MICROSOFT LABS

Dynamics 365 Data Archival and Retention Deployment Guide

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AppSource:

Import Archival solution from AppSource (https://appsource.microsoft.com) to CRM Org, use search term (**Dynamics 365 Data Archival and Retention**) to search solution in AppSource

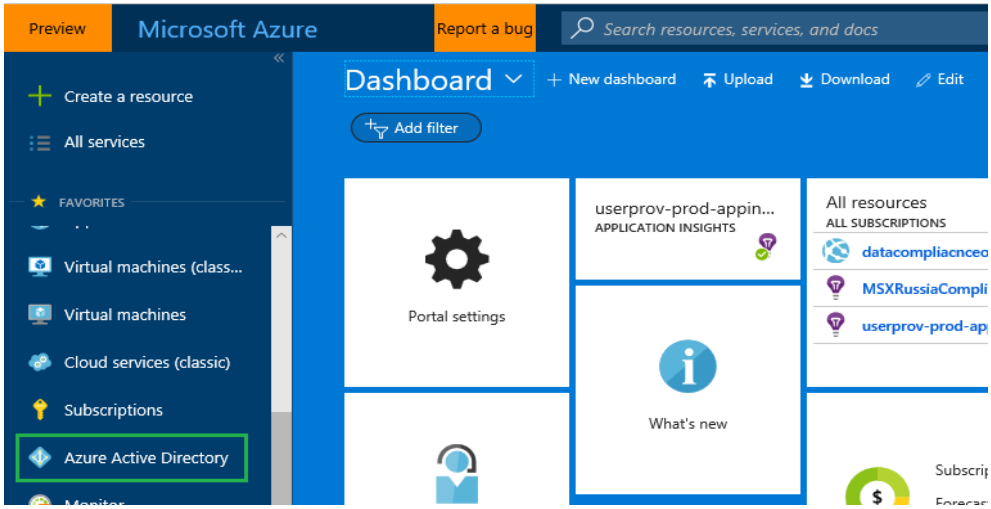
Commented [PKK1]: Check for font and font size and style consistency

Commented [CG(L2R1]: Done

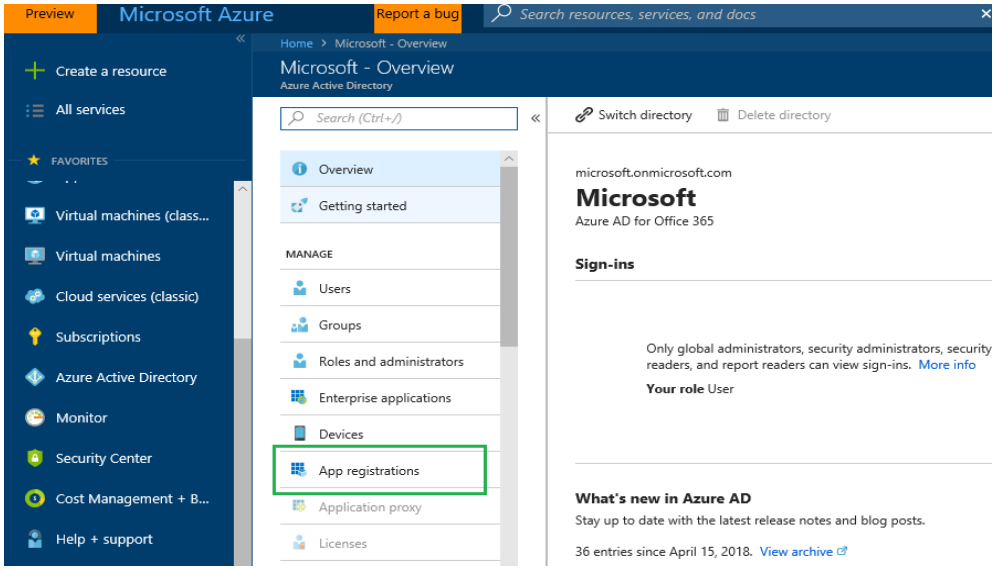
Create AAD Web App (Only for first time):

If you have already registered the applications in Azure Directory and have its Application ID & Secret, you can skip this step.

