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## About IBM® Storage Protect for Cloud Dynamics 365

About IBM® Storage Protect for Cloud Dynamics 365

*IBM® Storage Protect for Cloud Dynamics 365 ensures resiliency of service in the event of a disaster and quickly recovers lost or corrupted content from your backup. IBM® Storage Protect for Cloud Dynamics 365 offers backup capabilities for the **Dynamics CRM** organizations through the **Dynamics Customer Engagement** service and for the **Dynamics Finance and Operations** instances through the **Dynamics Unified Operations** service (Dynamics AX).*



## Sign up for IBM® Storage Protect for Cloud Dynamics 365 trial

Sign up for IBM® Storage Protect for Cloud Dynamics 365 trial

IBM® Storage Protect for Cloud provides new tenants with a 30-day trial license for each online service.

Dynamics 365 Sales enables salespeople to build strong relationships with their customers, take actions based on insights, and close deals faster. If you are new to Dynamics 365, refer to [See "Sign up for Dynamics 365 trial" on page 3](#) to get a 30-day free trial license.

To start protecting your Dynamics 365 data by using IBM® Storage Protect for Cloud Dynamics 365, refer to [See "Sign Up for IBM Storage Protect for Cloud Dynamics 365" on page 7](#).

### Sign up for Dynamics 365 trial

Sign up for Dynamics 365 trial

*Dynamics 365 Sales offers a 30-day free trial with the Sales Premium license. You can test the app with sample data and even try out your own customer data with this 30-day trial.*

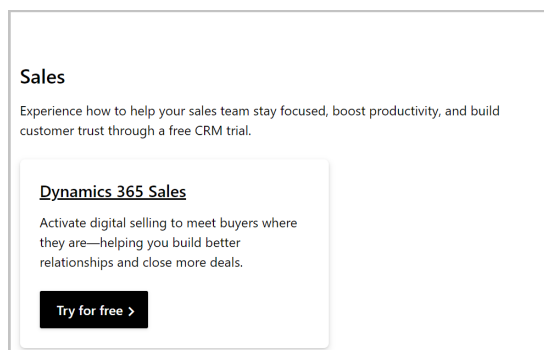
Go to [Dynamics 365 free trial page](#), and choose the solution that you want use by clicking **Try for free**. You can return at any time during the trial period and add solutions to your trial.

Note:

To use Dynamics 365 Sales, complete the following steps:

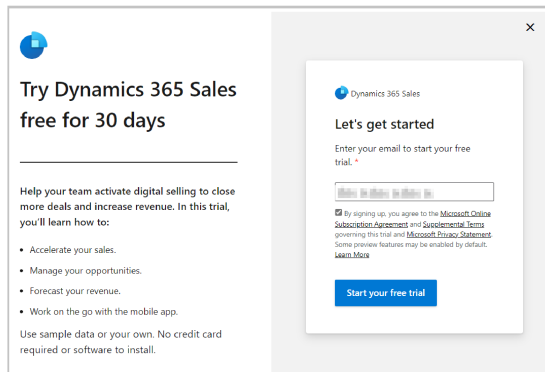
1. Go to [Dynamics 365 Sales page](#), and click **Try for free**.

ADDITIONAL INFORMATION:



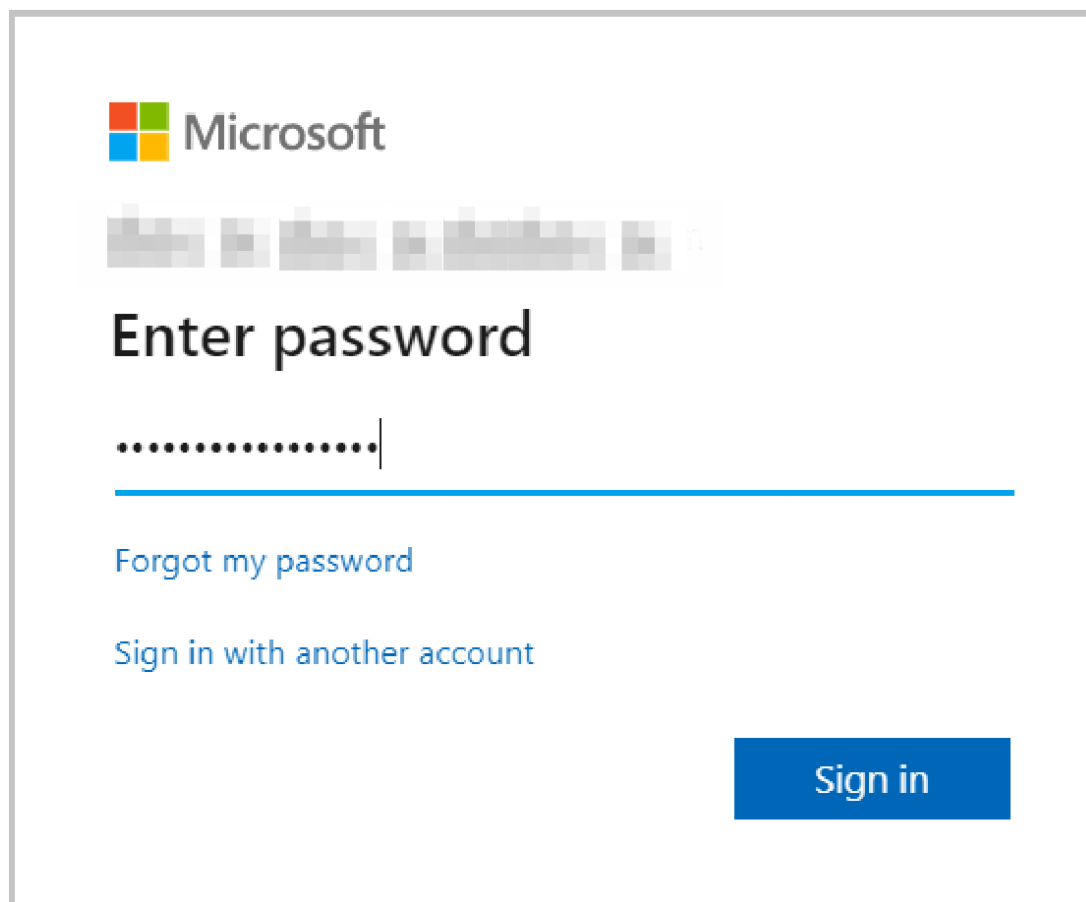
2. The Try Dynamics 365 Sales free for 30 days page opens. Enter your email id, accept the terms and conditions, and then click Start your free trial.

ADDITIONAL INFORMATION:



3. Enter the password, and click Sign in.

ADDITIONAL INFORMATION:



4. Approve sign in request by using the Microsoft Authenticator app.

ADDITIONAL INFORMATION:



## Approve sign in request



Open your Microsoft Authenticator app and approve the request to sign in.

[I can't use my Microsoft Authenticator app right now](#)

[More information](#)

5. Provide your Stay signed in preference by clicking either Yes or No.  
ADDITIONAL INFORMATION:



## Stay signed in?


Do this to reduce the number of times you are asked to sign in.

Don't show this again

No

[Yes](#)

6. Provide your contact information in the respective fields, and click Submit.  
ADDITIONAL INFORMATION:

 Dynamics 365 Sales

**Hi** [blurred]

We have a few questions before we get started.

**Country/region \***

[blurred]

**Phone number \***

[blurred]

I will receive information, tips, and offers about Solutions for Businesses and Organizations and other Microsoft products and services. [Privacy Statement](#).

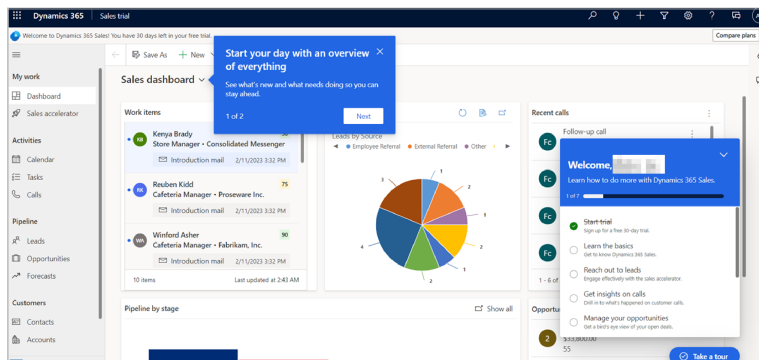
I would like Microsoft to share my information with selected partners so that I can receive relevant information about their products and services. [Privacy Statement](#).

**Submit**

7. When the trial is ready, select **Launch Trial** to sign in to the Sales Trial app.

ADDITIONAL INFORMATION:

The trial app opens the Dashboard page. A product tour assistant also starts as shown in the following image:



## Sign Up for IBM® Storage Protect for Cloud Dynamics 365

Sign Up for IBM® Storage Protect for Cloud Dynamics 365

IBM® Storage Protect for Cloud provides new tenants with a 30-day trial license for each online service. You can register for 30-day free trial to start using IBM® Storage Protect for Cloud Dynamics 365.

