Demo Setup

This lab is a continuation of the Module 3 lab. If you have already completed that you can carry on from there. If not you can import the solution started for this lab.

1. Navigate to https://make.powerapps.com.
2. Make sure you are in the correct environment.
3. Select Solutions from the left hand menu.
4. Click **Import Solution**
5. Click **Browse** and then select the **WiredBrainCoffee_1_0_0_4.zip** file from the course assets.
6. Click **Next and then click** Import**

It will take a few minutes to import the files but you will then have a new solution called Wired Brain Coffee that contains a Model Driven App and a Canvas App.

Module 4: Working with Applications

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Exercise 1 – Edit the Survey Form

In this exercise, you will edit the form for the Survey table.

Task 1 – Edit the Survey form

To customize your form:

1. Navigate to https://make.powerapps.com.
2. Make sure you are in the correct environment
3. Select **Solutions**.
4. Open the **Wired Brain Coffee Solution**
5. Select the **HR Survey Admin*** model-driven app.
6. Click **Edit**.
7. Locate the **Survey** table and select **Forms**.
8. Go to the **Components** tab, hover over the **Information** form in the **Main Forms** section, and click **edit** (the pencil icon).
9. Click on the **Header** section of the form. (This is the top section of the form that says **New Survey**)
10. Select the **Table columns** tab and uncheck the **Show only unused columns** checkbox.
11. Drag the **Owner** column for the and place it in the **header** on the right side of the form. You should now have two **Owner** columns on the

form: one in the **General** section, and one in the **header.**

12. Select the **General** tab by clicking on it. Enter **General** in the **Name** field in the Properties pane.

13. Expand the **Formatting** section.
14. Select **Two Columns** for **Layout.**. Click **Save**.
15. Select the **Days Remaining** column and drag it to the header next to **Owner.**

16. Select the new section of the **General** tab.
17. Select the **Component** tab.
18. Click **Timeline** from the **Related data** section in the Components pane and drag it to the New Section.

19. After the timeline is filled into the New Section, select the **New Section** that the timeline was just added to.

    Change the **Label** to **Timeline** and change the **Name** to

    Timeline.

20. Select the **Owner** column from the **General** section.
21. Click the **trash** button from the top menu. We are removing this column because we added a duplicate column to the header.

22. Add the **Start Date** column to the **General** section and place it below the **Title** column. You can add columns to the form by dragging the column

    from the Table columns and dropping it in the section you want to add the

    column to.

23. Add the **End Date** to the **General** section and place it below the **Start Date** column.

24. Select the **Component** tab.
25. Click **1 column tab**. A new tab will be added to the form.
26. Click on the new tab.
27. Change the **Label** to **Questions**.
28. Select the **Questions** tab.
29. Click the **Components** tab.
30. Click **Subgrid** from the **Related data** section. Check the **Show related records** check box and select **Questions** for Table.

    Then click **Done.**

31. In the right properties tab, enter **Questions** for **Label** and **Question** for **Name**.
    .

32. Make sure that **Show related records** is checked.

33. Make sure **Questions (Survey)** is selected for **Table.**

34. Select the **New Section** that the subgrid was added to. In the Properties tab, enter **Questions** for **Label** and **Questions** for **Name**.

35. Click **Save**.
36. Click **Publish** and wait for the publishing to complete.
37. Close the form designer tab. You should return to the model-driven app designer.

38. **DON'T** close the app designer.

Exercise 2 – Edit the Survey Question Form

In this exercise, you will edit the form for the Question table.

Task 1 – Edit the main form

1. Make sure you are in the app designer.
2. Click **+Add** and select **Entities**.
3. Locate the **Question** table and select it.
4. After the **Question** table is added to the application, select **Forms** for the **Question** table.

5. Hover over the **Information** form in the **Main Form** section and click **edit** (the pencil icon).

6. Select the **Header** by double clicking on it.
7. Add the **KSurvey** column to **Header** (the top part of the form) and place it on the right side of the header.

8. Select the **General** tab by double clicking. In the right **Properties** tab, enter **General** for Name.

9. Select **+ Component** from the command bar.
10. Click **1-Column section.**
11. Double click on the new section.
12. Enter **Answers** for Label. Select the **Table columns** tab on the left menu.

13. Add **Answer 1** column to the **Answers** section.
14. Add **Answer 1 Points** after the **Answer 1**.
15. Repeat the two steps above for each Answer and Points.
16. Click **Save**.

17. Click **Publish** and wait for the publish to complete.
18. Close the form editor. You should return to the model-driven app designer.
19. Click **Save** to save the changes to the application.
20. Click **Validate** and make sure there are no errors. You can ignore the warnings.
21. Click **Publish** to publish your changes.
22. **DON'T** close the app designer.

