Microsoft
Power Platform

Microsoft Teams

Building solutions with Dataverse for Teams

Lab 0 - Prerequisites

Workshop Version: 1.3, Published: 08-2022

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Lab scenario overview

All the labs in this course cover step-by-step building of solution called **Team Initiatives**, that is fully based on **Dataverse for Teams** and includes a wide range of **Power Platform** capabilities.

Team Initiatives is a solution that helps team owners to organize various activities/events within team and onboard people who wish to participate, through an approval process.
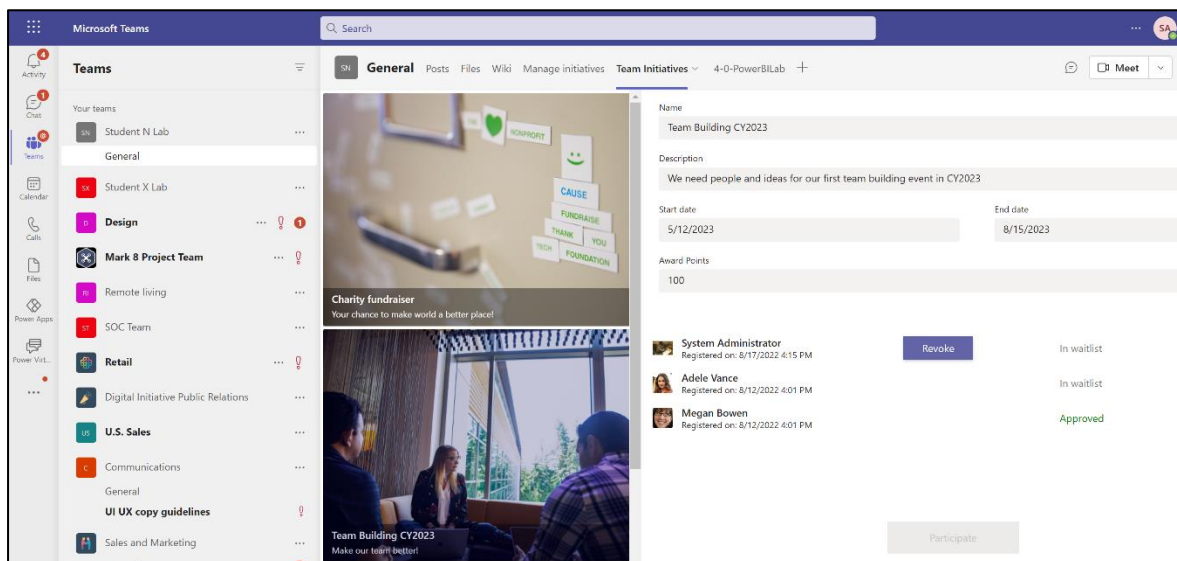
Each lab is a dependency for the next lab, that's why it's highly recommended to ask the instructor for help, if you have any problems, before proceeding to the next lab:

- **Lab 0** – Helps you to set up lab prerequisites

- **Lab 1** – Explains how to work with tables in Dataverse for Teams and build basic Power Apps for these tables

- **Lab 2** – Explains how to build more complex data models and Power Apps in Dataverse for Teams as you can see on the screenshot above

- **Lab 3** – Helps to enrich your applications with complex business logic using Power Automate flows with your Dataverse for Teams

- **Lab 4** – Explains how to use Power Virtual Agents to build bots, that will interact with data in Dataverse for Teams

- **Lab 5** – Shows how to use Dataverse for Teams data for reporting

Exercise 1:
Connect to your M365 tenant

> ❗ **Important**
>
> If you are experiencing problems with access, or you cannot find any of the resources and components described in this exercise – please, **notify your instructor as soon as possible**.

Objectives:

- Access to Labs on Demand
- Retrieve and use your M365 credentials to access your hands-on labs

Estimated time:

15 minutes

Task 1: Access to Labs on Demand

> ### ⚠️ Important – Use Incognito/InPrivate mode
>
> All the labs in this course require you to use the latest version of Edge or Chrome in **Incognito/InPrivate** mode.
>
> It's needed to avoid interference with your corporate account session.
>
> If you are experiencing any problems with starting up a browser in Incognito/InPrivate mode – please, **notify your instructor as soon as possible**.
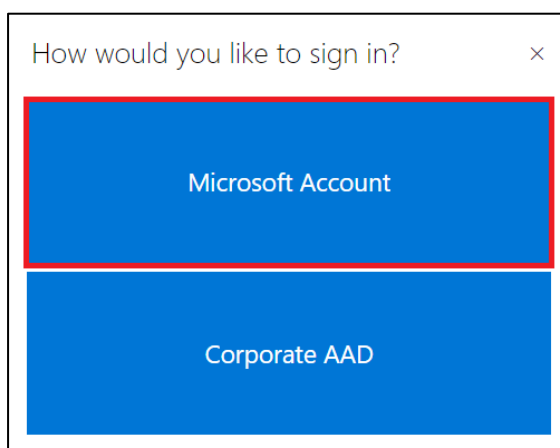
1. Open preferred browser in **Incognito/InPrivate** mode and navigate to:

    https://aka.ms/lod

2. Click **Sign In** button
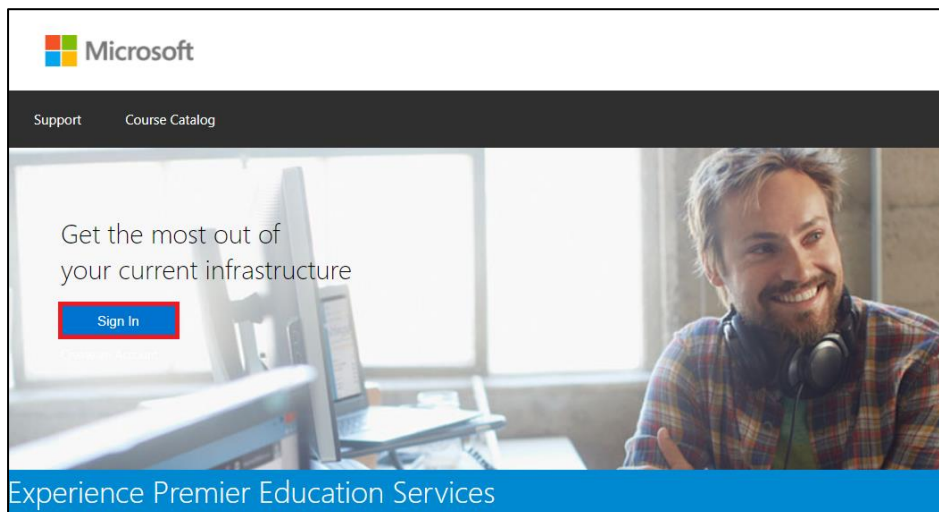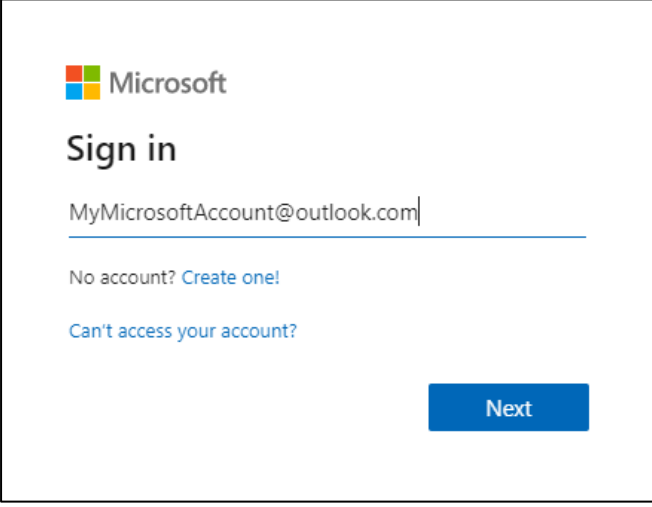
3. Choose **Microsoft Account** option

