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# DYNAMICS CON LIVE MAY 2024

# Getting Started with Power Platform Governance and Administration



# Wayne Walton



- Enterprise Architect with TTEC Digital
- Author of upcoming book *How to Deploy Dynamics Field Service*
- Worked with Dynamics since CRM 4.0
- One of the first people to learn the ill-fated Marketing Pilot after MS acquisition, and trained MS on it
- Part of one of the first CCD to Unified Service Desk upgrades



# Things to Know

- This is a 101-level session
  - New Administrators
  - New To Dynamics
  - Want a Foundational understanding of the platform
- If you have your own ALM, this is likely too basic for you
- Questions are very welcome!
  - Interactive sessions are more fun, so feel free to raise your hand and ask
  - You don't need to wait until the end of the presentation
  - I can hang out afterward for in-depth questions



# What are We Even Talking About?

- Administration

- Setting up and managing Users
- Licensing
- Setting up and managing Environments
- In-Environment configuration
- Responding to User Requests

- Governance

- Alignment of IT and Business goals
- Security in Dynamics and Power Platform
- Conditional Access
- Data Loss Prevention
- System Usage
- Data Retention





# **Administration**

# Where to Administer Power Platform

- Microsoft 365 Admin - <https://admin.microsoft.com/>
- Microsoft Entra (Formerly Active Directory) - <https://entra.microsoft.com/>
- Power Platform Admin - <https://admin.powerplatform.microsoft.com/>
- PowerApps - <https://make.powerapps.com/>
- Microsoft Cloud Solution Center - <https://solutions.microsoft.com/>
- Release Planner - <https://releaseplans.microsoft.com/>



# Microsoft 365 Security Hierarchy



- Microsoft 365 Admin (AKA Tenant Admin)
  - Power Platform Admin (Environment Admin)
    - PowerApps Admin (Dynamics System Administrator)





# Microsoft 365 Admin

## Users, Groups, Licenses, Tenants

The screenshot displays the Microsoft 365 Admin Center interface. The top navigation bar includes the 'Microsoft 365 admin center' title, a search bar, and utility icons for help, settings, and user profile. The left-hand navigation pane lists various administrative sections, with 'Active users' currently selected. The main content area shows the 'Active users' page, which includes a breadcrumb trail (Home > Active users), a 'Enable Dark mode' toggle, and a toolbar with actions like 'Add a user', 'User templates', 'Add multiple users', 'Multi-factor authentication', 'Delete a user', and 'Refresh'. A search box for the active users list is also present. Below the toolbar is a table listing active users with columns for checkboxes, display names, usernames, and licenses. A 'Choose columns' button is located in the top right of the table area.

<input type="checkbox"/>	Display name ↑	Username	Licenses	Choose columns
<input type="checkbox"/>	[Redacted]	[Redacted]	Dynamics 365 Customer Service Digital Messaging Partner	
<input type="checkbox"/>	[Redacted]	[Redacted]	Dynamics 365 Customer Engagement Plan , Microsoft Cop	
<input type="checkbox"/>	[Redacted]	[Redacted]	Dynamics 365 Customer Engagement Plan , Microsoft Pow	
<input type="checkbox"/>	[Redacted]	[Redacted]	Unlicensed	
<input type="checkbox"/>	[Redacted]	[Redacted]	Microsoft Power Apps Plan 2 Trial , Office 365 E3 , Dynamic	
<input type="checkbox"/>	[Redacted]	[Redacted]	Dynamics 365 Customer Engagement Plan , Microsoft Pow	



# Microsoft Entra (formerly AD)

## Advanced Group Management

The screenshot displays the Microsoft Entra admin center interface. The left sidebar contains navigation options: Home, What's new, Diagnose & solve problems, Favorites, Identity, Overview, Users, Groups, All groups, Deleted groups, Group settings, Devices, Applications, Protection, and Identity governance. The main content area shows the 'Groups | All groups' page for 'TTEC Digital'. It includes a search bar, a 'Search mode' toggle set to 'Contains', and a table of 7 groups found. The table has columns for Name, Object Id, and Group type. The groups listed are: AC (Microsoft 365), AC (Microsoft 365), A (Microsoft 365), AH (Microsoft 365), MD (Microsoft 365), M (Security), and PP (Security). A notification banner at the top of the main area states 'Azure Active Directory is now Microsoft Entra ID. Learn more'.

Name	Object Id	Group type
AC		Microsoft 365
AC		Microsoft 365
A		Microsoft 365
AH		Microsoft 365
MD		Microsoft 365
M		Security
PP		Security



# Power Platform Admin

Environments, Security Roles, System Settings, Capacity

The screenshot displays the Power Platform Admin Center interface. The top navigation bar includes a hamburger menu, the text "Power Platform admin center", and utility icons for settings, help, and user profile (AU). The left sidebar contains a menu with items: Home, Environments (selected), Environment groups, Advisor, Analytics, Billing, Settings, and Resources. The main content area is titled "Environments" and includes a toolbar with actions like Deselect, Detailed view, Open, Resources, Settings, and Convert to production. A search bar is also present. Below the toolbar is a descriptive paragraph about environments. At the bottom, there is a table listing three environments.