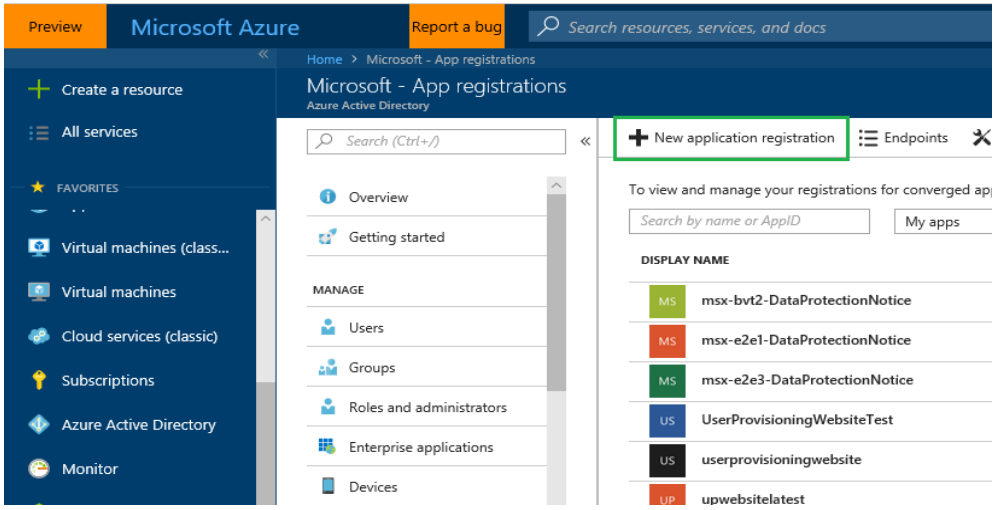
1. Login to windows azure portal (https://ms.portal.azure.com/)
2. Click on **Azure Active Directory**, as shown in below image.