    Organization policies may not allow to use your Corporate Account, that's why we recommend using Microsoft Account to connect to Labs on Demand.
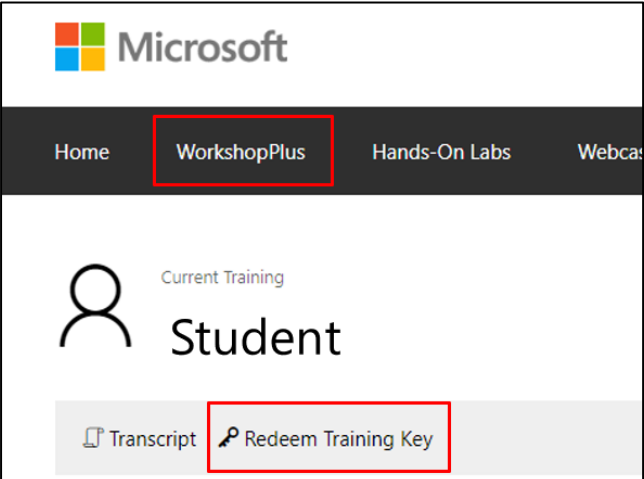
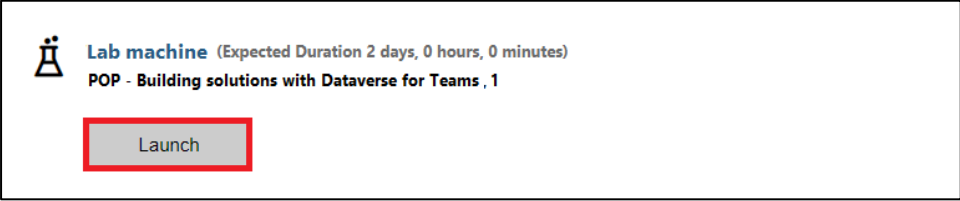4. Sign in using your personal **Microsoft Account**

5. After you logged in, go to **WorkshopPlus -> My Training**
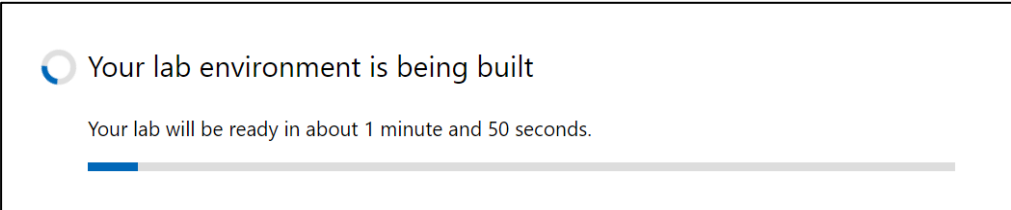   Click **Redeem Training Key** and provide **the training key provided by the Instructor**

6. Find activity **Lab machine** and click **Launch**

7. New window should open, give it some time to load lab contents:

8. When the lab is loaded, navigate to **Resources** tab

> 🟥 **Important – Office 365 Credentials**
>
> **Office 365 credentials displayed in Resources tab will be used in ALL lab exercises.**
>
> Please, copy them locally and use them to login to Microsoft 365 tenant in the next and all following tasks.
>
> **When you see M365xXXXXXX URLs and Usernames in your lab docs, please, replace it with TenantPrefix of your lab tenant.**
>
> **For example:** admin@M365xXXXXXX.onmicrosoft.com should be replaced with the actual username provided in the Resources tab.
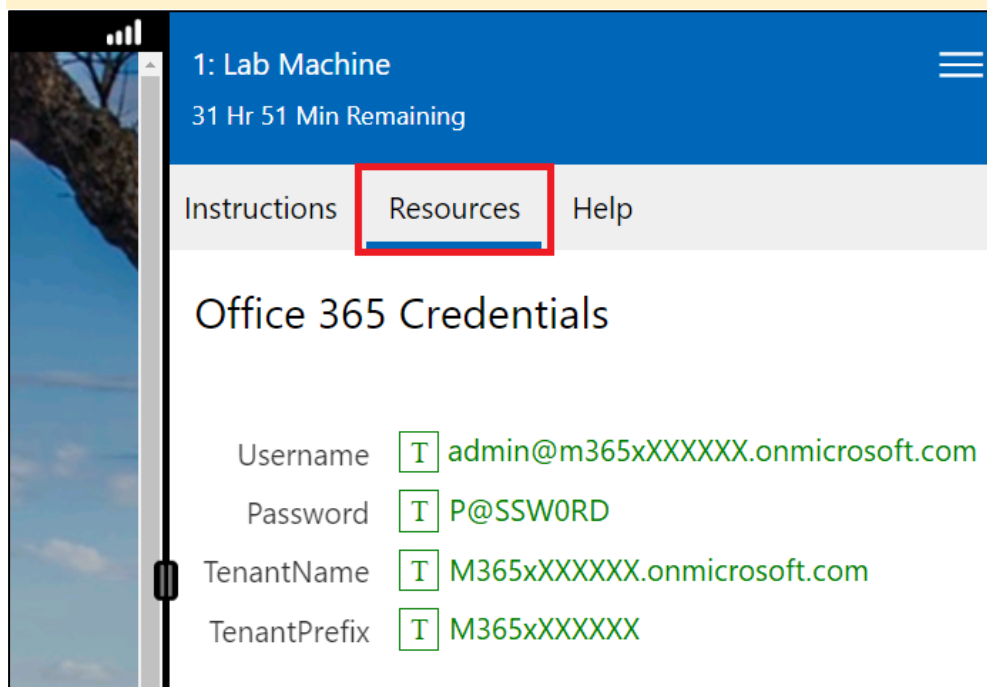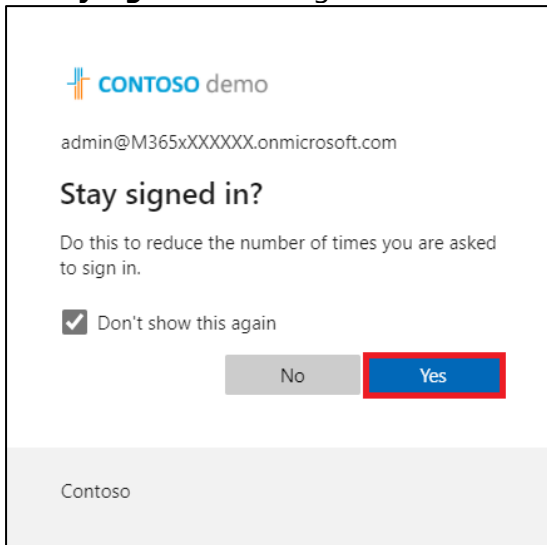
Task 2: Connect to your hands-on labs Microsoft 365 tenant

