

Dataverse for T in a Day

December 1, 2021

REMOVE THIS COMMENT BEFORE TEACHING
Enter your name and company

Instructor introduction

REMOVE THIS COMMENT BEFORE TEACHING
Enter your name and bio details

Course aim

This course aims to teach you how to build databases, apps, workflows, chatbots, and reports for Microsoft Teams, using low code Power Platform tools.

Course aim

Prerequisites

- This course has been designed for beginners, with no prior experience of app building or working with Power Platform
- Some familiarity with Microsoft Teams is assumed

Course modules

Introduction

Customer Stories

01: Power Apps for Teams

02: Power Automate for Teams

03: Power Virtual Agents for Teams

04: Power BI for Teams

05: Sample Apps

06: Collaboration Game

Course Close

Labs



- 01: Power Apps for Teams 70 minutes
- 02: Power Automate for Teams 60 minutes
- 03: Power Virtual Agents for Teams 60 minutes
- 04: Power BI for Teams (Optional) 70 minutes
- 05: Sample apps 30 minutes
- 06: Collaboration exercise 20 minutes

Agenda

Time	Length	Module	Topic	Type
9:00	25 minutes	Overview	Introduction	Presentation
9:25	15 minutes	Module 1: Dataverse and Power Apps for Teams	Power Apps for Teams and Lab Demo	Presentation
9:40	70 minutes		Lab 01: Power Apps for Teams	Lab
10:50	10 minutes		Break	
11:00	15 minutes	Module 2: Power Automate for Teams	Power Automate for Teams and Lab Demo	Presentation
11:15	60 minutes		Lab 02: Power Automate for Teams	Lab
12:15	40 minutes		Lunch	
12:55	15 minutes	Module 3: Power Virtual Agents for Teams	Power Virtual Agents for Teams and Lab Demo	Presentation
13:10	60 minutes		Lab 03: Power Virtual Agents for Teams	Lab
14:10	15 minutes	Module 4: Power BI for Teams	Power BI for Teams and Lab Demo	Presentation
14:25	70 minutes		Lab 04: Power BI for Teams (Optional)	Lab
15:35	10 minutes		Break	
15:45	15 minutes	Module 5: Sample Apps	Deploy and Customize Sample Apps and Lab Demo	Presentation
16:00	30 minutes		Lab 05: Sample Apps	Lab
16:30	20 minutes	Module 6: Collaboration Game	Lab 06: Collaboration Exercise	Group Activity
16:50	10 minutes	Closing	Closing	Wrap up

Dataverse for Teams in a Day Survey

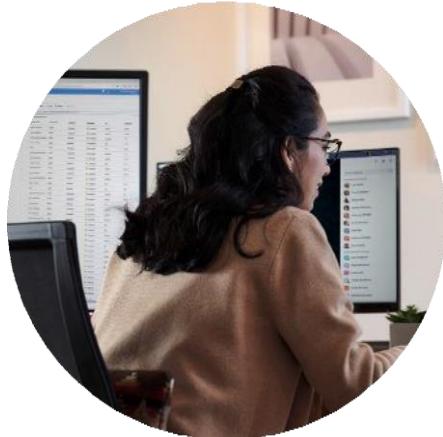
Please complete our survey at the end of this training, share your insights to improve the training and allow us to keep updating

<https://aka.ms/TeamsPPSurvey>

Dataverse for Teams in a Day

Introduction

Challenges transforming the way we work



Every business is a
digital business



Workforce has new
expectations



Pressure on IT budget
& resources



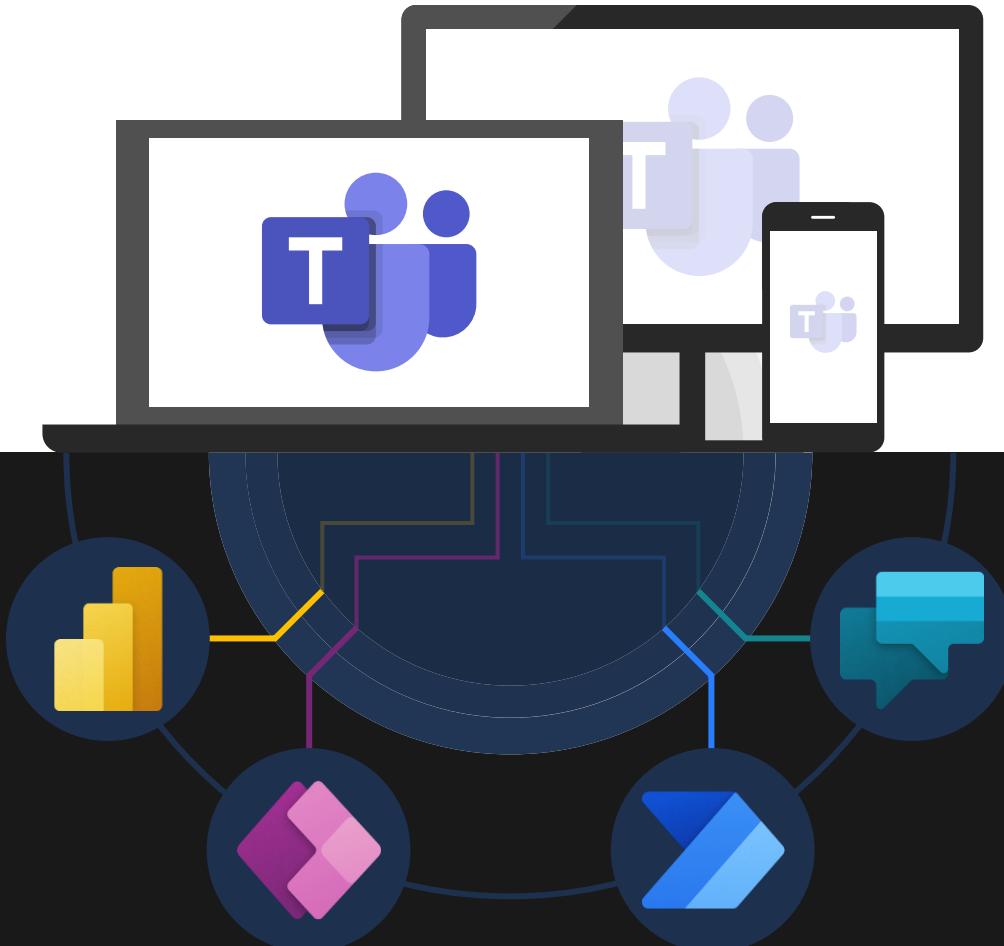
Shortage of pro
fessionals

Remote workplace meets digital transformation tools

Microsoft Teams

Platform for teamwork

Chat, collaboration, meetings, calling, and app integrations for **75M+** daily active users, and more than **5B** meeting minutes generated in a single day.



Microsoft Power Platform

Low-code business applications

Used by **97% of the Fortune 500** to accelerate internal app development and empower citizen developers to build custom line of business solutions.

Simplify work with Microsoft Teams Platform

Microsoft Teams integrations

Ready-made apps



+ hundreds of partner apps

Low-code apps & workflows
(Power Platform)

