Connie Watson, and Ben Burton.
2. Assign a Dynamics 365 License to Each User.

##### Detailed Steps

1. Create a user account in O365 for **Alan Jackson.**
   1. In a web browser, navigate to [**Https://portal.office.com**](Https://portal.office.com).
   2. Enter the username you created when you signed up for you trial. Ex. [someone@orgname.onmicrosoft.com](mailto:someone@orgname.onmicrosoft.com).
   3. Enter your Password.
   4. Check the **Keep me Signed in** Check box.
   5. Click the **Sign in** button.

(Settings -> Security -> Users -> New User)

* 1. Under the **Office 365 Admin Center** (Left side of screen), locate and select **USERS**.
  2. Select Active Users
  3. Click the **Plus** sign to create a new user.
  4. Enter the user information as noted below
     1. **First Name** = **Alan**
     2. **Last Name** = **Jackson**
     3. **Display Name** = **Alan Jackson** (Should auto-populate)
     4. **User Name** = **Alan**
  5. Click **Type Password**
  6. Enter a **pass@word1** for the password
  7. Re-enter **pass@word1** again to confirm
  8. Uncheck **Make this person change their password the next time they sign in**
  9. You do not need to assign a license at this point
  10. Click **Create**

1. Repeat the Steps above to create user accounts for **Connie Watson** and **Ben Burton** using the information below.

|  |  |
| --- | --- |
| Connie Watson | Ben Burton |
| First Name = Connie | First Name = Ben |
| Last Name = Watson | Last Name = Burton |
| Display Name = Connie Watson | Display Name = Ben Burton |
| User Name = Connie | User Name = Ben |
| Password = pass@word1 | Password = pass@word1 |
| Uncheck Make change password next time they sign in | Uncheck Make change password next time they sign in |

1. Assign each user a Microsoft Dynamics 365 Online License
   1. Each user should have automatically been assigned a CRM license when they were created, since your trial account only have Dynamics 365 Online, but you may at times need to assign a user license.
   2. In the All Users view.
   3. Click the Check Box next to Alan, Connie, and Ben to select their accounts
   4. Click **Edit**.
   5. Under **Details**, click the **Next** button.
   6. Under **Settings**, click the **Next** button.
   7. Under **Assign Licenses**, Select **Add** to existing license assignments.
   8. Locate and **Select Microsoft Dynamics 365 Online** 
      1. All items underneath will also be selected
   9. Click **Submit**
   10. Click **Finish**

<https://trials.dynamics.com/>

#### **Task 2:** Create the appropriate Business Units

##### Since the users have been created, you now need to create the specific business units that will used to assign each of the users to in the application. These business units will serve as the foundation for the application security that you will be configuring in the next module.

There are 5 Business that need to be created. Each of them will have a specific parent Business unit. The table below outlines the details about the business units.

|  |  |
| --- | --- |
| Name | Parent Business Unit |
| Sales | Root Business Unit |
| Marketing | Root Business Unit |
| Service | Root Business Unit |
| Channel Sales | Sales |
| Consumer Sales | Sales |

**Note:** The root business unit will be the business unit that was created when you first setup your trial organization.

##### High Level Steps

1. Add Business Units to your organization based on the information outlined in the table above.
2. Move users to the Business Units as described in the exercise scenario.

##### Detailed Steps

* + - 1. Add Business Units to your organization based on the information outlined in the table above.

1. On the navigation bar, click the **Main** button (Looks like three lines),select **Settings**, then click **Security** under the System heading.
2. Click **Business Units**.
3. Just above the list of Business Units, click the **New** button.
4. On the New Business Unit screen, enter **Sales** into the **Name** field.
   1. Do not change the Parent Business Unit.
5. Click **Save and New** *(located just to the right of Save and Close)*.
6. Enter **Service** for the **Name**, and click **Save and New**.
7. Enter **Marketing** for the **Name**, and click **Save and Close**.
8. On the list of Business Units, click **New**.
9. Enter **Channel Sales** for the **Name**.
10. Click the lookup icon in the Parent Business field.
11. Select **Sales**.
12. Click **Save and New**.
13. Enter **Consumer Sales** for the **Name**.
14. Click the lookup icon in the Parent Business field.
15. Select **Sales**.
16. Click **Save and Close**.
17. Move users to the Business Units as described in the exercise scenario.
18. In Dynamics CRM, navigate to **Settings** > **Security**.
19. Click **Users**.
20. In the **Enabled Users** view, Select **Alan Jackson** and **Connie Watson** in the view.
21. On the command bar click **More Commands**.
22. In the drop-down list click **Change Business Unit**.
23. In the **Change Business Unit** dialog click the lookup button and select the **Service** Business Unit, and then click **OK**.
24. In the **Enabled Users** view, select **Ben Burton**.
25. On the command bar click **More Commands**.
26. In the drop-down list click **Change Business Unit**.
27. In the **Change Business Unit** dialog click the lookup button and select the **Marketing** Business Unit.
28. Click **OK**.

