

Dataverse for Teams in a Day

Lab 00

Overview and Attendee Prerequisites

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Lab Overview & Learning Objectives

Dataverse for Teams in a Day is beginner-friendly training where you will explore how to build databases, apps, workflows, chatbots, and reports for Microsoft Teams, using low code Power Platform tools.

Throughout the training you'll be completing hands-on labs where you will learn how to:

- Create a relational database (Dataverse for Teams) to store your data in Teams
- Create apps in Teams with Power Apps
- Use Power Automate in Teams
- Build your own Power Virtual Agent chatbot in Teams
- Connect your Dataverse tables to Power BI to build and share reports
- Use and configure sample apps available in Teams
- Collaborate and engage with solutions built by others

Lab Scenario

Labs 01-04 take you through building a solution for Microsoft Teams to manage a home office setup process for the employees of fictional organization, Contoso. You will use the Power Platform tools in teams to manage and approve asset requests from employees with an app and a bot:

- Employees use an app or chatbot in Teams to request equipment for their home office setup
- Data about available assets and requests is stored in Dataverse for Teams
- Requests are approved or rejected in Teams and the employee receives a notification
- A report shows insights/trends about the requests

Lab Structure

The lab is divided into 7 modules, with one lab document provided for each module.

- **Lab 00- Overview & Attendee Prerequisites:** You will be installing the Power BI Desktop application and signing up for a trial tenant. **Signing up for a trial tenant is NOT required if you are completing the training with a group, and the instructor has already provided you with a login for the labs.**
- **Lab 01- Power Apps for Teams:** You will build an app for Microsoft Teams that allows employees to request equipment for their home-office set up. Power Apps is a low-code/no-code tool used to build your own custom business applications using drag and drop functionality.

You will see how Microsoft Dataverse for Teams can be used to build out your own data model and store data. From the data model you create, you will build an app using Power Apps, which gives users a front-end interface to perform a task and interact with data. You will start by creating a Dataverse instance with tables relating to the home-office equipment ordering scenario. The tables will store details of the available assets for order, then you will build an app which employees can use to submit their asset requests.

- **Lab 02- Power Automate for Teams:** You will be working with the Power Automate app for Microsoft Teams, to automate approvals and notifications. Power Automate enables users to make their workday easier by automating routine tasks and processes, with trigger and action style flows.
- **Lab 03- Power Virtual Agents for Teams:** Power Virtual Agents is available as an app in Microsoft Teams, enabling you to create an internal chatbot. You will be adding the Power Virtual Agents app to Microsoft Teams, and creating a chatbot for the employees of Contoso to get information about frequently asked questions for home office setup, and to use the bot to request home office assets. The chatbot will be able to submit an asset request on behalf of the user, and you will see the request in the same Dataverse for Teams table that you created in Lab 01.
- **Lab 04- Power BI for Teams (Optional):** **Please note that this lab is optional since it requires use of Power BI Desktop.** You will be using Power BI to connect to your Microsoft Dataverse tables, to build a report about the home office set up asset requests. Power BI is the tool that allows you get insights from your data by building interactive reports and dashboards. The Power BI app in Microsoft Teams allows team members to view and collaborate on reports and dashboards from within the Teams interface. The Power BI app contains the same features as Power BI Service. Power BI Service contains a basic range of tools for building and editing reports.
- **Lab 05- Sample Apps:** **This lab is standalone and has no impact on the Home Office Setup scenario built in the previous labs.** In this lab, you will explore the sample apps available in Microsoft Teams, and you will install and customize the Issue Reporting sample app. Sample apps are pre-built apps for a particular use case and are available in the Teams store. Sample apps allow you to get started quickly and can be customized and extended using any part of the Power Platform to suit your business requirements.
- **Lab 06- Collaboration Exercise:** This will be done as a group and your course instructor will introduce you to this exercise. In this lab, you will see how all the tools you have built in the previous labs come together as a complete solution in Microsoft Teams. You will invite others into your team (and join other teams) for a fun collaboration exercise. For this exercise, it is suggested (but not critical) to have completed the app in Lab 01, flows in Lab 02, chatbot in Lab 03 and optionally the Power BI report in Lab 04.