Power Apps



Build custom apps

Power Automate



Automate repetitive tasks

Power Virtual Agents



Create tailored chatbots

Power BI

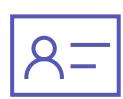


Visualize and discuss data

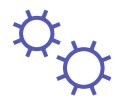
Full-code custom solutions



Departmental tools



Employee resources



Processes and workflow



Support and info

Depth of coding required

Extend Teams with low-code Power Platform tools



Power Apps

Create custom apps



Power Automate

Automate intelligent workflows



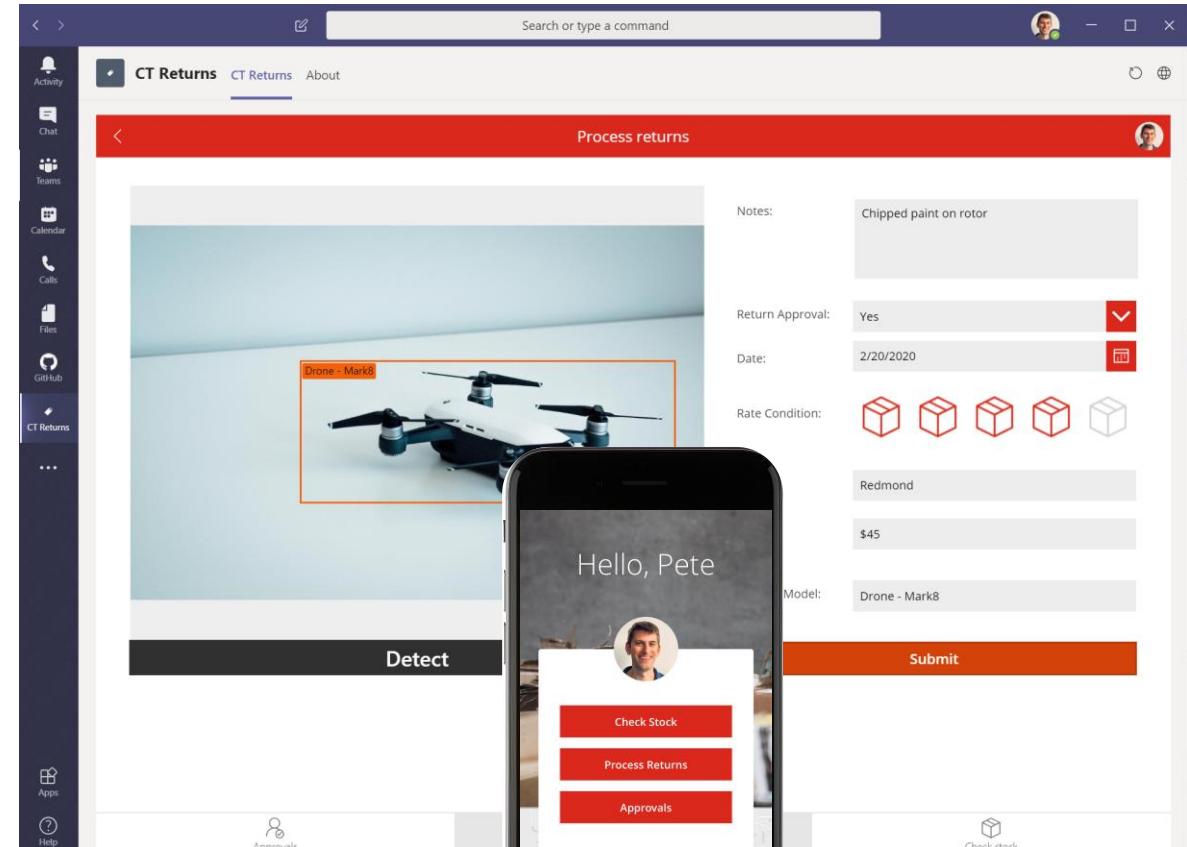
Power Virtual Agents

Build low-code chatbots



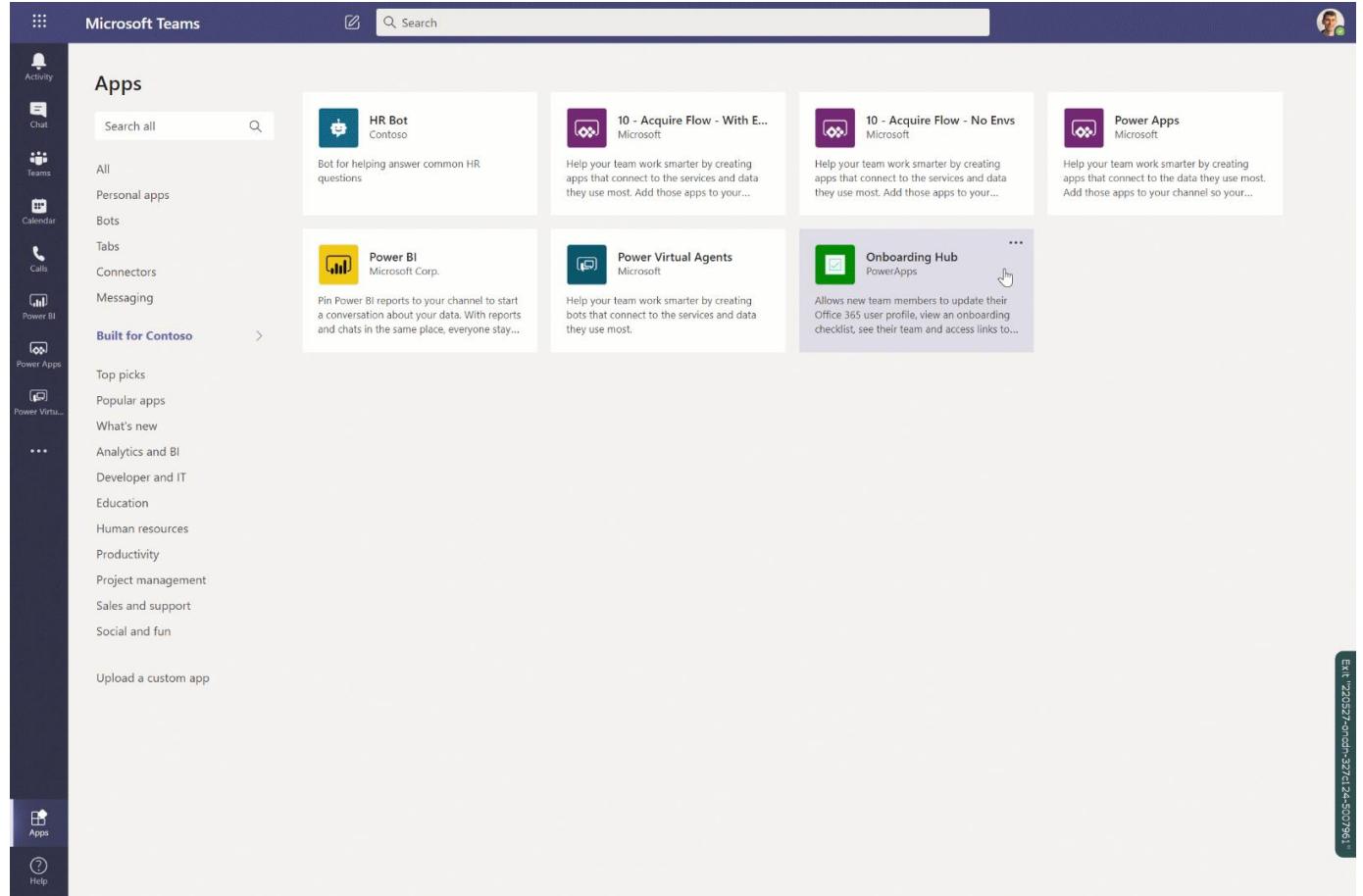
Power BI

Visualize data and drive rich insights



Install solutions with a single click

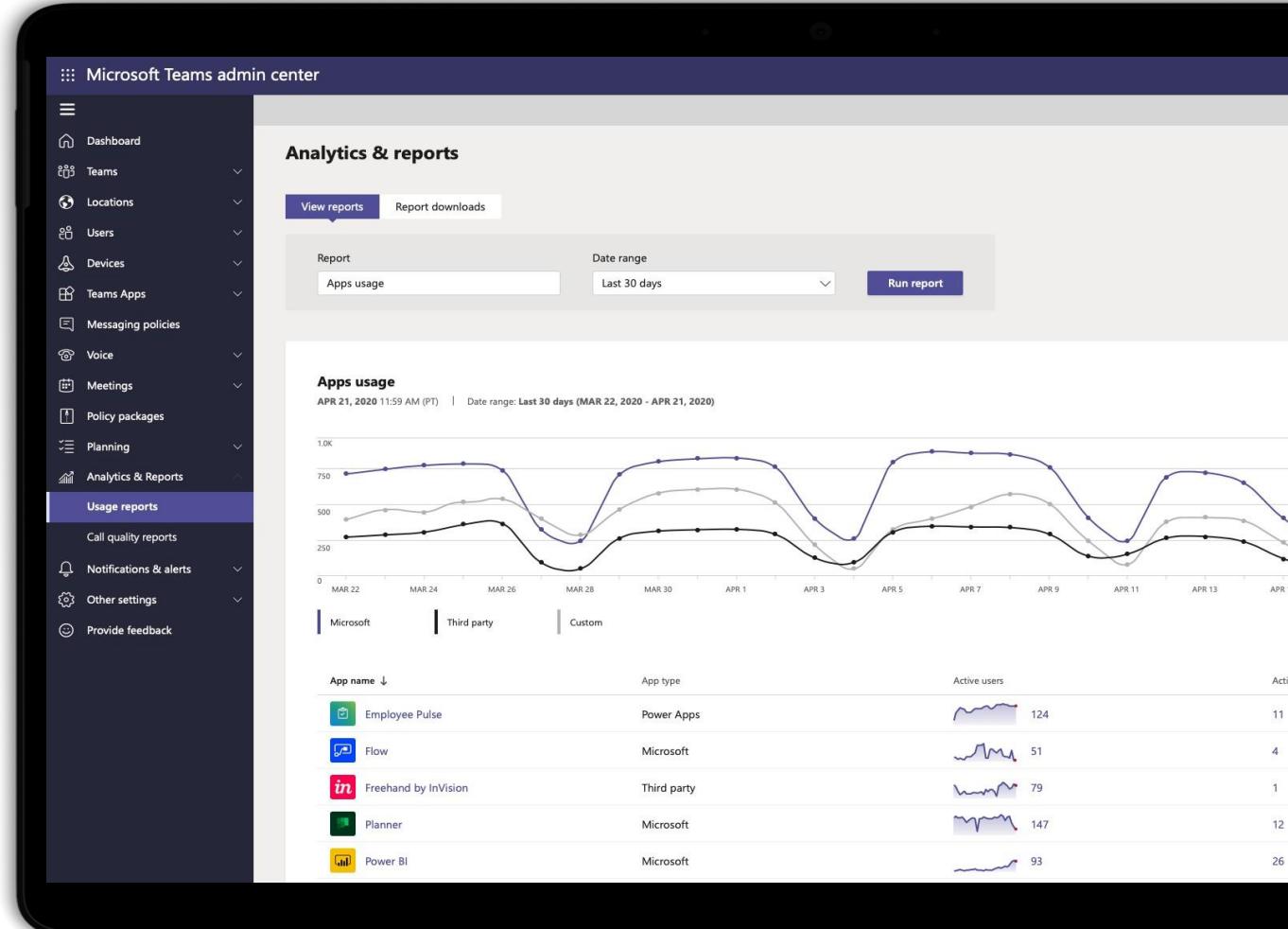
- Teams users can find and install custom solutions in the Teams app store
- Citizen developers can easily put their solutions where Teams users know where to look



Security and Administration

Teams and Power Platform is for Admins

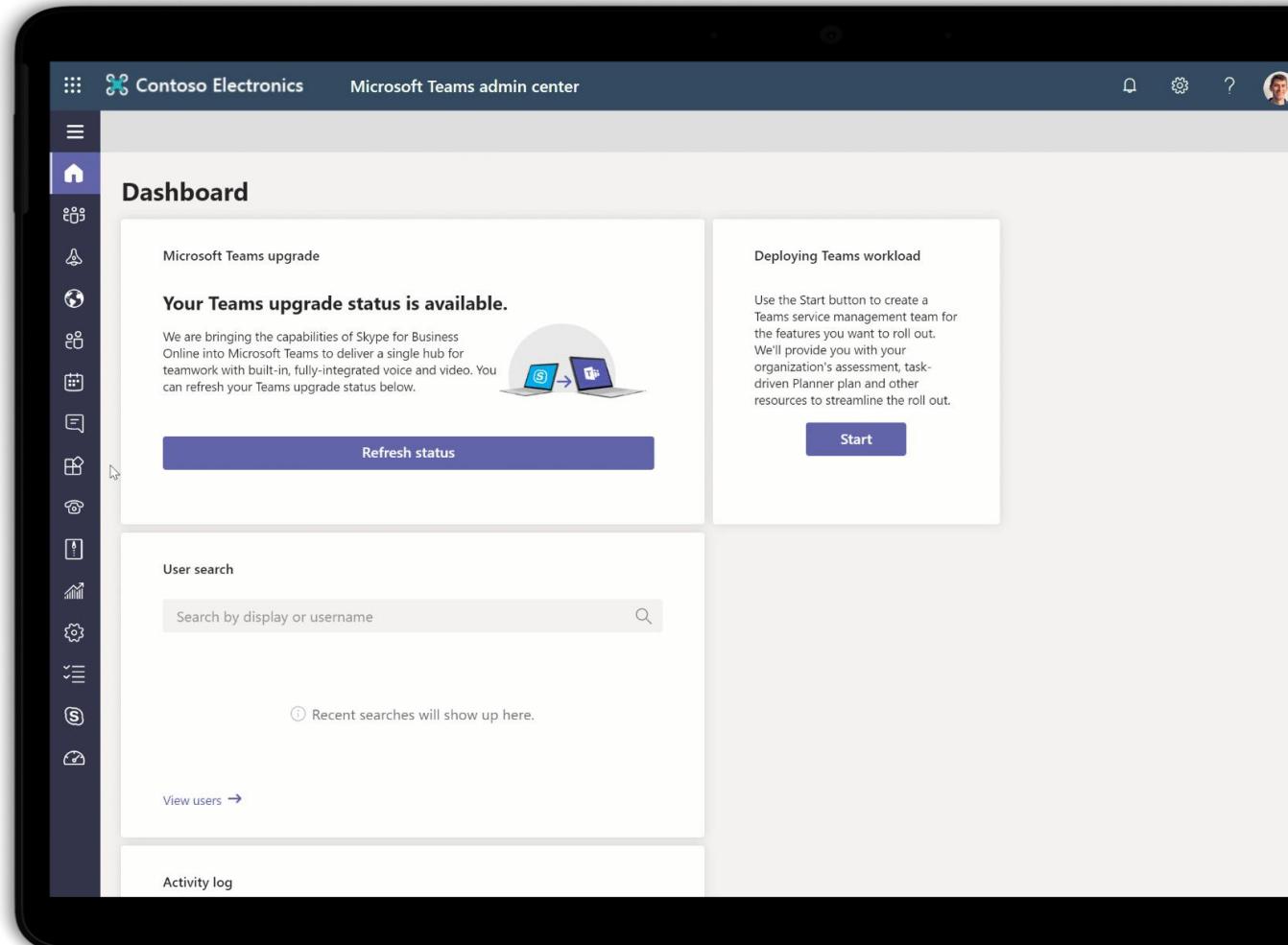
- Identify trends with usage analytics
- Drive solution adoption with custom policies
- Control your data with user-level access



Security and Administration

Teams and Power Platform is for Admins

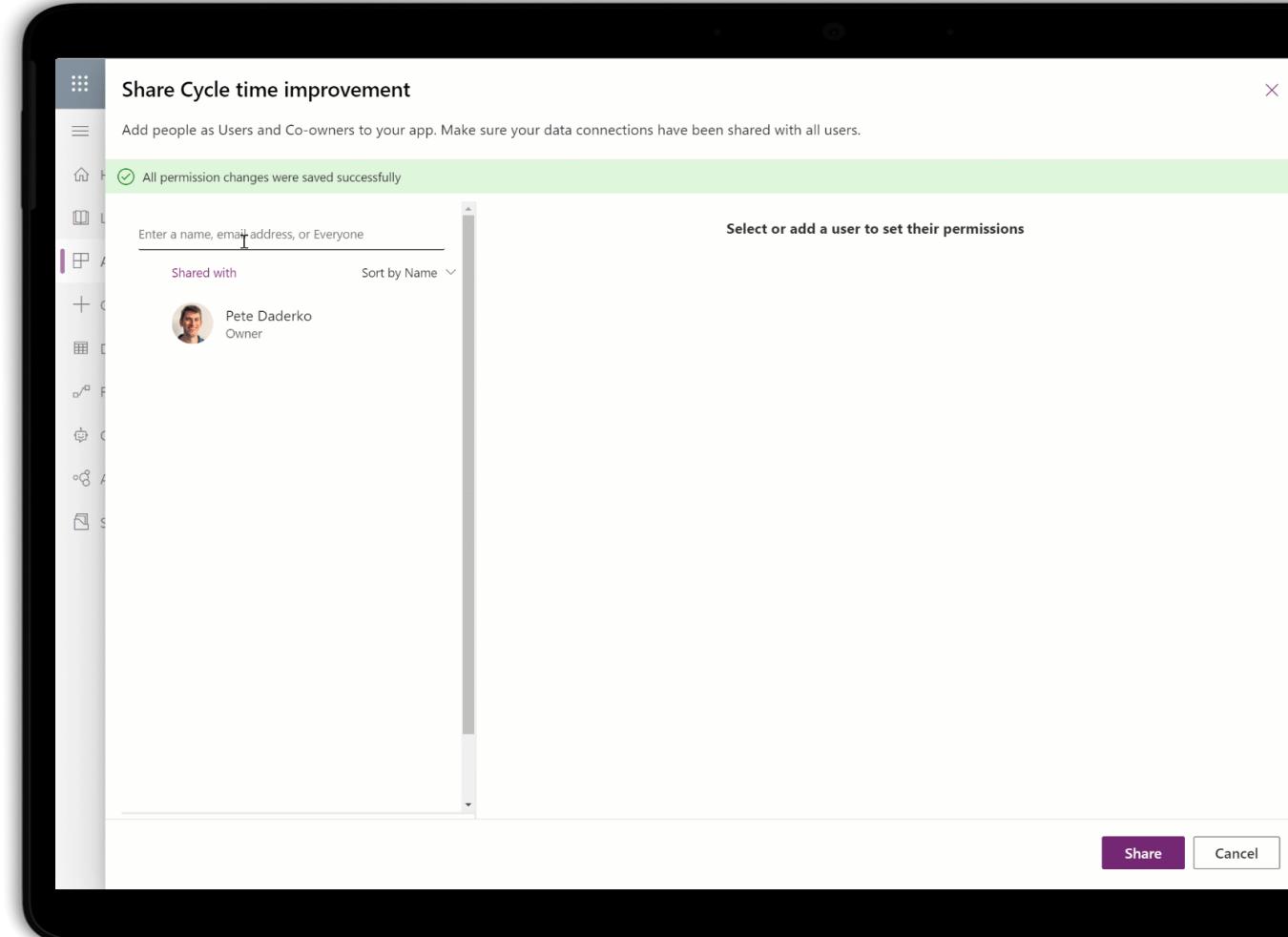
- Identify trends with usage analytics
- Drive solution adoption with custom policies
- Control your data with user-level access



Security and Administration

Teams and Power Platform is for Admins

- Identify trends with usage analytics
- Drive solution adoption with custom policies
- Control your data with user-level access



Powerful capabilities included for Teams users

Licensing options

Included at no additional cost for Microsoft Teams customers

- Add **Dataverse for Teams** to any Team. Supports high volume (1 million records) for each Team out of the box
- Use apps, chatbots and automations backed by Dataverse for Teams **embedded in Teams** on any platform
- All existing included Power Platform capabilities and standard connectors
- Surface APIs managed in Azure APIM to users of embedded Teams apps

Upgrade to standalone Power Apps, Automate or Virtual Agents for:

- **Full Dataverse** for enterprise-grade capabilities, including advanced role-based access control, highly extensible business logic, sophisticated reporting and robust offline
- Existing **premium connectors** to enterprise systems (SAP, Oracle, etc)
- **Standalone** premium apps, bots and automations outside of Teams

Teams and Power Platform

Key points

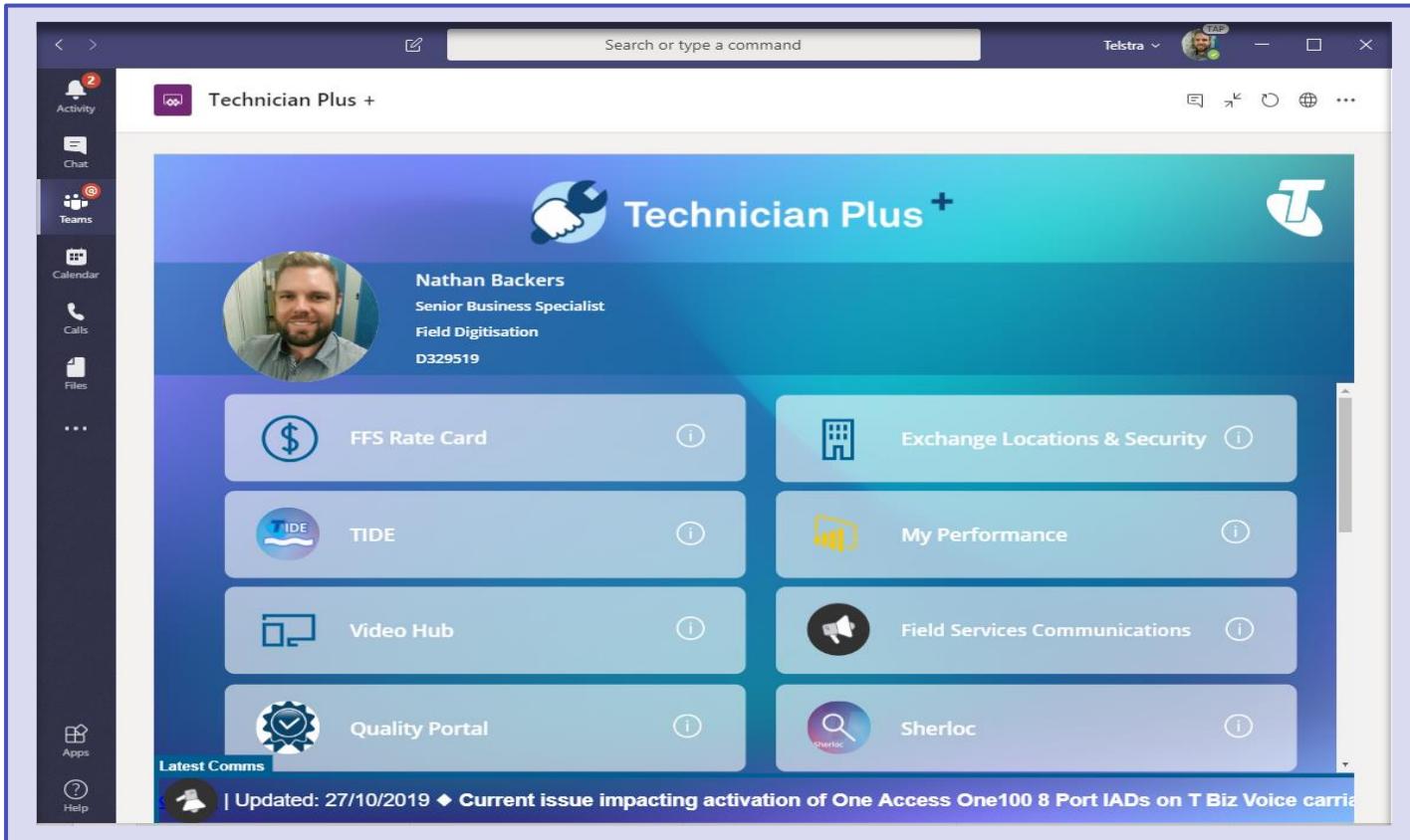
- Teams is a mature platform
 - Integrate apps and automate workflows
- IT admins are in control
 - Leverage robust management tools
- It is easy to get started
 - If you have an idea you can build it