1. Go to [IBM® Storage Protect for Cloud Dynamics 365 Free Trial](#) page and choose one of the following options to register for a 30-day free trial.

ADDITIONAL INFORMATION:

- If you already have an IBM account, click **Log in** and provide your **IBMid**.
- If you are a new user, complete the following steps to create an IBMid.  
**Account Information** - Enter the basic information in all required fields and then click **Next**.

#### E-mail

Enter your corporate e-mail address. This e-mail address will become your IBMid, and you can use this ID to log in to **IBM.com**.

#### First name

Enter your first name.

#### Last name

Enter your last name.

#### Country or region of residence

Select your country from the drop-down list.

#### State or province

Select your state from the drop-down list.

The screenshot shows the registration page for IBM Spectrum Protect Plus Online Services for Dynamics 365. The page title is "IBM Spectrum Protect Plus Online Services for Dynamics 365 30-day trial". The main heading is "Get your 30-day free trial by filling out the form below!". The form is divided into three sections: 1. Account information, 2. Additional information, and 3. Verify email. The "Account information" section includes fields for "E-mail ID", "First name", "Last name", "Residency", "Country or region of residence" (set to India), and "State or province" (set to Tamil Nadu). There is a "Next" button below the "Country or region of residence" field. The "Additional information" section is currently empty. The "Verify email" section has a "Create account" button. There is also a "Sign in with LinkedIn" button in the top right corner of the form area.

ADDITIONAL INFORMATION:

Note: You can add other Dynamics apps to your dashboard at any time.

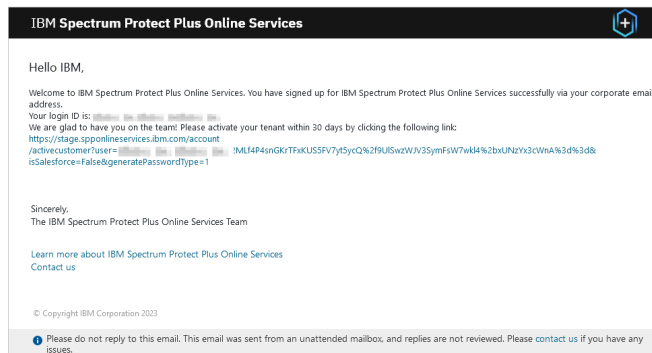
2. **Additional Information** – Complete the required fields and then click **Continue**.

ADDITIONAL INFORMATION:

- Enter the additional information such as **Phone**, **Company**, and **Job title** in the respective fields.

- Select the data center closest to your Microsoft 365 tenant from the drop-down list for the best performance. After the sign-up is finished, you cannot change the data center.
  - Confirm your communication preferences by choosing one of the following options:
    - by email
    - by telephone
3. You will be redirected to the My IBM home page where you can see the product and the activation status. A confirmation e-mail will be sent to your corporate email address which was used under Account Information.
4. Once you receive the e-mail, click the supplied link to activate your account. The link will be active for 30 days.

ADDITIONAL INFORMATION:



## Scan Your Organizations

### Scan Your Organizations

*IBM® Storage Protect for Cloud Dynamics 365 supports scanning and protecting your organizations via either app profile authentication or service account authentication. You can go to the **Scan Settings** page to configure how you would like to scan and initialize the organizations the first time you access this product.*

On the **Scan Settings** page, you can select the service account that you have configured in IBM® Storage Protect for Cloud, or you can configure an app profile connection for the scan.

Complete the following steps to start scanning your organizations:

1. See ["Create an App Profile for Dynamics Customer Engagement"](#) on page 10
2. See ["Create an environment in the Power Platform admin center"](#) on page 12
3. See ["Creating an application user"](#) on page 13
4. See ["Adding an App Profile Connection"](#) on page 16

Note the following for scanning organizations using service account:

- Only service accounts that have the Global Administrator role or Dynamics 365 Service Administrator role can be displayed in the **Scan Setting** page grouped in tenants.
- The first auto-initiated scan uses random service accounts. You can select different service accounts for rescans.

