

Designing and Developing PowerApps Portals



Agenda

- PowerApps Portal Architecture
 - Portal Editor
 - Portal Management App
 - Portal Configuration
 - Developing Web Templates



PowerApps Portals

- Provides web development platform
 - Create websites that target authenticated users
 - Create websites that target anonymous users
- Portal content managed by business users
 - Portal Editor used to add pages and author content
 - Portal Management App used to manage portal
- Portal can be customized by web developers
 - Portal can be extended with custom web templates
 - Web templates can be written to access CDS entities



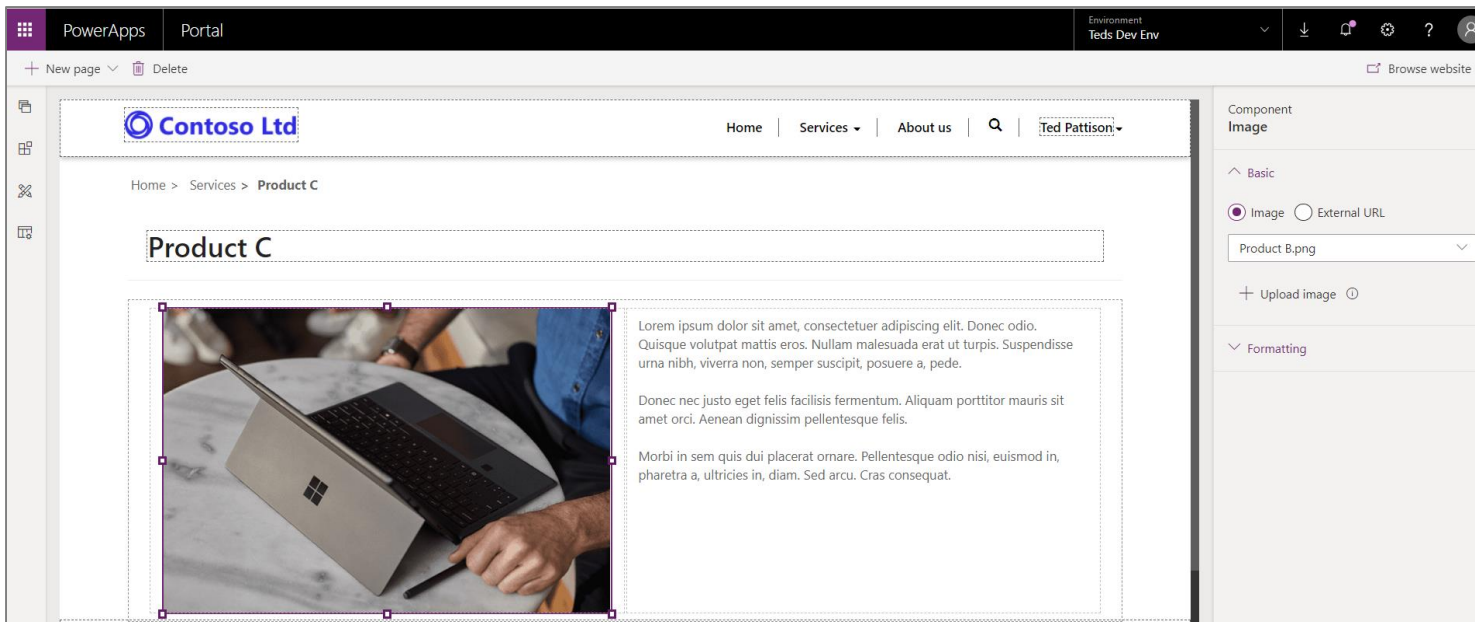
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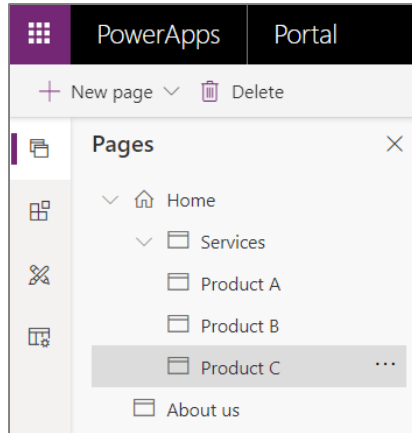
Portal Editor