Completed solutions

Your attendee material contains completed solution files for the Home Office Set Up solution. You only require these if you wish to import the built solution rather than build it from scratch, as demonstrated in the labs.

Prerequisites

The estimated time to complete this lab is 30 minutes.

In these prerequisites, you will be installing the Power BI Desktop application and signing up for a trial tenant with Office 365 E5 license..

Power BI Desktop is required in order to complete Lab 04- Power BI for Teams (Optional). **This is an optional lab. If you are unable to install Power BI Desktop or access a Power BI Pro license, you can skip Lab 04: Power BI for Teams.**

*Part 2 of these prerequisites, **Set up a tenant**, is only required if you are completing the Dataverse for Teams labs individually, and not as part of a training group. **If you are attending a Dataverse for Teams training session with an instructor, the instructor will be providing you with a trial account to use to complete the labs.***

*If you are completing the training individually and without a group/trainer, only then do you need to complete the **Set up a Tenant** prerequisite in this lab.*

Install Power BI Desktop (Optional)

In Lab 04, you will be required to use the Power BI Desktop application. You will need to install it on your device. See below on how to download and install Power BI Desktop if you do not already have it.

If you are unable to install Power BI Desktop, you can skip Lab 04: Power BI for Teams since it is an optional part of the training.

Device Requirements

- You must have, at minimum, a computer with 2-cores and 4GB RAM running Windows 8, Windows Server 2008 R2, or later.

Download and Install Power BI Desktop

- If you have Windows 10, use Microsoft App Store to download and install the Power BI Desktop app.
- Download and install the Microsoft Power BI Desktop from <http://www.microsoft.com/en-us/download/details.aspx?id=45331>

Set up a Tenant

If you are completing the training individually and without a group/trainer, will you need to complete the prerequisites below.

If you are attending a Dataverse for Teams in a Day training session with a trainer, the trainer will be providing you with a trial account to use to complete the labs. You do not need to complete any more of the prerequisites in this lab.