## Create an App Profile for Dynamics Customer Engagement

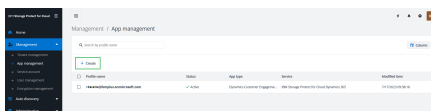
### Create an App Profile for Dynamics Customer Engagement

*The Tenant Owner and Service Administrators can create an app profile in IBM® Storage Protect for Cloud.*

To create an app profile for Dynamics Customer Engagement, complete the following steps:

1. **Sign in to IBM® Storage Protect for Cloud.**
2. **In the navigation panel, select Management > App Management.**
3. **Click Create on the App Management page.**

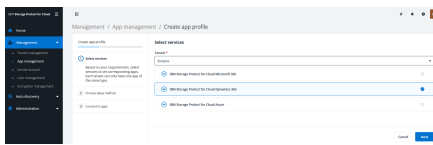
ADDITIONAL INFORMATION:



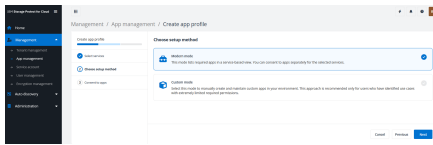
4. **In the Select services panel of the Create app profile page, complete the following actions:**

ADDITIONAL INFORMATION:

- a. In the **Tenant** field, select **ibmplus** from the drop-down list.
- b. Select IBM® Storage Protect for Cloud Dynamics 365 from the displayed options and click **Next**.

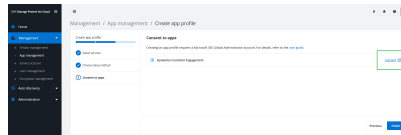


5. In the Choose setup method panel, select Modern mode and click Next.  
 ADDITIONAL INFORMATION:





6. In the Consent to apps panel, complete the following actions:  
 ADDITIONAL INFORMATION:

- a. Click on the **Consent** link that is shown along with **Dynamics Customer Engagement** option.





- b. Read the information in the pop-up window and click **Accept** for the permissions requested.

 Microsoft

 @ibmplus.onmicrosoft.com

## Permissions requested

Review for your organization

 **IBM Storage Protect for Cloud Administrator for Dynamics**  
 International Business Machines Corporation 

This app would like to:

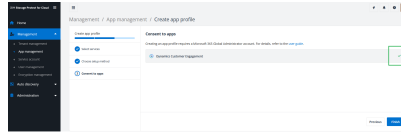
- ✓ Access Common Data Service as organization users
- ✓ Sign in and read user profile
- ✓ Read directory data

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their [terms of service](#) and [privacy statement](#). You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

Does this app look suspicious? [Report it here](#)

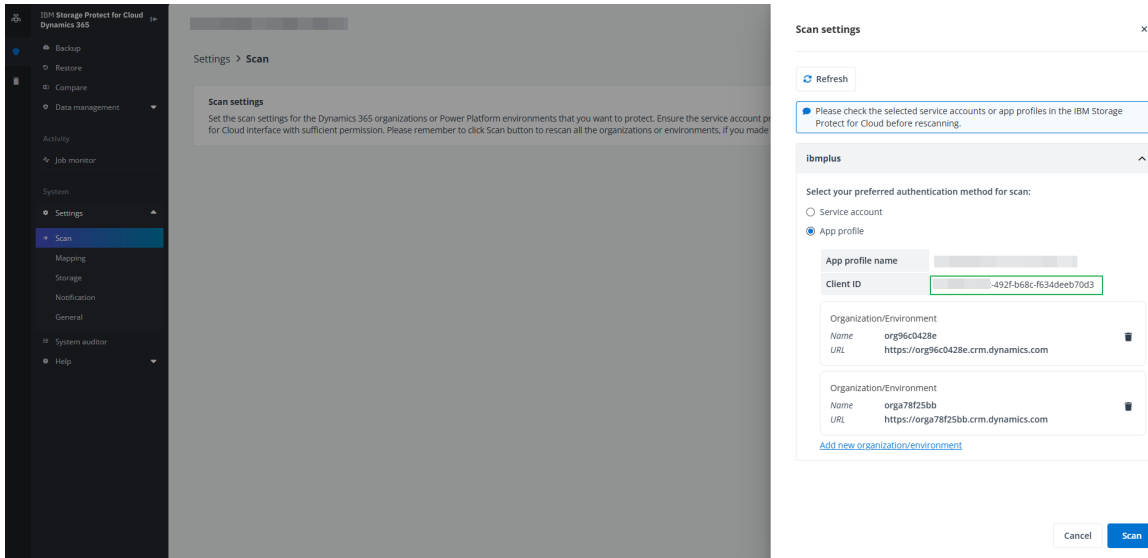
- c. Ensure that you see a check mark in place of the **Consent** link and click **Finish**.