Power Platform admin center

Environments

An [environment](#) is a space to store, manage, and share your organization's business data, apps, chatbots, and flows. When an environment is [managed](#), it allows you greater visibility and control.

Environment	Type	State	Dataverse	Managed	Reg
	Production	Ready	Yes	No	Unit
	Sandbox	Ready	Yes	No	Unit
	Default	Ready	Yes	No	Unit



# Power Apps

Single Environment System Design, Tables, Solutions, Automate

Power Apps

Search

Environment

Home

Create

Learn

Apps

Solutions

Tables

Choices

Flows

Chatbots

AI hub

More

Power Platform

+ New table | Import | Export | Analyze

Search

### Tables

Describe the new table

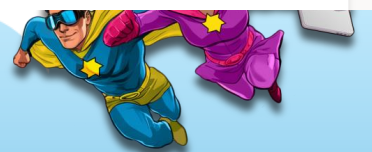
Create with SharePoint list PREVIEW

Create with Excel or .CSV file

Start with a blank table

Recommended Custom All

Table	Name	Type	Managed	Customizable	Tags
Account	account	Standard	Yes	Yes	Core
Address	customeraddress	Standard	Yes	Yes	Standard
Appointment	appointment	Activity	Yes	Yes	Productivity
Appointment Interaction	new_appointmentinteracti...	Standard	No	Yes	Custom
Appointment Type	ttec_appointmenttype	Standard	No	Yes	Custom



# Microsoft Cloud Solution Center

Specialized Solutions for certain organizations

The screenshot shows the Microsoft Cloud Solution Center interface. At the top, there is a dark blue header with the text "Microsoft Cloud Solution Center" and a hamburger menu icon. Below the header is a light blue navigation sidebar with the following items: Home (selected), Deployment manager, Support, Industry Clouds (a sub-header), Financial Services, Healthcare, Manufacturing (Preview), Nonprofit, Retail, and Sustainability. The main content area has a blue background at the top with the text "Hello Administrator" and "Discover, learn about, and set up your solutions". Below this is a section titled "Select your industry cloud and business" with the subtitle "Quickly find solutions designed for you by selecting your business within the relevant Microsoft industry clouds on this page." There are three cards below this section: "Microsoft Cloud for Financial Services" with a "View all solutions" link, "Microsoft Cloud for Healthcare" with a "View all solutions" link, and "Microsoft Cloud for Manufacturing (Preview)" with a "View all solutions" link.



# Microsoft Release Planner

Track future updates from Microsoft for your products

Planned 7 upcoming features included in release plans	Coming soon 3 upcoming features available this month	Try now 5 new features recently released to market			
▼ Enable enterprise scale					
▲ Building modern apps					
Modernize maker experience security settings				Public Preview Jun 2024	+ ▼
Select columns downloaded on mobile devices				Public Preview Jun 2024	+ ▼
Use the Power Platform Environment Settings app				Public Preview Jul 2024	+ ▼
▼ Copilot for Power Apps makers and users					



# 3rd Part Tool - XRMToolBox

- URL- <https://www.xrmtoolbox.com/>

The screenshot shows the XRMToolBox application window. The title bar reads "XrmToolBox for Microsoft Dynamics CRM 2011 to 2016 (v1.2017.3.14)". The interface includes a menu bar with options like "Connect to CRM", "Manage connections", "Tabs", "Plugins Store", "Search", "Help", "Feedback", and "Donate". Below the menu bar, there are tabs for "Home", "A Sample Tool (Not connected)", and "Attribute Bulk Updater (Quanta Dev)". The main area is divided into two panes. The left pane, titled "Entities", lists various entities with their display names and schema names. The right pane, titled "Attribute Property Selection", contains a message "Select which attribute properties should be updated" and several checkboxes for "Valid for Adv. Find", "Valid for Audit", "Is Secured", and "Requirement Level". Below this is a table of attributes with columns for "Attribute Display Name", "Attribute Logical Name", "Can change", "Is Customiza...", "On Form", and "Requir...".

Attribute Display Name	Attribute Logical Name	Can change	Is Customiza...	On Form	Requir...
<input type="checkbox"/> Account	accountid	True	True	False	System...
<input type="checkbox"/> Account Name	name	True	True	True	Applica...
<input type="checkbox"/> Account Number	accountnumber	True	True	False	None
<input type="checkbox"/> Account Rating	accountratingcode	True	True	False	None
<input type="checkbox"/> Address 1	address1_composite	True	True	True	None
<input type="checkbox"/> Address 1: Address Type	address1_addresstypecode	True	True	False	None
<input checked="" type="checkbox"/> Address 1: City	address1_city	True	True	True	None
<input type="checkbox"/> Address 1: Country/Regi...	address1_country	True	True	False	None
<input type="checkbox"/> Address 1: County	address1_county	True	True	False	None
<input type="checkbox"/> Address 1: Fax	address1_fax	True	True	False	None
<input type="checkbox"/> Address 1: Freight Terms	address1_freighttermsco...	True	True	True	None
<input type="checkbox"/> Address 1: ID	address1_addressid	False	False	False	None
<input type="checkbox"/> Address 1: Latitude	address1_latitude	True	True	False	None
<input type="checkbox"/> Address 1: Longitude	address1_longitude	True	True	False	None



# 3<sup>rd</sup> Part Tool – PCF Gallery

- URL- <https://pcf.gallery>



**CONTACT INFORMATION**

First Name \* Alex

Last Name \* Baker

Job Title Cafeteria Manager

Age 48

Age Input Component

Account \* ...

