

Building solutions with Dataverse for Teams

# Lab 0 - Prerequisites

Workshop Version: 1.3, Published: 08-2022

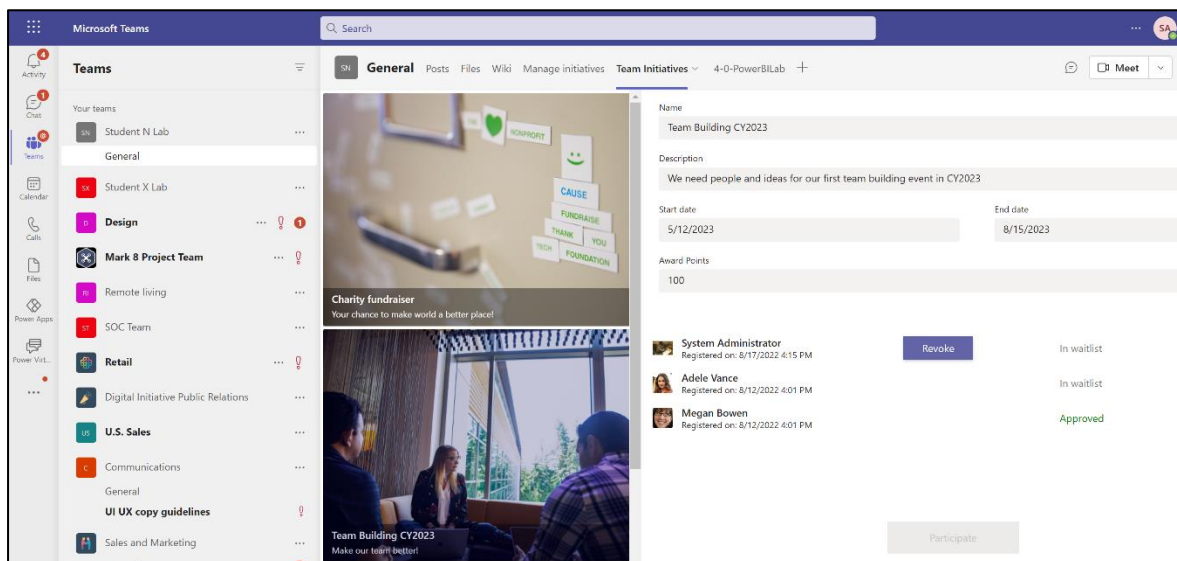
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# Lab scenario overview

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.

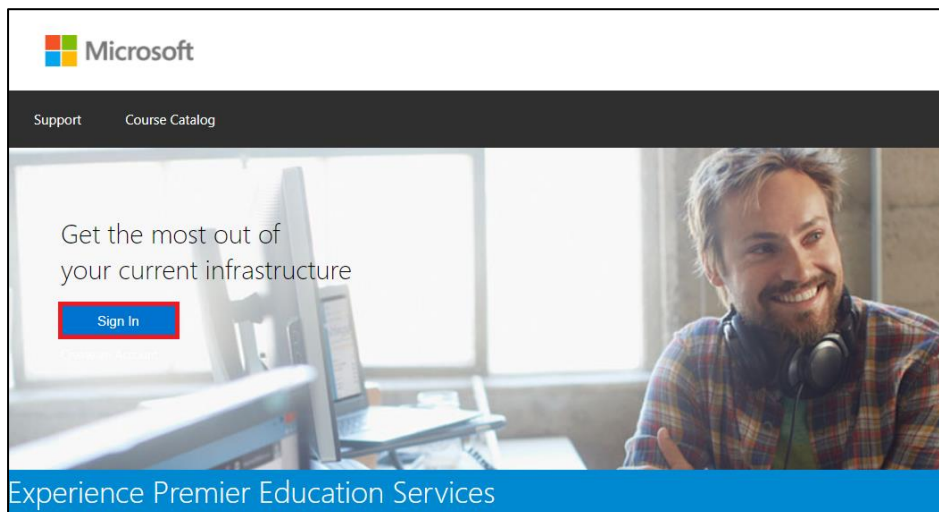
It's needed to avoid interference with your corporate account session.

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:

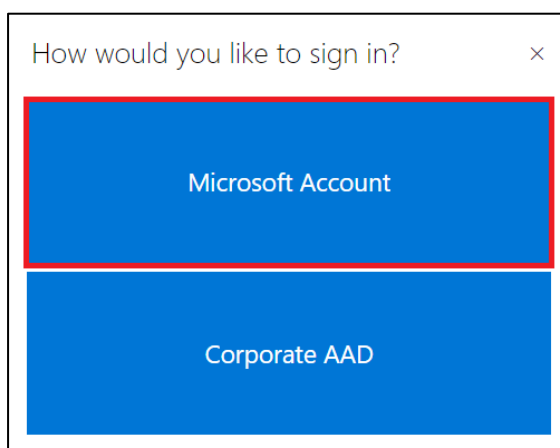
<https://aka.ms/lod>

2. Click **Sign In** button

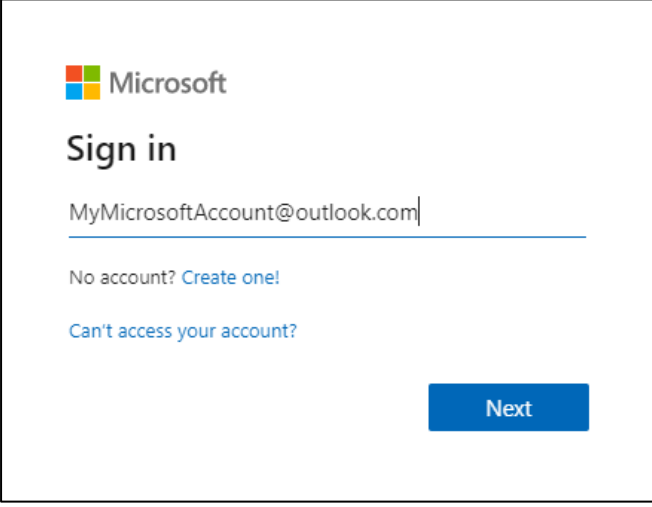


3. Choose **Microsoft Account** option

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

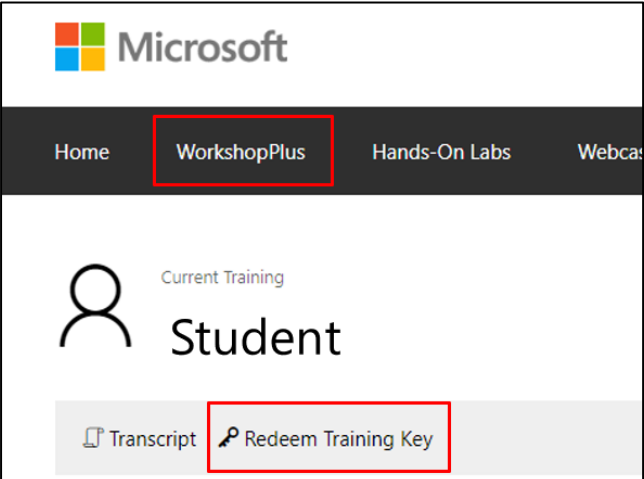


4. Sign in using your personal **Microsoft Account**



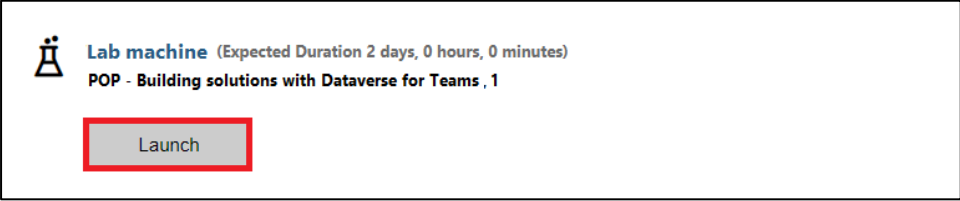
The image shows the Microsoft sign-in page. At the top is the Microsoft logo. Below it is the text "Sign in". There is a text input field containing "MyMicrosoftAccount@outlook.com". Below the input field are two links: "No account? Create one!" and "Can't access your account?". At the bottom right is a blue button labeled "Next".

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



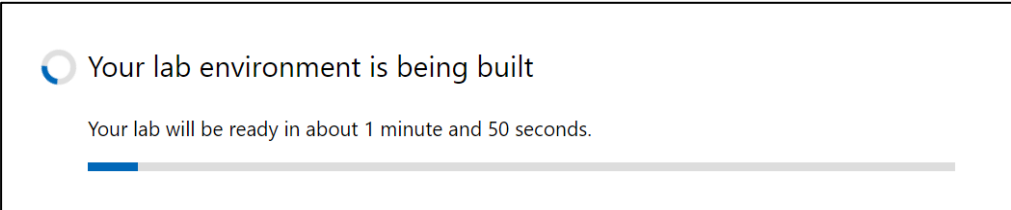
The image shows the Microsoft WorkshopPlus "My Training" page. At the top is the Microsoft logo. Below it is a navigation bar with links: "Home", "WorkshopPlus", "Hands-On Labs", and "Webcasts". The "WorkshopPlus" link is highlighted with a red box. Below the navigation bar is a section titled "Current Training" with a user icon and the text "Student". Below this is a row of buttons: "Transcript" and "Redeem Training Key". The "Redeem Training Key" button is highlighted with a red box.

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



The image shows a card for the "Lab machine" activity. At the top is a flask icon. To the right of the icon is the text "Lab machine (Expected Duration 2 days, 0 hours, 0 minutes)". Below this is the text "POP - Building solutions with Dataverse for Teams , 1". At the bottom is a button labeled "Launch", which is highlighted with a red box.

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



The image shows a loading screen for the lab environment. At the top is a circular progress indicator. To the right of the indicator is the text "Your lab environment is being built". Below this is the text "Your lab will be ready in about 1 minute and 50 seconds." and a progress bar.

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



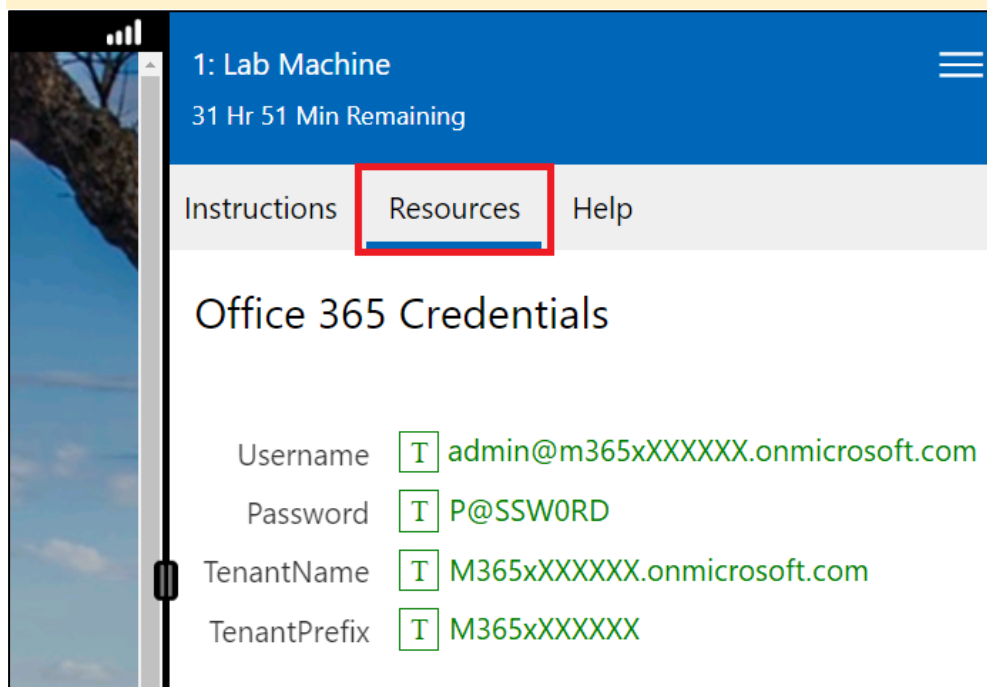
### Important – Office 365 Credentials

**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 M365XXXXXX URLs and Usernames in your lab docs, please, replace it with TenantPrefix of your lab tenant.**

**For example:** admin@M365XXXXXX.onmicrosoft.com should be replaced with the actual username provided in the Resources tab.