3. Click on **App registrations**, as shown in below image.

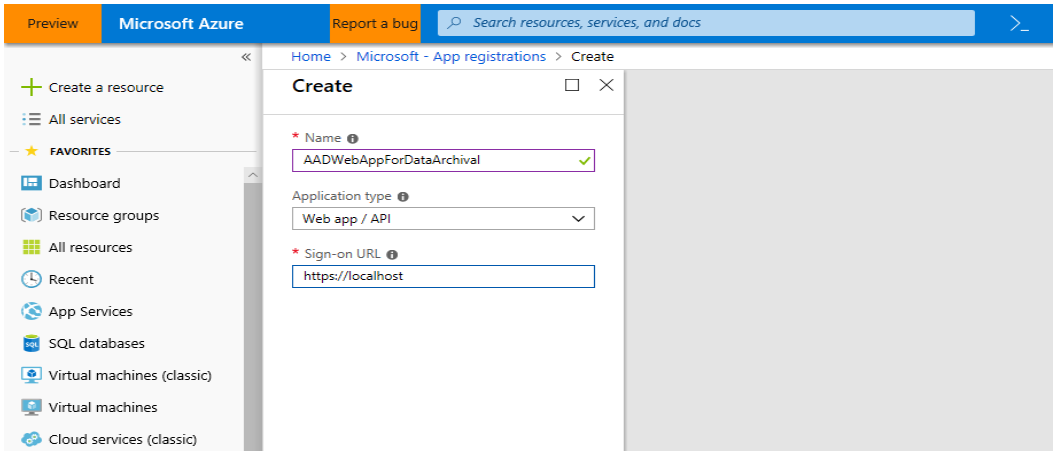


4. Click on **New application registration**, as shown in below image



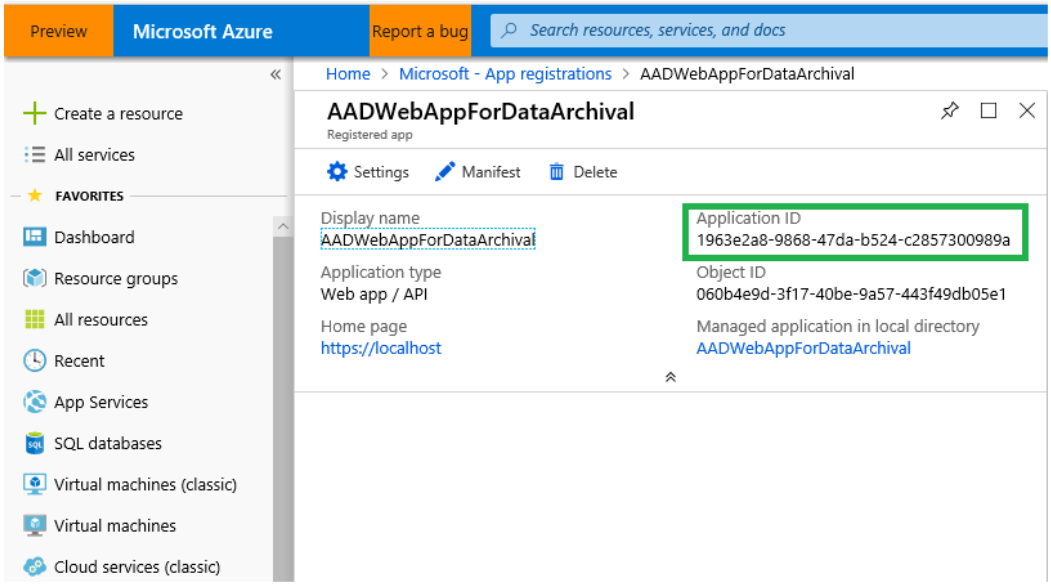
5. Provide the details as shown below and click on **Create** button

- Name: Any valid web application name. For ex: AADWebAppForDataArchival
- Application Type: Web app / API (Select it from drop down if it is not already selected)
- Sign-on URL: Any valid URL. For ex: https://localhost

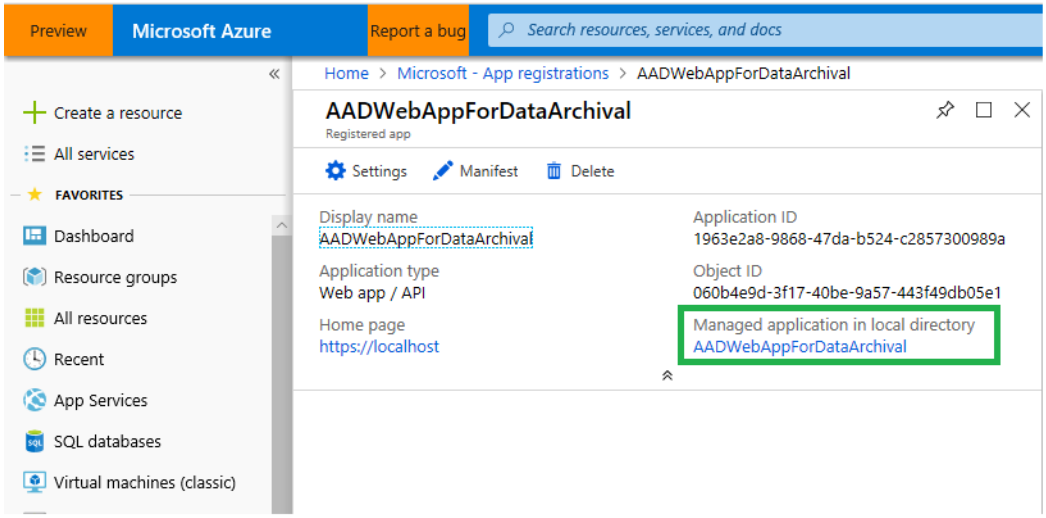


Note: Tap anywhere on the screen if Create button is not enabled.