Interaction Date \* 23/12/2024 11:23

Interaction Date \* 23/12/2024 11:23

Interaction ID \* ...

Name \* ...

Specific Date Picker

Start Time 15:30

Start Time (OOTB) 09:00

Dates 09:30

10:00





# Governance



# What is Governance Again?

- How IT helps Business align to its needs
- As much design philosophy as rules
- In Power Platform, this is means securing data and enabling use
- Bookmark this Page! <https://learn.microsoft.com/en-us/power-platform/admin/security>



# General Environment Security

The basic settings for all Power Platform environments

The screenshot displays the Power Platform admin center interface. The left-hand navigation pane includes options such as Home, Environments, Environment groups, Advisor, Analytics, Dataverse, Power Automate, Power Apps, Data export, Billing, Settings, Resources, Capacity, Dynamics 365 apps, Power Apps assets, Power Pages sites, Help + support, Data integration, and Data (preview). The main content area is titled 'Privacy + Security' and contains several configuration sections:

- Privacy preference:** A toggle switch for 'Show privacy statement link for this organization' is currently set to 'Off'. Below it is a text input field for the 'Privacy statement URL'.
- Default action to take when an error occurs:** Three radio button options are provided: 'Ask the user for permission to send an error report to Microsoft', 'Automatically send an error report to Microsoft without user interaction', and 'Never send an error report to Microsoft'.
- Blocked Attachments:** A text area lists file extensions to be blocked, including .ade, .adp, .app, .asa, .ashx, .asmx, .asp, .bas, .bat, .cdx, .cer, .chm, .class, .cmd, .com, .config, .cpl, .crt, .csh, .dll, .exe, .fxp, .hlp, .hta, .htm, .html, .id, .idc, .idq, .inf, .ins, .isp, .its, .jar, .jse, .ksh, .lnk, .mad, .maf, .mag, .mam, .maq, .mar, .mas, .mat, .mau, .mav, .maw, .mda, .mdb, .mde, .mdt, .mdw, .mdz, .msc, .msh, .msh1, .msh1.xml, .msh2, .msh2.xml, .mshxml, .msi, .msp, .mst, .ops, .pcd, .pif, .prf, .prg, .pri, .nter, .pst, .reg, .rem, .scf, .scr, .sct, .shb, .shs, .shtm, .shtml, .soap, .stm, .tmp, .url, .vb, .vbe, .vbs, .vsm, .vss, .vst, .vsw, .ws, .wsc, .wcf, .wcfm, .wcfm.vb, .wcfm.vbe, .wcfm.vbs, .wcfm.vss, .wcfm.vst, .wcfm.vsw, .wcfm.wsc, .wcfm.wcfm.vb, .wcfm.vbe, .wcfm.vbs, .wcfm.vss, .wcfm.vst, .wcfm.vsw, .wcfm.wsc.
- Blocked Mime Types:** A text input field contains the mime type 'image/svg+xml'.
- Session Expiration:** A toggle switch for 'Set custom session timeout' is 'Off'. Below it is a text input field for 'Enter maximum session length' with a 'Minutes' label.
- Inactivity timeout:** A toggle switch for 'Set inactivity timeout' is 'Off'.
- Enable sharing:** A toggle switch for 'Allow users to share read-only links to records with other users from this environment' is 'On'.
- Show details when unfurling links:** A toggle switch for 'Show record name and type to unauthorized users when unfurling links in Teams chats' is 'On'.
- IP address settings:** A toggle switch for 'Enable IP address based cookie binding' is 'Off'.



# Managed Environments

A growing suite of native governance tools in Power Platform

- Environment groups (Preview)
- Limit sharing
- Weekly usage insights
- Data policies
- Pipelines in Power Platform
- Maker welcome content
- Solution checker
- IP Firewall
- IP cookie binding
- Customer Managed Key (CMK)
- Lockbox
- Extended backup
- DLP for desktop flow
- Export data to Azure Application Insights
- Catalog in Power Platform
- Default environment routing
- Create an app description with Copilot



# Managed Environments

A newer suite of native governance tools in Power Platform

## Enable Managed Environments

Increase visibility and control for  . [Learn more](#)

## Licensing details

All users in Managed Environments must have a Power Apps, Power Automate, or Dynamics 365 license with premium usage rights. [Learn more](#)

## Auto-claim

If a license auto-claim policy does not already exist, one will be created for the tenant. You can control if the policy applies to Managed Environments only, or to all environments. [View tenant settings](#)

## Limit sharing

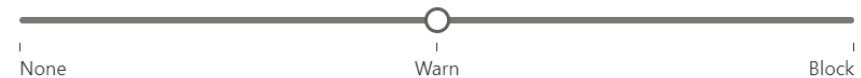
Help reduce risk by limiting how widely canvas apps can be shared. [Learn more](#)

- Don't set limits (default)
- Exclude sharing with security groups

Limit total individuals who can share to No limit

## Solution checker enforcement

Automatically verify solution checker results for security and reliability issues before solution import. [Learn more](#)



Check for security and reliability issues in the solution checker results, but do not block solution import for any issues.

