

consensus

Contract Lifecycle and Matter Management by **barhead**

 Microsoft | AppSource

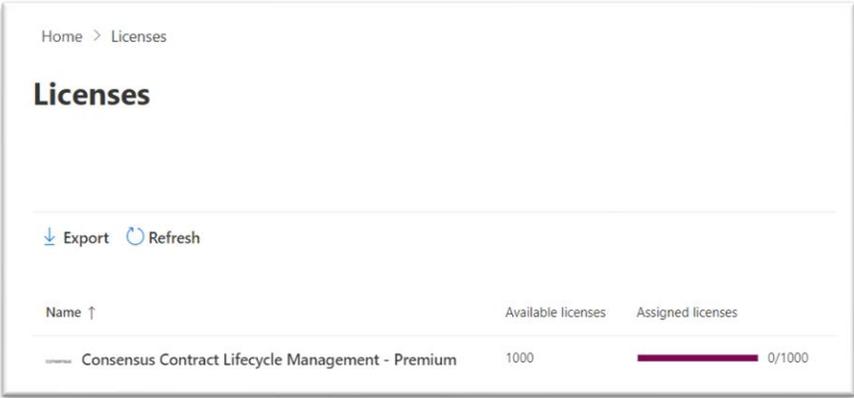
Installation Guide

If you require any assistance installing Consensus, please reach out to us via <https://barhead.com/contact>

Contents

1	Pre-requisites	3
1.1	Service Account	3
1.2	Licensing	3
1.3	Application Access	3
1.4	Power Platform Storage	4
1.4.1	Provision a new environment	5
2	Install Dynamics 365 App for Outlook	7
3	Install Consensus	10
3.1.1	Install Consensus	10