## Result

The App Management page appears, and the app profile is created successfully. The App profile details are visible in the App Management page.

AFTER COMPLETING THE TASK In IBM® Storage Protect for Cloud Dynamics 365, navigate to **Settings > Scan Settings**. Copy the **Client ID**, which will be used while [creating an application user](#).



## Create an environment in the Power Platform admin center

Create an environment in the Power Platform admin center

*For the trial users, a Dynamics 365 environment must be created. If you are already using Dynamics 365 and have an environment set up, you can skip this procedure.*

To create an environment, complete the following steps:

1. **Sign in to the Power Platform admin center at <https://admin.powerplatform.microsoft.com> as a Dynamics 365 admin.**
2. **In the navigation panel, select Environments, and then click New.**
3. **Enter the information in all required fields, and click Next.**

ADDITIONAL INFORMATION:

### Name

The name of your environment

### Region

Choose a region for the environment.

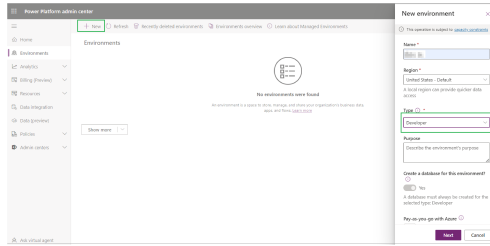
### Type

Make sure that environment is selected as **Developer**.

## Purpose

A description of the environment

ADDITIONAL INFORMATION:



## 4. Enter the following, and select Save.

ADDITIONAL INFORMATION:

### Language

Set the default language for this environment.

### URL

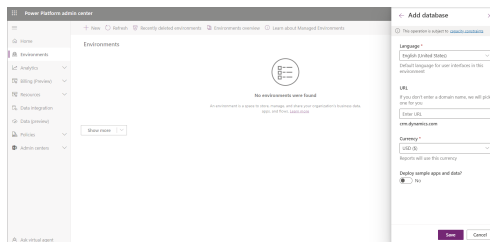
A unique domain name is generated. To create a custom URL, select **click here**. Enter your organization name. Organization URLs must be unique. If your organization name has already been reserved in the destination data center, it won't be available.

### Currency

Set the base currency that is used for reporting.

### Deploy sample apps and data

Select Yes to include sample apps and data. Sample data gives you something to experiment with as you learn. You must select No for Enable Dynamics 365 apps for this setting to appear.



ResultThe new environment is created and will be available in the Environments page.

## Creating an application user

### Creating an application user

*You can create an unlicensed application user in your environment. This application user will be given access to your environment's data on behalf of the user who's using your application.*

To create an application user, complete the following steps:

1. Sign in to the Power Platform admin center at <https://admin.powerplatform.microsoft.com> as a Dynamics 365 admin.

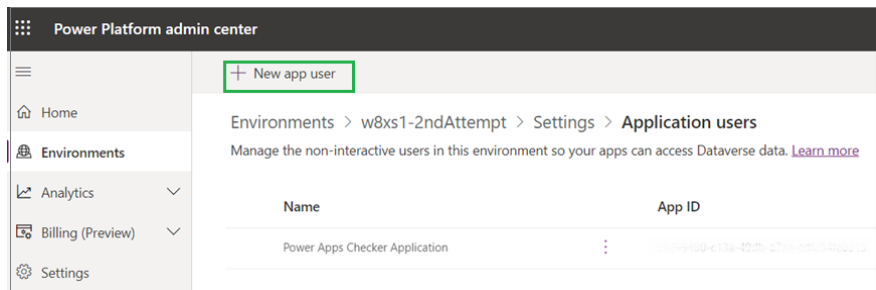
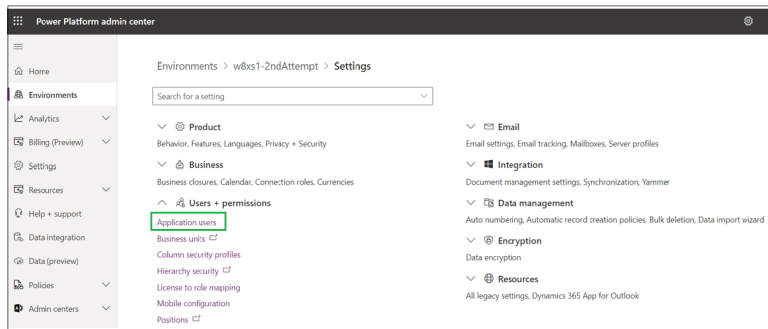
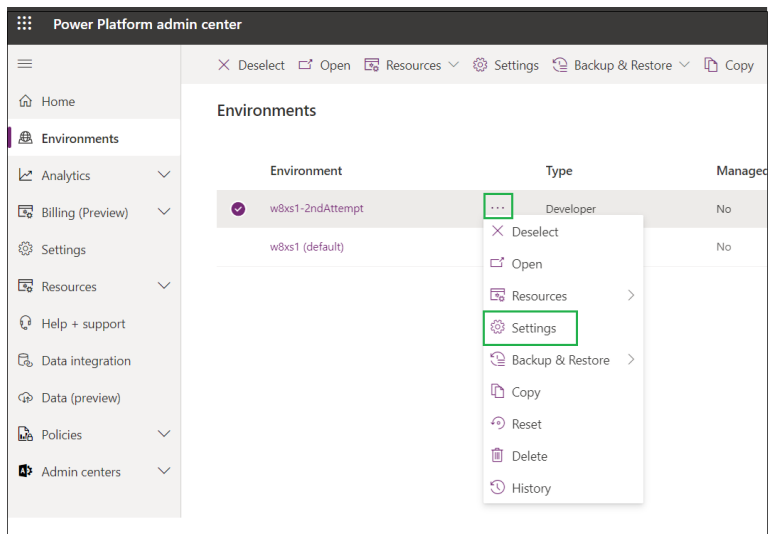
2. Navigate to Environments, and select an environment from the list. Click the menu icon (