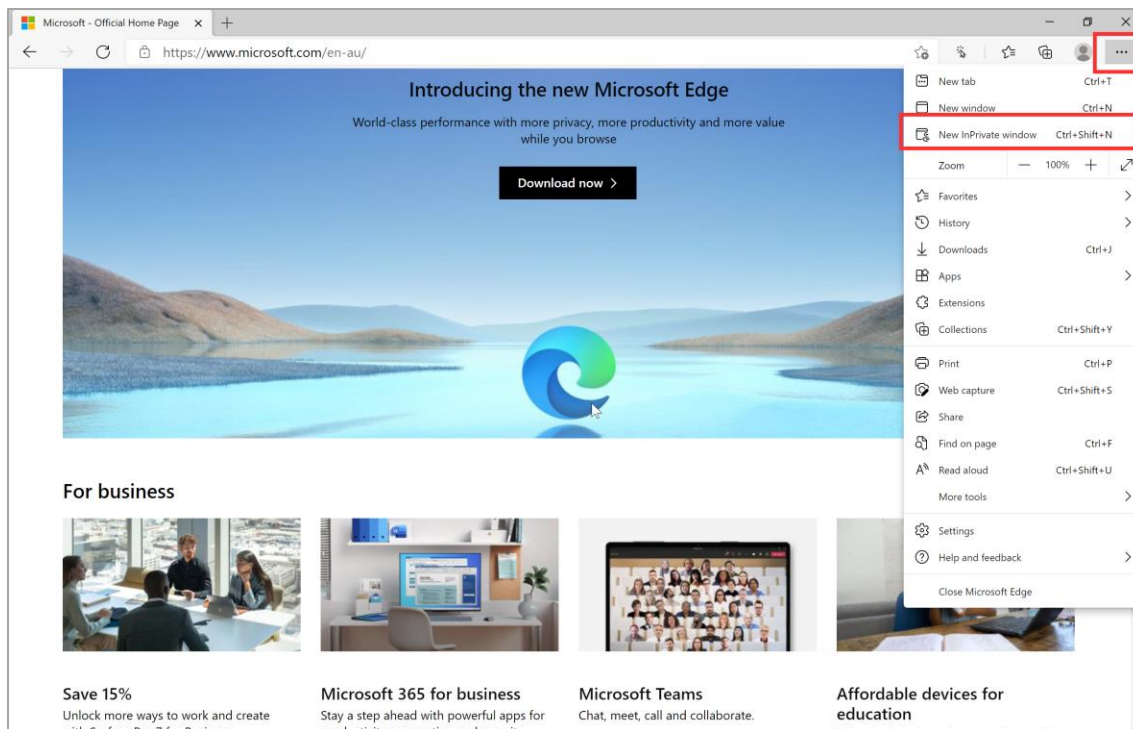
Task 1: Create a Trial Tenant

Follow the instructions below to sign up for a free trial.

1. Open a private browser

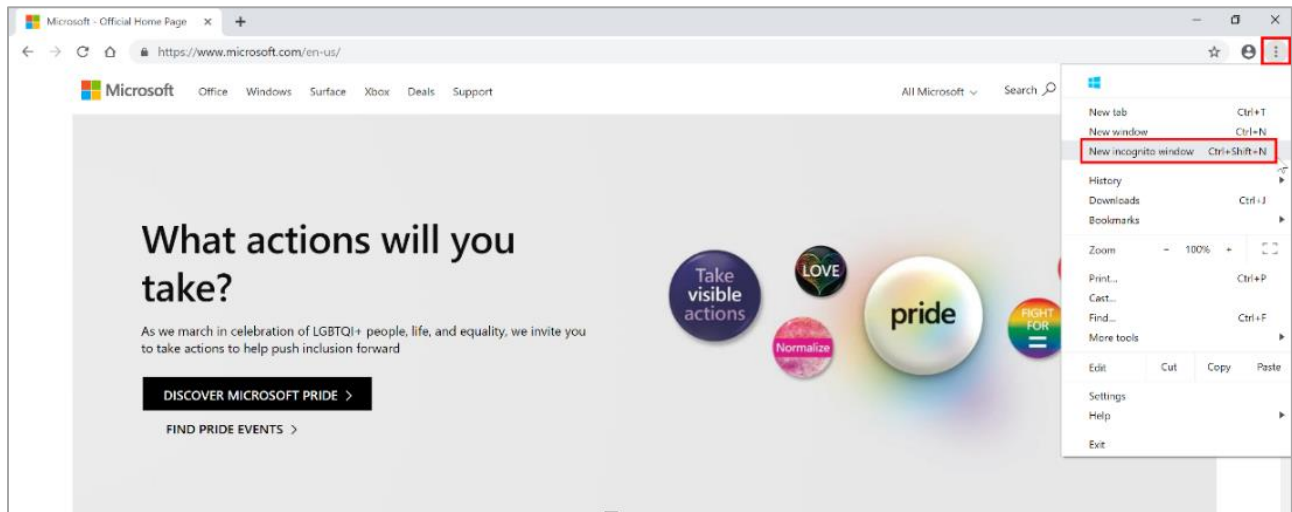
If you're in Edge, open a New InPrivate Window.

- I. To open a New InPrivate Window in Edge: click ...
- II. Then, select New InPrivate Window.

