

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](#)

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. 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.
- **Test Sandbox:** This is where you will test the custom solution.
- **Production:** This is where your users will use BrightWork 365.

For environment creation instructions see [Create and manage environments in the Power Platform admin center - Power Platform | Microsoft Learn](#). Required **Settings** details are as follows:

- For the Type of environment, select **Sandbox** for Dev and Test, and **Production** for Production.
- Choose to add a **Dataverse data store**.
- URL Setting: Use URLs that make it easy to distinguish between the **Dev, Test** and **Production** environments. We suggest the naming convention **bw365-{customer name}-{environment type}**, e.g., **bw365-acme-dev**.
- We recommend selecting a Security group to manage access to the environment. See [Control Environment Access](#) below.
- If you are using Microsoft Power Apps per app licenses, proceed to allocate capacity to the environments - see [Capacity add-ons for Power Apps and Power Automate - Power Platform | Microsoft Learn](#). In the **Manage add-ons** screen, you allocate capacity to the environments in the **App passes** field.

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.

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](#).