Task 2 – Test Your Work

1. Click **Play**.
2. Switch from the **Administration** area to the **Surveys** area in the bottom left. Select the **Survey`** table and click **+ New**.
3. The form should have two tabs: **General** and **Questions**.
4. The General tab should have two sections: one with General information (Title, Start Date, End Date, and Difficulty) and one with the **Timeline**.
5. Enter **Test Survey Three** for **Title**.
6. Select today's date for **Start Date** and select ten days into the future for **End Date**.
7. Select **Beginner** for **Difficulty**.
8. Click **Save**.
9. Make sure the **Days Remaining** value was calculated correctly.
10. Select the **Questions** tab.
11. Click **+ New Question**.
12. Close the application without creating ** Question** record.
13. You should return to the app designer. Click **Save and Close** to close it.

Exercise 2 – Edit the Survey View

Task 1 – Edit the Knowledge Assessment active item view

1. Navigate to https://make.powerapps.com.
2. Make sure you are in the correct environment.
3. Select **Solutions**.
4. Open the **Wired Brain Coffee Solution**
5. Open the **Survey** table.
6. Select the **Views** tab.
7. Click to open the **Active Survey** view.

Task 2 – Add and Remove Columns from View

1. The **Active Survey** view currently has two columns.
2. Click on the **Status Reason** column to add it to the View.
3. Click on the **Owner** column to add it to the View.
4. Click on the **Modified By** column to add it to the View.
5. Click on the **Modified By** column header, select **+ Insert view column**.
6. Select **Modified On** to add this column before the Modified By column. The view should now have six columns.
7. You will now remove the **Created On** column. Click on the header of the **Created On** column.
8. Click **Remove**. The **Created On** column will be removed from the view.
9. You will now add a column from a related table to the view. From the **Table columns** side bar, select the **Related** tab.
10. All the tables that the **Survey** table has a **N:1** relationship with will be listed here. Expand **Owning User (User).**
11. Enter **Email** on the search box and enter.
12. Select **Primary Email**. The **Primary Email** will be added to the view.
13. Click **Save**.
14. **Do not** close this window.

Task 3 – Reorder View Columns and Change Column Width

As a rule, you will always want to have the order of the columns in view be the

highest value to lowest unless you have other specific needs.

1. You will now reorder the columns. Select the **Owner** column header and click **Move Left**.
2. You can also reorder columns by drag/drop. Drag the **Primary Email** column header and drop it to the left of the **Status Reason** column.
3. Move the **Modified On** column to right of the **Modified By** column.
4. The columns order should now be **Title**, **Owner**, **Primary Email**, **Status Reason**, **Modified By**, and **Modified On**.
5. You will now make the **Title** and **Primary Email** columns wider. Select the **Title** column header and drag the right edge to the right. The

   Title column should get wider.
6. Select the **Primary Email** column header and drag the right edge to the right until the entire email addresses are visible.

7. Click **Save**.

Task 4 – Sorting

The View is now sorted by the **Title (A-Z).** You will configure the sorting to

be based on the Modified On column first.

1. Locate the **Sort By...** area located in the view properties.
2. Remove the default value. We want to sort **Modified On**.
3. Click **Sort By** and select **Modified On**.
4. Click **Then Sort By** and select **Owner**.
5. Click **Save**.

Task 5 – Use Save as to create a copy

1. Add **Days Remaining** as the last column in the view.
2. Then click the **dropdown** button next to the Save button and select **Save As**.
3. Enter **Created This Month** for Name and click **Save**.
4. Locate the **Filter By** section of the **View** property. You should have **Status is 'Active'**. All records have a status column; if you don't

   filter to only show active, you may have records showing in your list that

   are not editable or meant to be inactive. Inactive is used in Microsoft

   Dataverse to mark records as soft deleted as an alternate to physically

   deleting the records.

5. You will add the Created On column back to the view. Select **Created On** from the **Table columns**.
6. In the **Properties** pane, select **Edit filters.**
7. In the pop-up, click **+ Add** and select **+ Add row.**
8. In the first dropdown, select **Created on**. In the second dropdown, select **This Month**. Make sure the box for both rows are checked.

9. Click **OK**.
10. Click **Save**.
11. Click **Publish**.
12. Click the **back** button.
13. From the navigation breadcrumbs, click on the solution name **Common Data Services Default Solution**.

14. Click **Publish All Customizations**.

Task 6 – Test your Views

1. While still on https://make.powerapps.com, select **Apps**.

2. Click on the **HR Survey** model-driven application and select **Play.** Switch from **Administration** to **Survey.**

3. The **Active Surveys** view will be loaded. Make sure the columns you selected are there in the order you selected. (You may need to

   use the view drop-down to re-select the view and cause it to refresh.)

4. Click the **Select a view** dropdown next to the **Active Knowledge Assessments** view title and choose the **Created This Month** view.

5. Make sure the columns are showing in the order you selected.