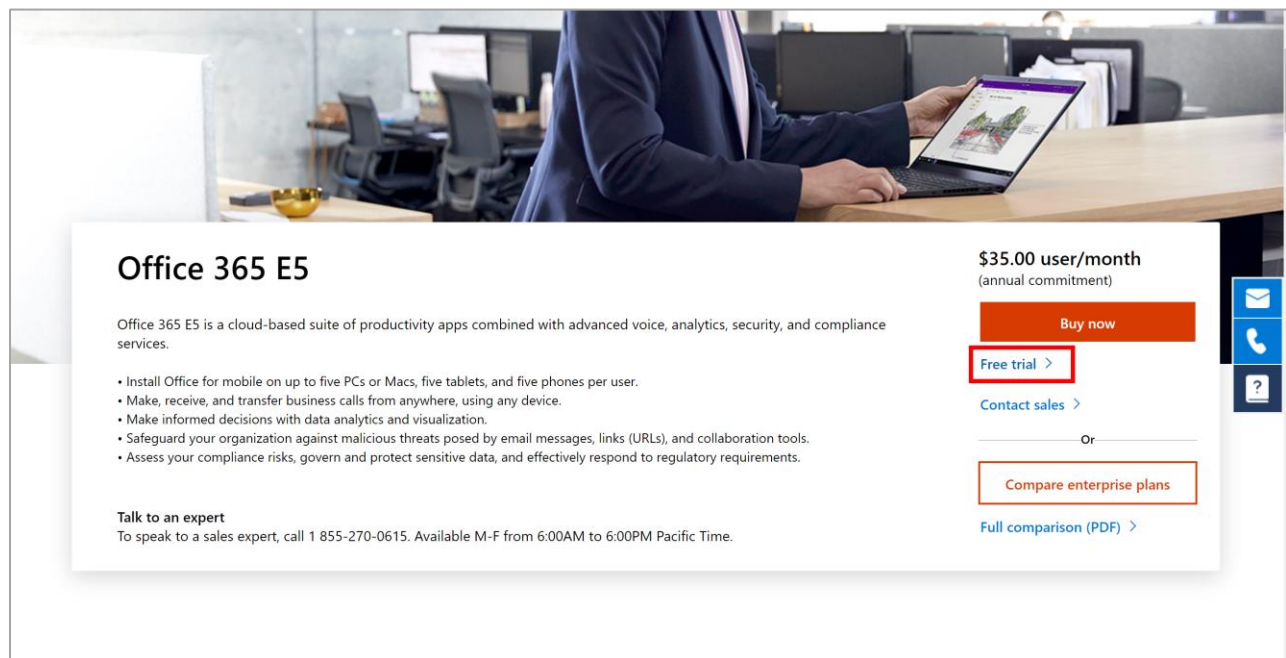


If you're in Chrome, open a New Incognito Window.

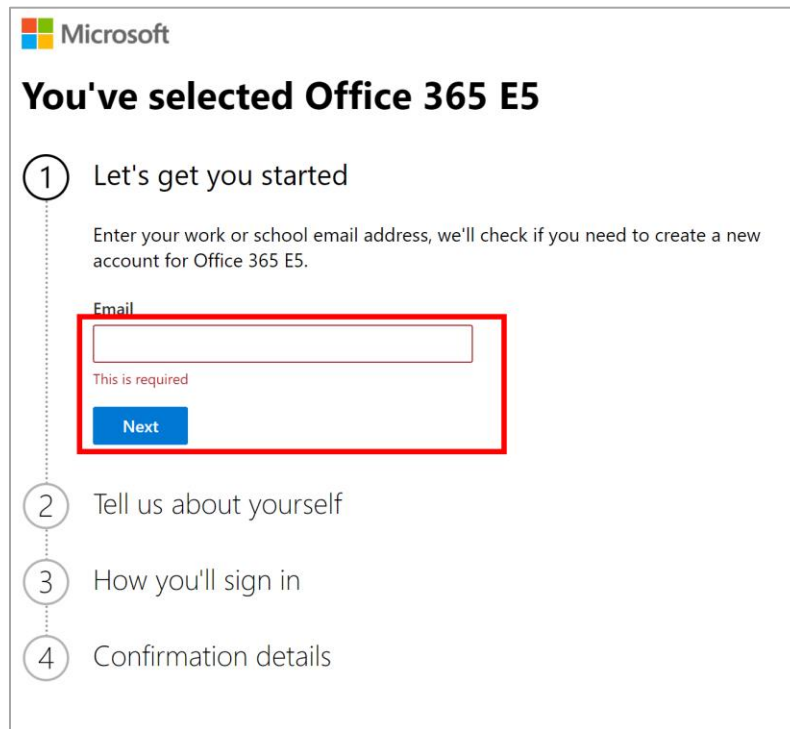
- I. To open New Incognito Window in Chrome: click ⋮
- II. Then, select New Incognito Window.