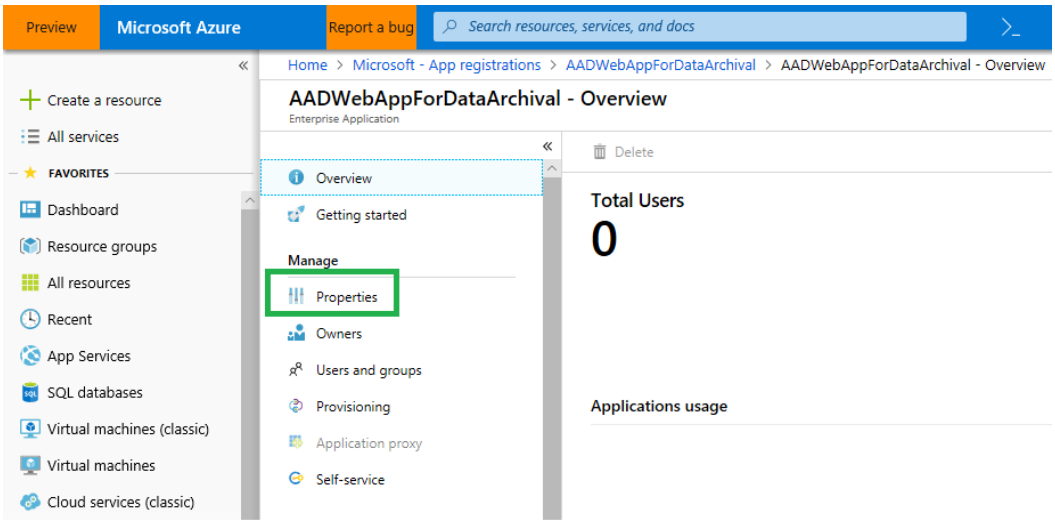
6. Save Application ID.



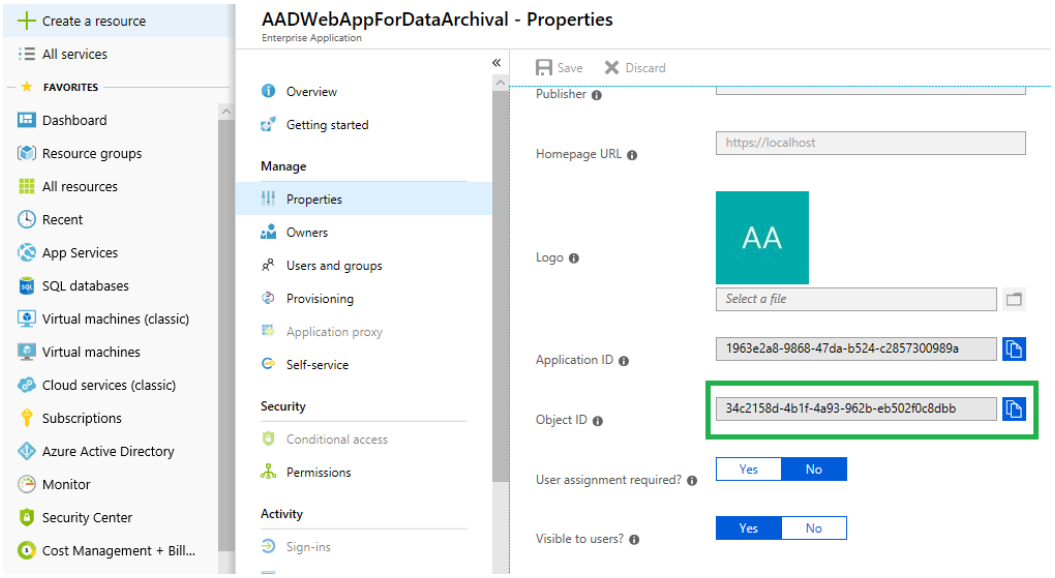
7. Click on Managed application in local directory as shown in below picture.



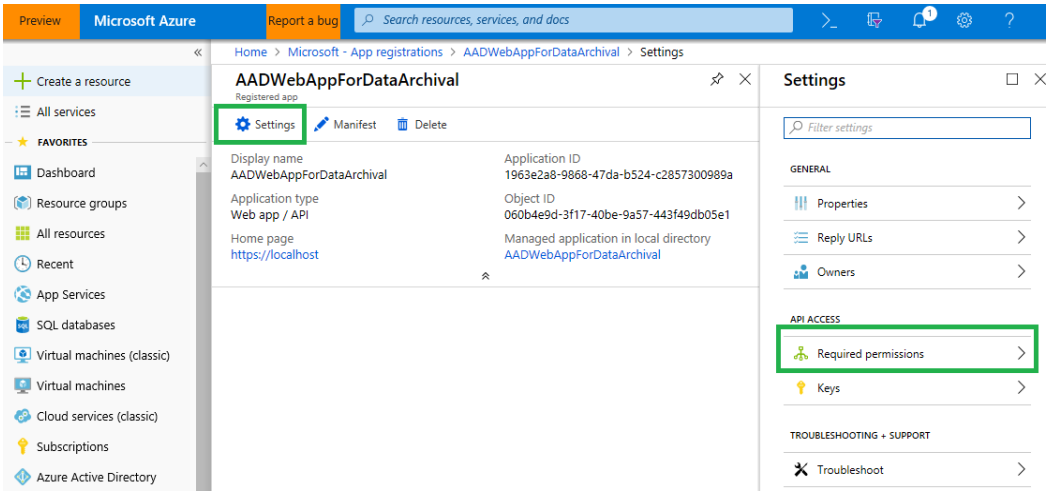
Click on Properties as shown in below image.