Dataverse for Teams in a Day

Customer Stories

Customer Story: Telstra



Business outcomes

- 10 million minutes in time savings returned to the business
- Reduction of silos through automation of repeatable business processes

TEAMS PLATFORM CUSTOM SOLUTION

Automating operations and improving customer experience at Telstra with Microsoft Teams



Top integrations leveraged



Powering digital transformations with Teams + Power Platform



"Microsoft Teams, and its interoperability with Power BI and Power Apps, has homogenized and **eased not just meetings, but overall communication** here at PayPal."



"What we've done with Microsoft Teams and Power Apps represents a real shift in how we communicate, how reporting works, and the ways in which **employees can build upon the tools they have at their disposal.**"



"I probably save 90 minutes a day using the app, and I no longer have to carry a stack of papers around... **Everything I need to know is right in the app,** and the tasks required for each patient on my floor are clearly laid out."

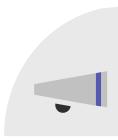


"After a little learning, Power Apps and Power Automate in Teams are easy to use and adaptable enough to solve a lot of problems. If I can **make our CSTs and my life easier as we work for customers,** that's a good thing."

Teams + Power Platform for any department

MARKETING

- Manage product update process, from receiving customer feedback to sharing product guidance with Sales
- Plan and execute marketing campaigns, and track outcomes



SALES

- Easily create and manage Sales leads from chat
- Keep Sales teams informed about the latest product details and promotions



HUMAN RESOURCES

- Onboard new hires and share helpful resources
- Coordinate organization-wide crisis communications
- Manage employee learning with tailored resources
- Manage candidate recruitment lifecycle



PROJECT MANAGEMENT

- Create/update project details and track progress
- Manage scrums with remote teams, and streamline task assignment and tracking
- Streamline approvals for project staffing, timeline, and budgets



CUSTOMER SERVICE

- Manage and track the customer service call process
- Provide employees in the field with updated promo and product information



OPERATIONS

- Manage end-to-end product return process
- Share inventory levels and take action to replenish
- Track equipment status
- Manage manufacturing process lifecycle



ENGINEERING/IT

- Allow users to request IT support directly from chat
- Manage hardware and software refresh cycles
- Create tickets and track incident management processes



FINANCE

- Coordinate Investor Relations communications process
- Organize budget requests and updates
- Submit and approve procurement requests



SERVICES/FACILITIES

- Manage the facilities request lifecycle via chat (e.g., replace light bulbs)
- Receive, track, and respond to employee grievances



FIRSTLINE WORKERS

- Document repairs on-site and connect with other experts
- Submit and track customer feedback in real time



DataVerse for Teams in a Day

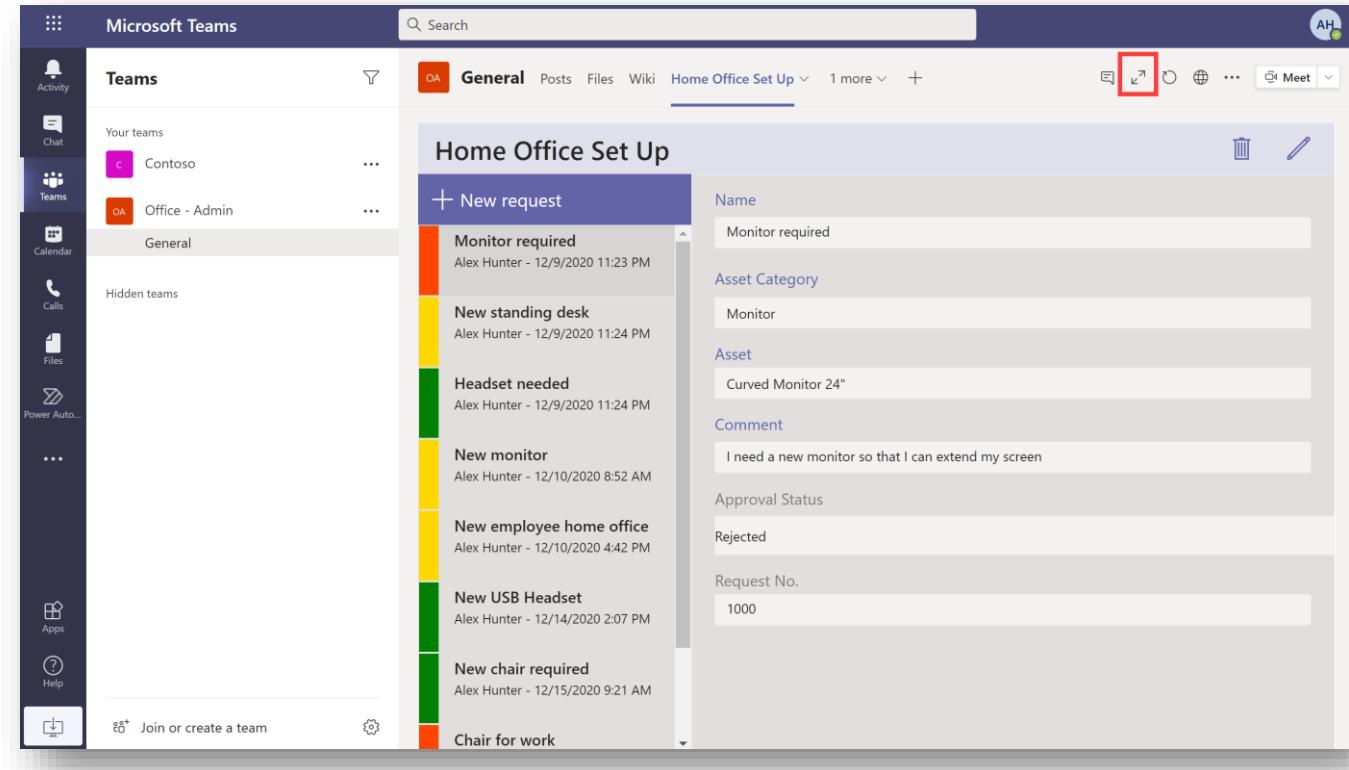
Introduction

Lab Scenario

Home office setup

Manage and approve 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



Lab Overview

Home Office Setup

Lab 01: Power Apps for Teams

- Create Dataverse instance
- Customize the app
- Publishing and sharing your app



Lab 02: Power Automate for Teams

- Create a flow in Teams
- Collaboration
- Create an approval flow
- Create an approval notification



Lab 03: Power Virtual Agents for Teams

- Create a chatbot in Teams
- Personalize the greeting
- Create a topic
- Create a flow
- Publishing and sharing your chatbot



Lab 04: Power BI for Teams

- Connect to Dataverse and transform data
- Build your report in Teams
- Using the report

Lab Overview

Home Office Setup

Lab 01: Power Apps for Teams



Lab 02: Power Automate for Teams



Lab 03: Power Virtual Agents for Teams



Lab 04: Power BI for Teams

Standalone Lab

Lab 05: Sample Apps

- Install the Issue Reporting sample app
- Explore the Issue Reporting app
- Customize the sample app

Group Activity

Lab 06: Collaboration Exercise

- **Based on Home Office Setup labs**
- Add others to your team
- Create requests in other teams
- Manage your team

Lab Material

Follow instructions in PDFs:

- Lab 00- Overview & Attendee Prerequisites
- Lab 01- Power Apps for Teams
- Lab 02- Power Automate for Teams
- Lab 03- Power Virtual Agents for Teams
- Lab 04- Power BI for Teams (Optional)
- Lab 05- Sample Apps
- Lab 06- Collaboration Exercise

Download lab material from
<https://aka.ms/TeamsPPAttendee>
& extract zip

Dataverse for Teams in a Day

Module 01

Power Apps for Teams

Module outline

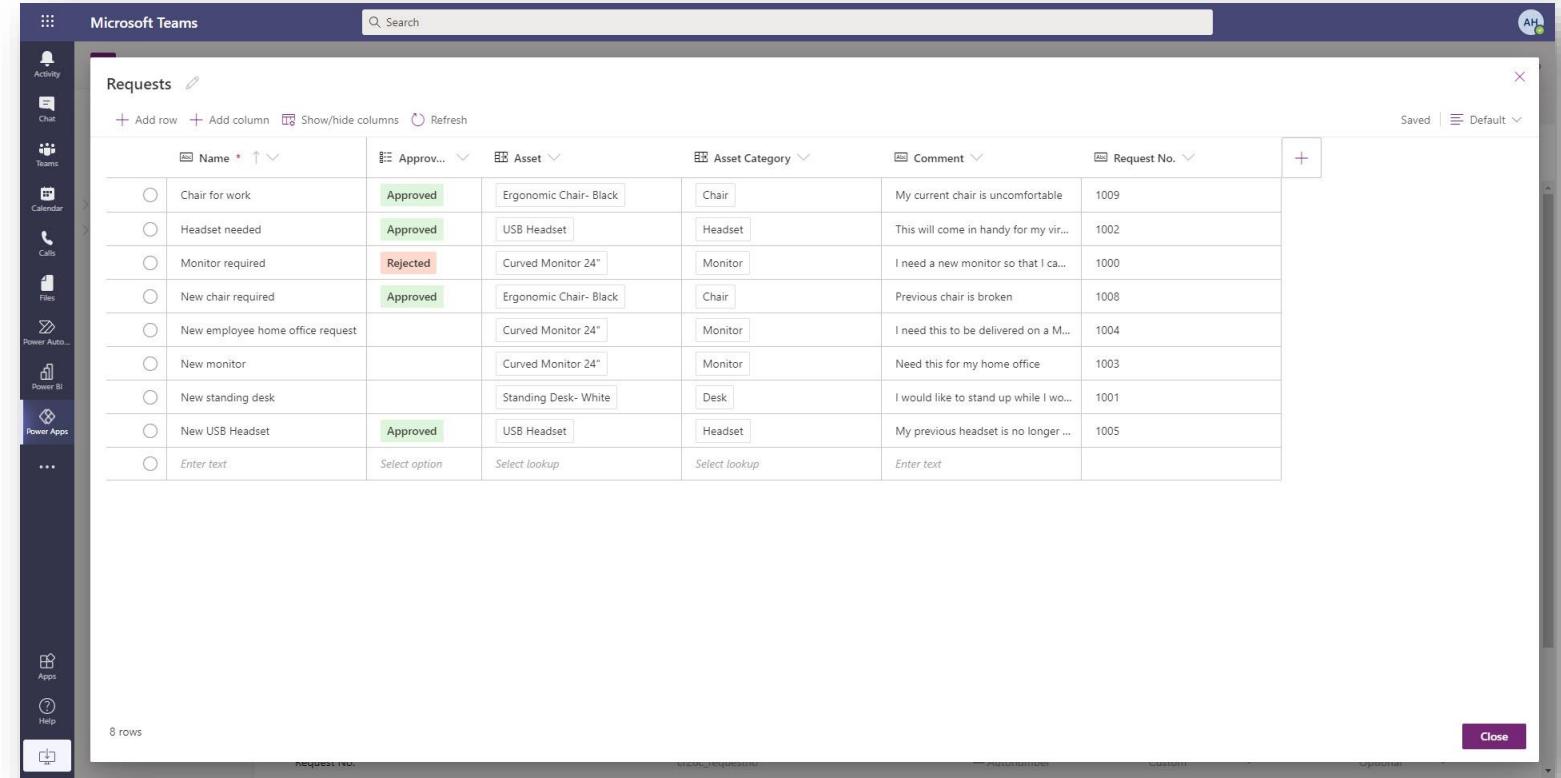
01: Power Apps for Teams

- Introducing Dataverse for Teams
- Data types
- Relational data
- Build low-code apps for Teams

Introducing Dataverse for Teams

Store and work with your data in Microsoft Teams

- A Teams-tailored version of the relational database behind Dynamics 365 and Power Platform
- Provides storage, rich data types with enterprise capabilities, and one-click solution deployment.
- Built into Teams, governable by IT.