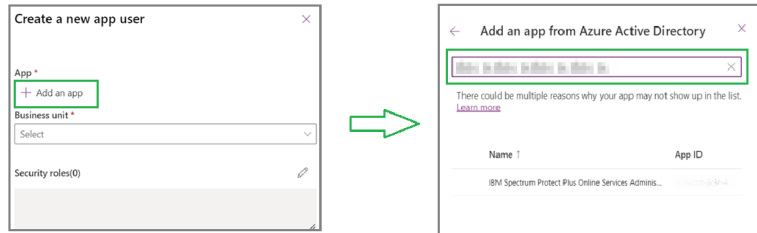
).

3. Select Settings › Users + permissions › Application users › New app user to open the Create a new app user page.

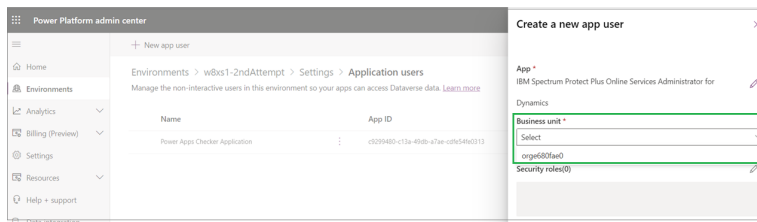
ADDITIONAL INFORMATION:



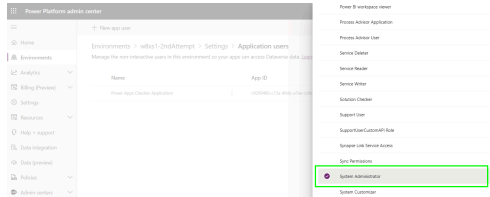
4. Select + Add an app. Enter the client ID that was created for the selected user in the IBM® Storage Protect for Cloud GUI.  
 ADDITIONAL INFORMATION:



5. Select the app, and click Add.  
 6. The selected app is displayed under App. Under Business Unit, select a business unit from the drop-down list.  
 ADDITIONAL INFORMATION:



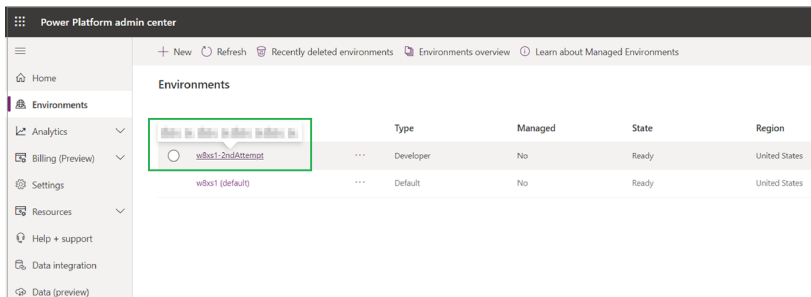
7. After choosing a business unit, you can select security roles to add to the new application user. You must choose System Administrator security role.  
 ADDITIONAL INFORMATION:



Important: To edit security roles you must have the System Administrator privileges.