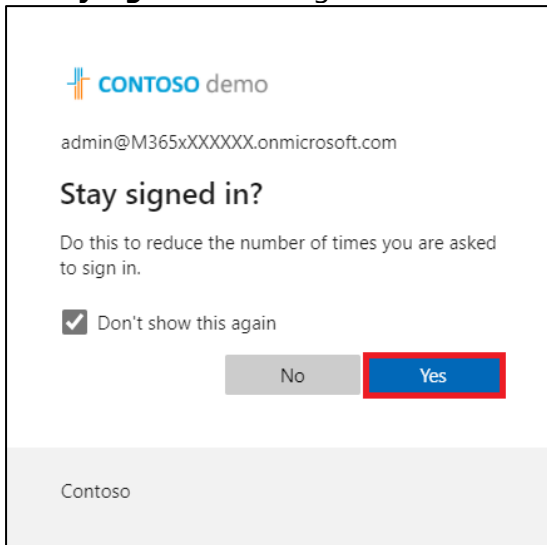
## Task 2: Connect to your hands-on labs Microsoft 365 tenant

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**:

The screenshot displays the Microsoft Office 365 login interface. The top section, titled 'Welcome to Office', includes a navigation bar with links like 'Products', 'Resources', 'Templates', 'Support', and 'More'. Below the navigation bar, there's a blue banner with the text 'Remote Learning in education. Learn more >'. The main heading is 'Welcome to Office', followed by the tagline 'Your place to create, communicate, collaborate, and get great work done.' Two buttons are present: 'Sign in' (highlighted with a red box) and 'Get Office'. Below these buttons is a link 'Sign up for the free version of Office >'. The bottom section is divided into two panels. The left panel, titled 'Sign in', shows the username 'admin@M365XXXXXXXX.onmicrosoft.com' entered in the text field (highlighted with a red box). Below the text field are links for 'No account? Create one!' and 'Can't access your account?'. A blue 'Next' button is at the bottom. The right panel, titled 'Enter password', shows a password field with masked characters (highlighted with a red box). Below the password field is a link 'Forgot my password'. A blue 'Sign in' button is at the bottom right. The footer of the right panel shows 'Contoso'.



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



The screenshot shows a dialog box titled "Stay signed in?" from a "CONTOSO demo" environment. The email address "admin@M365XXXXXX.onmicrosoft.com" is displayed. Below the title, it says "Do this to reduce the number of times you are asked to sign in." There is a checkbox labeled "Don't show this again" which is checked. At the bottom, there are two buttons: "No" and "Yes". The "Yes" button is highlighted with a red border. The footer of the dialog shows the "Contoso" logo.

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 M365XXXXXX with your actual lab tenant prefix.**

# Exercise 2:

## Set up a Dataverse for Teams environment

### Objectives:

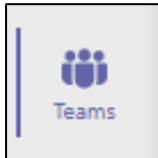
- Create a team
- Install and pin required Teams apps
- Provision a Dataverse for Teams environment
- Do initial Approvals provisioning

### Estimated time:

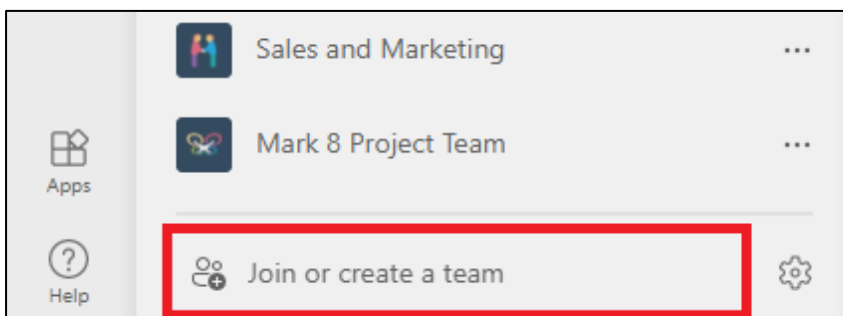
15 minutes

## Task 1: Create a Team

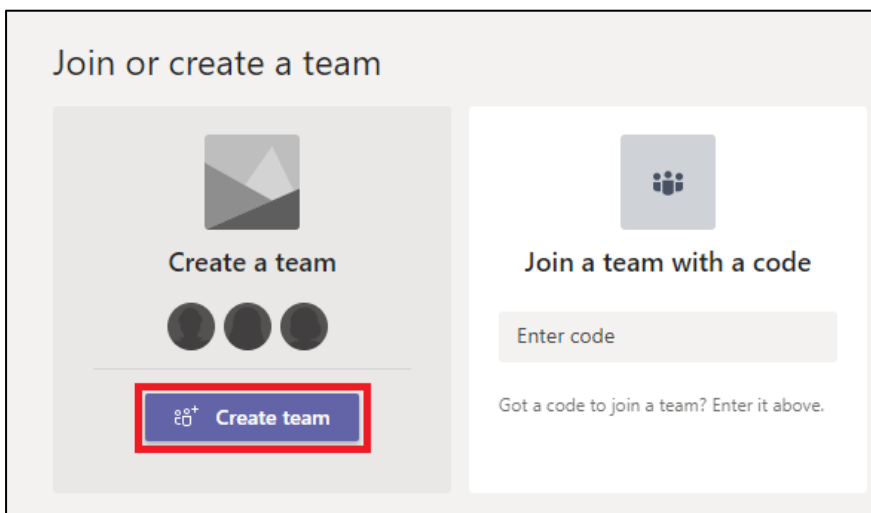
1. In **InPrivate/Incognito** browser mode, while logged in into your **M365XXXXXXX lab tenant**, navigate to <https://teams.microsoft.com>
2. Make sure that you have **Teams** selected on the left bar



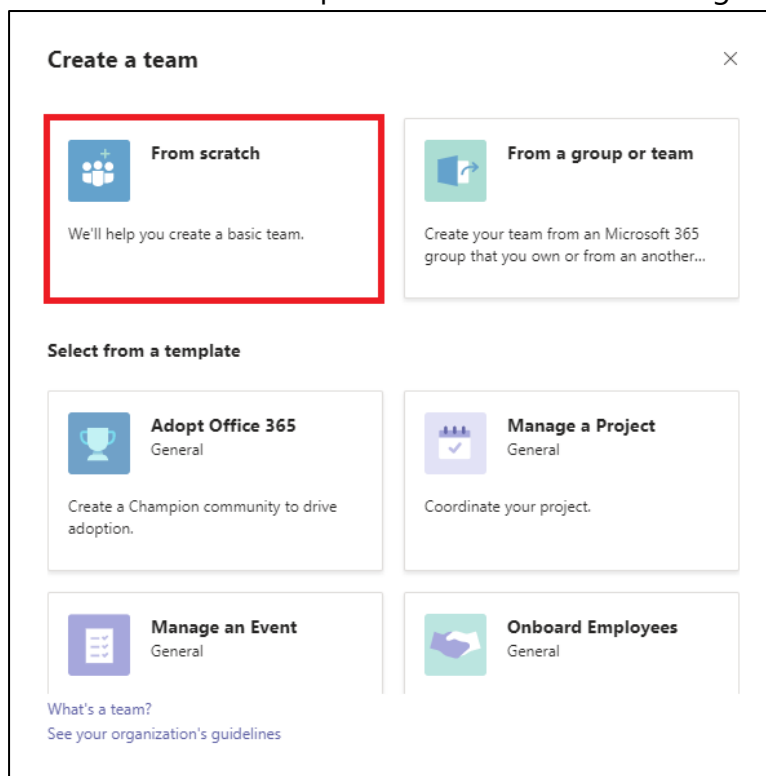
3. Click **Join or create a team** in the left bottom corner