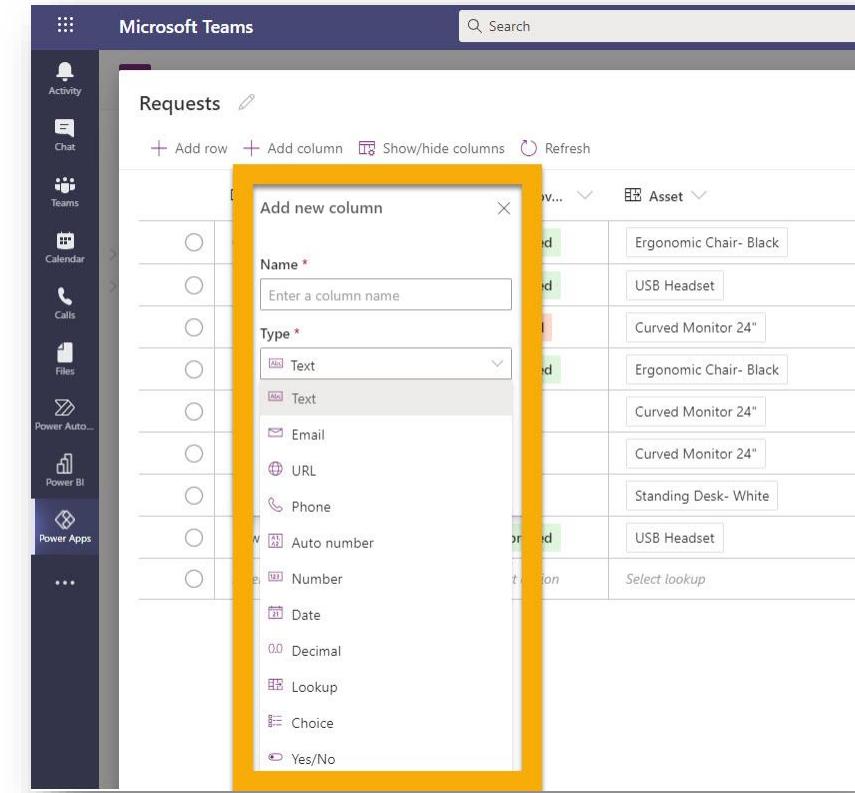
The screenshot shows a Microsoft Teams application window titled "Requests". The left sidebar includes icons for Activity, Chat, Teams, Calendar, Calls, Files, Power Automate, Power BI, and Power Apps. The main content area displays a table with the following data:

Name	Approved	Asset	Asset Category	Comment	Request No.
Chair for work	Approved	Ergonomic Chair- Black	Chair	My current chair is uncomfortable	1009
Headset needed	Approved	USB Headset	Headset	This will come in handy for my vir...	1002
Monitor required	Rejected	Curved Monitor 24"	Monitor	I need a new monitor so that I ca...	1000
New chair required	Approved	Ergonomic Chair- Black	Chair	Previous chair is broken	1008
New employee home office request		Curved Monitor 24"	Monitor	I need this to be delivered on a M...	1004
New monitor		Curved Monitor 24"	Monitor	Need this for my home office	1003
New standing desk		Standing Desk- White	Desk	I would like to stand up while I wo...	1001
New USB Headset	Approved	USB Headset	Headset	My previous headset is no longer ...	1005
Enter text	Select option	Select lookup	Select lookup	Enter text	

Data types

Range of rich data types available

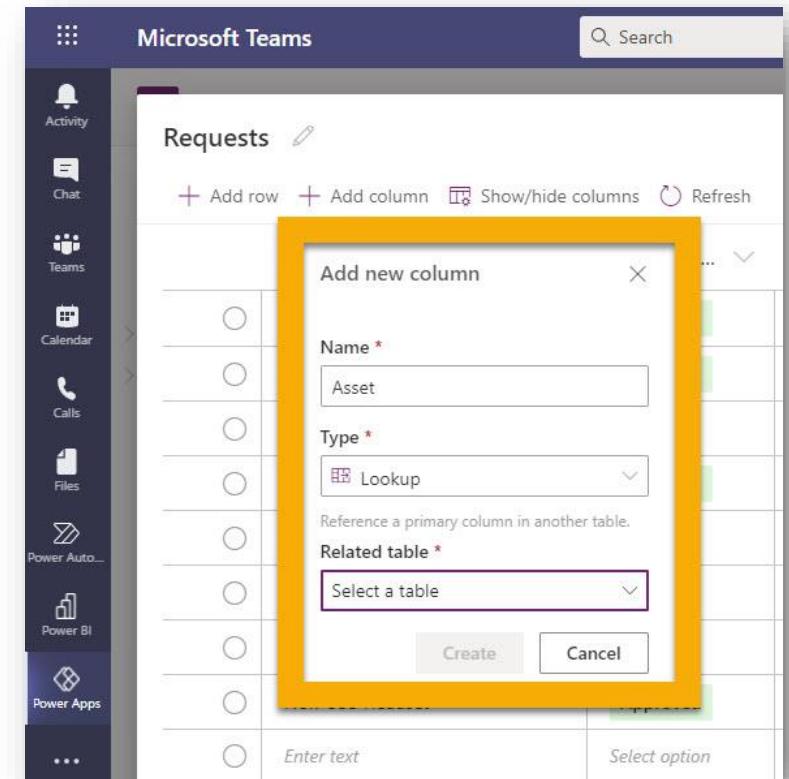
- Text
- Email
- URL
- Phone
- Auto number
- Number
- Date
- Decimal
- Lookup
- Choice
- Yes/No



Relational data

Create a relational database with no code

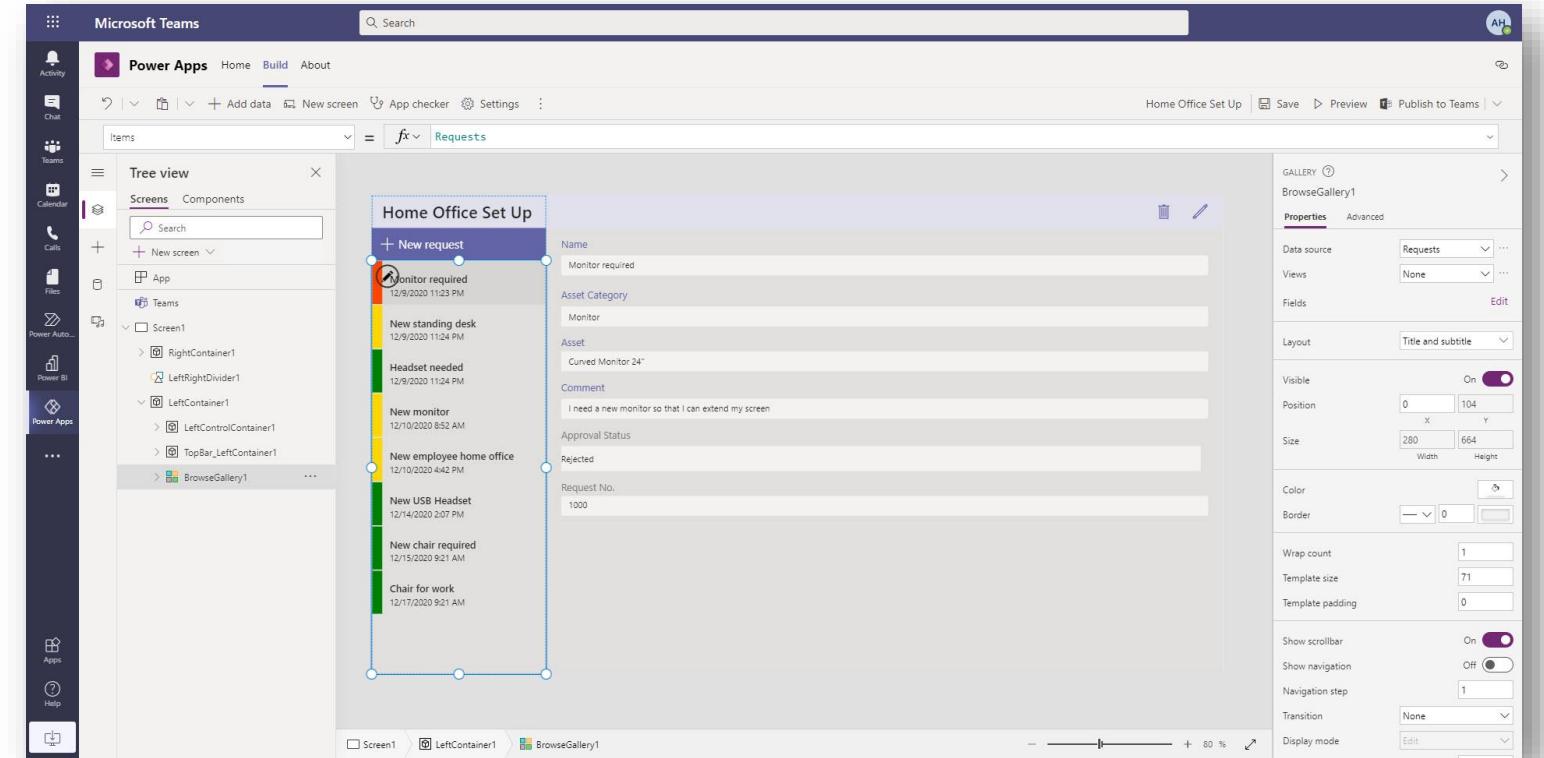
- Relational database
- Establish lookups and relationships across any table in the database
- Develop your apps from these true structured relationships



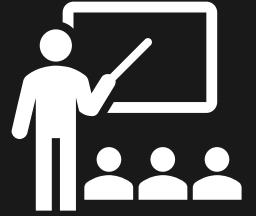
Build low-code apps for Teams

Create custom apps with Power Apps studio embedded in Teams

- Teams users have an embedded App Studio with easy-to-use no code editable grid
- Excel-like formulas and PowerPoint-like design
- Out of the box low code responsive layout – for web, tablet, mobile as Teams native



Demo 01



Power Apps for Teams app

Create Dataverse for Teams tables

Create a low code app for Teams connected to your database

Lab 01

70 minutes

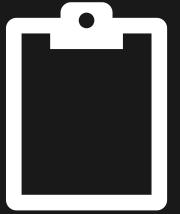


Power Apps for Teams

Lab document: Lab 01 – Power Apps for Teams

1. Create Dataverse instance
2. Customize the app
3. Publishing and sharing your app

Resources



Power Apps Community

<http://community.powerapps.com/>

Power Apps Blog

<https://blog.powerapps.com>

Power Apps Documentation

<https://docs.microsoft.com/powerapps>

Tip: Power Platform and Teams are evolving at a rapid rate—one of the best ways to keep pace with updates is to subscribe to the Power Platform blogs

Dataverse for Teams in a Day

Module 02

Power Automate for Teams

Module outline

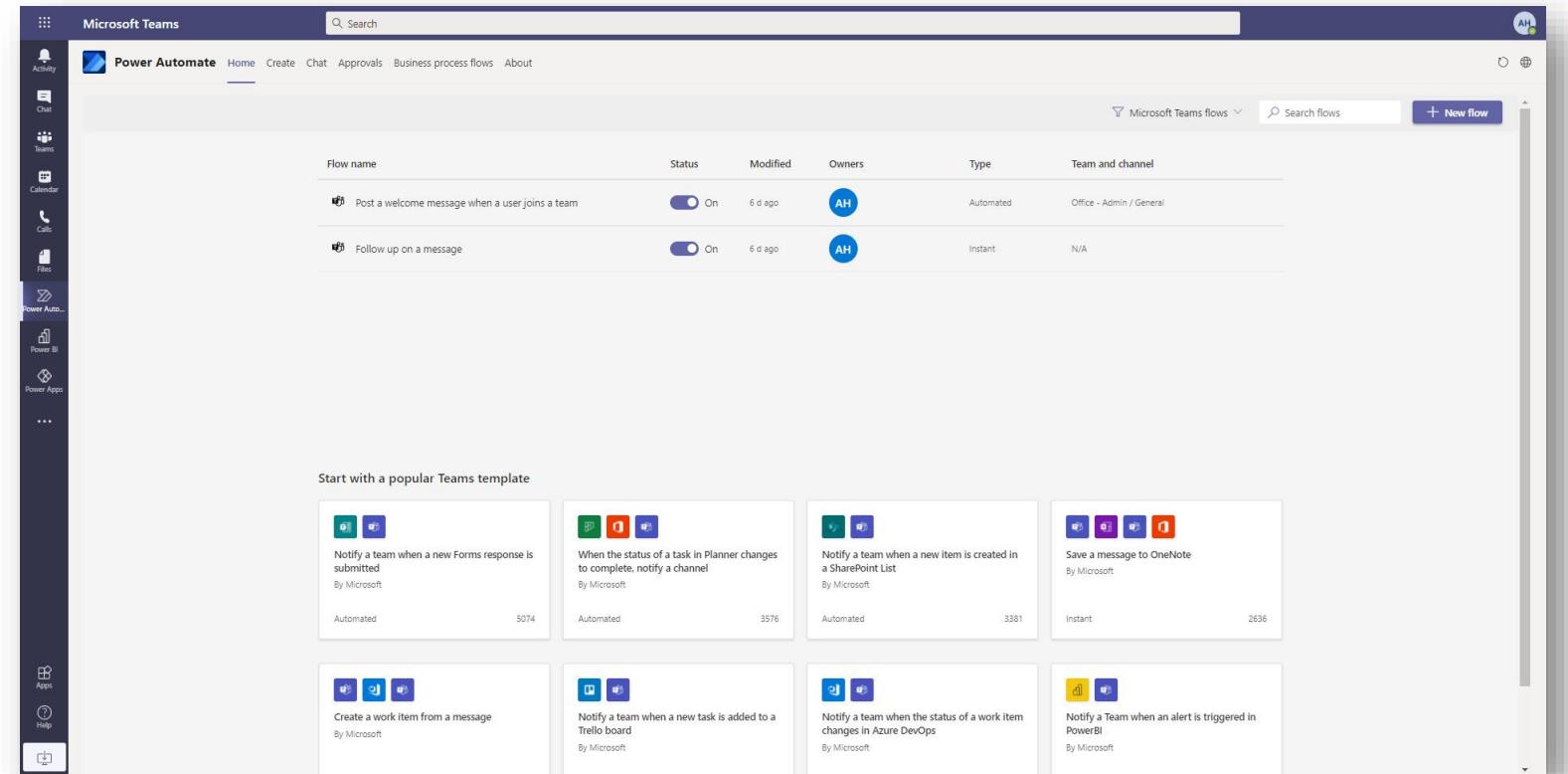
02: Power Automate for Teams

- Power Automate for Teams
- Create flows from templates
- Edit in advanced mode

Power Automate for Teams

Create automations for Teams with no code

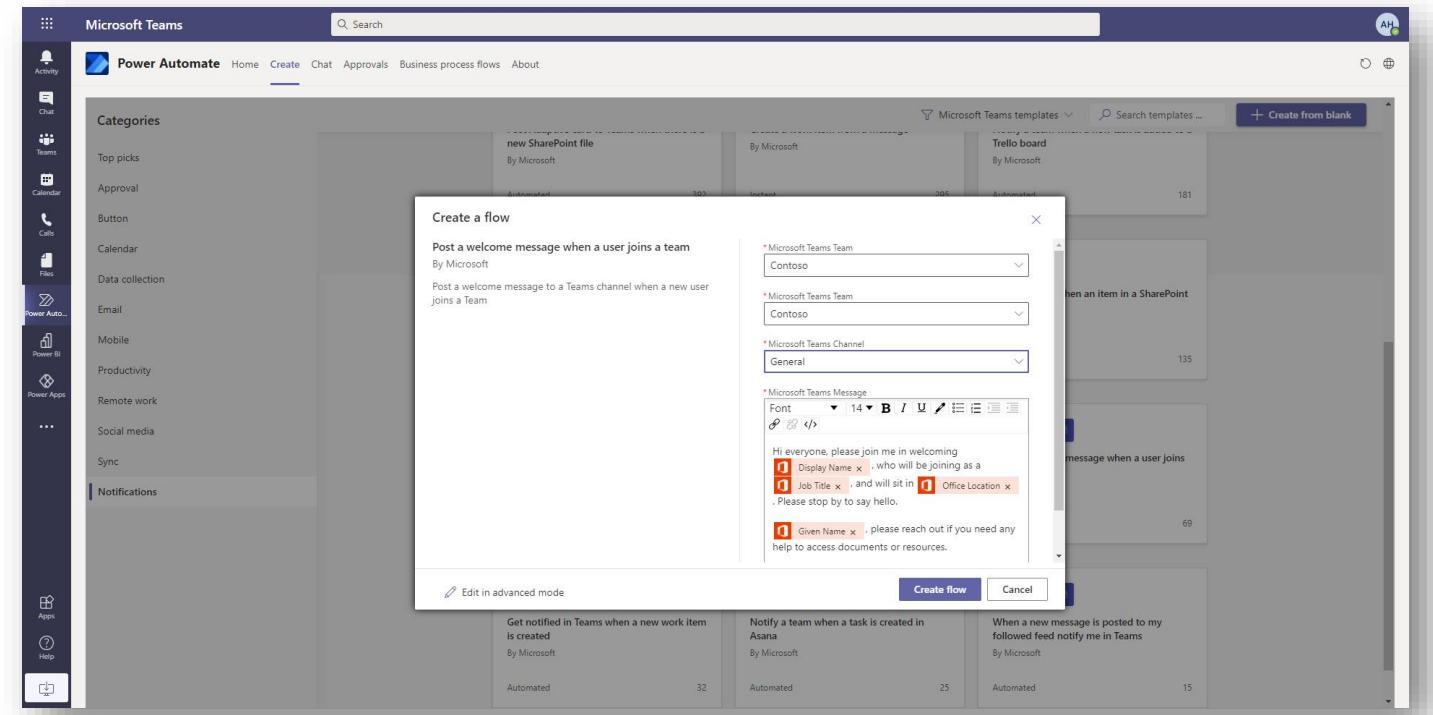
- Simple experience to create workflows and automations in Teams even if you are not familiar with Power Automate
- Homescreen shows your flows and easy access to start with templates related to Teams