1. Please, have your **Username** and **Password** information (found in LoD lab resources tab) ready – it will be used across all the hands-on labs in this course.

2. Open preferred browser in **Incognito/InPrivate** mode and navigate to: https://office.com

3. Click **Sign in** button and provide your **Username** and **Password**:

4. In **Stay signed in?** dialog, check **Don't show this again** and click **Yes**

5. Now you are signed into your hands-on labs M365 tenant. Use this session in all other labs.

> ❗ **Important**
>
> If you accidentally logged out, please, return to this lab and repeat these steps to log in once again.
>
> **Always remember to replace M365xXXXXXX with your actual lab tenant prefix.**

# Exercise 2: Set up a Dataverse for Teams environment

Objectives:

- Create a team
- Install and pin required Teams apps
- Provision a Dataverse for Teams environment
- Do initial Approvals provisioning

Estimated time:
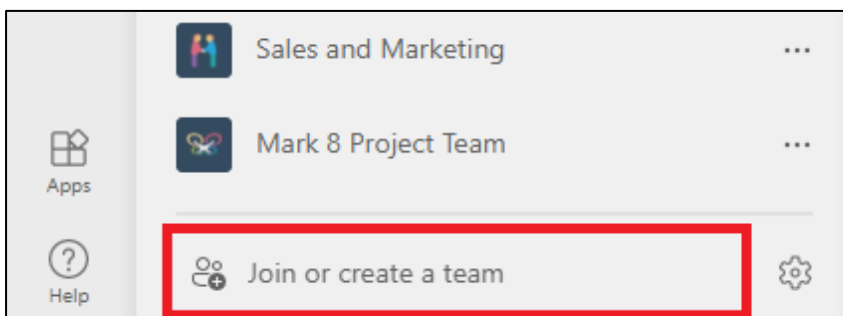
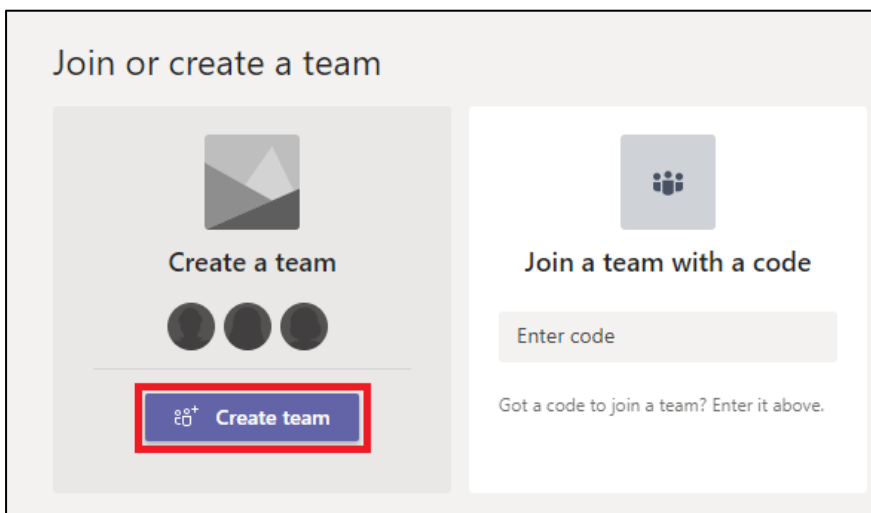15 minutes

Task 1: Create a Team

1. In **InPrivate/Incognito** browser mode, while logged in into your **M365xXXXXXX lab tenant**, navigate to https://teams.microsoft.com

2. Make sure that you have **Teams** selected on the left bar
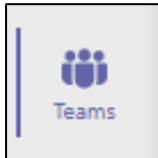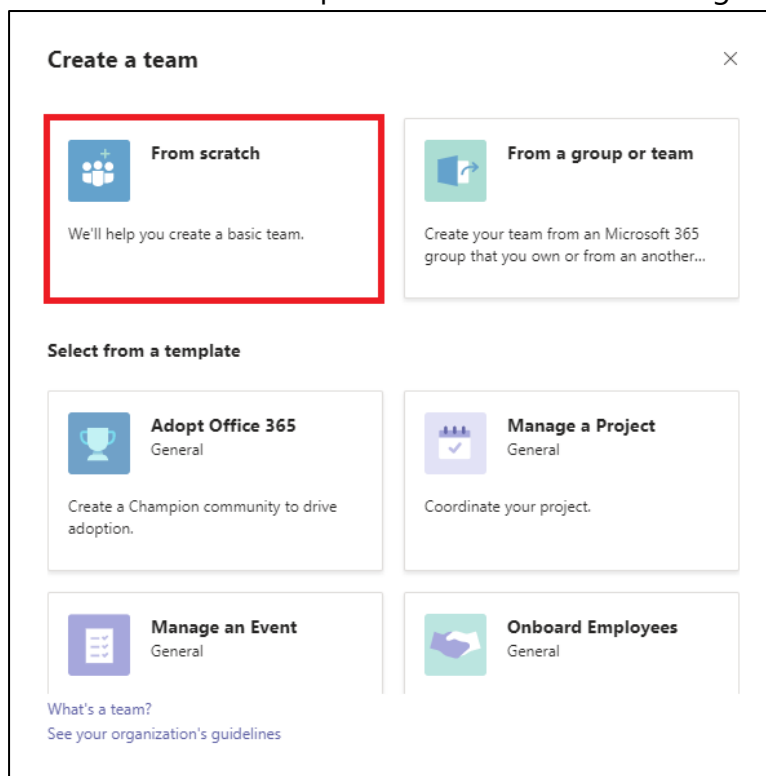