2. In your private browser, navigate to <https://www.microsoft.com/en-us/microsoft-365/enterprise/office-365-e5>. Select **Free Trial** to navigate to trial sign up page.



3. Enter your work email address and click **Next**.



Microsoft

You've selected Office 365 E5

- 1 Let's get you started
- 2 Tell us about yourself
- 3 How you'll sign in
- 4 Confirmation details

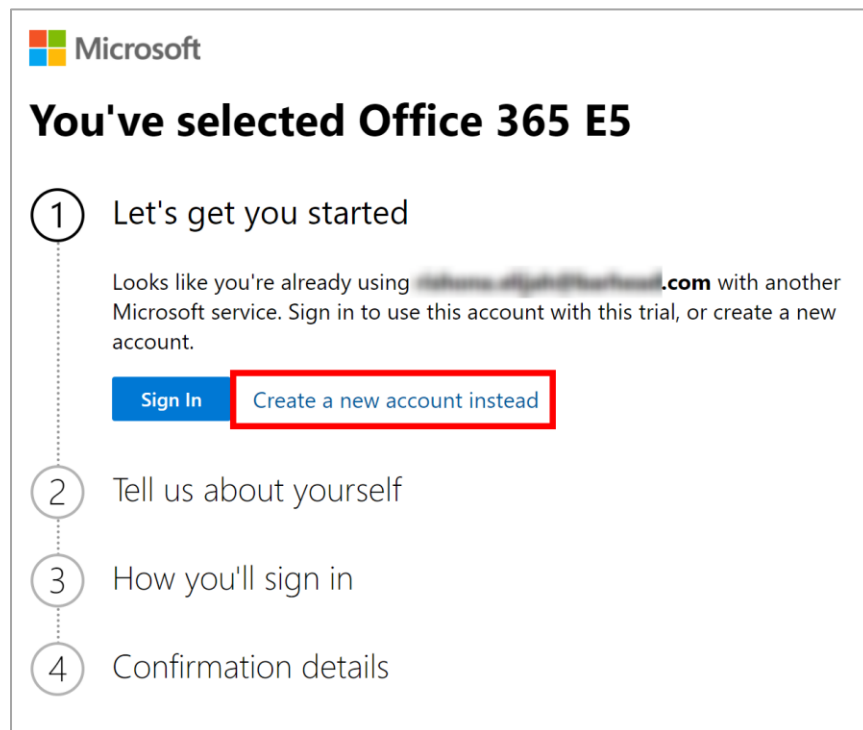
Enter your work or school email address, we'll check if you need to create a new account for Office 365 E5.

Email

This is required

Next

4. Click **Set up account**. If it prompts you to sign in at this stage, select the option **Create a new account instead**.



Microsoft

You've selected Office 365 E5

- 1 Let's get you started
- 2 Tell us about yourself
- 3 How you'll sign in
- 4 Confirmation details

Looks like you're already using [redacted] with another Microsoft service. Sign in to use this account with this trial, or create a new account.