ResultThe new app user is created.

AFTER COMPLETING THE TASKIn the environment page, hover over or click the environment and copy the environment URL, which will be used for scanning an organization.



## Adding an App Profile Connection

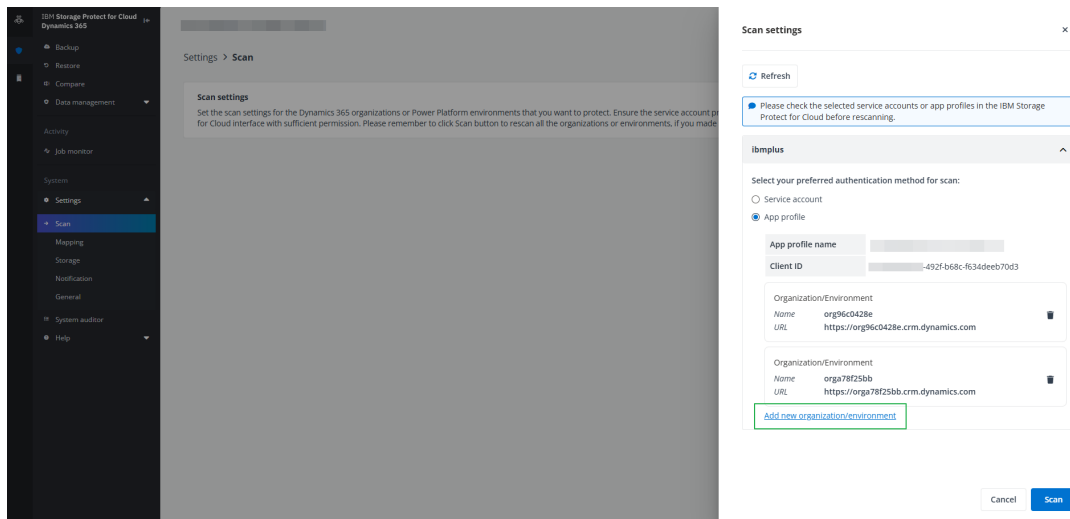
Adding an App Profile Connection

To add a connection to connect Dynamics 365 via app profile, log in to IBM® Storage Protect for Cloud Dynamics 365 and complete the following steps:

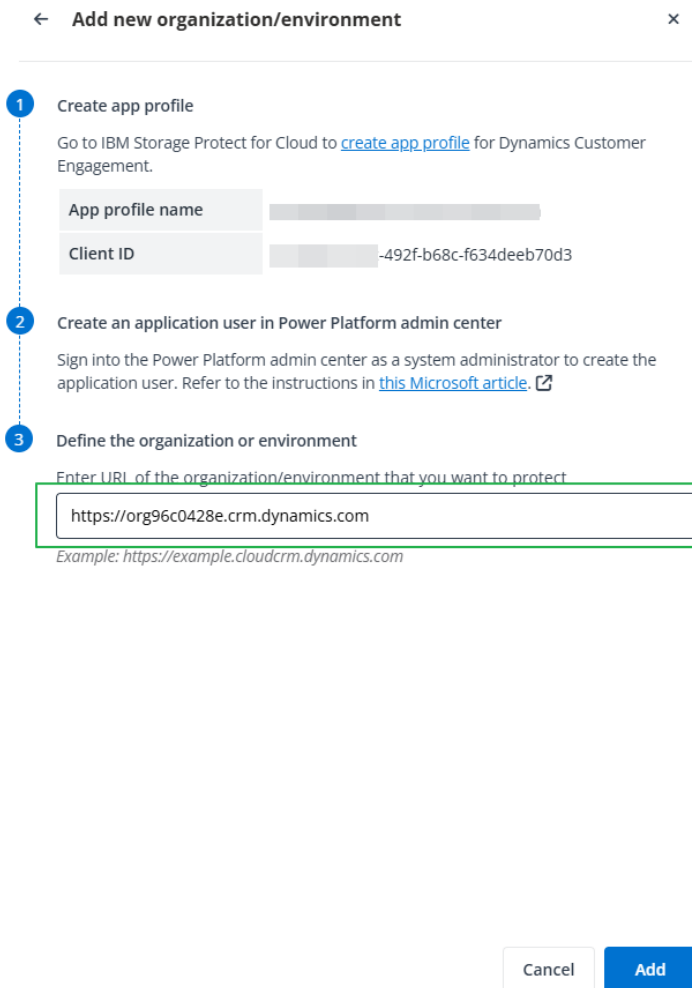
1. On the Scan Settings page, click Add New Organization. The Add New Organization window appears.

