Pre-Install Power Platform Environment Instructions

> **Tip**
>
> - We strongly recommend working alongside the BrightWork Support team to initiate the pre-install process, as this will ensure proper procedures are followed; this service is included as part of the BrightWork 365 Start Service. Customers are encouraged to schedule a pre-install technical call using this link: https://calendly.com/d/ckvb-zsc-sz7/bw365-pre-install-call.
> - For additional related info, also see:
>   - Plan and manage license and capacity allocations | Microsoft Learn
>   - BrightWork 365 Install & License Notes

> **Caution**
>
> - If you are using Microsoft Dynamics 365, the BrightWork 365 production installation should be done in the same environment as Microsoft Dynamics 365.
> - BrightWork 365 should not be installed in the **Default Environment**, unless you are also using Microsoft Dynamics 365 and that is the environment where it is installed.
> - Environments into which BrightWork 365 is installed must have the English language pack installed. This will only likely need to be done if the base language in your environment is not English.
> - It is important that you select the default Language and Currency of environments with care as this cannot be changed later. Your Dev environment should always be set to English, regardless of the language settings you want in your Test and Production environments.

Create Three Power Platform Install Environments

Prior to the installation of BrightWork 365, create three Power Platform environments with Dataverse data stores: two Sandbox environments (see Sandbox environments - Power Platform | Microsoft Learn), and one Production environment; BrightWork will eventually be installed into each of these three environments:

- **Dev Sandbox:** This is where your BrightWork consultant will create your custom solution. Your Dev environment should always be set to English, regardless of the language settings you want in your Test and Production environments. For the hosting of the Dev Sandbox environment, you have two options:
  - Create the environment in your own Microsoft 365 tenant and provide BrightWork with access.
  - Have BrightWork host the environment for a nominal fee instead of creating your own local Dev environment.
- **Test Sandbox:** This is where you will test the custom solution.
- **Production:** This is where your users will use BrightWork 365.

Control Environment Access

We advise that you use dedicated Microsoft 365 security groups to control access to the environments (i.e., a security group per environment). If you do not do this, all users in your Active Directory will be listed in the environment. The easiest way to accomplish this is to create a Microsoft Team and use the associated group to control access to the environment. For more information see Control user access to environments: security groups and licenses - Power Platform | Microsoft Docs.

How to Create an Environment

1. Navigate to Environments | Power Platform admin center in your tenant and click **+ New**.
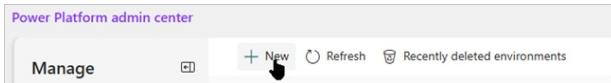
2. Give the environment a name and copy the name to your clipboard.
   As an example, if your organization were named Acme, we recommend an environment naming structure like the below and reusing the names in the environment URLs and associated SharePoint sitenames.
   1. bw365-acme-dev
   2. bw365-acme-uat
   3. bw365-acme-prod
3. We recommend making the environment a Managed Environment.
4. Select your Region.
5. We do not recommend selecting **Get new features early**.
6. Select the type: For Dev and UAT select **Sandbox** and for Prod select **Production**.
7. Ensure **Add a Dataverse data store** is selected (it will be automatically selected if you have made this a Managed Environment).
8. Click **Next**.
9. Select your default Language and Currency. English must be selected as the Default Language for the Dev environment. It is important that you select the default Language and Currency with care as it cannot be changed later.
10. Select a Security group.
11. Click **here** in the URL section and paste in the name you copied earlier.
12. Click **Save**.
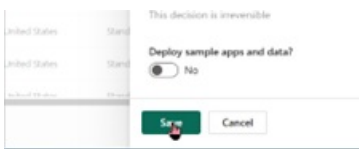
> **Tip** If you are using Microsoft Power Apps per app licenses, proceed to allocate capacity to the environments - see https://learn.microsoft.com/en-us/power-platform/admin/capacity-add-on. In the Manage add-ons screen, you allocate capacity to the environments in the App passes field.