Create flows from templates

Quick and easy templates for users with no experience

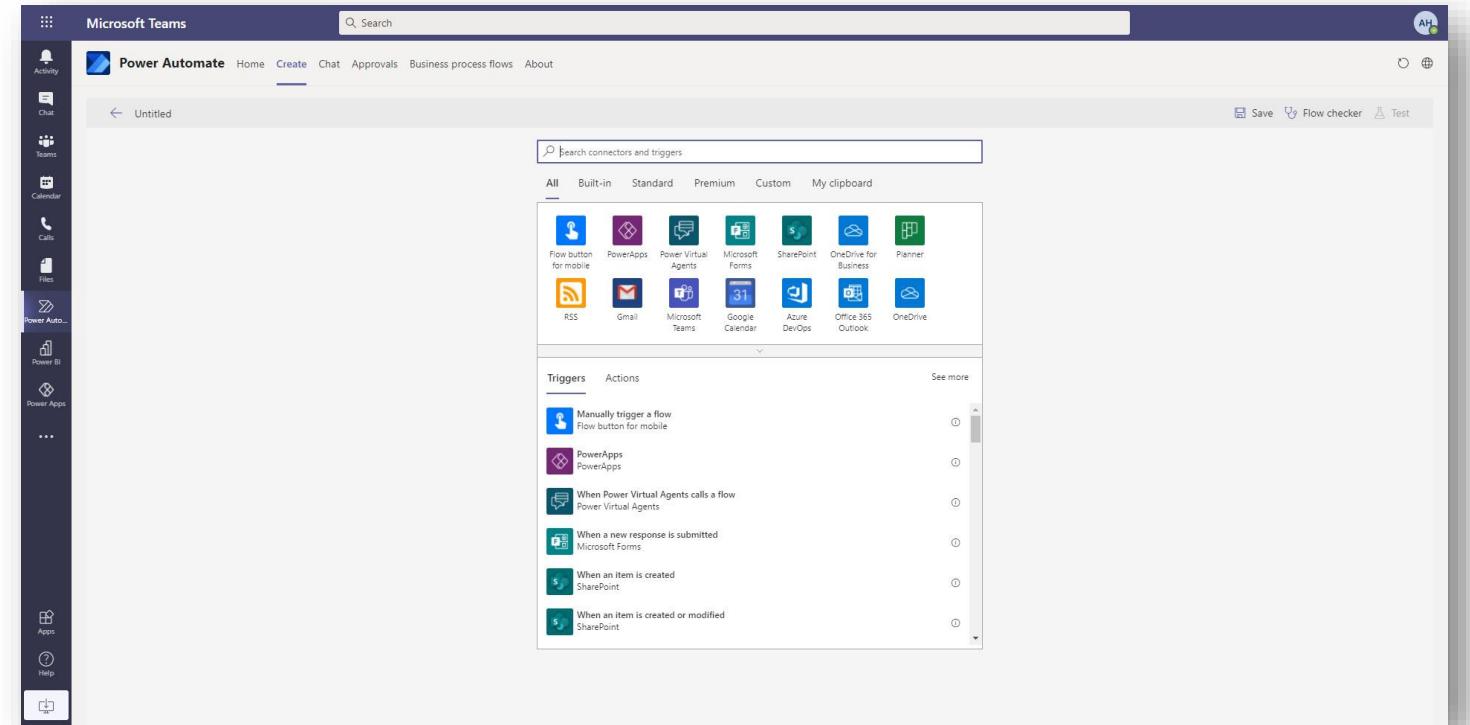
- Create flows quickly using simple templates
- No need to use the full Power Automate design experience or see the full structure of the flow
- Provide the inputs for the flow parameters and save



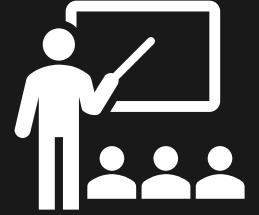
Edit in advanced mode

Full Power Automate editing experience embedded in Teams

- Open the advanced editor from a template
- Create a flow from blank
- Triggers and actions



Demo 02



Power Automate for Teams app

Create a flow from a template

Create a flow from blank

Lab 02

60 minutes



Power Automate for Teams

Lab document: Lab 02 – Power Automate for Teams

1. Create a flow in Teams
2. Collaboration
3. Create an approval flow
4. Create an approval notification

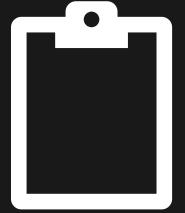
Tips for Lab 02

Power Automate for Teams



- The flows created in Exercise 1 and 2 of this lab are not critical to Home Office Set up solution. If participants are running behind on the labs, these flows can be skipped.
- Approval provisioning can take some time when run in an environment for the first time. When testing the flow in Exercise 3, participants will be presented with a warning/error about this. At this stage, participants can continue to test the flow, but move onto the next exercise in the meantime. It usually takes about 10-20 minutes until the provisioning is complete.

Resources



Power Automate Community

<https://community.powerautomate.com>

Power Automate Blog

<https://blog.powerautomate.com>

Power Automate Documentation

<https://docs.microsoft.com/powerautomate>

Tip: Power Platform and Teams are evolving at a rapid rate—one of the best ways to keep pace with updates is to subscribe to the Power Platform blogs

Dataverse for Teams in a Day

Module 03

Power Virtual Agents for Teams

Module outline

03: Power Virtual Agents in Teams

- Chatbots for employees
- Power Virtual Agents for Teams
- Trigger phrases
- Authoring canvas
- Test your bot as you build
- Connect to Dataverse for Teams

Chatbots for employees

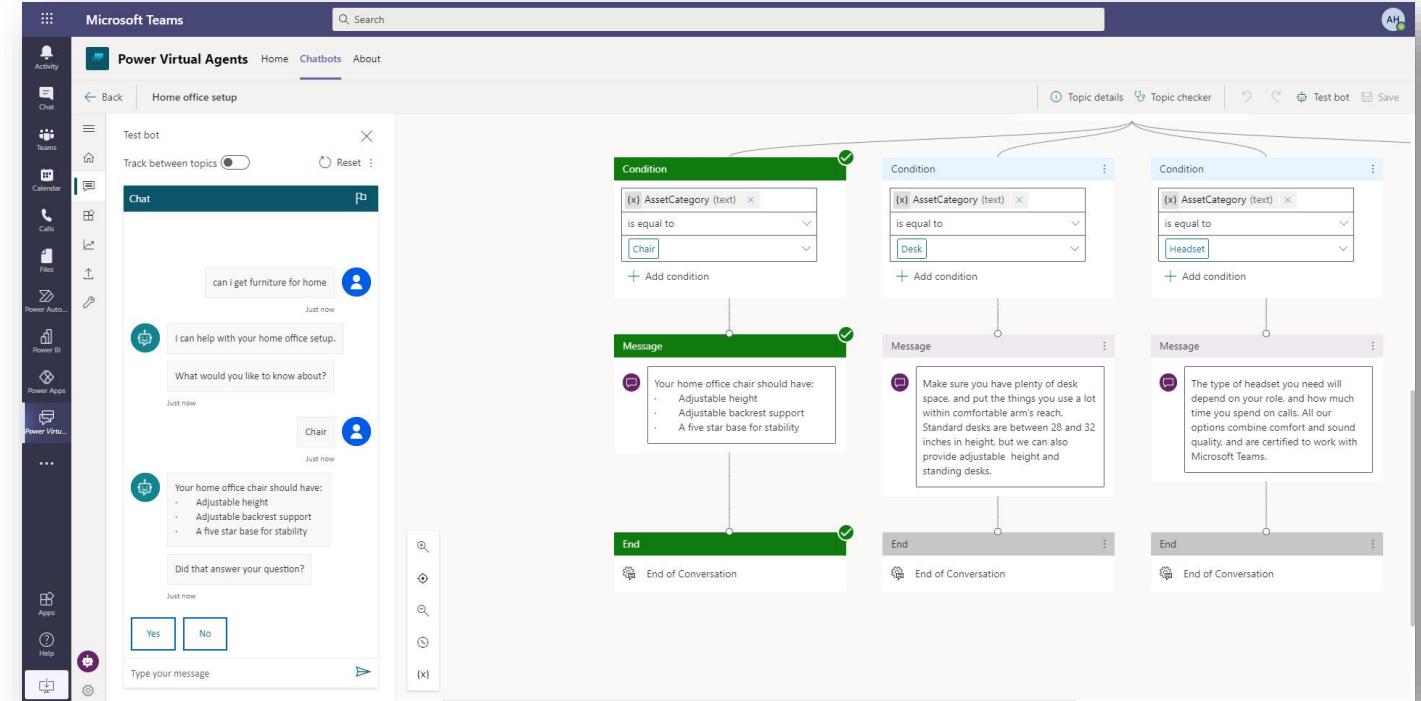
When and why to embed a chatbot in Microsoft Teams

- Improve how work gets done
- Consistent internal communication
- Available 24/7
- Conversational nature of a chatbot blends well with other chats in Teams
- Sample use cases:
 - IT helpdesk
 - HR self-service
 - Onboarding help

Power Virtual Agents for Teams

Build low-code bots with the integrated Power Virtual Agents studio

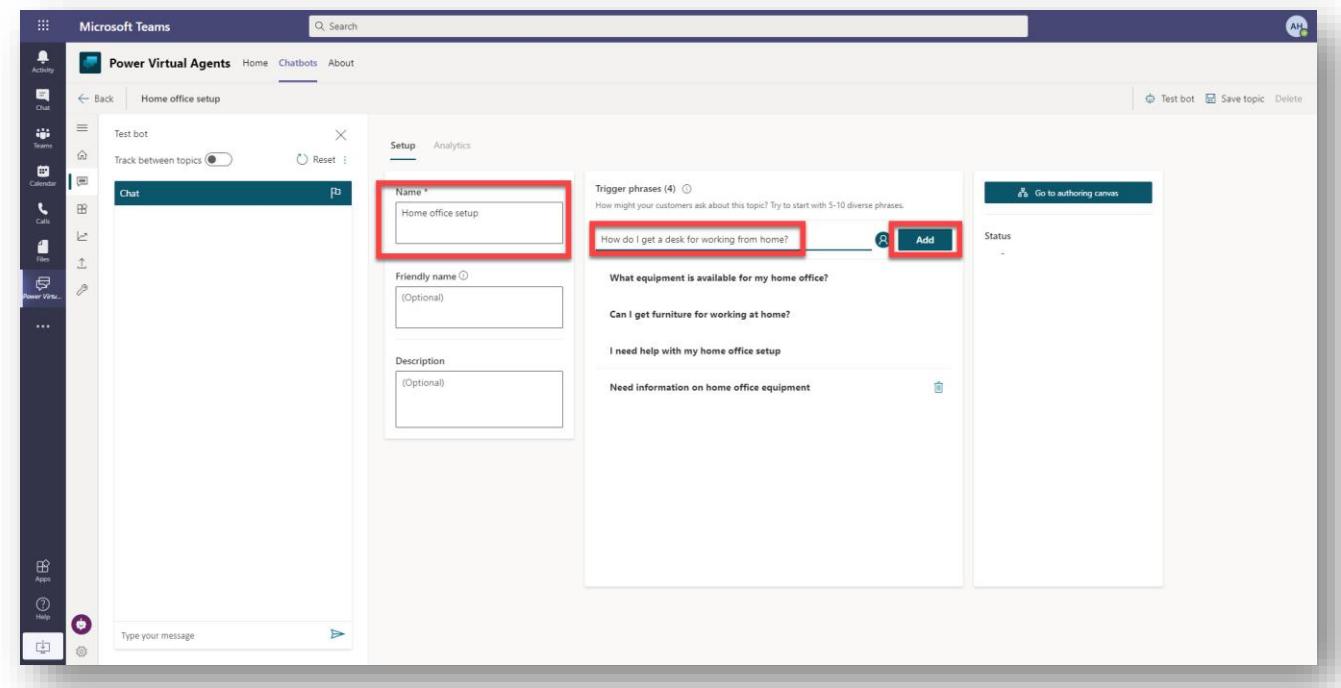
- Teams users can build and deploy custom chatbots for Teams
- Simple chatbot creation and maintenance with an easy-to-use graphical interface
- Built in natural conversational AI