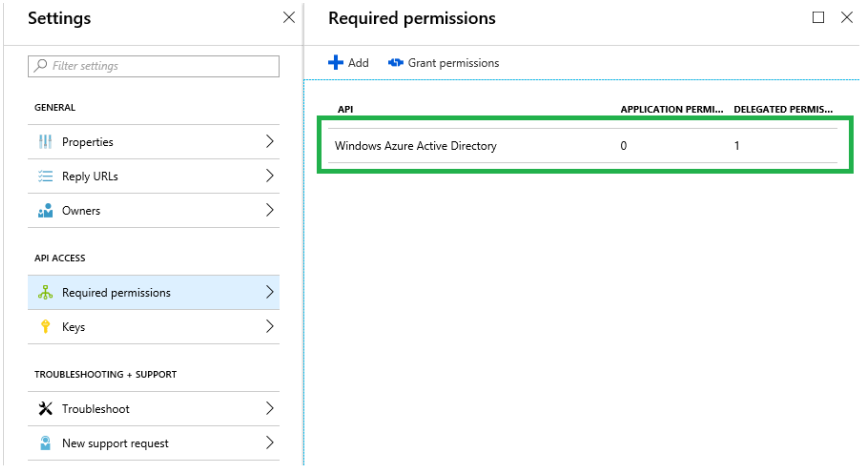
Save Object ID, as shown in below image.



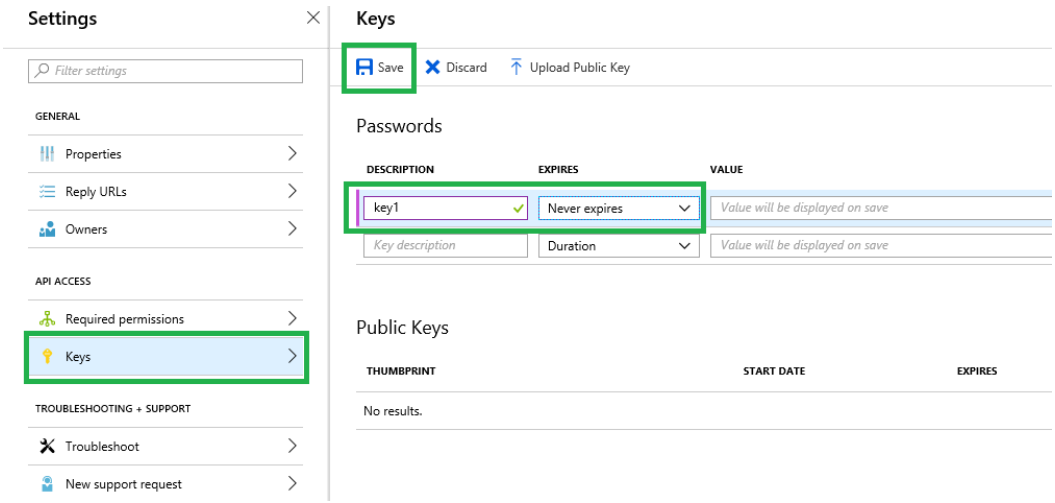
8. Click on Settings and Click on Required permissions



click **+Add** button -> Click on Select an **API** |Click on **Windows Azure Active Directory** | Click on **Select**. In Select Permissions | Under Delegated Permissions | select only **Sing In and read user profile Permission** and click on **Select**.