- Used to add pages and author page content
 - Designed for less-technical users
 - Editor not require web designer/developer skills

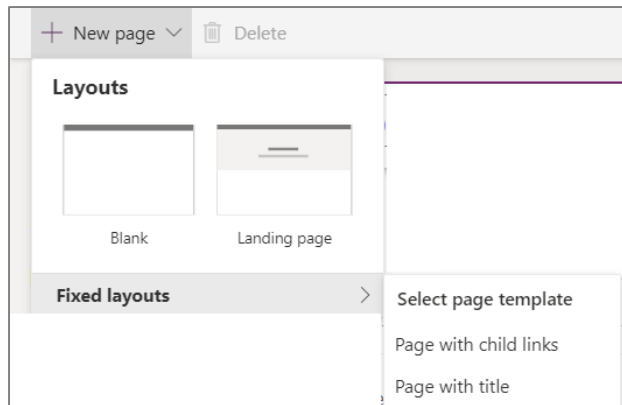


Adding and Navigating Pages

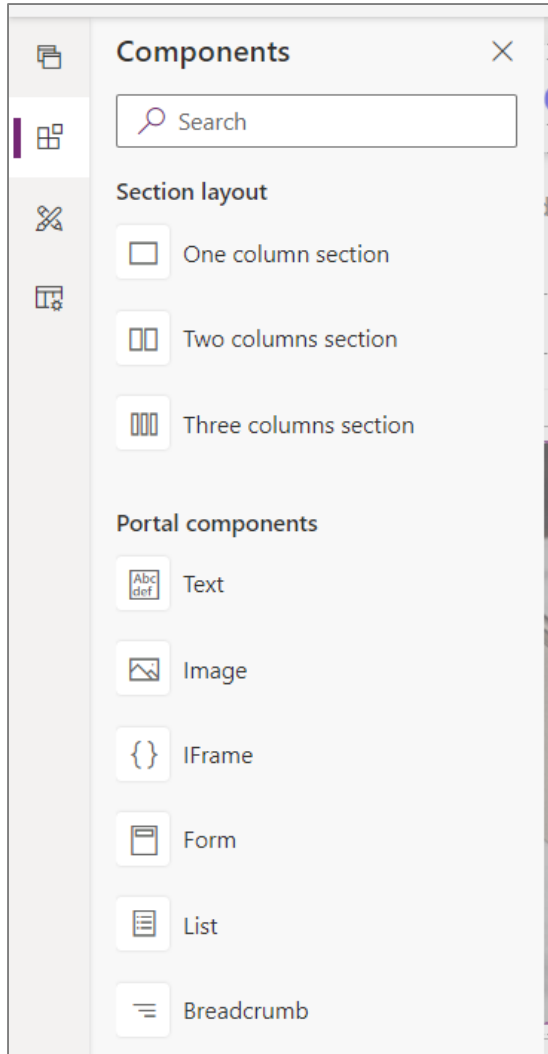
- **Pages** tab provides navigation across pages