Sign In Create a new account instead

5. Fill in your information and click **Next**.

1

Let's get you started

2

Tell us about yourself

First name

Admin

Middle name (Optional)

Last name

Teams

Business phone number

2066666666

Company name

Contoso

Company size

10-24 people

Country or Region

United States

Next

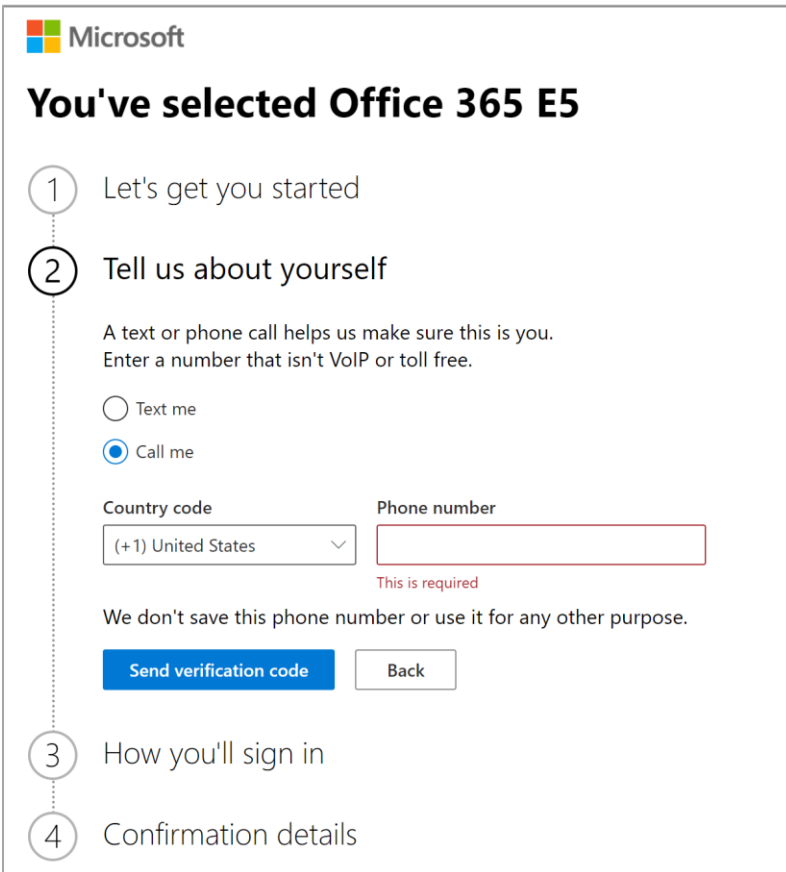
3

How you'll sign in

4

Confirmation details

6. You'll be asked to verify your identity using either phone call or text message. Follow the directions and confirm your identity by entering your phone number, and then entering the verification code you receive.



The image shows a Microsoft verification screen for Office 365 E5. It features a progress bar on the left with four steps: 1. Let's get you started, 2. Tell us about yourself (current step), 3. How you'll sign in, and 4. Confirmation details. The main heading is 'You've selected Office 365 E5'. Below the progress bar, step 2 is expanded, showing instructions: 'A text or phone call helps us make sure this is you. Enter a number that isn't VoIP or toll free.' There are two radio buttons: 'Text me' (unselected) and 'Call me' (selected). Below these are two input fields: 'Country code' with a dropdown menu showing '(+1) United States' and a 'Phone number' field. A red error message 'This is required' is displayed below the phone number field. At the bottom of the form, there is a blue button labeled 'Send verification code' and a white button labeled 'Back'. A disclaimer states: 'We don't save this phone number or use it for any other purpose.'

Microsoft

You've selected Office 365 E5

- 1 Let's get you started
- 2 Tell us about yourself

A text or phone call helps us make sure this is you.
Enter a number that isn't VoIP or toll free.

☐ Text me
☒ Call me

Country code: (+1) United States Phone number:

This is required

We don't save this phone number or use it for any other purpose.

[Send verification code](#) [Back](#)
- 3 How you'll sign in
- 4 Confirmation details

7. In the Create your business identity section, fill in information for an administrator user and select your tenant domain.

The tenant domain must be unique.