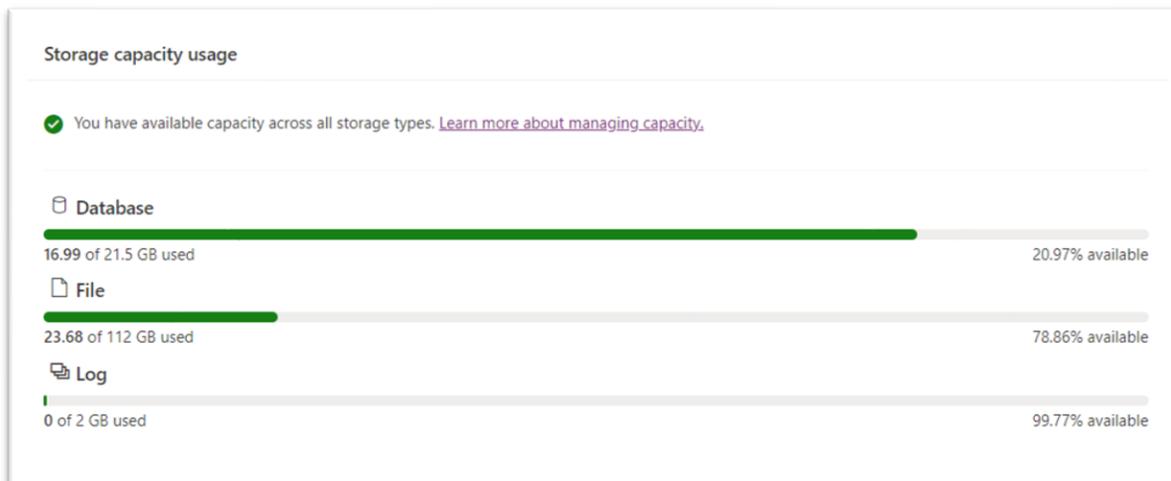
1 Pre-requisites

Checklist	Status						
<p>1.1 Service Account</p> <p>For the deployment process, we strongly recommend that you undertake this using a “service account”. A service account ensures that the Consensus application is owned by a generic account that can be easily managed, as opposed to an individual account. This account requires the licensing set out below, along with specific permissions covered later in this guide.</p>							
<p>1.2 Licensing</p> <p>Your service account should have the following licenses at a minimum:</p> <ul style="list-style-type: none">• Power Apps Per User Plan License• Microsoft 365 License (including Outlook, Teams and SharePoint)• Adobe Sign License (if using E-Signature)• Relevant Consensus licensing							
<p>1.3 Application Access</p> <p>Navigate to Microsoft 365 admin center - Licenses.</p> <p>Confirm the availability of the relevant Consensus licenses. You should see a license for either/both apps:</p>  <p>The screenshot shows the 'Licenses' page in the Microsoft 365 admin center. At the top, there is a breadcrumb 'Home > Licenses' and a title 'Licenses'. Below the title, there are 'Export' and 'Refresh' buttons. A table displays the license information:</p> <table border="1"><thead><tr><th>Name ↑</th><th>Available licenses</th><th>Assigned licenses</th></tr></thead><tbody><tr><td>Consensus Contract Lifecycle Management - Premium</td><td>1000</td><td>0/1000</td></tr></tbody></table>	Name ↑	Available licenses	Assigned licenses	Consensus Contract Lifecycle Management - Premium	1000	0/1000	
Name ↑	Available licenses	Assigned licenses					
Consensus Contract Lifecycle Management - Premium	1000	0/1000					

If you do not see any Consensus licenses in the Microsoft 365 admin center as display above, reach out to your Barhead account manager.

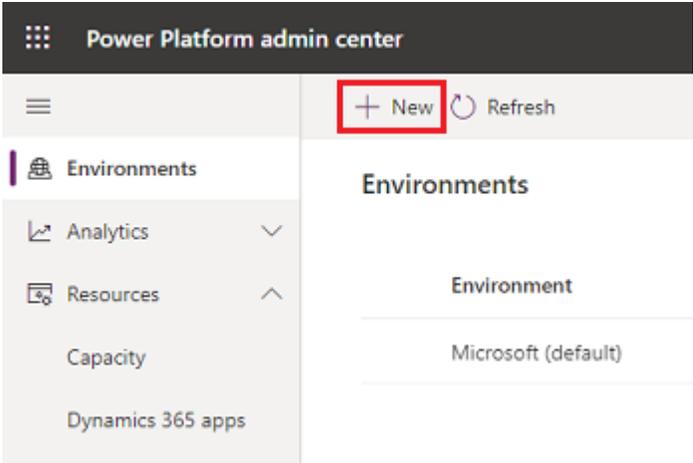
1.4 Power Platform Storage

1. To provision a Power Platform environment, there must be at least 1GB of remaining Power Platform capacity in your tenant.
2. You can verify the available storage here: <https://admin.powerplatform.microsoft.com/resources/capacity>
3. You should see at least 1GB available **Database** capacity, as well as the message “You have available storage capacity across all storage types”:



4. If you have less than 1GB **Dataverse** capacity available, you can either [Free up storage space - Power Platform | Microsoft Docs](#), or [Add Microsoft Dataverse storage capacity - Power Platform | Microsoft Docs](#) to enable the provisioning of a new environment, required for Consensus installation.