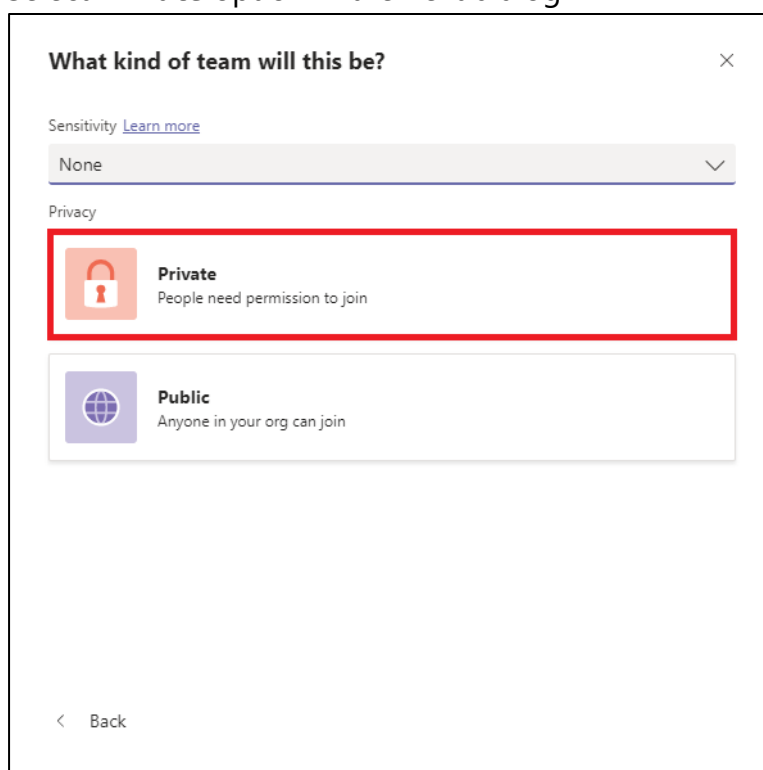
4. Click **Create team** button



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

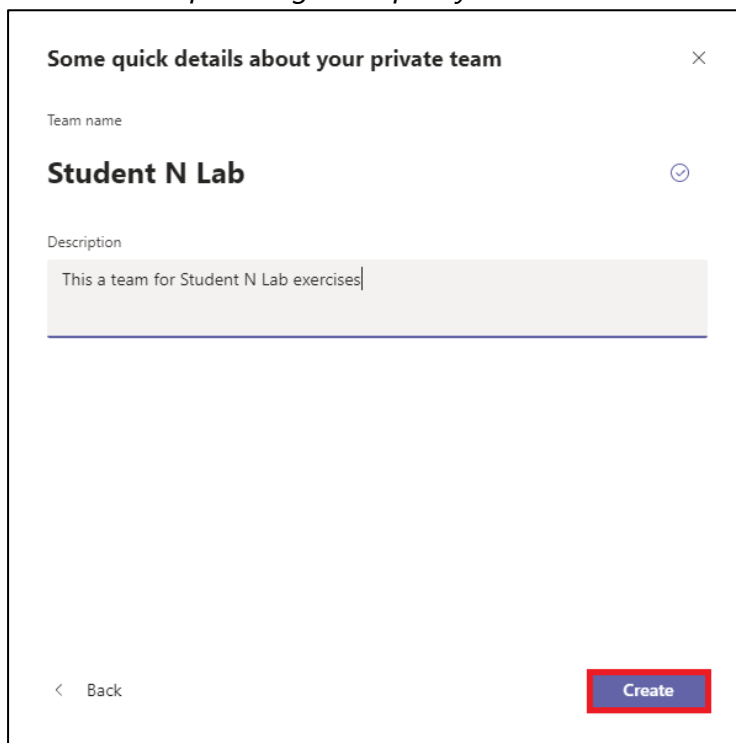


6. Select **Private** option in the next dialog



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.



Some quick details about your private team

Team name

**Student N Lab**

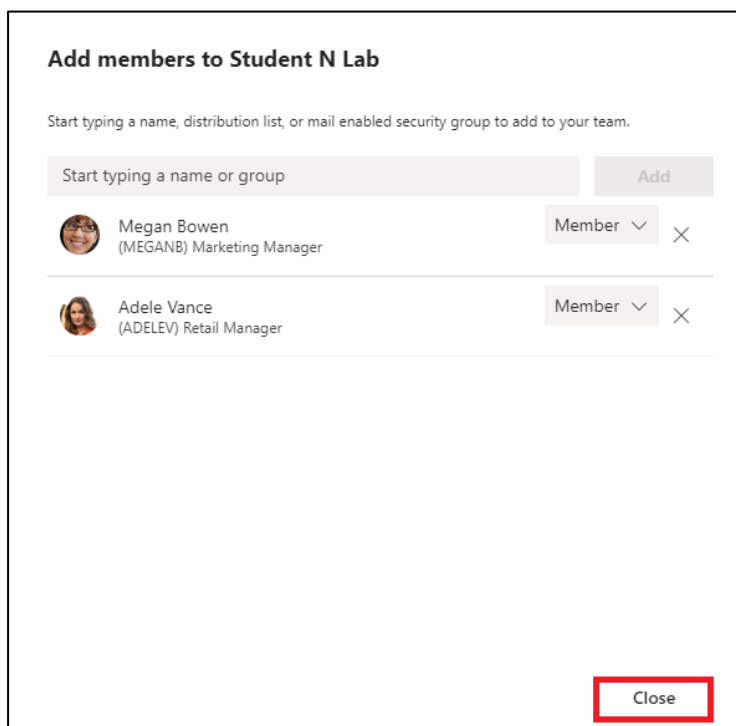
Description

This a team for Student N Lab exercises

< Back

Create

8. Add **Adele Vance** and **Megan Bowen** as team members, then click **Close**





Add members to Student N Lab

Start typing a name, distribution list, or mail enabled security group to add to your team.