Trigger phrases

Natural conversational AI

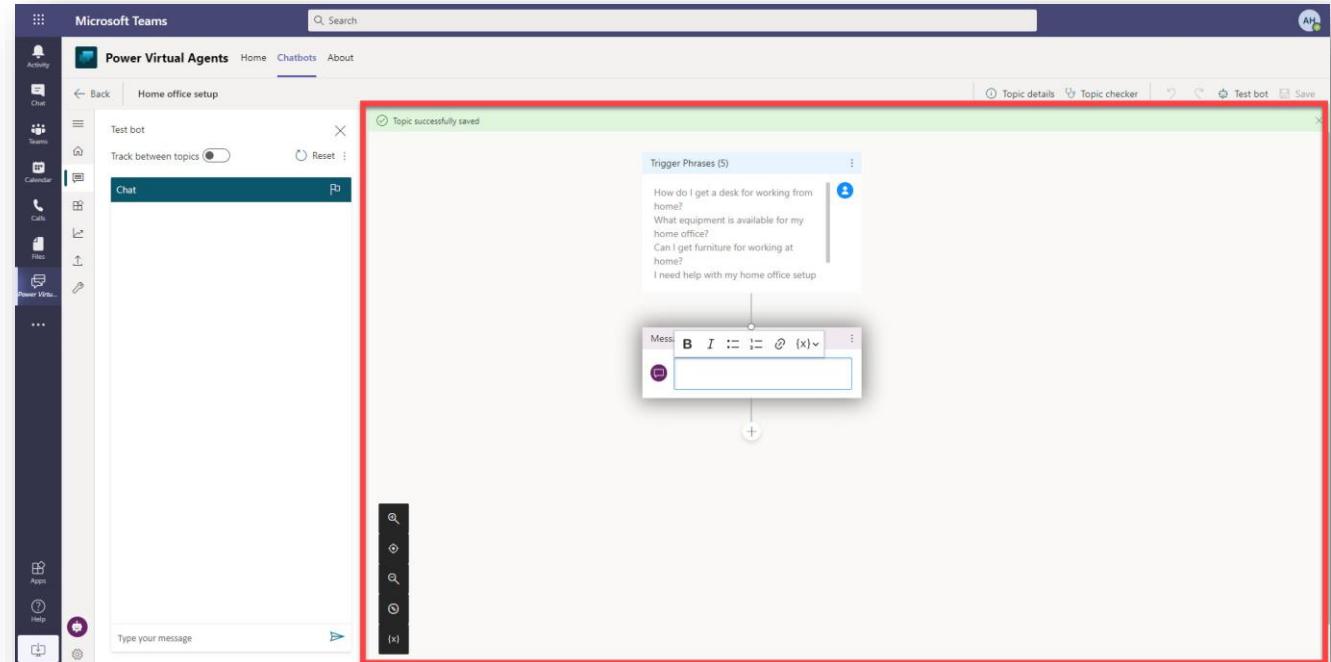
- Define only a few trigger phrases – AI will trigger the topic closest in meaning to the user utterance
- Use natural language in trigger phrases
- Capture the intent – the way an employee might ask about a problem / issue. e.g., “can I order a new chair for my home office”



Authoring canvas

Easy to use graphical interface

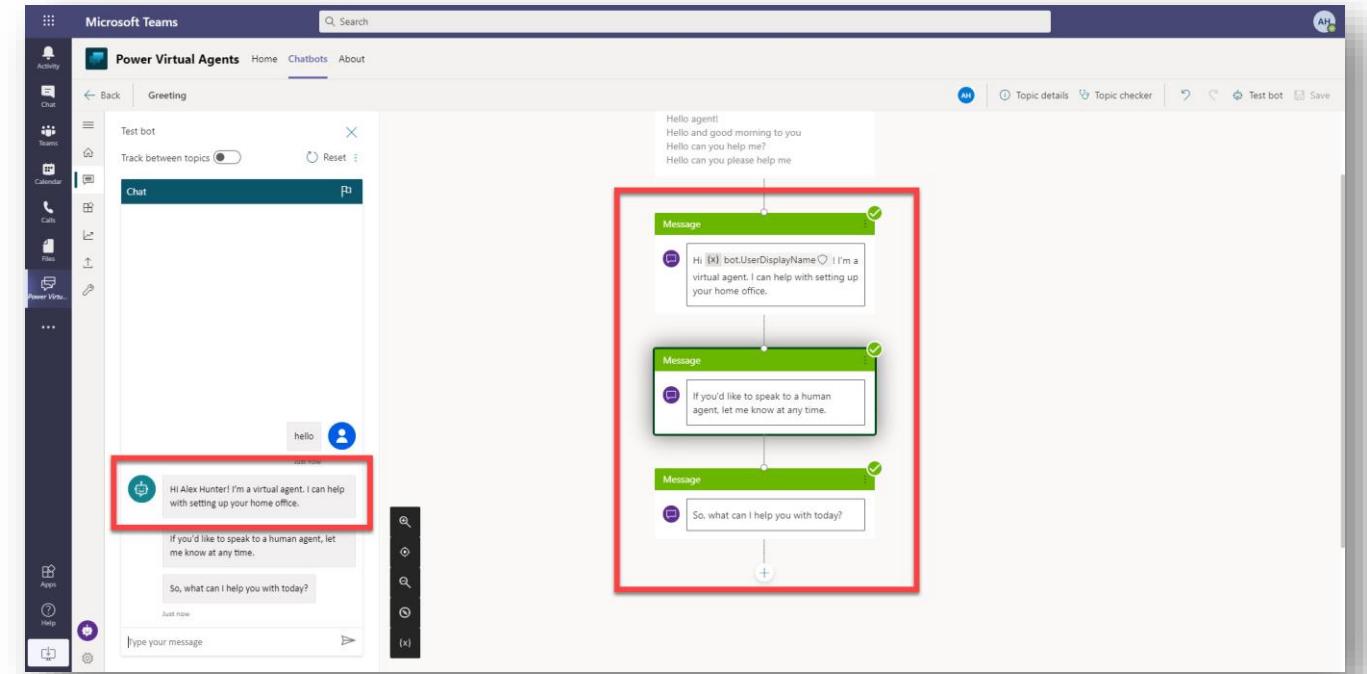
- Build your conversation tree in the authoring canvas
- Add and edit messages, questions and call actions
- Remember user responses by storing them in variables to use later



Test your bot as you build it

Test alongside your authoring canvas before you publish

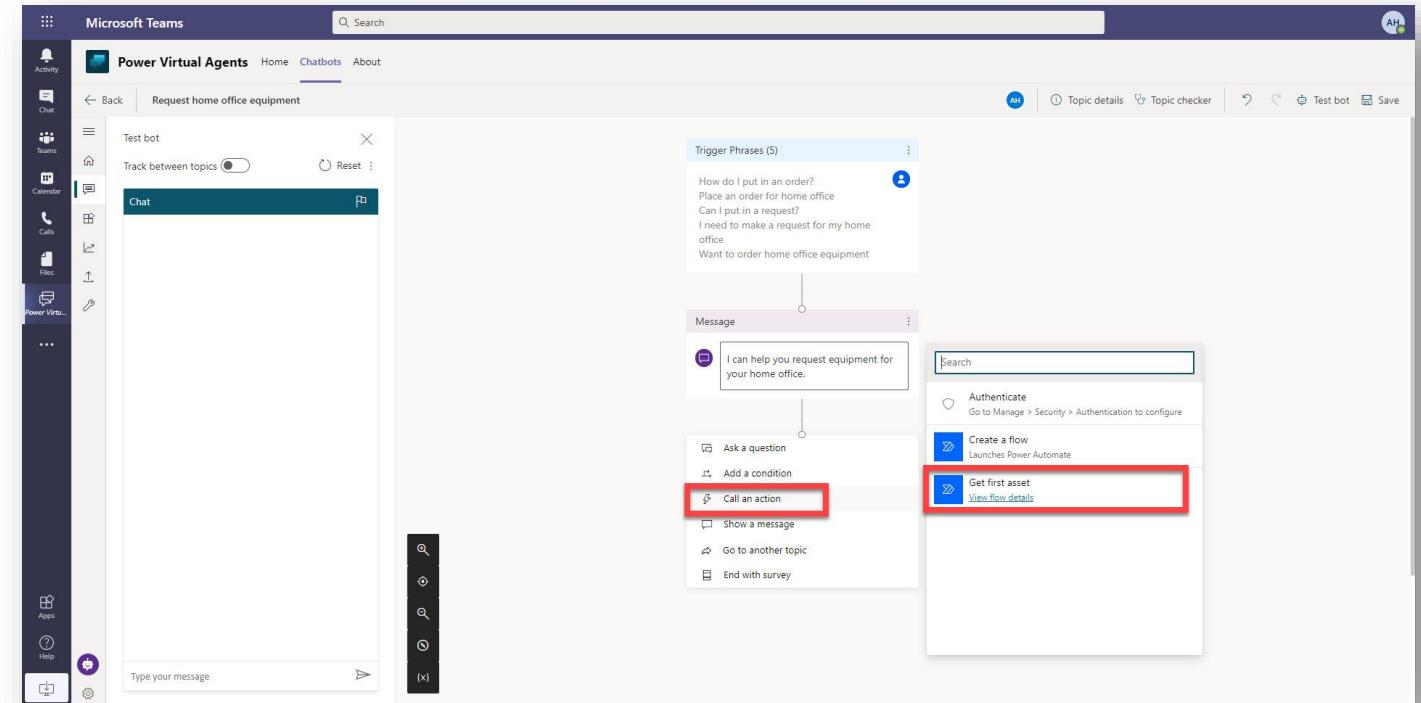
- Test and chat with your bot as you build it
- Track between topics to navigate the chat tree as you test your bot



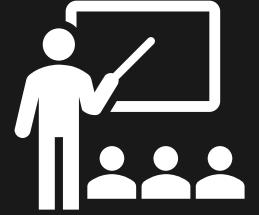
Connect to Dataverse for Teams

Build low-code bots with the integrated Power Virtual Agents studio

- Fully integrated with Power Automate so your bot can trigger automations
- Connect with Dataverse for Teams to retrieve or submit data on behalf of the user
- Chatbot recognizes the logged in user in Teams



Demo 03



Power Virtual Agents for Teams app

Create topics using the authoring canvas

Call a flow from your chatbot

Test your chatbot in the test pane

Lab 03

60 minutes



Power Virtual Agents for Teams

Lab document: Lab 03 – Power Virtual Agents for Teams

1. Create a chatbot in Teams
2. Personalize the greeting
3. Create a topic
4. Create a flow using the embedded flow experience
5. Publishing and sharing your chatbot

Resources



Power Virtual Agents Community

<https://community.powervirtualagents.com>

Power Virtual Agents Blog

<https://blog.powervirtualagents.com>

Power Virtual Agents Documentation

<https://docs.microsoft.com/powervirtualagents>

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Dataverse for Teams in a Day

Module 04

Power BI for Teams

Module outline

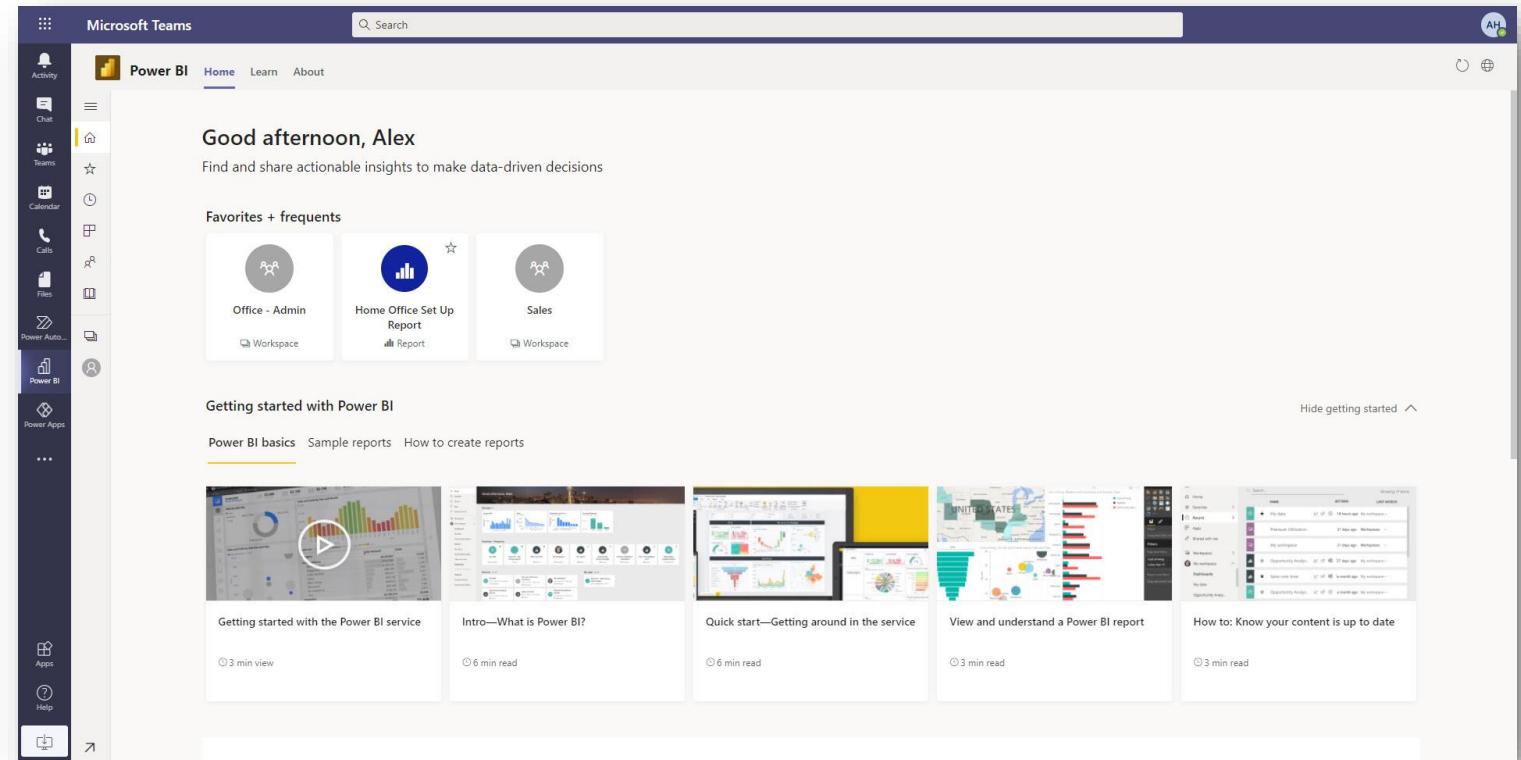
04: Power BI for Teams

- Power BI for Teams app
- Search and find data quickly
- Send reports to colleagues
- Chat about data with a click
- Organize your reports with the Power BI tab