3. Click **Join or create a team** in the left bottom corner
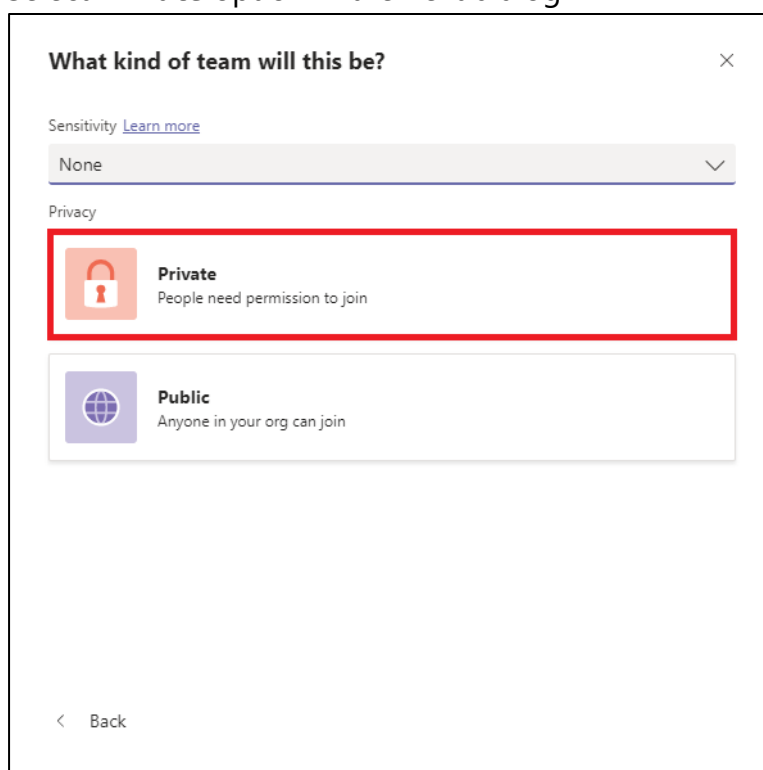

4. Click **Create team** button

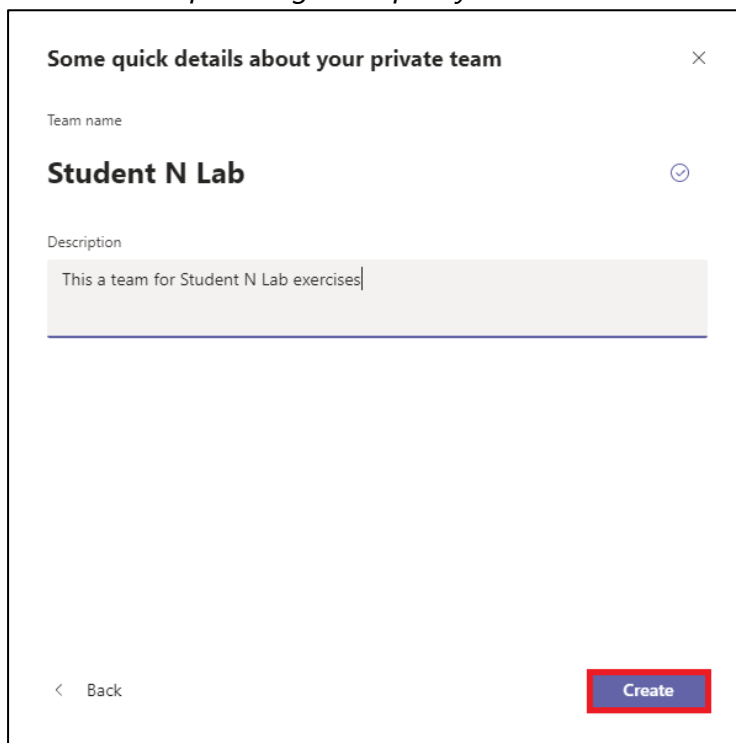5. Select **From scratch** option in Create a team dialog

6. Select **Private** option in the next dialog

7. **Name your team**, you may include your initials or student number to easily recognize your Team, and then click **Create**

   Note: *In all upcoming examples you will see **Student N Lab** as an example.*
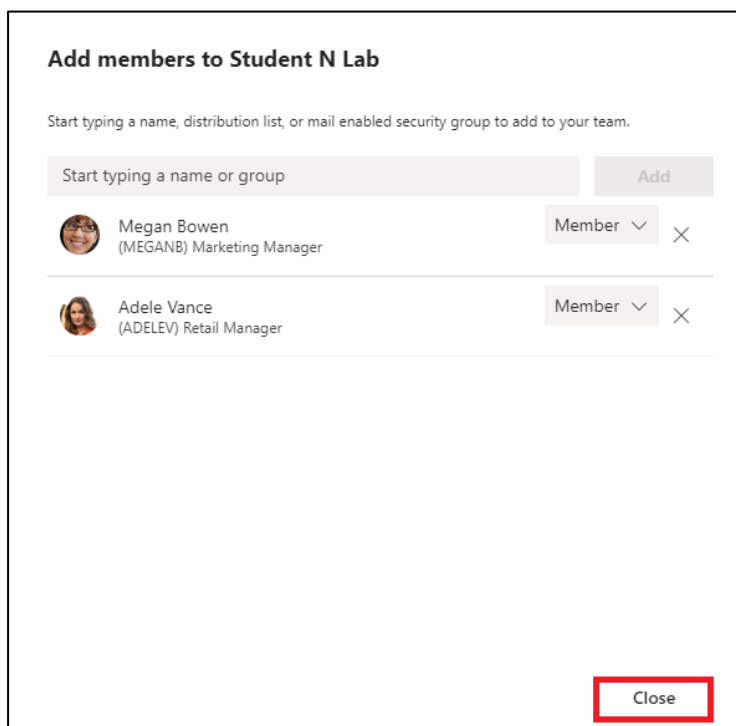
8. Add **Adele Vance** and **Megan Bowen** as team members, then click **Close**