Start typing a name or group

Add

	Megan Bowen (MEGANB) Marketing Manager	Member	×
	Adele Vance (ADELEV) Retail Manager	Member	×

Close

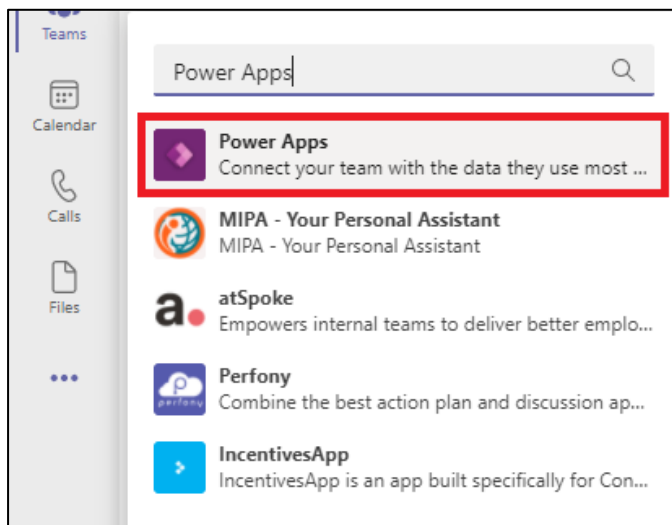
9. Task is completed.

## Task 2: Install and pin required Teams apps

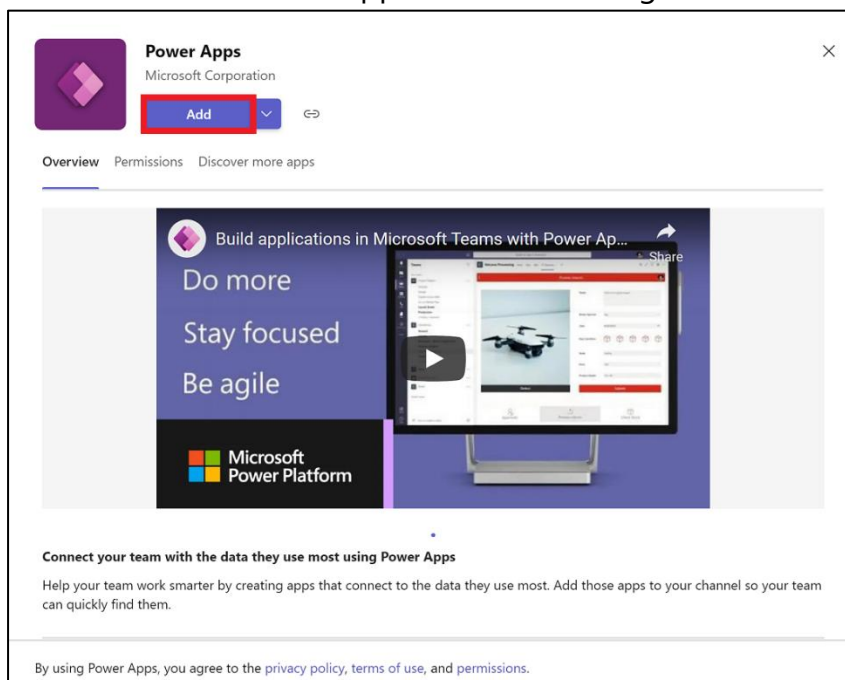
1. If Teams web app is not started yet, navigate to <https://teams.microsoft.com>
2. Select **ellipsis (...)** icon in the left bar



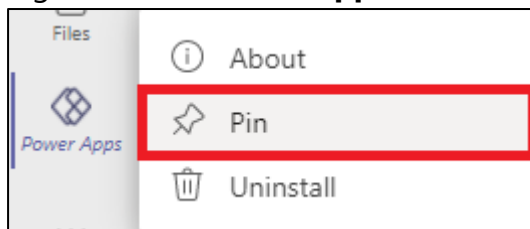
3. Type **"Power Apps"** in the "Find an app" prompt, then **click** on this app



4. Click **Add** button in the app installation dialog



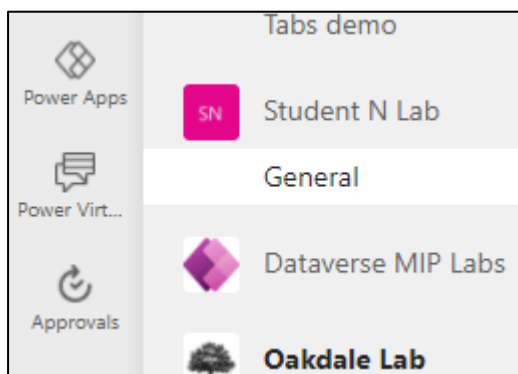
5. Right-click on **Power Apps** in the left bar and select **Pin**



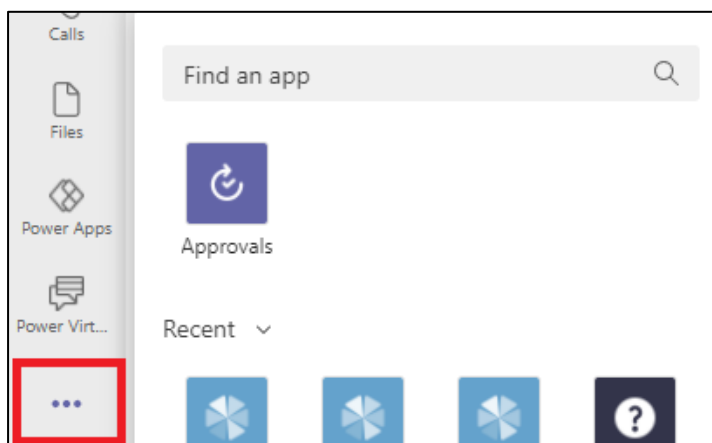
6. Repeat the same set of actions for the following apps:

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



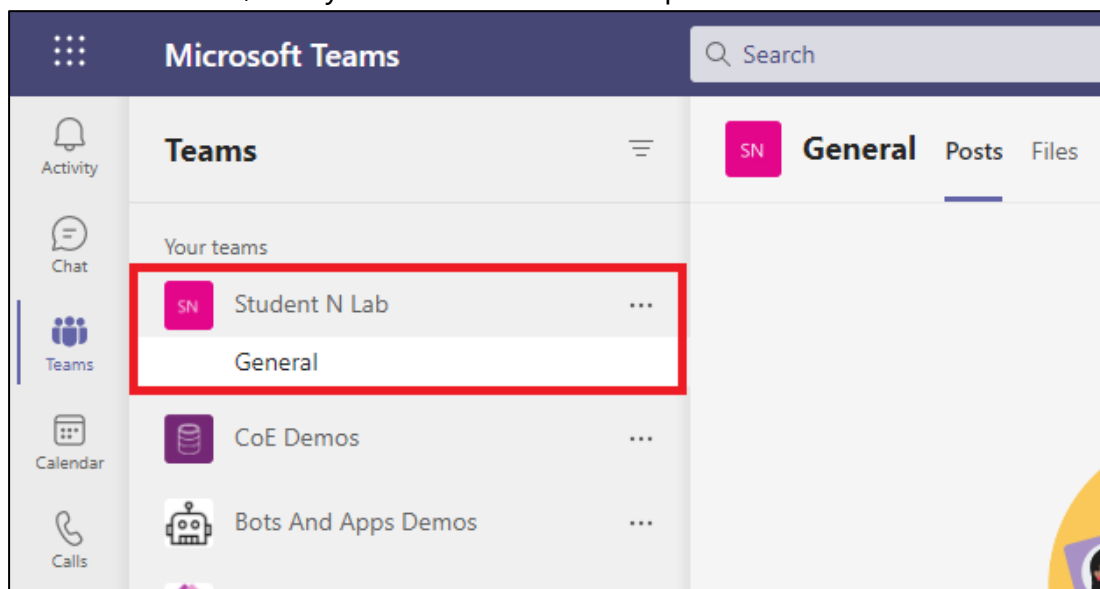
### Dataverse for Teams environments

Dataverse for Teams environment is a container connected to your Team, that can host Team's apps, flows, bots, and data tables.

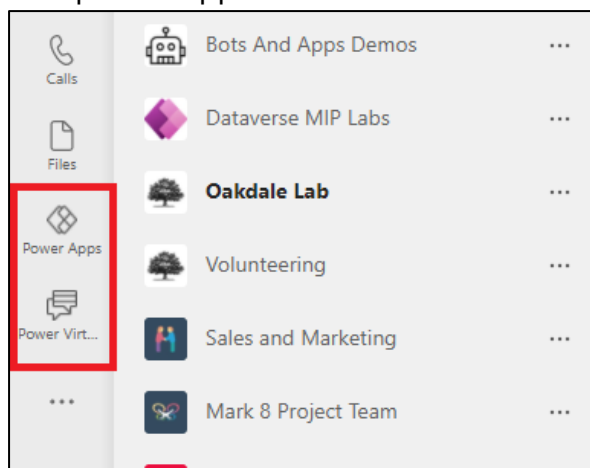
This environment is isolated from Power Platform's default productivity environment, where we usually work with apps and flows.

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

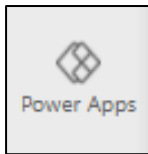


3. Find pinned app shortcuts in the left bar

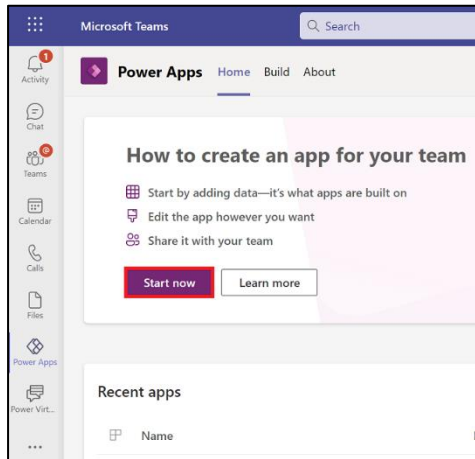




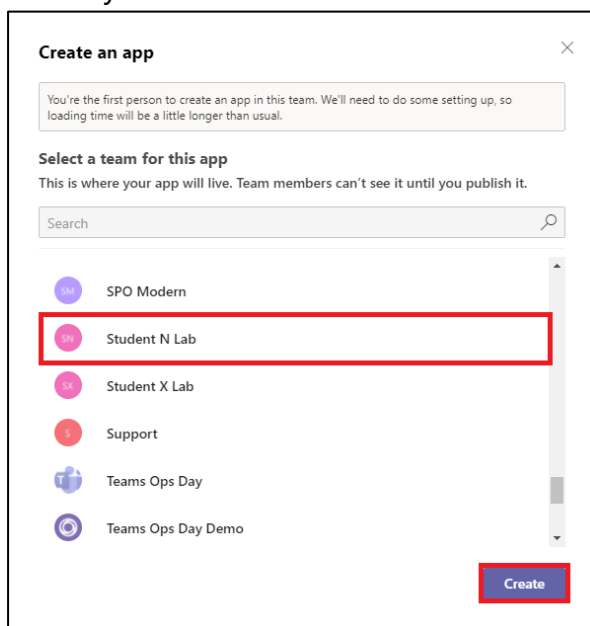
4. Select the **Power Apps** app



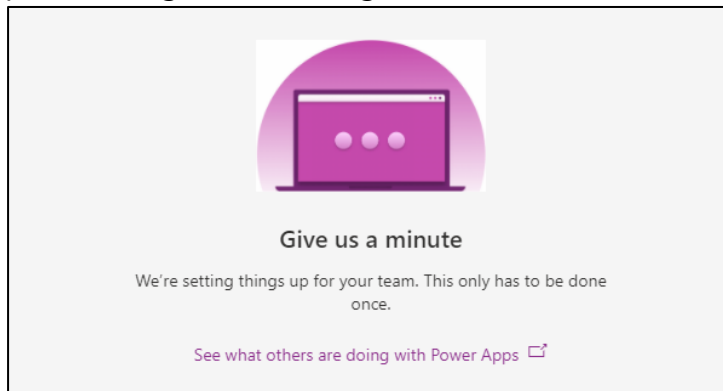
5. Click **Start now** on Power Apps home screen



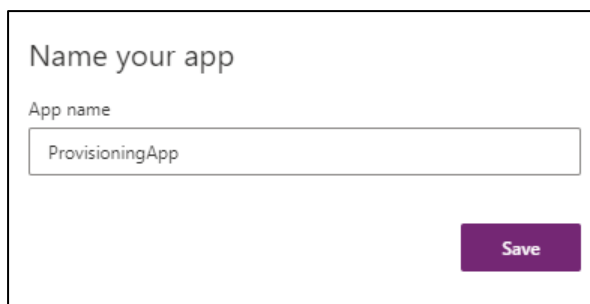
6. **Select** your team and click **Create**. Give it some time.