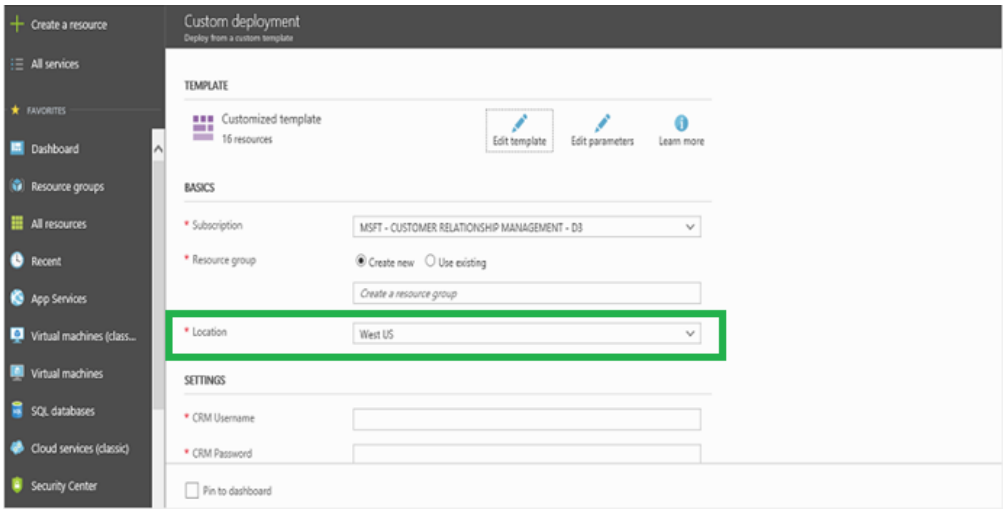
9. Click on Keys -> Provide any value in Description (for ex: key1) and Select a value for Expires (for ex: Never expires) -> Click on Save button as shown in below image.



Note *****: Secret value will get generated. **Save it**, it is visible only once.

Create Azure Resources (ARM Template)

Once you have successfully registered the web application in Azure Active Directory (AAD), click **here** to launch Azure Resource Manager Template as shown below

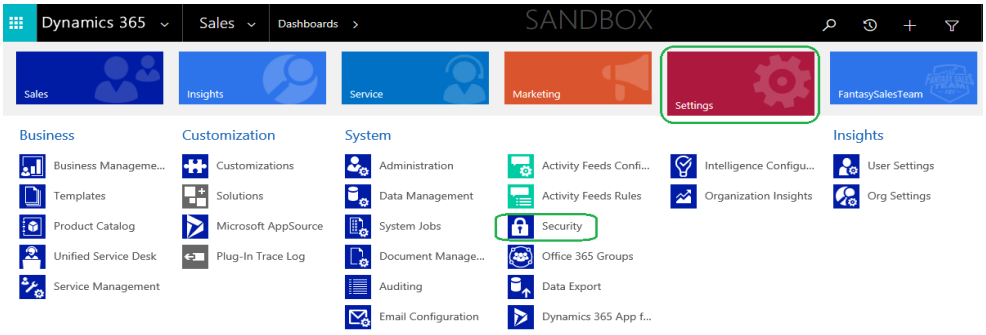


Complete the form and deploy to Azure, then navigate to Azure Portal Resource Group.

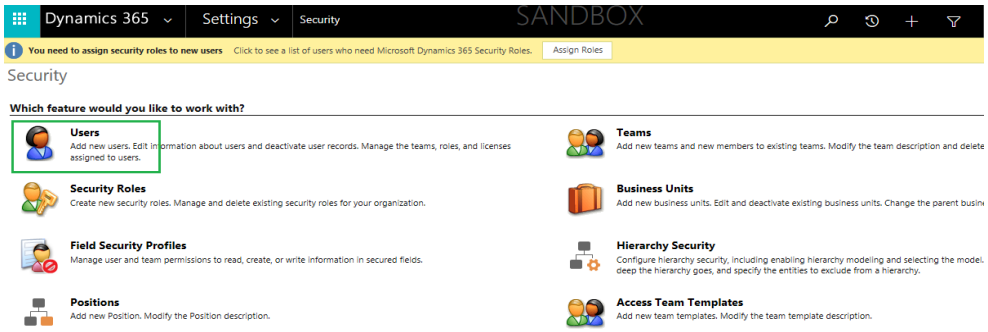
Note: Make a note of all azure resource's names provided in the template.