9. Task is completed.

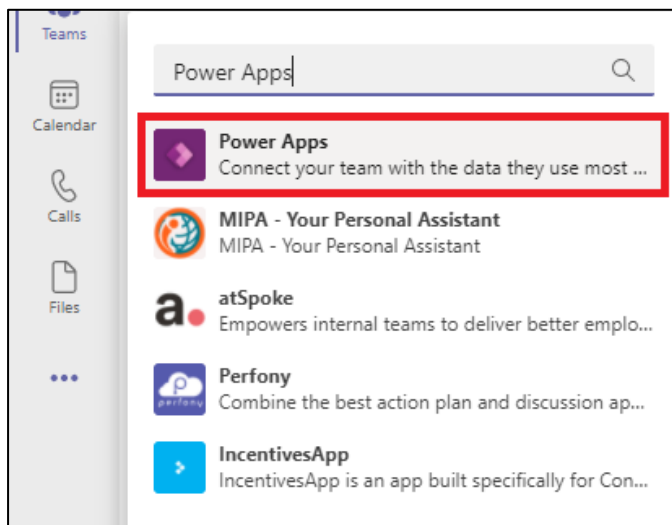## Task 2: Install and pin required Teams apps

1. If Teams web app is not started yet, navigate to https://teams.microsoft.com

2. Select **ellipsis (...)** icon in the left bar

3. Type **"Power Apps"** in the "Find an app" prompt, then **click** on this app

4. Click **Add** button in the app installation dialog
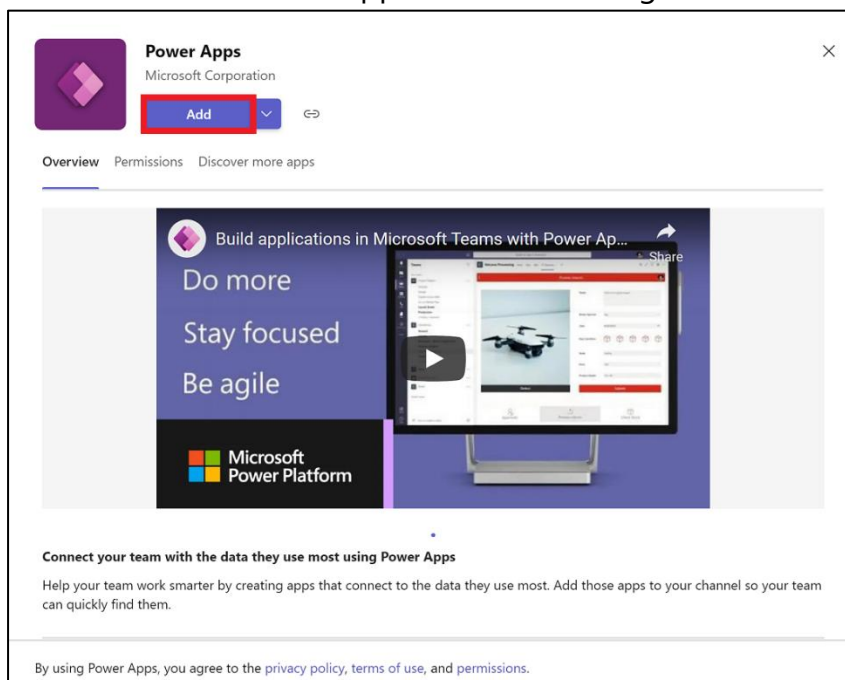
5. Right-click on **Power Apps** in the left bar and select **Pin**
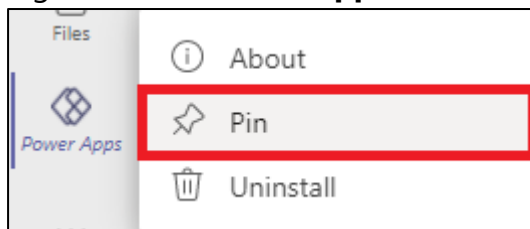
6. Repeat the same set of actions for the following apps:

   a. **Power Virtual Agents**

   b. **Approvals**

Note: *Some icons may be hidden, because of the browser window size. In this case, you can access these apps by clicking* **ellipsis (...)**

Task is completed.

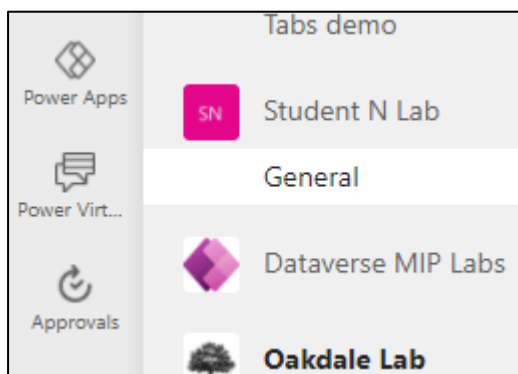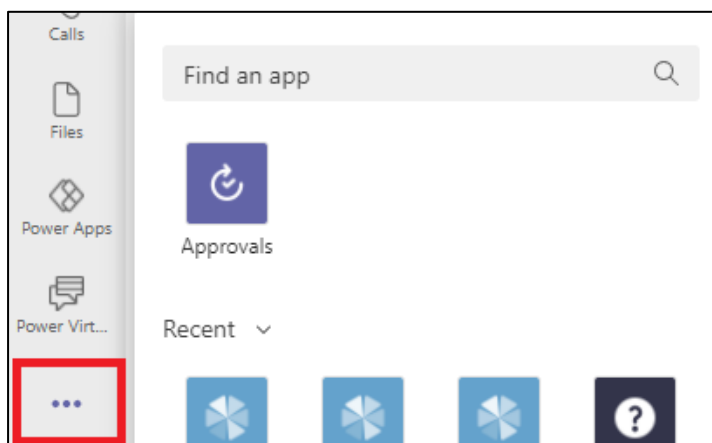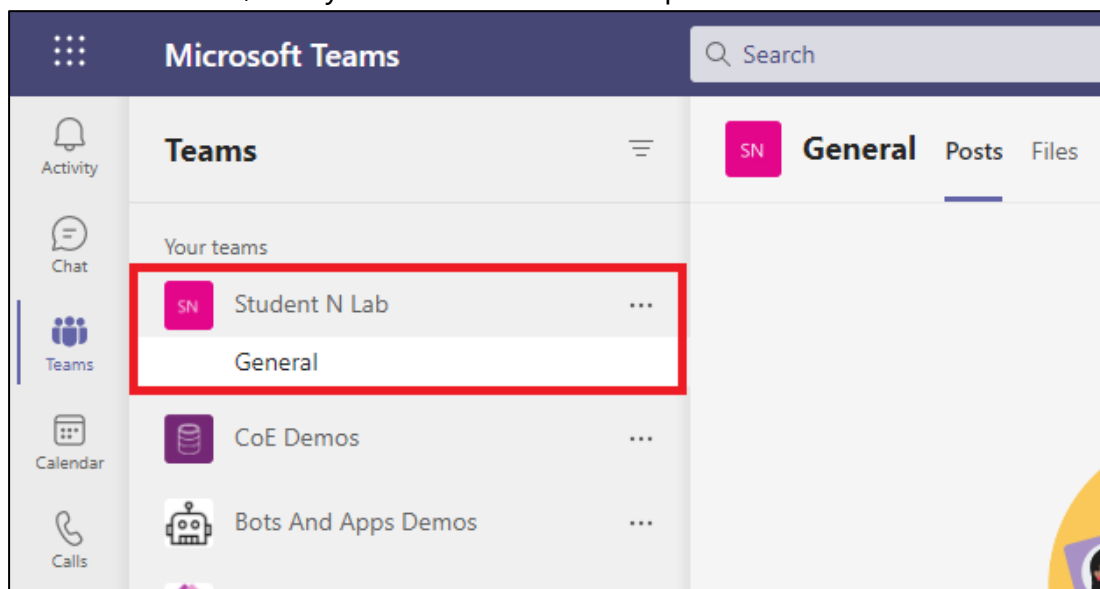## Task 3: Provision a Dataverse for Teams environment