- Pages added using **New page** menu button

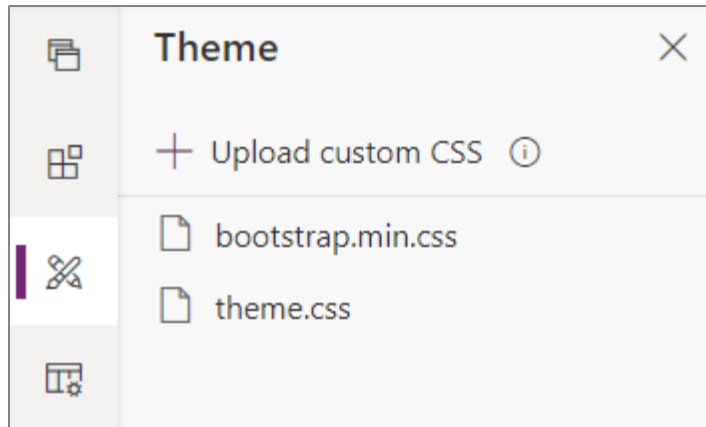


Adding Page Content using Components



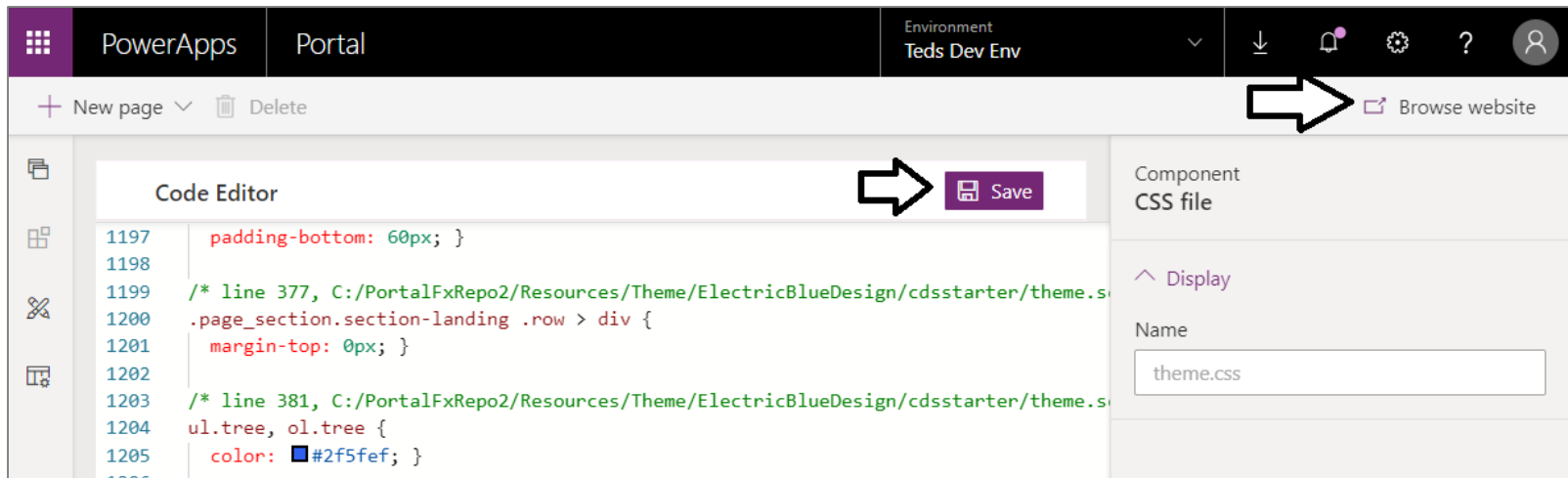
Themes

- PowerApps portals styled using Bootstrap 3
 - Not practical to use a more recent version of bootstrap (e.g. v4)
 - theme.css file is provided for your custom styles



Seeing Your Changes in the Portal

- Portal Editor provides **Browse website** button
 - Used to test how the portal will appear to others
 - Browse website clears cache to enabled development



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Configuring a PowerApps Portal

The screenshot displays the PowerApps Portals admin center interface. The left sidebar contains a navigation menu with the following items: Portal Details (selected), Portal Actions, Set up SharePoint integration, Set up Power BI integration, Run Portal Checker, Manage portal authentication key, and Set up IP address restriction.

The main content area is titled "Portal Details" and includes a "General Settings" section. The settings are as follows:

- Name:** Ted Pattison Portal
- Type:** Trial
- Application ID:** 6938dd26-5ba2-4e6f-8fc3-67ecb0787d93
- Owner:** Ted Pattison
- Portal URL:** Base Portal URL: <https://TedPattison.powerappsportals.com>

A yellow warning banner states: "Your trial portal will expire in 29 day(s). Convert your portal to production to avoid its suspension. [Learn more](#)". Below this is a purple "Convert" button.

A modal dialog titled "Convert trial to production" is open, asking for confirmation. The message inside reads: "This action will convert your trial portal to production. Are you sure you want to continue?". The dialog has a close button (X) and two buttons at the bottom: "Confirm" (purple) and "Cancel" (white).

Below the main interface, a second screenshot shows the "Run Portal Checker" option selected in the sidebar. A message box displays the status: "Your request has been submitted and request id is d6a62ba6-6ba1-4728-8773-07f8472ebcfb. This request might take some time to finish, so please click [here](#) after some time to see the status."