1.4.1 Provision a new environment

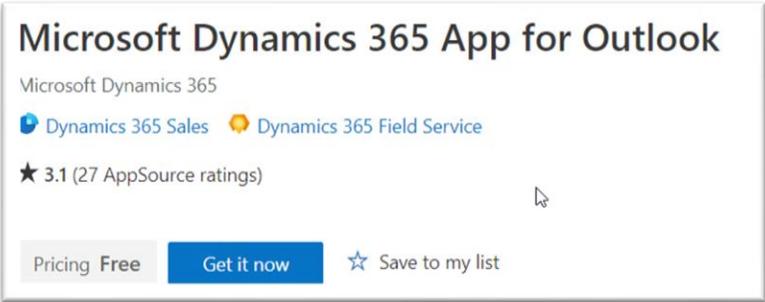
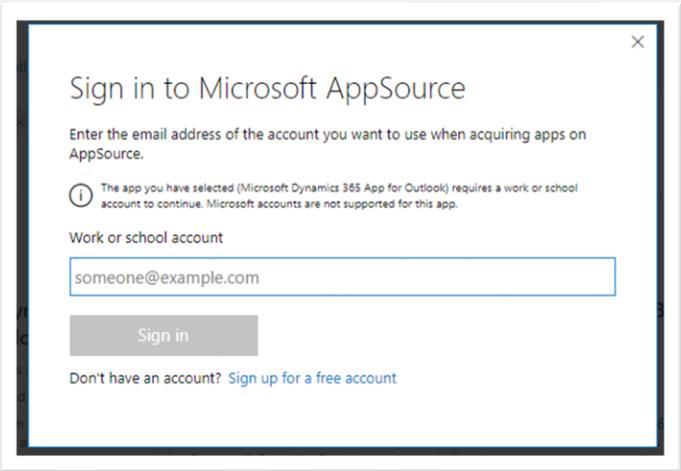
Checklist	Status						
<ol style="list-style-type: none"> Consensus is designed to be installed on an empty Microsoft Power Platform environment. Whilst deploying on an existing environment is supported, we recommend you do this on a pre-production environment to ensure successful operation. Alternatively, feel free to contact us at consensus@barhead.com. Sign in to the Power Platform admin center at https://admin.powerplatform.microsoft.com as an admin (Dynamics 365 admin, Global admin, or Microsoft Power Platform admin). In the navigation pane, select Environments, and then select New.  <p>The screenshot shows the Power Platform admin center interface. The top navigation bar includes a hamburger menu, a '+ New' button (highlighted with a red box), and a 'Refresh' button. The left sidebar shows the 'Environments' section selected. The main content area displays a table with one row: 'Environment' with the value 'Microsoft (default)'.</p>							
<ol style="list-style-type: none"> Enter the following, and then select Next. <table border="1" data-bbox="279 1187 1913 1390"> <thead> <tr> <th>Setting</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>Consensus - Production</td> </tr> <tr> <td>Type</td> <td>Choose production, trial, or sandbox.</td> </tr> </tbody> </table>	Setting	Description	Name	Consensus - Production	Type	Choose production, trial, or sandbox.	
Setting	Description						
Name	Consensus - Production						
Type	Choose production, trial, or sandbox.						

Region	Choose a region for the environment.
Purpose	A description of the environment.
Create a database for this environment?	Select Yes .

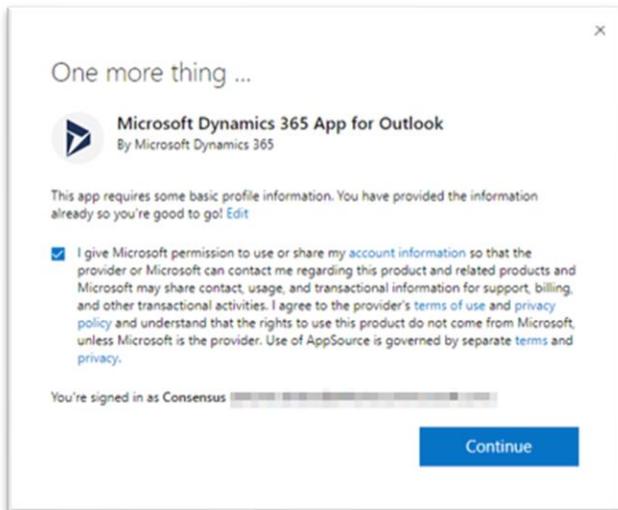
5. Enter the following, and then select **Save**.

Setting	Description
Language	The default language for this environment. More information: Dataverse language collations
URL	Enter your organization name – i.e. organizationname-consensus-prod . If your organization name has already been reserved in the destination datacenter, it won't be available.
Currency	The base currency used for reporting.
Enable Dynamics 365 apps	Select No .
Deploy sample apps and data	Select No .
Security group	Select a security group to restrict access to this environment.

2 Install Dynamics 365 App for Outlook

Checklist	Status
<p>1. Navigate to the Microsoft Dynamics 365 App for Outlook – AppSource listing.</p> <p>2. On the listing above, select Get it now:</p>  <p>3. You will need to sign in the service account used previously.</p> 	

4. Click the checkbox and click Continue.



5. Select the target environment created in [1.4.1](#) > click those 2 checkboxes > click install.

Power Platform admin center - Google Chrome

admin.powerplatform.microsoft.com/resources/applications?AppSourceInstall=true&applicationId=mscrm.fa50aa98-e8bb-4757-83ce-6d60...