- Send emails only when a solution is blocked. If unchecked, you'll also get emails when there are warnings.

## Excluded Rules

Select Solution Checker rules to exclude from enforcement. ▼

## Usage insights

Get adoption insights, like top apps and flows, in this environment. [Learn more](#)

- Include insights for this environment in the weekly email digest
- Add additional recipients for the weekly email digest

Enable

Close





# Environment Routing

Give makers their own dedicated dev environment automatically

enter

## Tenant settings

These settings are applicable across your organization. [Learn more](#)

Name	Description
Copilot in Power Apps (preview)	Enable new AI-powered Copilot features for people who make apps.
Copilot feedback	When using Copilot in Power Apps, allow users to submit feedback.
Copilot data collection	When using Copilot in Power Apps, allow users to share their prompts.
<input checked="" type="checkbox"/> Environment routing (Preview) 	Guide makers to specific environments based on defined rules.
Weekly digest 	Manage additional recipients for the weekly digest email for Makers.
Canvas app insights	Allow people to collect insights for individual canvas apps.
Developer environment assignments	Control who can create and manage developer environments.

## Environment routing

[Preview](#) ×

Direct new Power Apps makers into their own personal developer environments. [Learn more](#)

**Create personal developer environments for makers**

On

---

**User type**

Select who can be routed to a new personal developer environment.

All makers

New makers only

---

**Environment group**

Keep your organization compliant by assigning newly created developer environments to a specific group.



# Data Loss Prevention Policies

Secure data connectors, ban certain connections

Power Platform admin center

Capacity

Dynamics 365 apps

Power Apps assets

Power Pages sites

Help + support

Data integration

Data (preview)

Policies

Data policies

Tenant isolation

Customer Lockbox

DLP Policies > New Policy

Policy name

Prebuilt connectors

Custom connectors

Scope

Review

Move to Business Block Configure connector Set default group

### Assign connectors

Business (0) **Non-business (1204) | Default** Blocked (0) Search connectors

Connectors for non-sensitive data. Connectors in this group can't share data with connectors in other groups. Unassigned connectors will show up here by default.

	Name	Blockable	Endpoint c
<input checked="" type="checkbox"/>	Salesforce	Yes	No



# Tenant Isolation

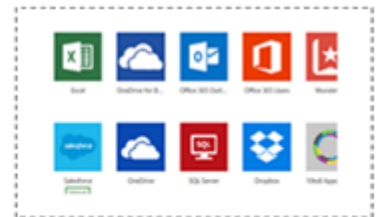
Prevent external tenants from connecting to secured data

The screenshot shows the Power Platform admin center interface. The left-hand navigation pane includes: Help + support, Data integration, Data (preview), Policies (with a sub-menu for Data policies), Tenant isolation (highlighted), Customer Lockbox, Enterprise policies, Billing policies, and Admin centers. The main content area is titled "Tenant Isolation" and includes a "+ New tenant rule" button and a search bar. The text explains that tenant isolation can block external tenants from connecting into the tenant (inbound) and block the tenant from connecting to external tenants (outbound). A toggle switch is currently set to "Off". Below the text is a table with columns for "Allowed direction" and "Tenant ID". The table contains one row with "Inbound and Outbound" and an asterisk (\*).

## CUSTOMER TENANT CONTOSO



Contoso User cannot establish a connection using Fabrikam credentials



Fabrikam user cannot establish a connection using Contoso credentials



## EXTERNAL TENANT FABRIKAM





# Power Platform Analytics

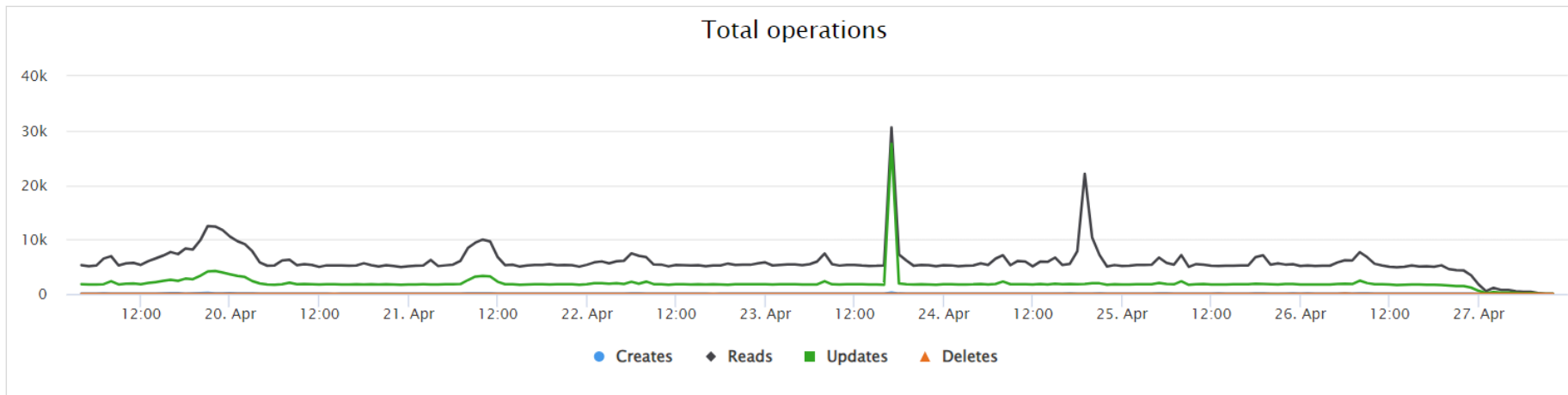
Get insight into usage

## Dataverse analytics

[Learn more](#) · [Who can view these reports?](#)

