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Microsoft Dynamics 365 Manufacturing Accelerator

Introduction
The purpose of this document is to provide a guide on installing and configuring Dynamics 365 Manufacturing Accelerators solutions.

Prerequisite Files
Make sure the CDS default solution (which comes preexisting in the environment) is present which included entities like Contact and Accounts.

Main Solutions
For a list of all entities and attributes, find the Manufacturing Reference Guide amongst the included documentation. To import, follow steps in the “Manually deploy Main Solutions” section below. Solutions must be installed in the following order:

1. Dynamics 365 Manufacturing Accelerator
   a. Name: Dynamics365ManufacturingAccelerator
   b. Description: This solution contains the entities, forms, and views used across the accelerator.
   c. Dependencies:
      i. None
2. Dynamics 365 Manufacturing Accelerator Model Driven App
   a. Name: Dynamics365ManufacturingAcceleratorModelDrivenApp
   b. Description: This app contains, Dynamics Customizations solution, Dashboard and Model Driven App.
   c. Dependencies:
      i. Dynamics365ManufacturingAccelerator
3. Dynamics365ManufacturingAcceleratorPortal
   a. Name: Dynamics365ManufacturingAcceleratorPortal
   b. Description: This solution contains Supplier Portal customization, which includes supplier on-boarding and electronic communication configuration. It also includes workflow, processes and power automate to support business scenarios which needs to be trigger.
   c. Dependencies:
      i. Dynamics365ManufacturingAccelerator
      ii. Dynamics365ManufacturingAcceleratorModelDrivenApp

Additional Solutions
These solutions contain Sample Data for the Manufacturing Solution, Supplier Portal and Model Driven Admin App Solution. To import, follow steps in the “Import Additional Solutions with Configuration Migration Tool” section below.

1. Dynamics 365 Manufacturing Accelerator Sample Data
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1. Name: Dynamics365ManufacturingAcceleratorSampleData.zip
   b. Description: The data package contains data related to Question entities.
   c. Dependencies:
      i. Make sure all the solutions mentioned above under “Main Solutions” are imported.

2. Dynamics 365 Manufacturing Accelerator Portal Data
   a. Name: Dynamics365ManufacturingAcceleratorPortalData.zip
   b. Description: The data package contains data related to portal configurations.
   c. Dependencies:
      i. Make sure the Common data service for starter portal is installed.
      iii. Ensure that the all the solutions mentioned above under “Main Solutions” are imported.

Installation Steps

Manually Import Main Solutions

To manually import a main solution:

2. Click Import button in ribbon.
3. Click Choose File button and select managed solution zip file under main solution heading one by one.
4. Click Open button.
5. Click Next through all steps and then Import.

Provision the Portal

1. Sign in to Power Apps.
2. Under Make your own app, select Portal from blank.
3. If the selected environment does not contain portal pre-requisites, a message is displayed in the Portal from blank window suggesting you select another environment or create a new one.
4. In the **Portal from blank** window, enter a name for the portal and address for the website, and select a language from the drop-down list. When you are done, select **Create**.
After you select **Create**, the portal will begin provisioning and the provisioning status is displayed through notifications.

If you have created your portal in the environment that does not have portal pre-requisites installed, the provisioning status is also displayed in the grid:

After the portal is provisioned successfully, the status is updated, and the portal is displayed in the grid:

5. Select More Commands (...) > Settings.
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For more information on this, see this guide.

Import Additional Solutions with Configuration Migration Tool
To Import an additional solution using the Configuration Migration Tool:

1. Open “Configuration Migration Tool” folder (Note: Make sure folder is on Desktop so directory name is short). In order to download this tool, see heading “Data Migration Utility (Configuration Migration)” below in the document.
2. Open the new “Tools” folder, then “ConfigurationMigration”, and run “DataMigrationUtility”.
3. To Import:
   a. Select “Import Data”.
   b. Connect to the org to import the data to.
   c. Select the appropriate data zip file along with
   d. Perform the import.