Create Application User in CRM Org:

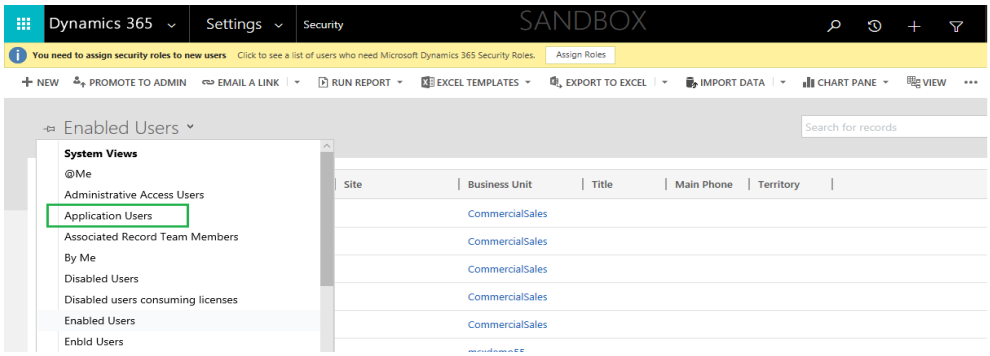
1. Login to CRM Org with a user who has **system admin role**
2. Click on **Settings - > Security** as shown in below image.



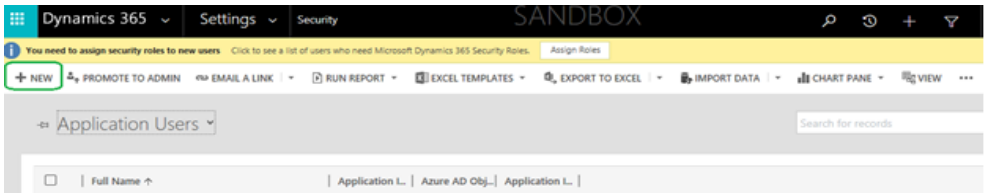
3. Click on **Users** as shown in below image



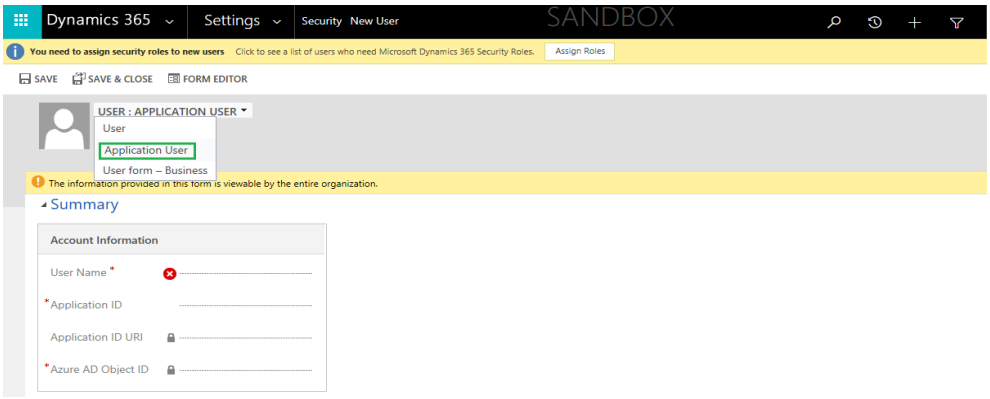
4. Select **Application Users** from the dropdown as shown in below image