[Home](#) [Active users](#) [Mode of access](#) [Entity usage](#) [System jobs](#) [Plug-ins](#) [API calls statistics](#) [Mailbox usage](#)

Showing data for [https://\[redacted\].crm.dynamics.com/](https://[redacted].crm.dynamics.com/) from [redacted] | [Change filters](#)



# Application Insights with Data Export

## Azure enhanced reporting

New data exports to Azure Application Insights

- Data Package
- Environment
- Subscription
- Review and Finish

### Export to Azure Application Insights

Name the export package \*

PowerAutomate Runs

Create an Azure Application Insights instance to begin exporting analytics data. [Go to the Azure Portal.](#)

Dataverse diagnostics and performance

Data about APIs, form load diag

Power Automate

Data about Cloud flow runs, trig

Cloud flow runs

Cloud flow triggers

Cloud flow actions

Dynamics Customer Service (pr

CH1-RetailAppAI

Application Insights

Search

Overview

Activity log

Access control (IAM)

Tags

Diagnose and solve problems

Investigate

Application map

Smart detection

Live metrics

Transaction search

Availability

Failures

Performance

Troubleshooting guides

Monitoring

Alerts

Metrics

Application Dashboard

Essentials

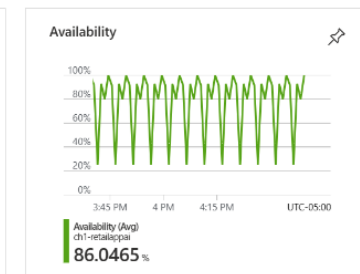
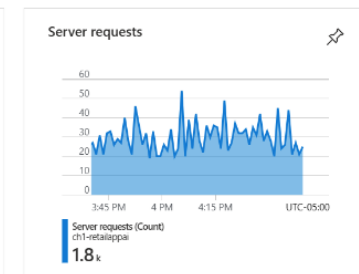
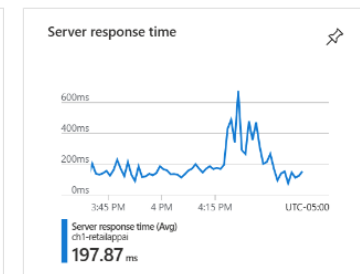
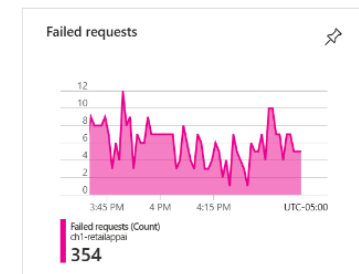
Resource group (move) : CH1-FabrikamRG