ADDITIONAL INFORMATION:

Note: You can use the App ID displayed on the Scan Settings page to search for that IBM® Storage Protect for Cloud app in Azure Active Directory.



2. Enter the URL of the organization that you copied from the [Power Platform admin center](#).  
ADDITIONAL INFORMATION:



3. Click Add to save this connection and go back to the Scan Settings page.

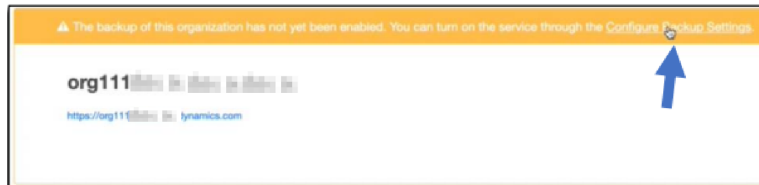
4. Click Scan to scan or refresh the organizations.

## Setting up a Daily Backup Schedule

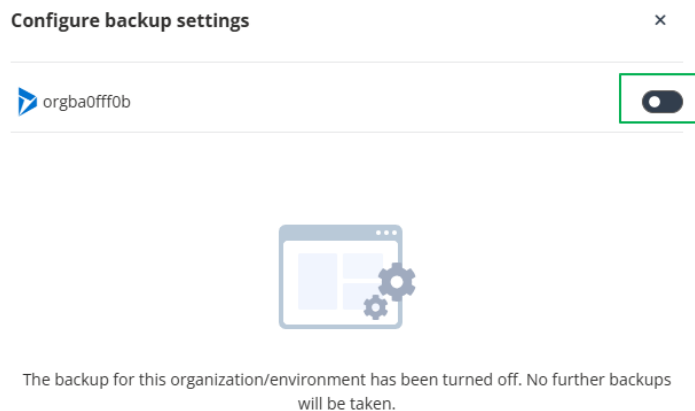
### Setting up a Daily Backup Schedule

To set up a daily backup schedule, log in to IBM® Storage Protect for Cloud Dynamics 365 and complete the following steps:

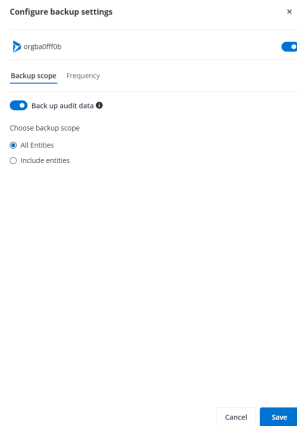
1. In the Navigation panel, click Backup. On the backup page, click the link Configure Backup Settings.  
ADDITIONAL INFORMATION:



2. The Configure Backup Settings page opens. Click the toggle to enable the backup of this organization.  
ADDITIONAL INFORMATION:



3. Choose Back up audit data if required.
4. Choose one of the following actions based on your needs and then click Save.  
ADDITIONAL INFORMATION:
  - All entities
  - Include entities
5. Select Frequency to set the number of backups to run per day including the start times, then click Save.  
ADDITIONAL INFORMATION:



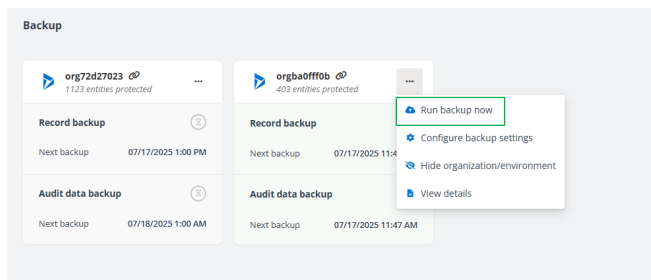
6. In the next dialog, click Continue. The backup starts.

ADDITIONAL INFORMATION:

Note: The first backup might take some time to complete. If you are using a Dynamics 365 trial environment, the backup can take up to 15 minutes.

7. After the initial backup is completed, you can run an ad hoc backup by selecting the 3 dots, next to your organization name, and choosing Run backup now.

ADDITIONAL INFORMATION:



ResultThe IBM® Storage Protect for Cloud Dynamics 365 is configured and the backup operation is successfully scheduled.