5. Click on + **New** as shown in below image



6. Select **Application User View** from the View Selector (if it is not already selected) as shown in below image.



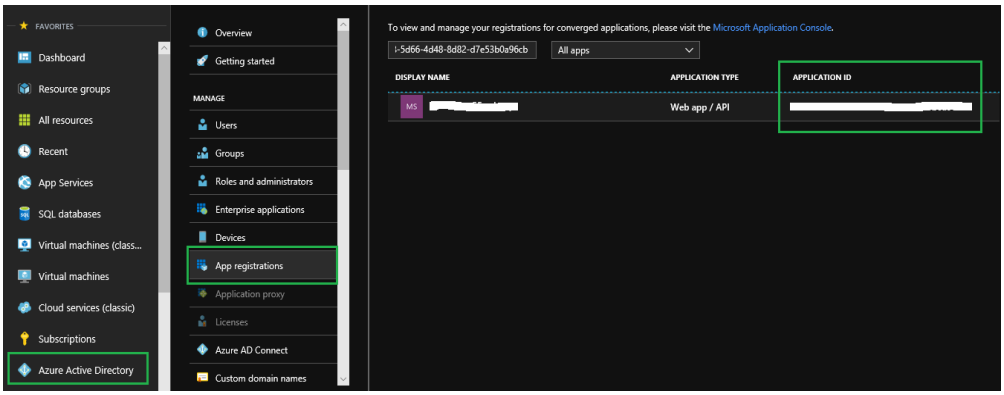
7. Provide details as mentioned below and Save the details
   - **Application ID**: Azure Active Directory Web Application ID (Application ID generated for AAD Web App, refer below screen shot).
   - **Full Name:** Any valid full name. For ex: First Name: **Archival** & Last Name: **Admin**
   - **Primary Email**: Any valid email. For ex: dummy@dummy.com

     ***Above email address will not be using in Archival process to send any emails.

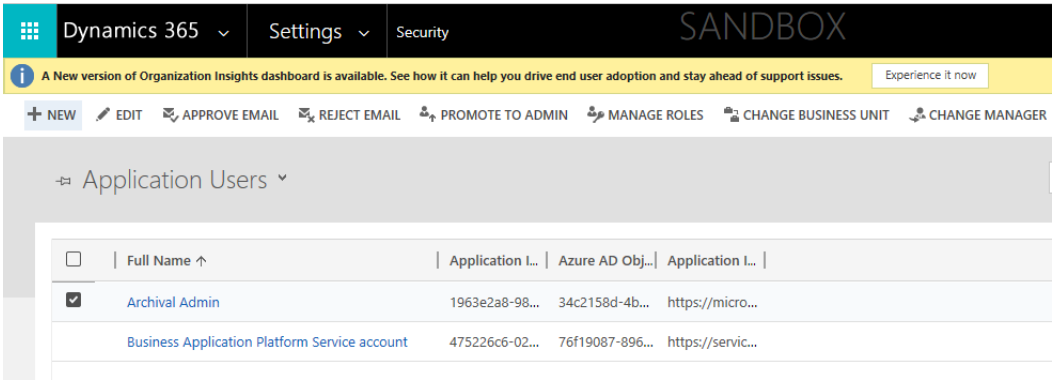
   Note: User Name, Application ID URI & Azure AD Object ID will get created when user is saved.

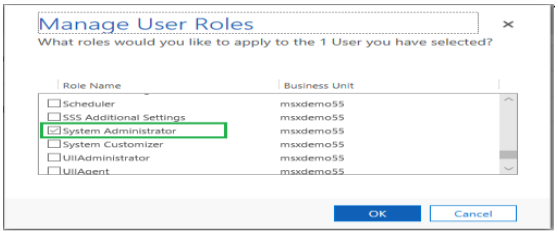
Commented [PKK3]: Add Azure screen shot representing web app ID extraction.

Commented [CG(L4R3]: Done



8. Select newly created Application User. Click on Manage Roles and grant System Admin role.


Dynamics 365
Settings
Security
SANDBOX
A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues.
Experience it now
NEW
EDIT
APPROVE EMAIL
REJECT EMAIL
PROMOTE TO ADMIN
MANAGE ROLES
CHANGE BUSINESS UNIT
CHANGE MANAGER
Application Users
Full Name
Application I...
Azure AD Obj...
Application I...
Archival Admin
1963e2a8-98...
34c2158d-4b...
https://micro...
Business Application Platform Service account
475226c6-02...
76f19087-896...
https://servic...


Manage User Roles
What roles would you like to apply to the 1 User you have selected?
Role Name
Business Unit
Scheduler
msxdemo55
SSS Additional Settings
msxdemo55
System Administrator
msxdemo55
System Customizer
msxdemo55
UIIAdministrator
msxdemo55
UIIAgent
msxdemo55
OK
Cancel