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Creating a Solution with Custom Entities

Solutions > Critical Path Training Solution			
Display name ▾		Name	Type ▾
Audience	...	cpt_audience	Option Set
Class	...	cpt_class	Entity
Class Location	...	cpt_classlocation	Entity
Course	...	cpt_course	Entity
Course Length	...	cpt_length	Option Set
Training Class Management 🔗	...	cpt_TrainingClassManagement	Client Extension
Training Class Management 🔗	...	cpt_TrainingClassManagement	Model-driven App
Import class events from Eventbrite 🔗	...	Import class events from Eventbrite	Flow



The Course Entity

Solutions > Critical Path Training Solution > Course

Fields

Relationships

Business rules

Views

Forms

Dashboards

Charts

Keys

Data

Display name ↑ ∨

Name ∨

Data type ∨

Audience

...

cpt_audience

☰ Option ...

Course Code

...

cpt_coursecode

Abc Text

Currency

...

transactioncurrencyid

🔍 Lookup

Description

...

cpt_description

Abc Text Area

Description URL

...

cpt_descriptionurl

Abc URL

Exchange Rate

...

exchangerate

×₂ Decimal...

Length

...

cpt_length

☰ Option ...

List Price

...

cpt_listprice

💰 Currency

List Price (Base)

...

cpt_listprice_base

💰 Currency

Name

Primary Field

...

cpt_name

Abc Text



The Class Entity

Solutions > Critical Path Training Solution > **Class**

Fields Relationships Business rules Views Forms Dashboards Charts Keys Data

Display name ↑ ∨		Name ∨	Data type ∨
Attend Online	...	cpt_attendonline	Two Options
Course	...	cpt_course	Lookup
Description	...	cpt_description	Text Area
End	...	cpt_end	Date and Time
EventbriteID	...	cpt_eventbriteid	Text
Instructor	...	cpt_instructor	Lookup
Location	...	cpt_location	Lookup
Name Primary Field	...	cpt_name	Text
Registration Url	...	cpt_registrationurl	URL
Start	...	cpt_start	Date and Time



Converting a Portal to Production

Apps in Teds Portal (orgb557ae94)

Recent apps Shared with me Apps I can edit Org apps

	Name	Modified	Owner	Type
	Training Class Management	2 d ago	Ted Pattison	Model-driven
	Portal Management	3 d ago	Ted Pattison	Model-driven
✓	Ted Pattison Portal	2 d ago	Ted Pattison	Portal

⌵

- Edit
- Browse
- Share
- Settings
- Delete

Portal settings

Name *

Ted Pattison Portal

Address *

[https://TedPattison.powerappsportals.c...](https://TedPattison.powerappsportals.com)

Language

English

Advanced options

Administration

See additional details and perform advanced portal actions e.g. Update website address or provide a custom domain name. [Learn more](#)

[Administration](#)

Site settings

Configure website settings. [Learn more](#)

[Site settings](#)

PowerApps Portals admin center

Portal Details

Portal Actions

- Set up SharePoint integration
- Set up Power BI integration
- Run Portal Checker
- Manage portal authentication key
- Set up IP address restriction

Portal Details

General Settings

Name

Ted Pattison Portal

Type

Trial

① Your trial portal will expire in 29 day(s). Convert your portal to production to avoid its suspension. [Learn more](#)