⚙️ **Dataverse for Teams environments**

Dataverse for Teams environment is a container connected to your Team, that can host Team's apps, flows, bots, and data tables.
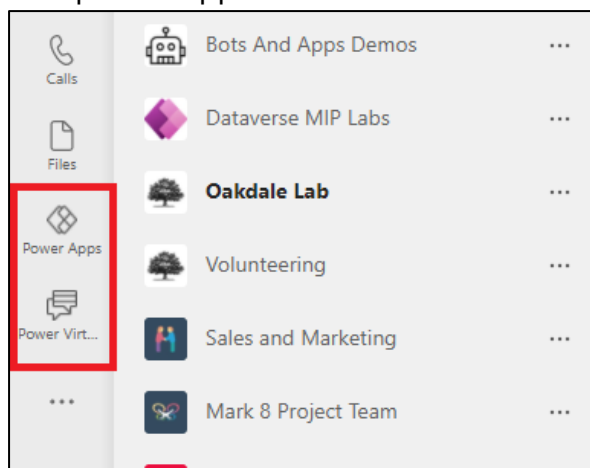
This environment is isolated from Power Platform's default productivity environment, where we usually work with apps and flows.

1. Navigate to https://teams.microsoft.com

2. Let's check that everything we need for the labs is in place

   Locate the **Team**, that you have created in the previous task

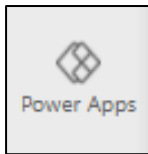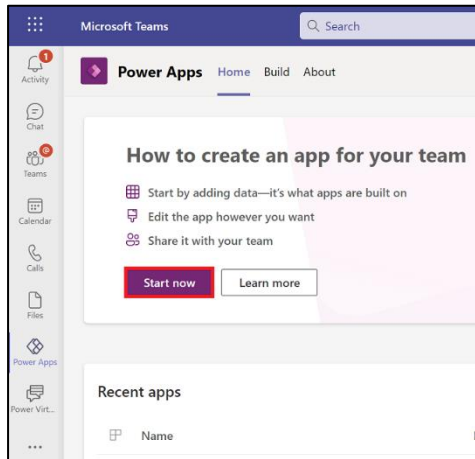3. Find pinned app shortcuts in the left bar

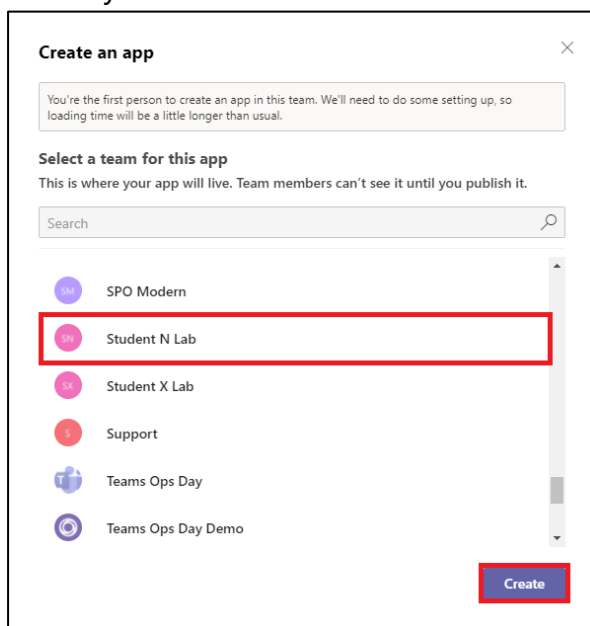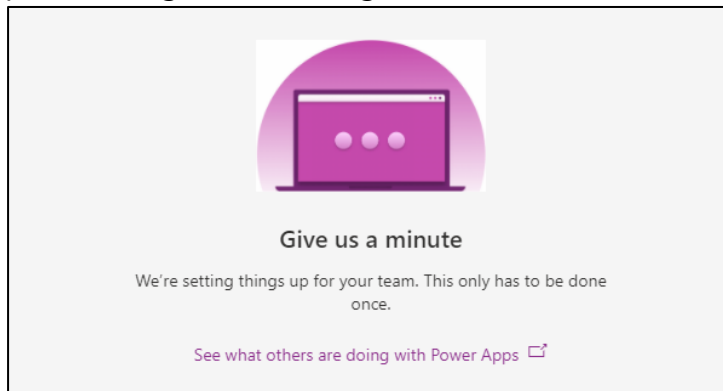4. Select the **Power Apps** app

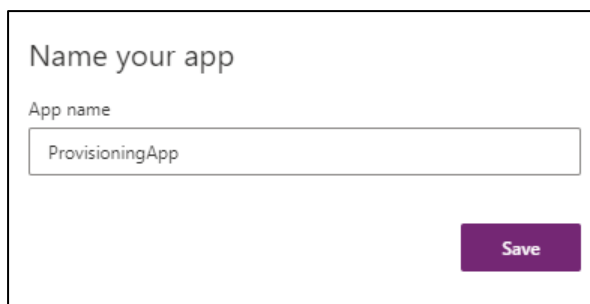5. Click **Start now** on Power Apps home screen

6. **Select** your team and click **Create**. Give it some time.

7. **Give us a minute** window will appear – Dataverse for Teams environment provisioning has started, give it some time.

8. Name your app as **ProvisioningApp** – we will not need it later anyway. Click **Save** button.

Task is completed.