Power Platform admin center

- Environments
- Analytics
- Resources
- Capacity
- Dynamics 365 apps**
 - Portals
 - Help + support
 - Data integration
 - Data (preview)
 - Policies
 - Admin centers

Install Microsoft Dynamics 365 App for Outlook

Name
Microsoft Dynamics 365 App for Outlook

Description
Extend the power of productivity in Outlook with Microsoft Dynamics 365 App for Outlook so your team can experience Common Data Service app in context of customer communication in Outlook. Capture your customer communication right within OutlookTrack...
[See more](#)

Publisher
Microsoft Dynamics 365

Select an environment *
Consensus Dev - Core + Matter

Don't see your environment?

- I agree to Microsoft's Legal Terms and Privacy Statement
- I agree to Privacy Statement and Legal Terms for importing packages into Dynamics 365

Install **Cancel**

6. Wait for the Dynamics 365 App for Outlook to be installed.

Install app Open AppSource Refresh Search

Microsoft Dynamics 365 App for Outlook installation started at 10:49 am, 1/27/2022 by Consensus.

Environments > Consensus Dev - Core + Matter > Dynamics 365 apps

Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

Name ↑	Status	Publisher
CCI Bots	Installed	Microsoft Dynamics 365
Consensus - Contract Lifecycle & Matter Management	Installed	Barhead Solutions Australia Pty Ltd
Dynamics 365 ContextualHelp	Installed	Microsoft Dynamics 365
Environment variables	Installed	Microsoft Dynamics 365
Microsoft Dynamics 365 App for Outlook	Installing...	Microsoft Dynamics 365
Microsoft Flow Extensions	Installed	Microsoft Dynamics 365
OData v4 Data Provider	Installed	Microsoft Dynamics 365
Power Apps Actions	Installed	Microsoft Dynamics 365
Power Apps Checker	Update available	Microsoft Dynamics 365
Power Automate Process Mining	Installed	Microsoft Dynamics 365

3 Install Consensus

3.1.1 Install Consensus

Checklist	Status
<ol style="list-style-type: none"> 1. We recommend completing this step using the Service Account. 2. Navigate to https://admin.microsoft.com/#/licenses. 3. Select one of the Consensus license items in the list, as identified in 1.2 Licensing. 4. Select “Install this product”: 	

Home > Licenses > License details

[Back to Licenses](#)

consensus **Consensus Contract Lifecycle Management - Premium**
Published by Barhead Solutions Australia Pty Ltd

Licenses
1000 available
0 assigned of 1000 total
[Install this product](#)

5. Choose the environment created in [1.4.1 Provision a new environment](#) to install to in the following window:

Install Consensus - Contract Lifecycle & Matter Management ✕

consensus

Name
Consensus - Contract Lifecycle & Matter Management

Description
Consensus is an end-to-end contract and matter management platform built on the Microsoft Cloud, developed for legal, procurement and contracting teams. It provides an automated and integrated workflow across documents, data, contracts and matters. It...
[See more](#)

Publisher
Barhead Solutions Australia Pty Ltd

Select an environment *

type or select environment

AppSource Consensus

- 6. Check **I agree to Microsoft's Legal Terms and Privacy Statement**, and **I agree to Privacy Statement and Legal Terms for importing packages into Dynamics 365**.
- 7. Select **Install**.

8. If successful, you'll be brought to the following window:

Consensus - Contract Lifecycle & Matter Management installation started at 12:45 pm, 3/2/2022 by [user] [role].

Environments > AppSource Consensus > Dynamics 365 apps

Check the status of Dynamics 365 apps and manage them across your org. [Learn more](#)

Name ↑		Status	Publisher
CCI Bots	...	Installed	Microsoft Dynamics 365
Consensus - Contract Lifecycle & Matter Management	...	Installing...	Barhead Solutions Australia Pty Ltd

9. If you encounter the error below, please ensure you are using the service account that created the environment to complete the installation.

 You don't have the required permissions to install or update this application. Please contact your system administrator or system customizer to install it or give you the required permissions.