8. Click **Check availability**.

③ How you'll sign in

● ●

To set up your account, you'll need a domain name. [What is a domain?](#)

You'll probably want a custom domain name for your business at some point. For now, choose a name for your domain using **onmicrosoft.com**.

teamsandpp .onmicrosoft.com

Check availability Next

④ Confirmation details

9. Click **Next** if the custom domain name is available.
10. You will next need to create your user ID and password to sign in to your account. Fill out a username and password, then click **Sign Up**.

③ How you'll sign in

● ●

Now create your username and password to sign in to your account.

Username

admin @ .onmicrosoft.com

Password

.....

Confirm password

.....

By selecting **Sign up**, you agree to our [trial agreement](#).

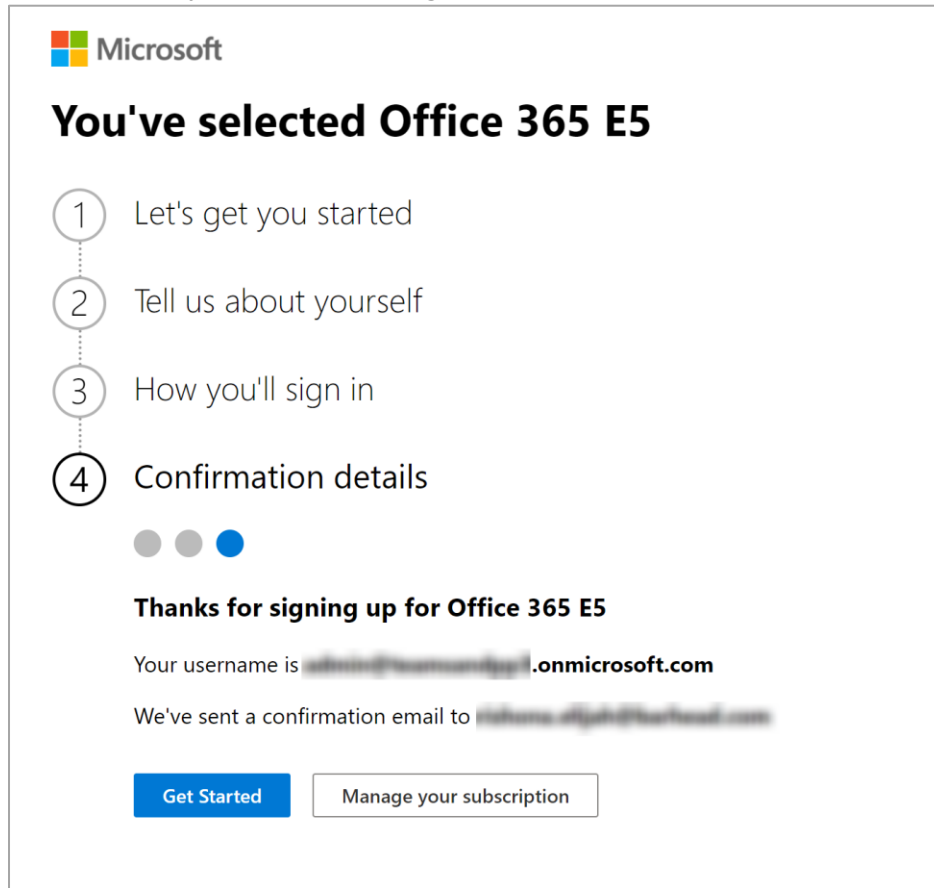
I understand that Microsoft may contact me about my trial.

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 select partners so I can receive relevant information about their products and services. [Privacy Statement](#).

Sign up Back

11. Wait while the tenant is created. It usually takes less than 1 minute. Take note of the login details you have just created as you will be creating users within this tenant.



Summary

In this lab, you have installed Power BI Desktop application. If you are completing the training as an individual, you have also created a trial tenant with Office 365 E5 to work in.

Lab Survey

We would appreciate your feedback on this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience. Please use the survey at <https://aka.ms/TeamsPPSurvey> to share your feedback. You may provide feedback for each module as you complete it or at the end once you've completed all the modules. Thank you!

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