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.

A screenshot of the 'Name your app' form. The title 'Name your app' is at the top. Below it, the label 'App name' is positioned above a text input field. The input field contains the text 'ProvisioningApp'. At the bottom right of the form is a purple button labeled 'Save'.

**Task is completed.**

## Task 4: Approvals provisioning

### ! Why do Approvals need provisioning?

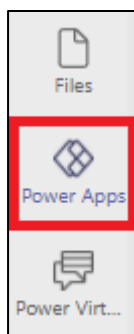
**Approvals** is a built-in application that uses Dataverse to store its data model. You may be familiar with this application, if you have ever created any flows and apps, that use Approvals connector.

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.

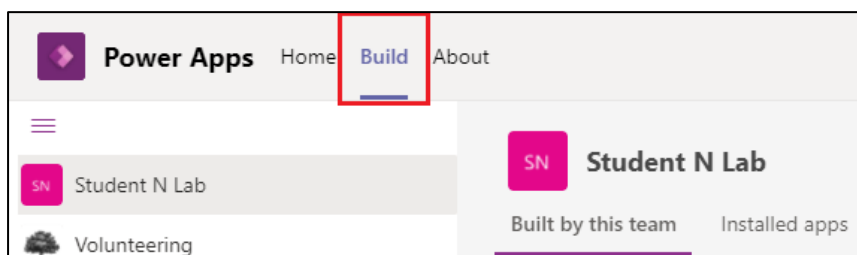
It may take some time, that's why we will start it right in the first lab.

More info: [Power Automate Approvals Provisioning Overview and Troubleshooting \(microsoft.com\)](https://docs.microsoft.com/en-gb/power-apps/developer/app-model/permissions-overview)

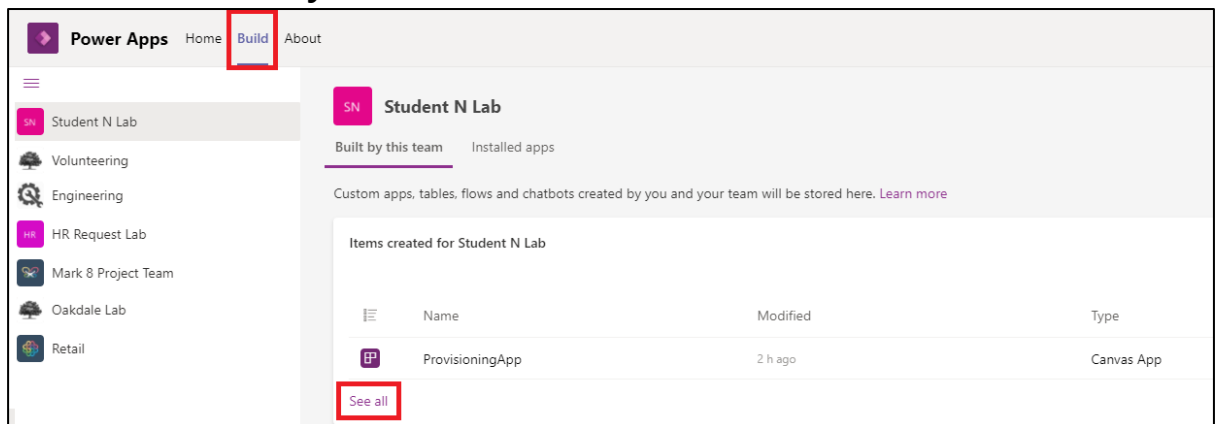
1. Open **Power Apps** app using the left bar



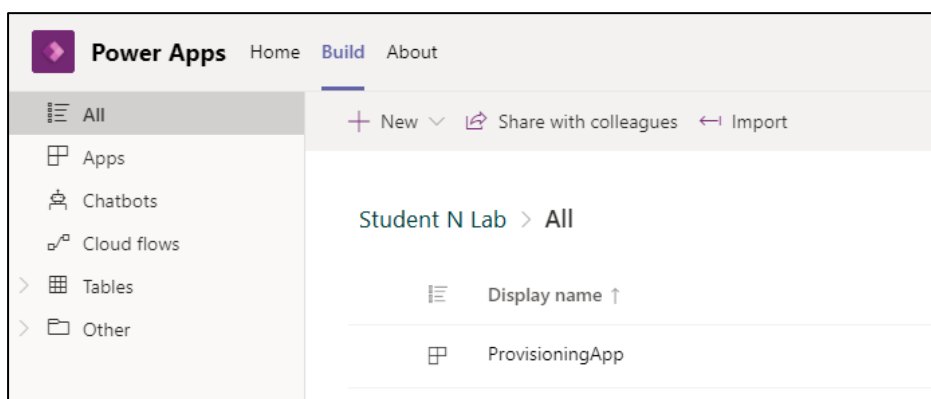
2. Select **Build** tab, then find and select your Team



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

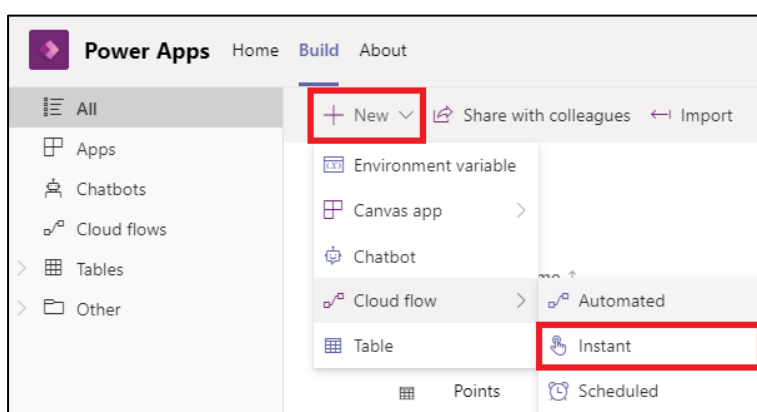


4. In this interface, you can see all the content created in your Team's **Dataverse for Teams** environment:



We will use this interface as the starting point in many lab tasks later.