Location : East US

Subscription (move) : Contoso Hotels\_Tenant - Production

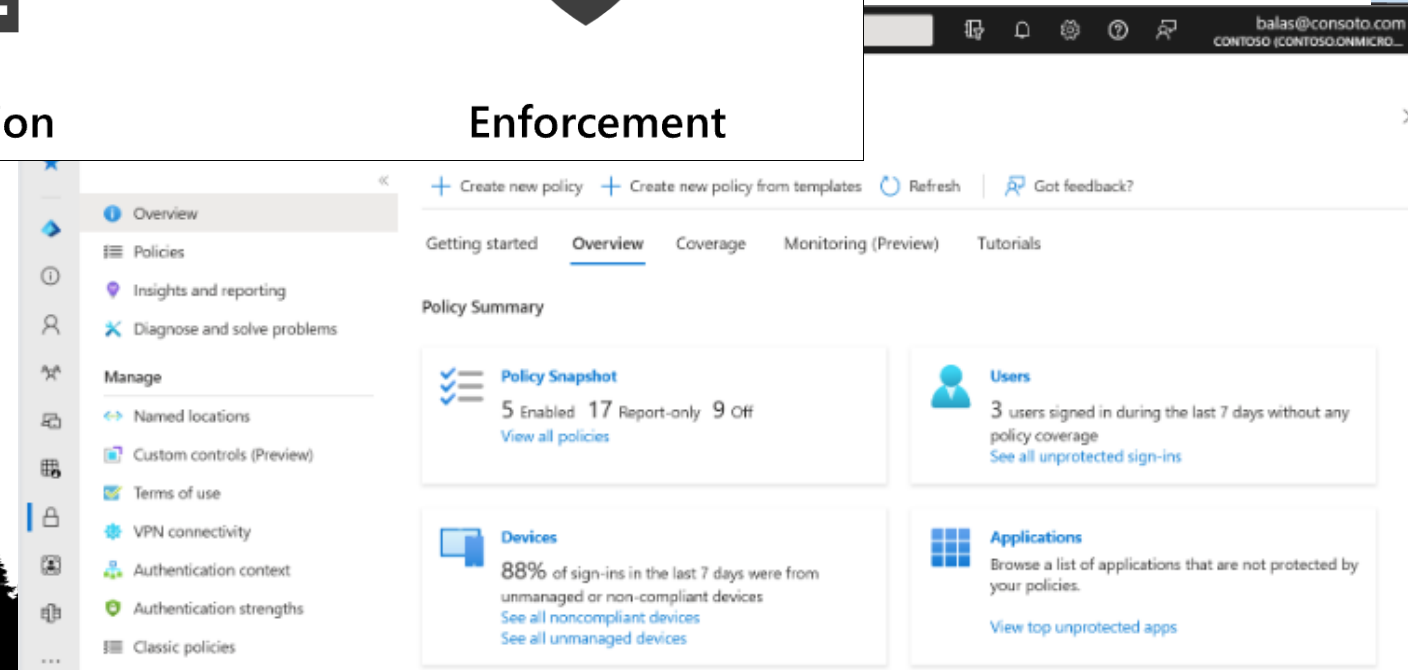
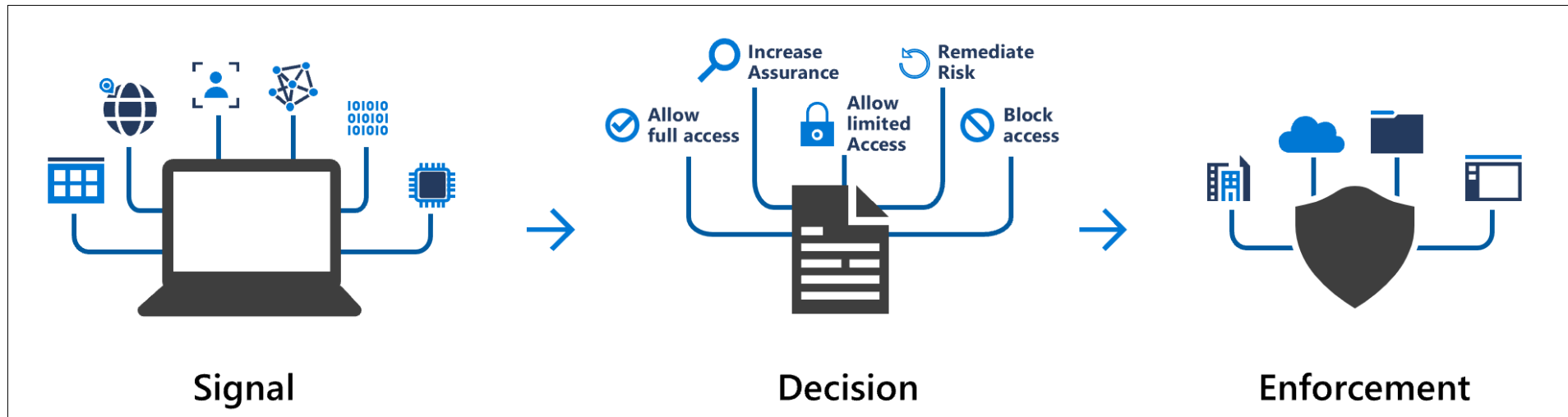
Tags (edit) : Criticality : High Env : Prod Project : Contoso

Show data for last: 30 minutes 1 hour 6 hours 12 hours 1 day 3 days 7 days 30 days



# Conditional Access with Entra

Premium option for fine-grained control over how users access apps





**What Comes Next?**



# Power Platform Center of Excellence

- Advanced Governance and Application Lifecycle Management
- More of a toolkit to build on than something to just turn on
- Includes modules for governance, nurturing use, admin planning, communication templates, ALM, backlogs
- Bookmark this page: <https://learn.microsoft.com/en-us/power-platform/guidance/coe/starter-kit>