Convert

Application ID

6938dd26-5ba2-4e6f-8fc3-67ecb0787d93

Owner

Ted Pattison

Portal URL

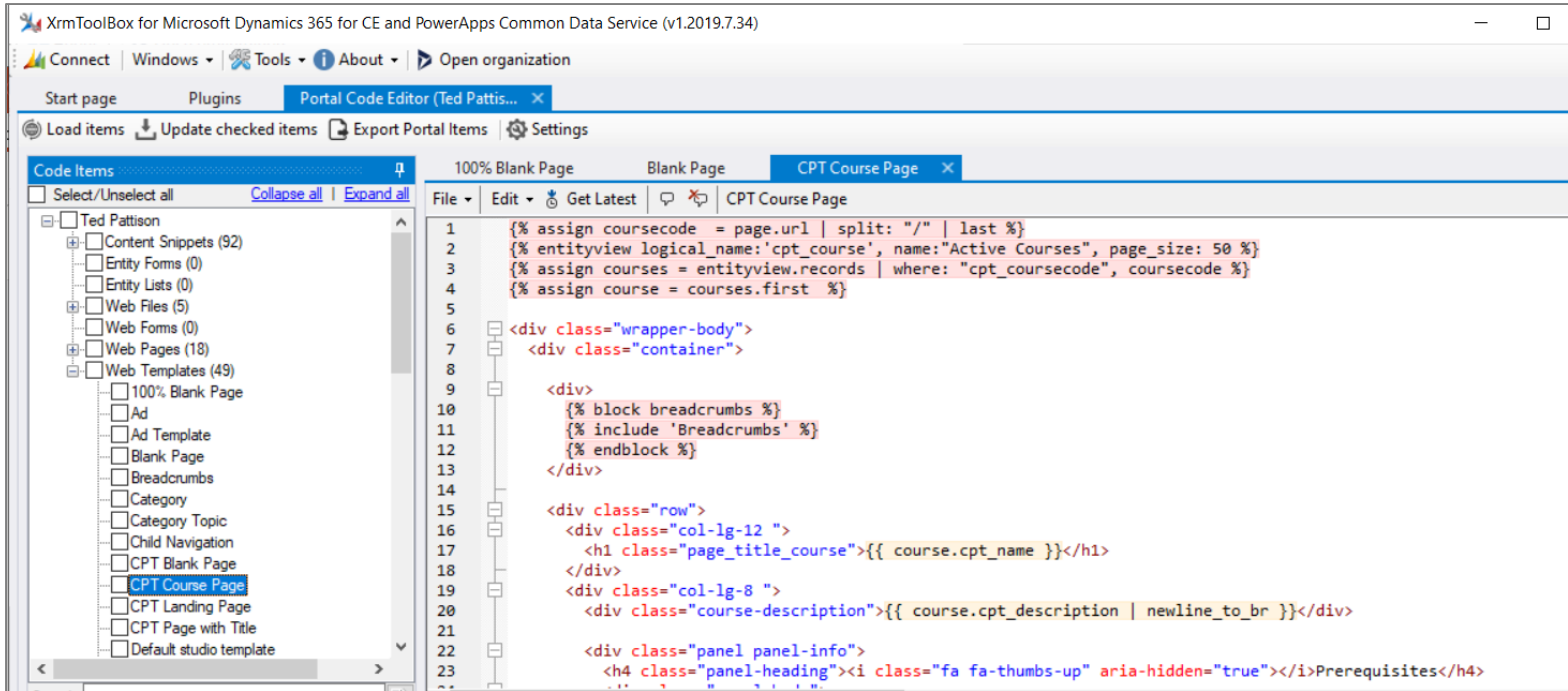
Base Portal URL

<https://TedPattison.powerappsportals.com>



XrmToolbox

- Authoring Tool for PowerApps Portals
 - Provides plug-ins for authoring and managing portals



Web Templates and Liquid Language

- Web Template created using Liquid scripting language
 - Can be used to access CDS data

```
<table class="table-schedule table table-bordered table-striped">
  <thead class="thead-dark">
    <tr>
      <th>Start</th>
      <th>Instructor</th>
      <th>Location</th>
      <th>Action</th>
    </tr>
  </thead>
  {% entityview logical_name:'cpt_class', name:"Active Classes", page_size: 50 %}
  {% assign classes = entityview.records | where: "cpt_Class_Course_cpt_Course.cpt_coursecode", course.cpt_coursecode |
    order_by: "cpt_start" %}
  {% for item in classes %}
    <tr>
      <td>{{item.cpt_start | date: "MMM d"}}</td>
      <td>{{item.cpt_instructor.name}}</td>
      <td>{{item.cpt_location.name}}</td>
      <td><a href="{{item.cpt_registrationurl}}" target="_blank">Register</td>
    </tr>
  {% endfor %}
{% endentityview %}
</table>
```



Summary

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