Power BI for Teams app

Access all your data in Microsoft Teams

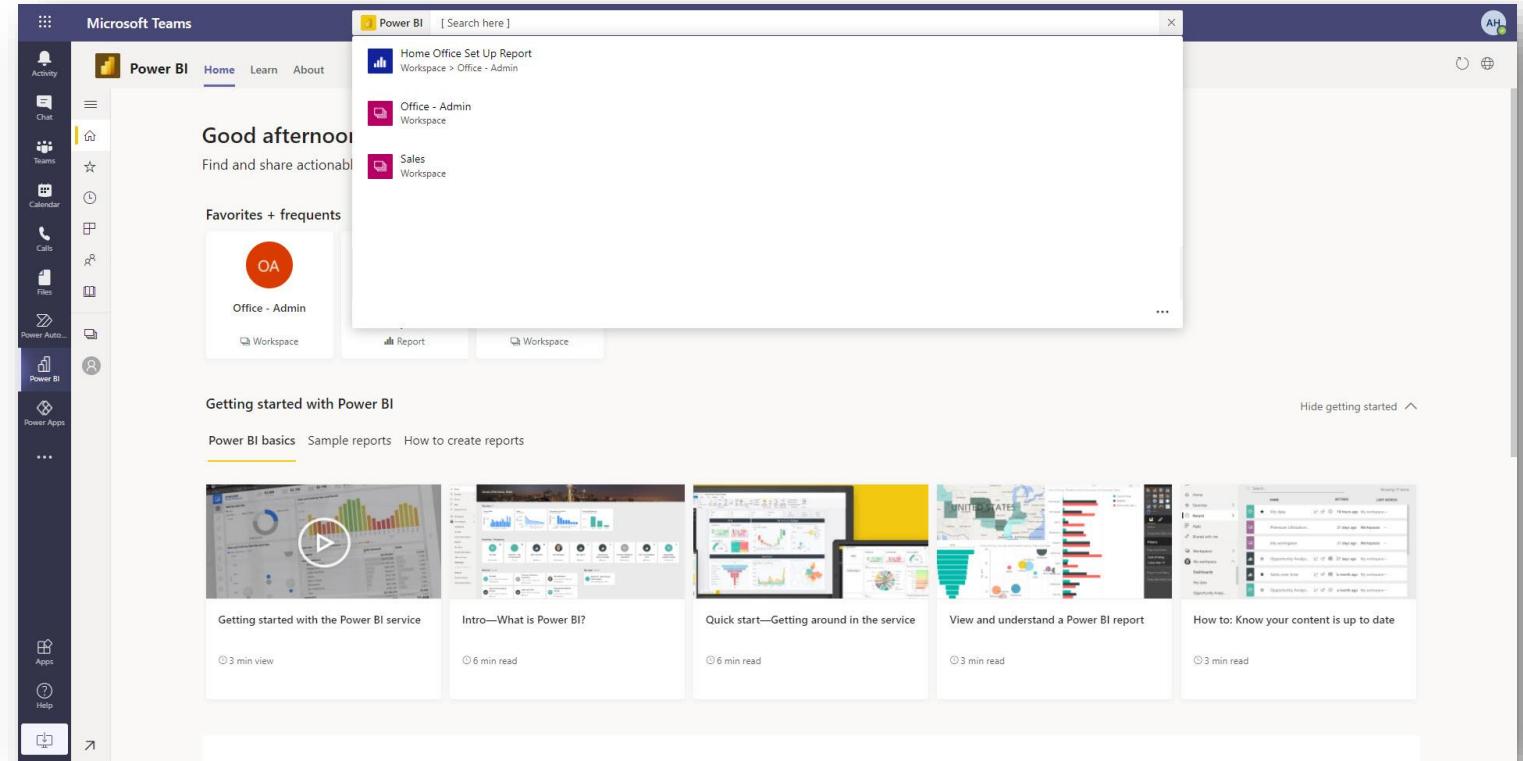
- Quickly discover, search and discuss data without ever leaving Teams
- Central, personalized home for data in Teams
- Use all your Power BI content without leaving Teams



Search and find data quickly

Type @PowerBI in the Teams search bar

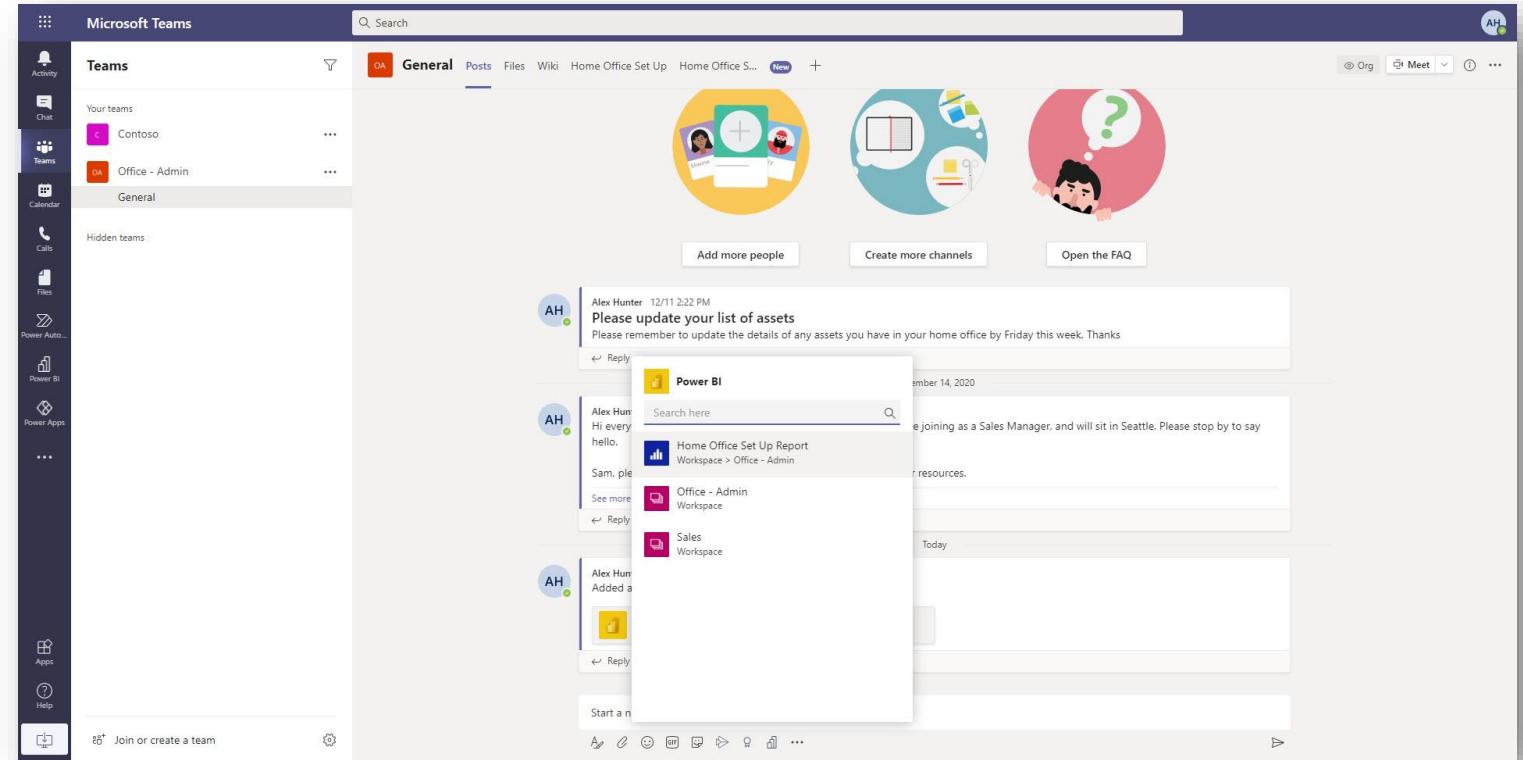
- Recent reports, dashboards and apps are immediately available
- Search for any Power BI content you have access to



Send reports to colleagues

Use the Power BI icon to send rich preview cards

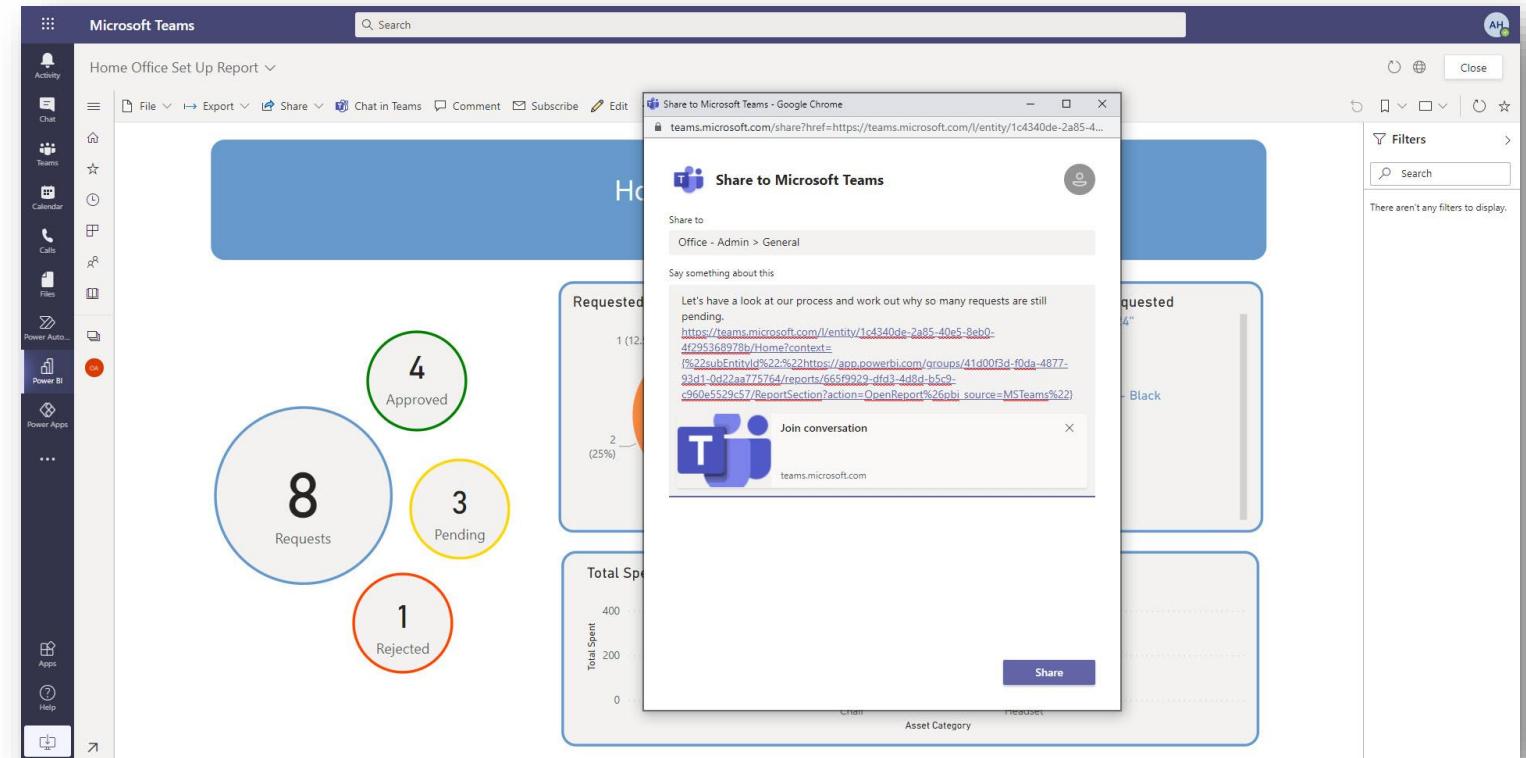
- Same flexibility as search to send recently used items for find the right one
- Recipients receive a rich preview card, making it easy to open the right report



Chat about data with a click

Start discussing data with rich links to get to your point

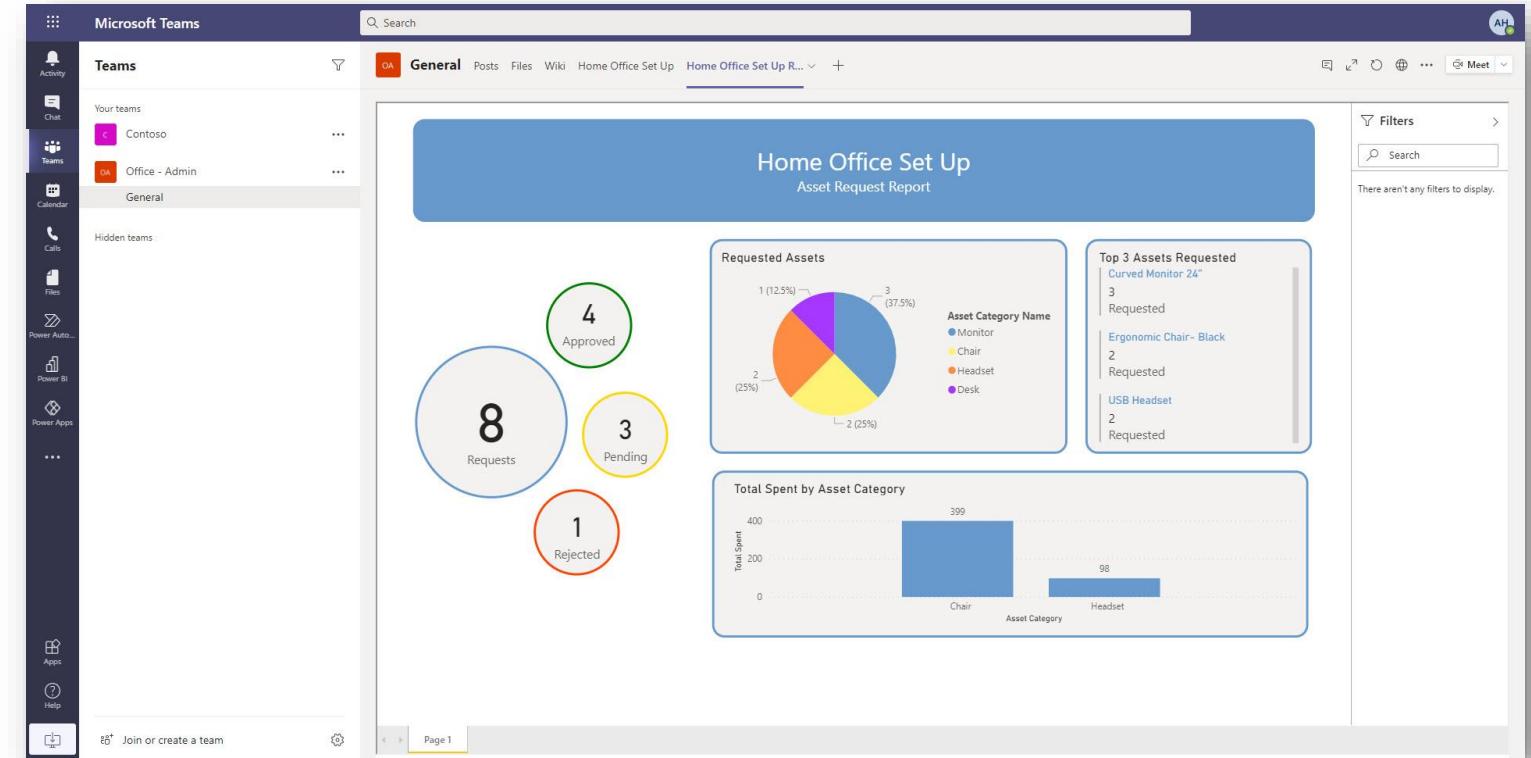
- Links include all applied filters and highlights
- Send a message to channels, 1 on 1 chats or group chats
- Available for reports, dashboards, and individual views