# Power Platform Adoption

## Power Platform Adoption Insights

29

Apps launched this month

10

Unique users in the past month

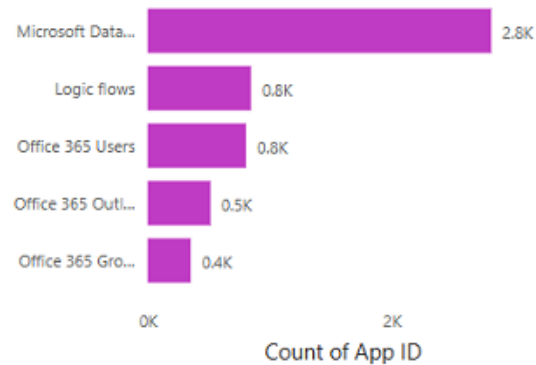
66

Apps launched in the past 90 days

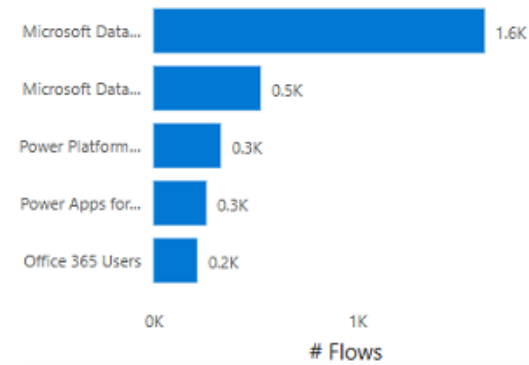
30

Total Makers

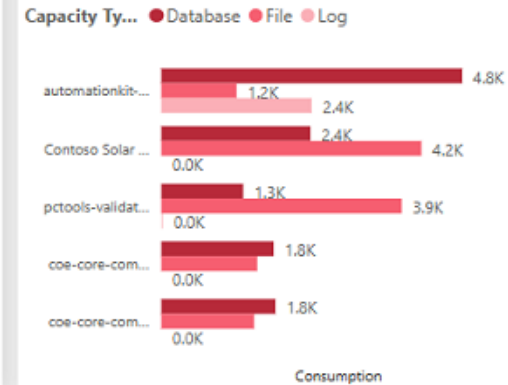
### Top 5 connectors used in apps



### Top 5 connectors used in flows



### Top 5 Capacity



### Top 5 most launched apps

Display Name	Owner	Sessions	U: U:
Automation Project - Test	Nathan Rigby	981	
Automation Solution Manager	Michael Peltier	276	
ALM Accelerator for Power Platform	Lynne Robbins	695	
Automation Project	Graham Barnes	515	
ButtonClicker	Graham Barnes	135	

### Top 5 makers with most used apps

Owner	Sessions	Unique Users	Users Shared	Groups
Nathan Rigby	981	1	0	0
Lynne Robbins	695	5	0	0
Graham Barnes	650	2	0	0
Michael Peltier	276	2	2	0

### Top 5 countries where makers create most used apps

Country	Sessions	Unique Users	Users Shared	Groups
	1907	3	2	0
United States	695	5	0	0



# Environment Capacity

## Environment Capacity

119  
# Environments

13  
# Environment Makers

3  
# Created in the last month

210  
Total Consumption (GB)

95  
Database Consumption (GB)

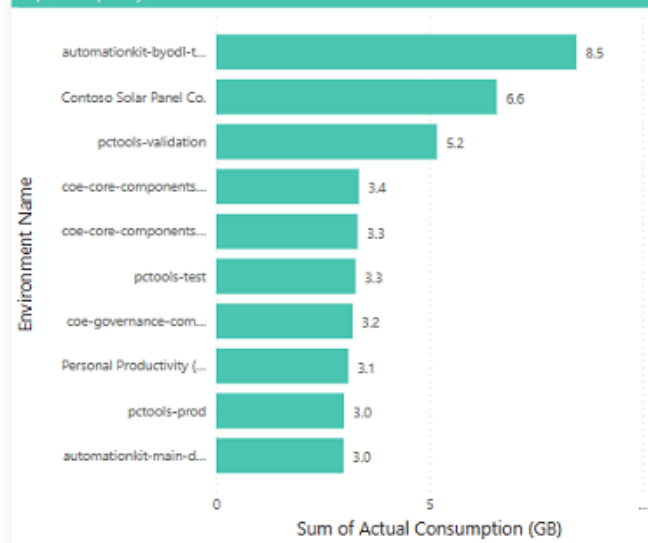
113  
File Consumption (GB)

2  
Log Consumption (GB)

### Environment Capacity Overview

Environment Name	Consumption (GB)	Capacity Type	Environment Maker	PPAC (Capacity)
automationkit-byodl-test	4.83	Database	Nestor Wilke	
Contoso Solar Panel Co.	4.18	File	SYSTEM	
pctools-validation	3.86	File	Lee Gu	
automationkit-byodl-test	2.41	Log	Nestor Wilke	
Contoso Solar Panel Co.	2.40	Database	SYSTEM	
coe-core-components-dev	1.83	Database	Nestor Wilke	
coe-core-components-dev-copy	1.81	Database	Lynne Robbins	
coe-governance-components-dev	1.80	Database	Nestor Wilke	
automation-satellite-validation	1.79	File	Lee Gu	
pctools-test	1.75	File	Nestor Wilke	
Personal Productivity (default)	1.75	File	SYSTEM	
automationkit-main-dev	1.67	File	Nestor Wilke	
AppsourcePackager_Main	1.64	File	Lee Gu	
automation-satellite-test	1.64	File	Lee Gu	
pctools-prod	1.63	File	Nestor Wilke	
pctools-codereview-dev	1.61	File	Nestor Wilke	
coe-nurture-components-dev	1.59	File	Nestor Wilke	
pctools-proof-of-concept-dev	1.59	File	Nestor Wilke	
coe-core-components-dev-copy	1.54	File	Lynne Robbins	
coe-febrelease-test	1.52	Database	Lee Gu	