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#### **Task 3:** Create the Product Development Team

##### A Team called Product Development is going to be used later for different purposes including record security. You will need to create the Team now so it can be used in later modules.

##### High Level Steps

1. Create a **Team** called **“Product Development”** in the **Marketing** Business Unit.
2. Add **Alan Jackson** to the new Product Development Team.

##### Detailed Steps

1. Create a Team called “Product Development” in the Marketing Business Unit.

1. Navigate to **Microsoft Dynamics 365** > **Settings** > **Security**
2. Click **Teams**.
3. On the command bar click **New**.
4. In the New Team form enter Product Development in the Team Name field.
5. In the **Business Unit** field click the lookup button, and then click **Look Up More Records**.
6. In the Look Up Record dialog box, select the **Marketing** Business Unit and then click **Add**.
7. In the **Administrator** field select the **Administrator** user using the lookup button.
8. On the command bar click the **Save** button.

2. Add Alan Jackson to the new Product Development Team.

1. In the **Team Members** section of the form click the **Add** button.
2. Click the lookup button and select **Alan Jackson** from the list.

# **Module 2: The Dynamics CRM Security Model**

# Practice 2.1: Configure Dynamics CRM Security

#### Scenario

Gail Erickson is Head of Customer Services at Adventure Works Cycles and she has asked you to make some changes to Security Roles because the current permissions no longer fit the business requirements for her department. She wants to do this using a new Security Role so you can replace the existing role for only a few users at first to make sure the new privileges are sufficient for them to continue to do their usual work.

Gail only wants Customer Service Representatives (CSRs) to be able to assign their own Cases, so they can give away a Case they own but not take one from a colleague (managers will still be able to reassign Cases between Users however they want to).

She has discovered that CSRs have privileges to delete sales records they own such as Quotes. She does not want them to be able to delete any sales records at all, so if a CSR has created a Quote they would have to go through the step of closing it as Lost rather than simply deleting it. This will enable more realistic reporting of the rate of success of sales generated by the customer service department for chargeable services.

In order to support the new product development (NPD) process, some members of the marketing department responsible for managing prototype testing will need to be able to create Cases and associate these to a Contract record for the prototype to track the effort and cost of the support provided but without charging this to the customer doing the testing. A new Security Role is needed to give selected marketing Users access to create and manage their own Cases and assign them to Contracts owned by marketing Users, but not to edit an Contracts outside the department.

Some users in the customer service department need to assign cases created and owned by staff in the marketing department in order to pick these up and work on them to support customers who are testing prototypes. You need to create a Security Role that will later be assigned to a Team in the Marketing Business Unit to achieve this objective.

#### Lab Setup

Before doing this lab you need to have completed the lab “Create Business Units and Teams” in the module “*Configuring Dynamics 365*”.

##### Exercise Scenario

In this exercise you need to create a new role called AWC CSR that is a copy of the existing Customer Service Representative role. The AWC CSR role must then be customized as shown in the following table (leave all other privileges at their current setting).

|  |  |  |
| --- | --- | --- |
| Entity | Privilege | Access Level |
| Case | Assign | User |
| **All** Sales entities (use the privilege shortcut method) | Delete | None |

You also need to create a new role called AWC Marketing as a copy of the Marketing Professional role. The AWC Marketing role requires the changes shown in the following table (leave all other privileges at their current setting).

|  |  |  |
| --- | --- | --- |
| Entity | Privilege | Access Level |
| Case (use the entity shortcut method, then adjust) | Read  All other privileges | Organization  User |
| Contract | Write | Business Unit |

You must also create a new role called AWC NPD, The AWC NPD role requires the following settings:

|  |  |  |
| --- | --- | --- |
| Entity | Privilege | Access Level |
| Case | Assign | Business Unit |

##### Finally you want to be able to use the Product Development Team to potentially own records. To facilitate this you are going to assign the AWC NPD Security Role to the Team.

##### High Level Steps

1. Create a copy of the Customer Service Representative and Marketing Professional Security Roles.
2. Modify the new **AWC CSR** and **AWC Marketing** Security Roles.
3. Create a Security Role called **AWC NPD** and modify it.
4. Assign the correct Security Roles to users participating in testing.
5. Assign the **AWC NPD** Security Role to the **Product Development** Team
6. Create test Case records to test Access