Task 4: Approvals provisioning

> ### ❗ Why do Approvals need provisioning?
>
> **Approvals** is a built-in application that uses Dataverse to store its data model.
> You may be familiar with this application, if you have ever created any flows and apps, that use Approvals connector.
>
> By default, all the data tables related to Approvals are not provisioned in the environment. Provisioning happens on-demand when any user creates an approval for the **first time** in that environment.
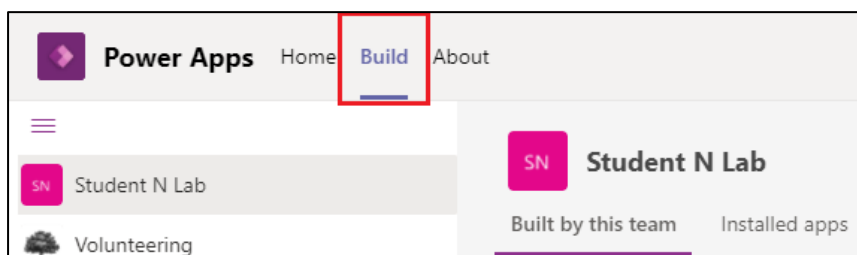>
> It may take some time, that's why we will start it right in the first lab.
>
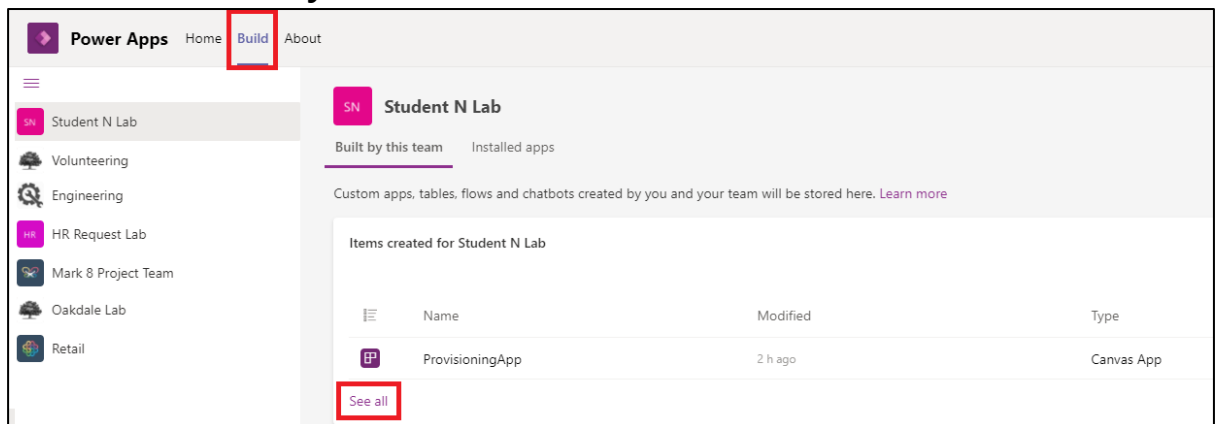> More info: Power Automate Approvals Provisioning Overview and Troubleshooting (microsoft.com)

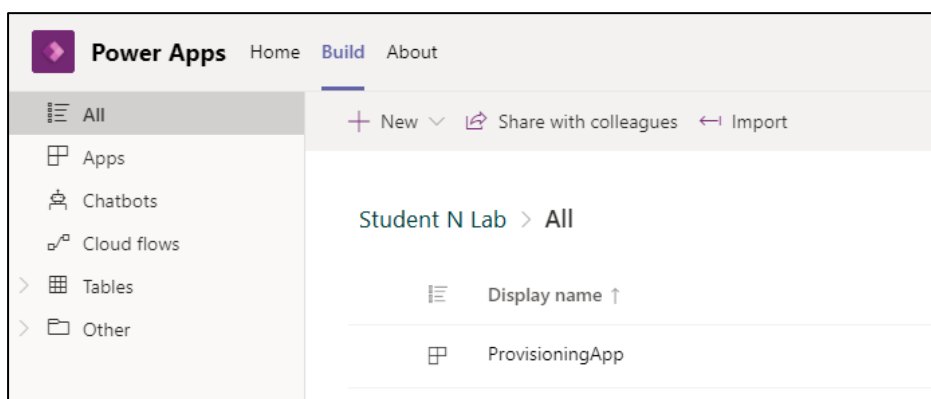1. Open **Power Apps** app using the left bar
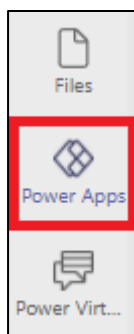
2. Select **Build** tab, then find and select your Team

3. In **Items created for your team,** click **See all** link

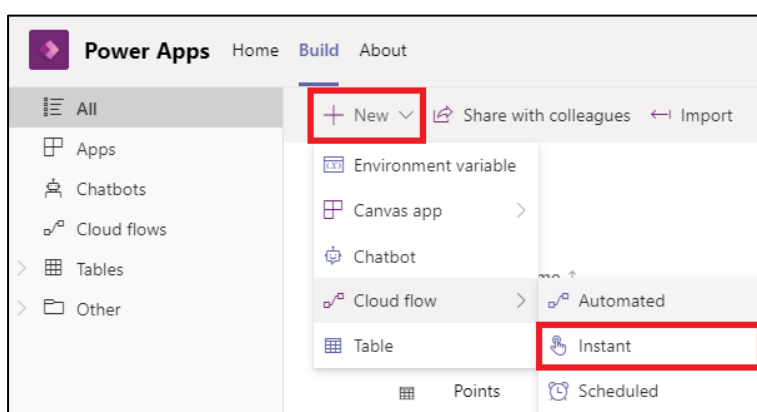4. In this interface, you can see all the content created in your Team's **Dataverse for Teams** environment:

We will use this interface as the starting point in many lab tasks later.
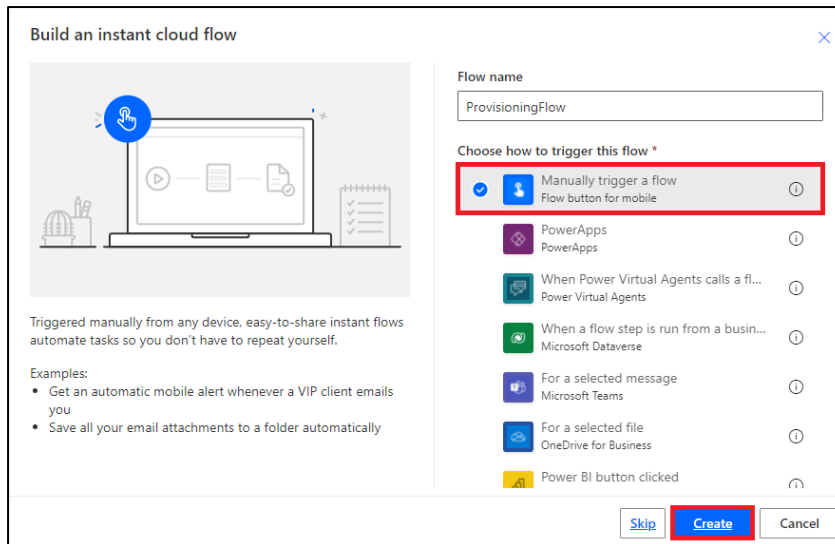
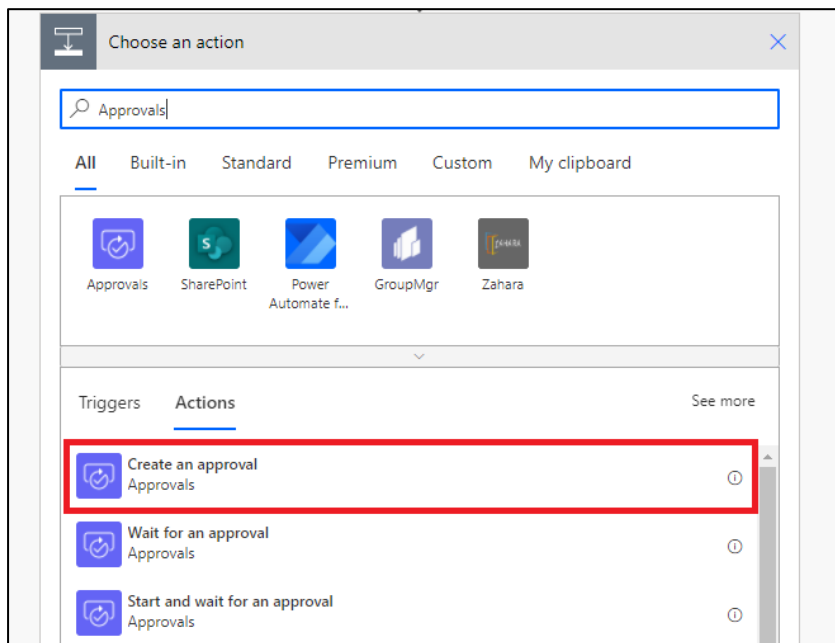5. To create a new flow, click **+New -> Cloud Flow -> Instant**

6. Set **Flow name** as *ProvisioningFlow*

   Select **Manually trigger a flow** trigger

   Click **Create** button (example on screenshot below)

7. Click **+New step** button
   Select **Create an approval** action in **Approvals** connector by clicking on it
   (use Search, if this connector or action is not present)

8. Set properties for **Create an approval**:

   Approval type: Approve/Reject – First to respond

   Title: ProvisioningFlow
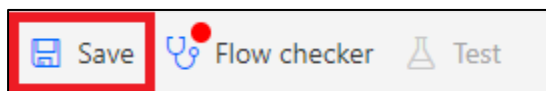
   Assigned to: admin@m365xXXXXXX.onmicrosoft.com
   (replace m365xXXXXXX with your actual Tenant Prefix)

   Details: any text

   See an example on screenshot below.

9. **Save** a flow

Notice that **Flow checker** has a warning, if you click on it, you should see the following:

Power Automate Approvals has not been installed for this environment. Run this approval flow to initiate provisioning.
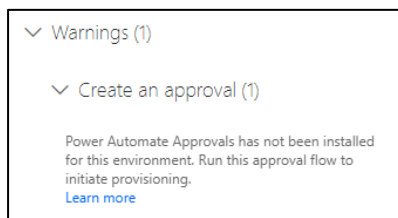
This is the exact reason of why we are creating this ProvisioningFlow.

10. After the flow is saved, click **Test** button

11. Select **Manually** option and click **Save & Test** button to start a test flow run.

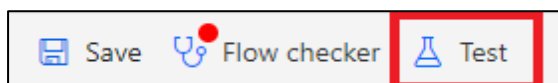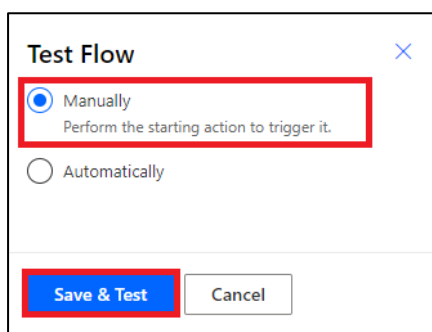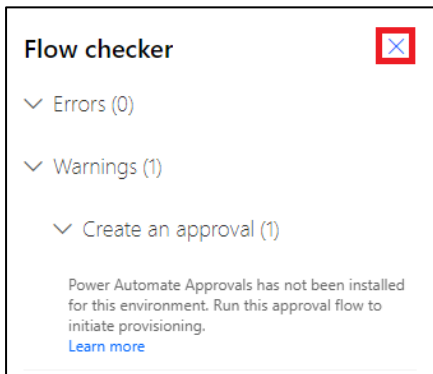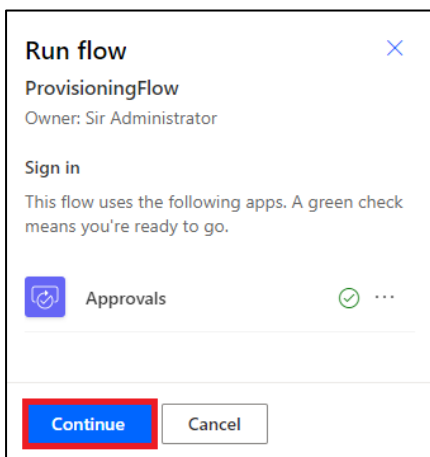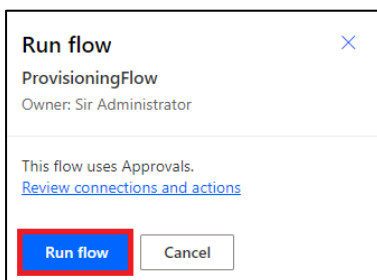12. **Flow checker** may show the warning once again. If it happens, just close it.

Flow checker

∨ Errors (0)

∨ Warnings (1)

∨ Create an approval (1)

Power Automate Approvals has not been installed for this environment. Run this approval flow to initiate provisioning.
Learn more

13. Confirm sign in details for a flow test by clicking **Continue** button:

Run flow

ProvisioningFlow
Owner: Sir Administrator

Sign in

This flow uses the following apps. A green check means you're ready to go.

Approvals ⊘ …

Continue   Cancel

14. Click **Run flow** button to finally run the flow.

Run flow

ProvisioningFlow
Owner: Sir Administrator

This flow uses Approvals.
Review connections and actions

Run flow   Cancel

Check that the flow is running, but don't wait for it now.

This flow will fail, but it will start Approvals provisioning process, that may take some time.

Task is completed.