Update Website Binding

1. In the Portal settings pane, select Administration.
2. In the Portal settings pane, select Administration.
Portal Authentication Configuration
The Dynamics 365 Manufacturing Accelerator Portal ships with a template and sample Power Automate Flow for Azure Active Directory guest authentication into the Supplier Relationship Accelerator. This
feature allows organizations already using Azure Active Directory to provision guest users in their tenant allowing them Single Sign-On experiences. The sample application ships with a Power Automate Flow that supports the following scenario.

1. Initial Access
   - Anonymous user browses site and fills out an access request
   - Back office user approves access request in the model-driven application
   - On approval, a Power Automate Flow uses the Office Graph API to create a guest user in the tenants AAD. The CDS connector also creates the account, contact and questionnaire records.
   - User receives an email from Azure AD with a redirect URL prompting sign-in to the portal

2. Technical and SME onboarding
   - A point of contact for an account invites a SME through the “pre-approved” access request pages
   - Power Automate uses the Office Graph API to create a guest user in the tenants AAD.
   - User receives an email from Azure AD with a redirect URL prompting sign-in to the portal

Prerequisites

**Azure Active Directory Application Registration Setup**
A new App Registration needs to be created, which can serve as medium to authenticate and authorize the requests between Flow and Graph API.

1. Login to Azure portal ([https://portal.azure.com/](https://portal.azure.com/)).
2. Navigate to **Azure Active Directory** by clicking the menu on top left of the page.
1.

3. Select **App Registration** and then click **New Registration**

4. Enter value in **Name** field and click **Register** button.
1. **Set permission for Graph API**
   1. Click on **API permission** and then to Add a permission.
   2. Select **Microsoft Graph** and then Application Permission.
   3. Search user.invite, check it and click Add Permission button.
   4. Then click Grant admin consent button. Note: This step must be completed by Azure Admin.

6. Get Application Id and Secret Key to be used in Flow.
   1. Go to Overview section and copy the value of **Application ID** and save in notepad
1. Go to Certificates & secrets
   1. Click New client secret under Client Secret
   2. Enter value in Description field.
   3. Select Never and click Add button.

4. Click Copy button to Copy the Value and save in notepad.
Configure Flow

1. Open and Edit the flow name **Access Request: Add User to AAD as guest and Create Vendor** found in **Dynamics365ManufacturingAcceleratorPortal** solution.
2. Update the following values
   1. SupplierURL: Update portal URL.
   2. Client: Enter Application ID noted in notepad from above.
   3. Secret: Enter secret key noted in notepad from above.
   4. Tenant: Enter Azure Active Directory Tenant
   5. DevURL: Enter portal URL
   6. SMEURL: Enter portal URL
   7. Identity provider: Enter tenant Id

Note: The above authentication approach is a sample, customers should assess all supported authentication mechanisms for their organization and make the right selection based on security, administration needs and price. To learn more about the authentication methods supported by Power Portals please see the link below.


Power BI Integration

The Dynamics 365 Manufacturing Accelerator is shipped with two Power BI reports namely **Admin** and **Manager Dashboards**. The user can customize these reports as per there needs and add to either Model driven app or portal.

Prerequisites

In order for Power BI reports to show in Model driven app and Portal, follow this [link](#).

Model Driven App

In order to view Power BI Dashboards, open the Model driven app. Go to **Reporting** and click **Power BI dashboard** under **New** button. And select **workspace** and **dashboard** to add here.
Portal

After the Power BI integration settings are enable, we can use liquid tags to show Power BI reports embedded in a web page. For reference see this [link](#).
Reference

Data Migration Utility (Configuration Migration)

The document explains how to import data to Microsoft Dynamics 365 CRM using the “Data Migration Utility”, which should be downloaded before starting the import process.

To download the tool please refer to the following link:

To run the tool, once downloaded, extract the files and double click on the application named “DataMigrationUtility.exe”.

Provide the user and password for the environment that you want to import the data and press “Login”. Note that you may need to change the “Deployment Type” and “Online Region” based on the environment that you are using.
Once authenticated, click on the search button to search for the sample data package.

A search window will appear. Locate and select the previously downloaded data package and press “Import Data” to begin the import process.
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Select the zipped file generated by the export process. This will be used to import to CRM.

Zip File:

Connected to "..."
The import file was found, ready to import 4 entities.

Import File
Cancel

The import file was found. To begin, click Import.