##### Detailed Steps

1. Create a copy of the Customer Service Representative and Marketing Professional Security Roles.
   1. Click **Microsoft Dynamics 365**, Click the **Main** button *(Looks like 3 Lines).*
   2. Select **Settings,** and then click on **Security** under the System heading.
   3. Click **Security Roles**.
   4. Select the **Customer Service Representative role.**
   5. On the menu bar at the top of the list of Security Roles, click **More Actions**, and then click **Copy Role**.
   6. In the Copy Security Role dialog box, in **New Role Name** enter **AWC CSR**.
   7. Clear the Open the new Security Role when copying is complete checkbox and click the **OK** button.
   8. Select the Marketing Professional role. On the menu bar at the top of the list of Security Roles, click **More Actions**, and then click **Copy Role**.
   9. In the Copy Security Role dialog box, in **New Role Name** enter **AWC Marketing**.
   10. Clear the **Open the new Security Role when copying is** complete checkbox and click the **OK** button
2. Modify the new **AWC CSR** and **AWC Marketing** Security Roles.
   1. In the list of Security Roles, double-click the **AWC CSR** role to open it.
   2. Click the **Service** tab.
   3. Click the privilege for **Assign** on the **Case** entity until it is at **User** level.
   4. Click the **Sales** tab.
   5. Click the **Delete** column header until the access level is set to **None** for all sales entities.
   6. On the toolbar, click **Save and Close**.
   7. Double-click the **AWC Marketing** role to open it.
   8. Click the **Service** tab.
   9. Click the **Case** entity label until all privileges have an access level of **User**.
   10. Click the privilege for **Read** on the **Case** entity until it is at Organization level
   11. Click the privilege for **Write** on the **Contract** entity label until it is at **None Selected** level.
   12. On the toolbar, click **Save and Close**.
3. Create a Security Role called **AWC NPD** and modify it.
   1. In the list of Security Roles, on the menu bar at the top of the list of Security Roles in the Solution, click **New**.
   2. In the **Security Role: New Security Role** form, enter **AWC NPD** in the Role Name field.
   3. In the **New Security Role** form click the **Service** tab.
   4. For the **Case** entity, set the access level for the **Assign** privilege to **Business Unit** then click the **Save and Close** button on the command bar.
4. Assign the correct Security Roles to the users who are participating in testing.
   1. In the **Enabled Users** view, select **Alan Jackson** and **Connie Watson**.
   2. On the command bar click **More Commands**.
   3. In the drop-down list click **Manage Roles**.
   4. In the **Manage Roles** dialog check the box next to the **AWC CSR** role then click **OK**.
   5. In the **Enabled Users** view, select **Ben Burton**.
   6. On the command bar click **More Commands**.
   7. In the drop-down list click **Manage Roles**
   8. In the **Manage Roles** dialog check the box next to the **AWC Marketing** role then click **OK**.
5. Assign the **AWC NPD** Security Role to the **Product Development** Team.
   1. Select **Settings,** and then click on **Security** under the System heading.
   2. Click **Teams**.
   3. Select the **Product Development** Team.
   4. On the command bar click **More Commands**, and then click **Manage Roles**.
   5. In the **Manage Team Roles** dialog box, select the checkbox next to the **AWC NPD** role.
   6. Click the **OK** button.

**Note:** *The Remainder of this lab is optional, if you want to test the functionality to see how it will be presented in the application as another user you can continue on. You will need to Sign out of Dynamics 365 and log in as the user account listed below. That can add some extra time to your labs.*

1. Create some test **Case** records.
   1. On the navigation bar click **Microsoft Dynamics 365**, click **Service**, and then click or point to **Service**, and then click **Cases**.
   2. On the command bar click the **New Case** button.
   3. In the Case record, in **Case Title**, enter **Alan Test**, and in the **Customer** field select **Adventure Works (sample)** using the lookup button.
   4. In the header, in the **Owner** field, type **Alan** and press the Tab key.
   5. On the command bar click **Save**, then click **New**.
   6. Repeat steps c through e to create two more Cases called **Ben Test** and **Connie Test**, each owned by **Ben Burton** and **Connie Watson** as appropriate.
2. Test which Cases can be assigned by Alan Jackson.
   1. On the Navigation bar, you can click your user account name, and select Sign out
      1. *Optionally depending on your Browser you can open the window using in private browsing, which will allow you to sign into a new browser session as a different user without having to sign out of another session*.
   2. Navigate to you dynamics organization URL. **Ex** [**https://name.crm.dynamics.com**](https://name.crm.dynamics.com)**.**
   3. Enter the user name **Alan@yourorgname.onmicrosoft.com** and a password of **pass@word1** (if you used that when you created the user) then click **OK**. Microsoft Dynamics CRM will open and the top-right corner of the screen will confirm that you are signed on as Alan Jackson.
   4. Navigate to **Microsoft Dynamics 365** > **Service** > **Cases**.
   5. Switch to the **Active Cases** view.
   6. Select the **Alan Test** Case, then on the command bar click **More Commands**, and then click **Assign**.
   7. In the Assign to Team or User dialog box, select Assign to another User or Team.
   8. Type **365** and press the Tab key. The **365 Administrator** User record will be resolved and shown in the lookup field.
   9. Click **Assign**. (Note whether this succeeds or if an error message is displayed.)
   10. (Optional) Repeat steps E. through I. for the **Ben Test** and **Connie Test** Cases, noting the outcome for each. *You will need to log out and log in as each user.*

**Note:** If you used in private browsing to open a new window, Leave this browser window open for later in this lab and switch back to the original window where you are signed in using your user account, using the Windows taskbar. Otherwise, you will need to log out of your organization and log back in using your account