### Top 10 Capacity



### Filters

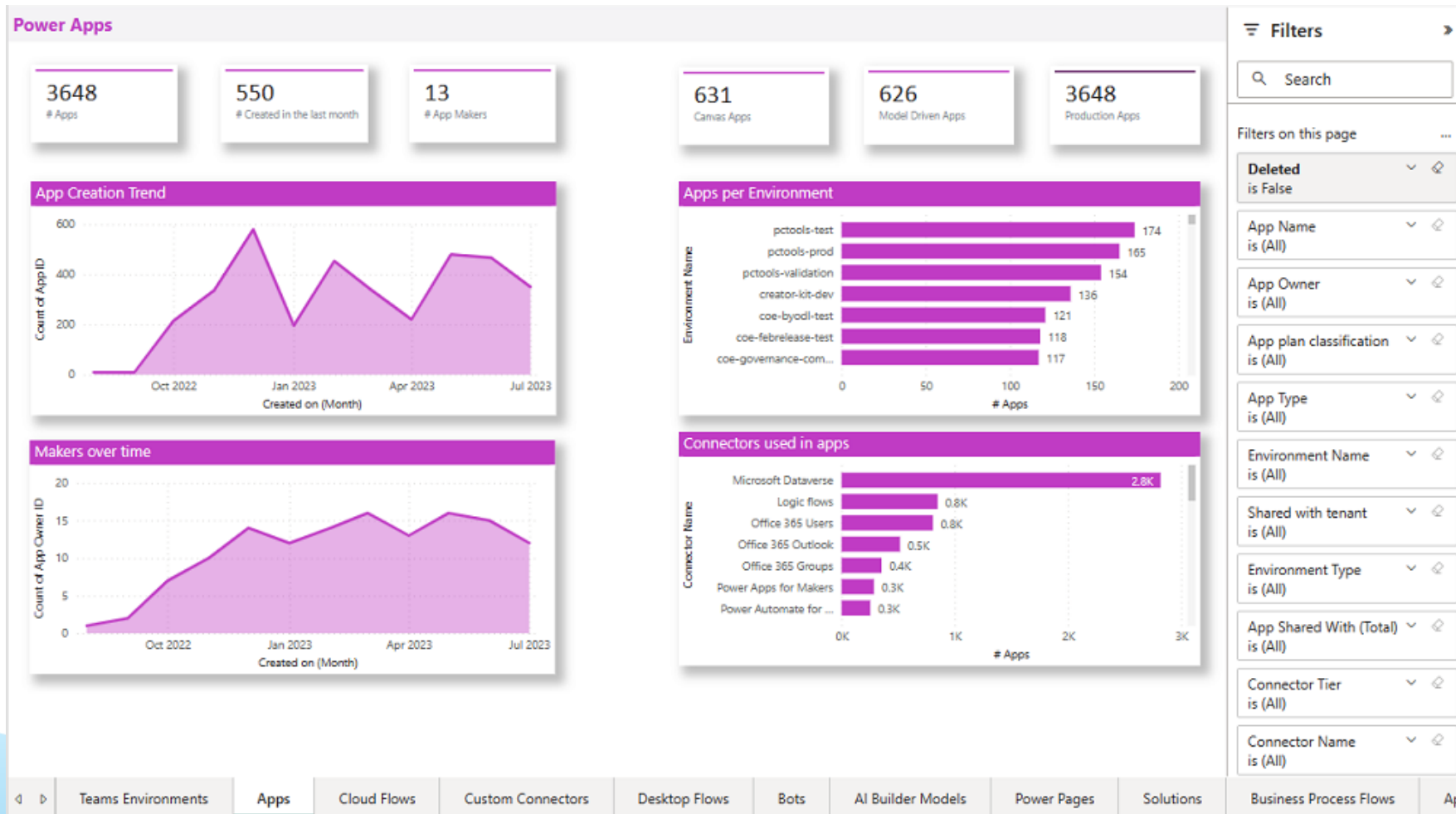
Search

### Filters on this page

- Created On is (All)
- Environment Name is (All)
- Environment Type is (All)
- Governance Protection... is (All)
- Environment Region is (All)
- Deleted is False



# Power Apps





# Page of Links

- User Access Management: <https://learn.microsoft.com/en-us/power-platform/admin/control-user-access>
- Group-based Licensing - <https://learn.microsoft.com/en-us/entra/fundamentals/concept-group-based-licensing>
- Managed Environments - <https://learn.microsoft.com/en-us/power-platform/admin/managed-environment-overview>
- App Insights for Power Platform - <https://learn.microsoft.com/en-us/power-platform/admin/set-up-export-application-insights>
- Security and Governance Considerations - <https://learn.microsoft.com/en-us/power-platform/admin/governance-considerations>
- Create and Manage Data Loss Prevention Policies - <https://learn.microsoft.com/en-us/power-platform/admin/prevent-data-loss>
- Content Security Policy - <https://learn.microsoft.com/en-us/power-platform/admin/content-security-policy>
- PowerShell for Power Apps (Includes DLP commands) - <https://learn.microsoft.com/en-us/power-platform/admin/powerapps-powershell>
- CoE Starter Kit Github - <https://github.com/microsoft/coe-starter-kit>
- Set up the CoE Starter Kit - <https://learn.microsoft.com/en-us/power-platform/guidance/coe/setup>
- Environment and Capacity Planning - <https://learn.microsoft.com/en-us/power-platform/guidance/coe/capacity-alerting>





**Thanks for Listening!**  
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