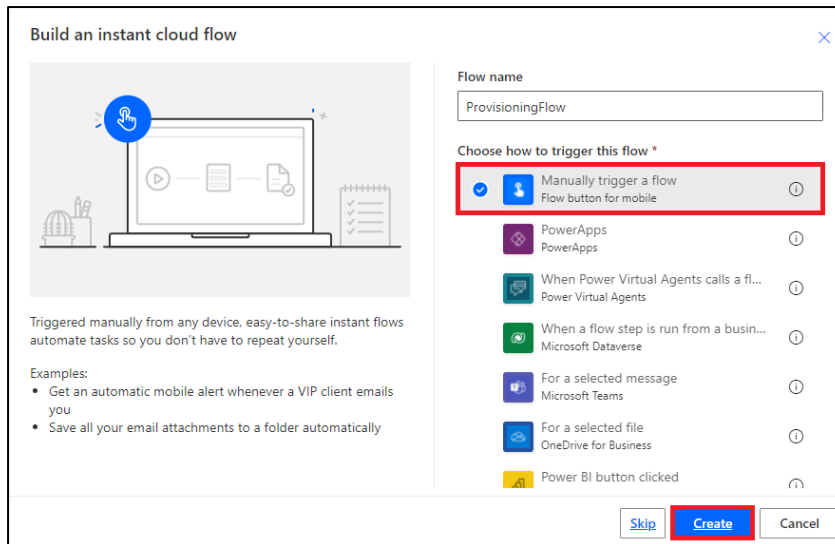
5. To create a new flow, click **+New -> Cloud Flow -> Instant**



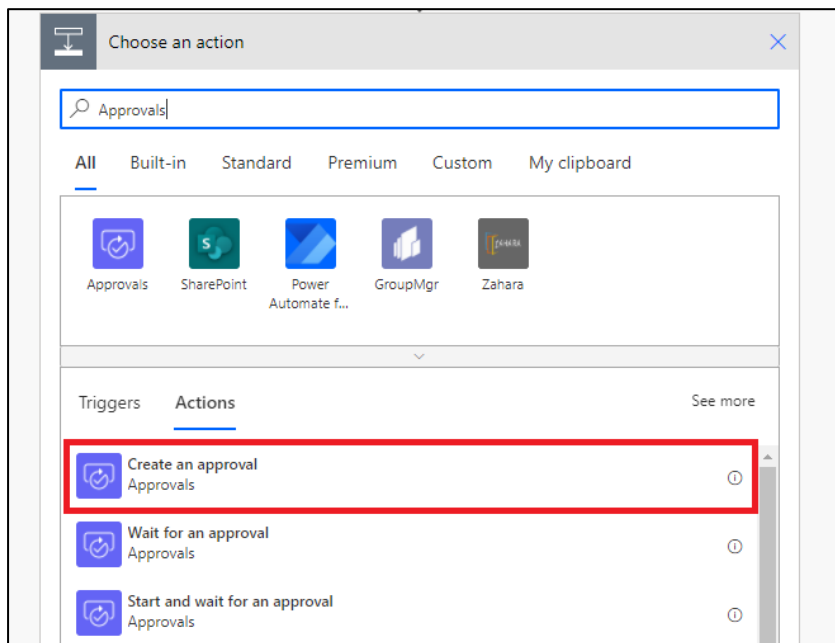
6. Set **Flow name** as *ProvisioningFlow*

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@m365XXXXXX.onmicrosoft.com  
(replace m365XXXXXX with your actual Tenant Prefix)
  - Details:** any text

See an example on screenshot below.

Manually trigger a flow

Create an approval

\* Approval type: Approve/Reject - First to respond

\* Title: ProvisioningFlow

\* Assigned to: admin@m365xXXXXX.onmicrosoft.com

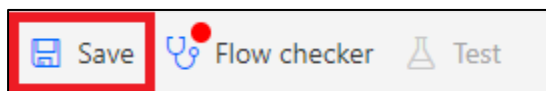
Details: any text

Item link: Add a link to the item to approve

Item link description: Describe the link to the item

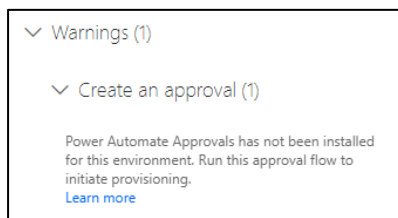
Show advanced options

9. **Save** a flow



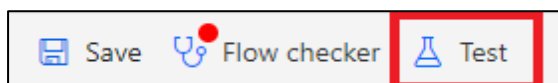
Notice that **Flow checker** has a warning, if you click on it, you should see the following:

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

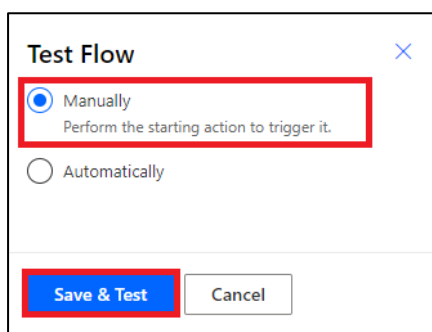


This is the exact reason of why we are creating this ProvisioningFlow.

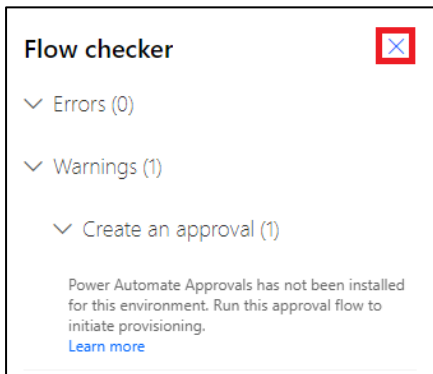
10. After the flow is saved, click **Test** button



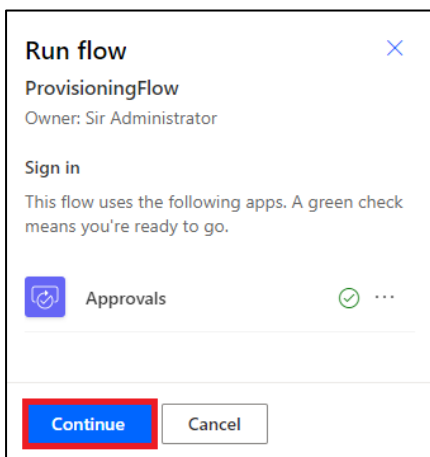
11. Select **Manually** option and click **Save & Test** button to start a test flow run.



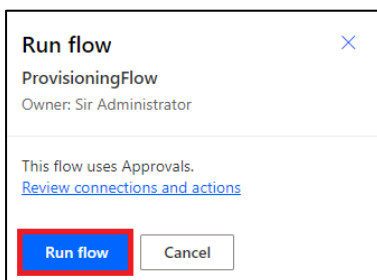
12. **Flow checker** may show the warning once again. If it happens, just close it.



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



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



**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.**