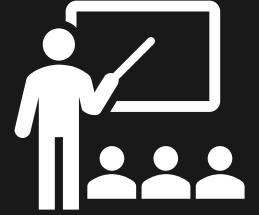
Organize your reports with the Power BI tab

Help teammates find reports in channels

- Supports reports in apps and workspaces
- Use the tab conversation to discuss the report



Demo 04



Power BI for Teams app

View your report in Teams

Chat in Teams to collaborate on your report

Connect Power BI to your Dataverse for Teams tables

Lab 04

70 minutes



Power BI for Teams (Optional)

Lab document: Lab 04 – Power BI for Teams

1. Connect to Dataverse and transform data
2. Build your report in Teams
3. Using the report

Resources



Power BI community

<http://community.powerbi.com/>

Power BI blog

<https://blog.powerbi.com/>

Power BI documentation

<https://docs.microsoft.com/power-bi/>

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DataVerse for Teams in a Day

Module 05

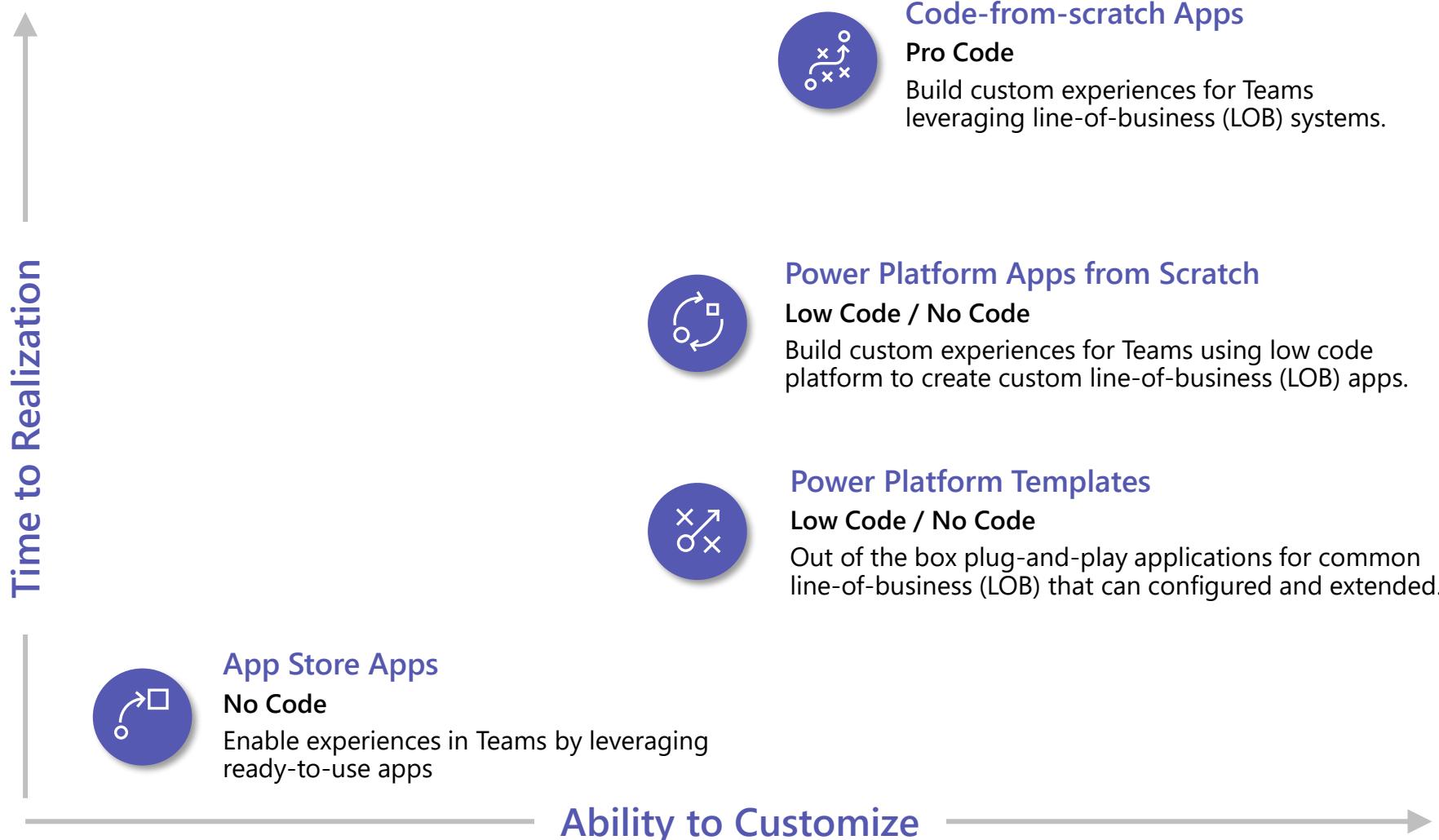
Sample Apps

Module outline

05: Deploy and Customize Sample Apps

- Sample apps
 - Inspection
 - Issue reporting
 - Employee ideas
- Scenarios for customizing app templates

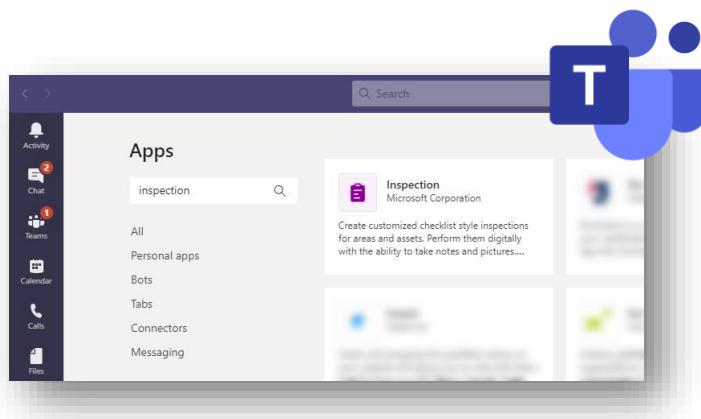
Sample apps are high-impact apps ...



... that are simple to deploy and easy to extend



Simple to deploy



One-click deployment

Automated experience to deploy the app to your own team – acquire apps from the Teams Store.

Plug-n-play experiences

Apps are functional out of the box, with most common scenarios configurable from the manager app.



Easy to extend



Extend using Low-Code

Leverage Power Platform to extend capabilities of the apps to your needs from within Teams.

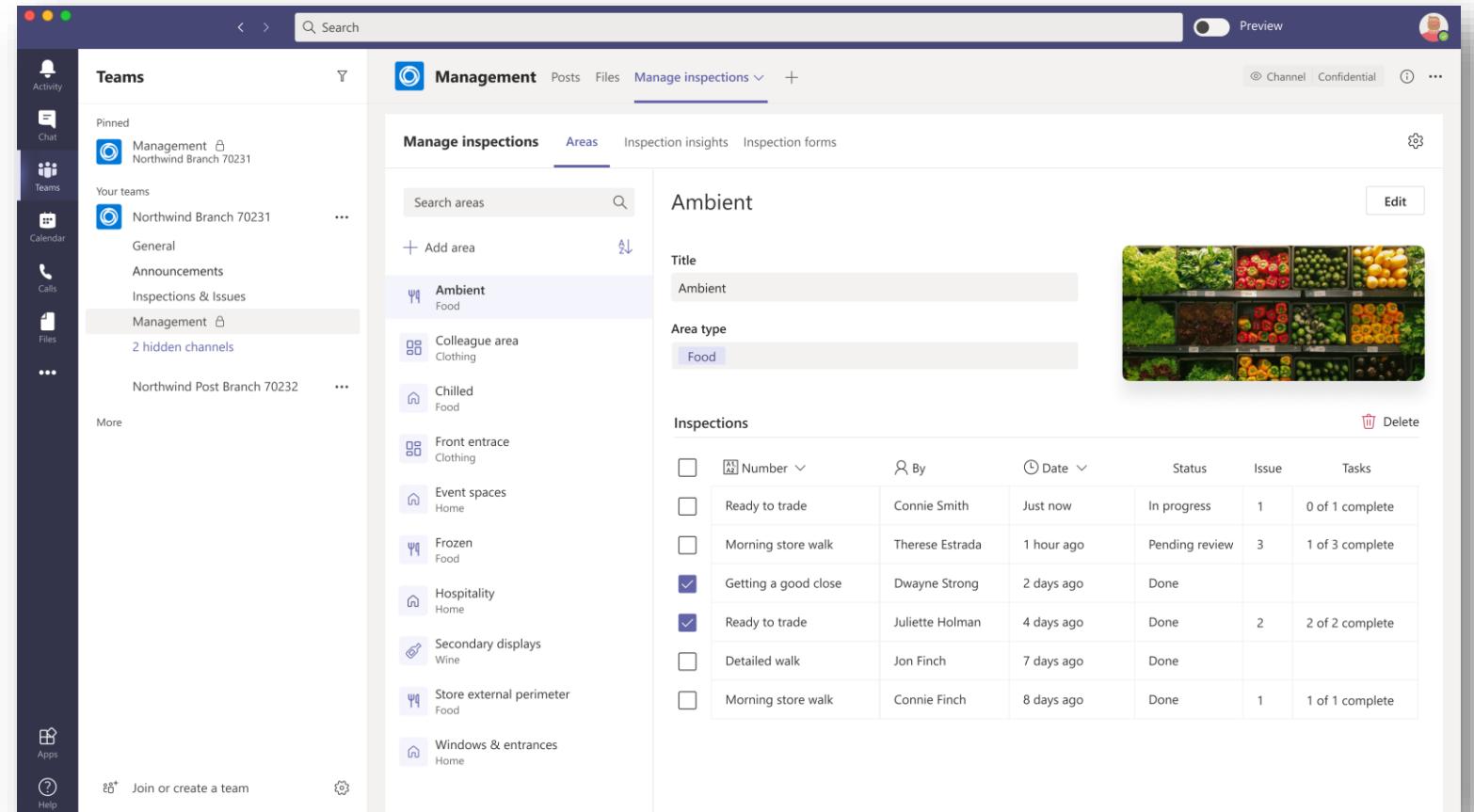
Open source

Unmanaged solutions open sourced on GitHub to be accessible anytime (coming soon).

Inspection

aka.ms/TeamsInspection

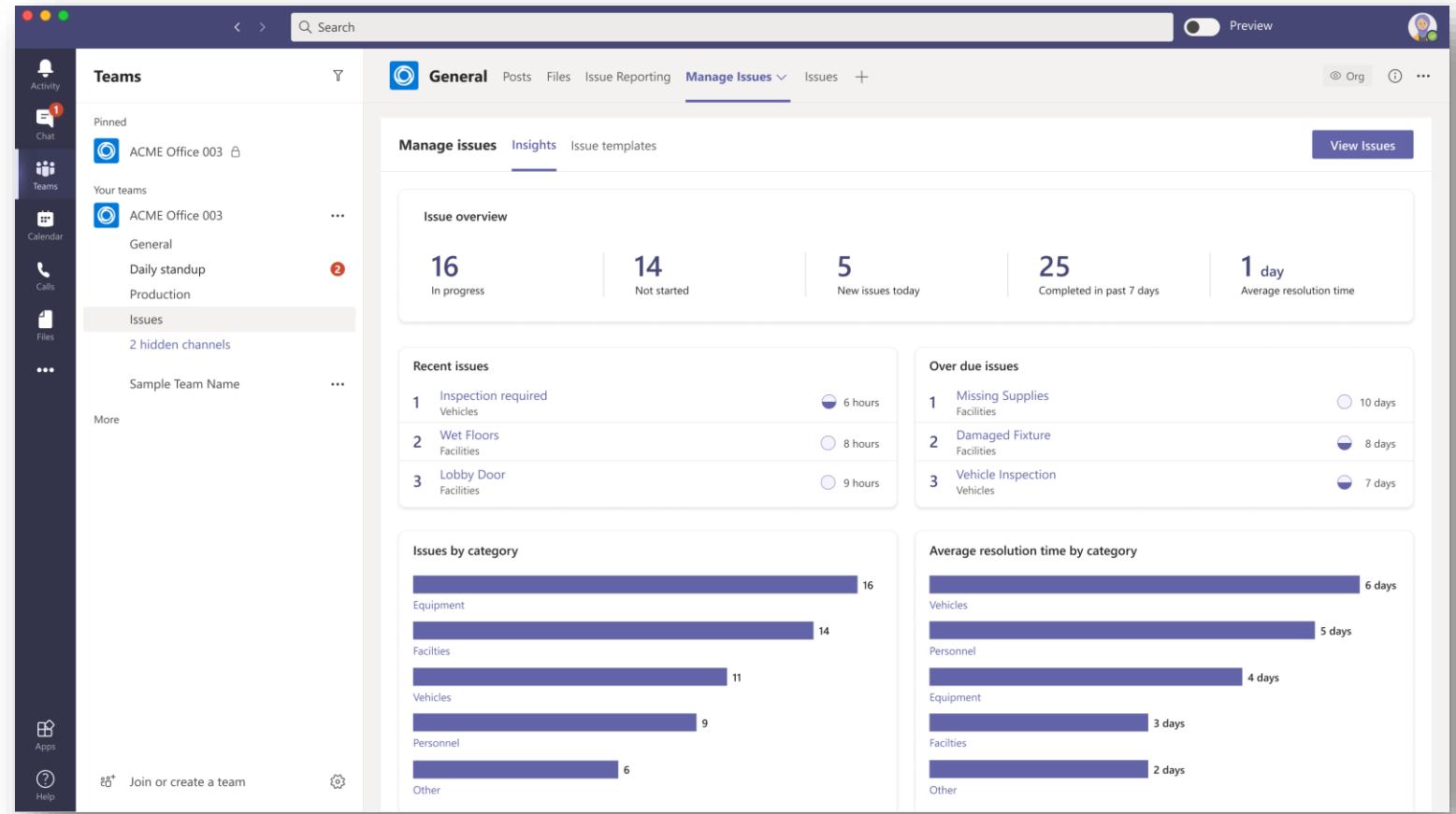
- Enables front line workers to inspect an asset or area to manage quality of products and services or maintain safety at workplace
- Facilitates communication between team members to address issues found during inspection
- Provides simple reports for managers to expedite issue resolution and highlight trends



Issue Reporting

aka.ms/TeamsIssueReporting

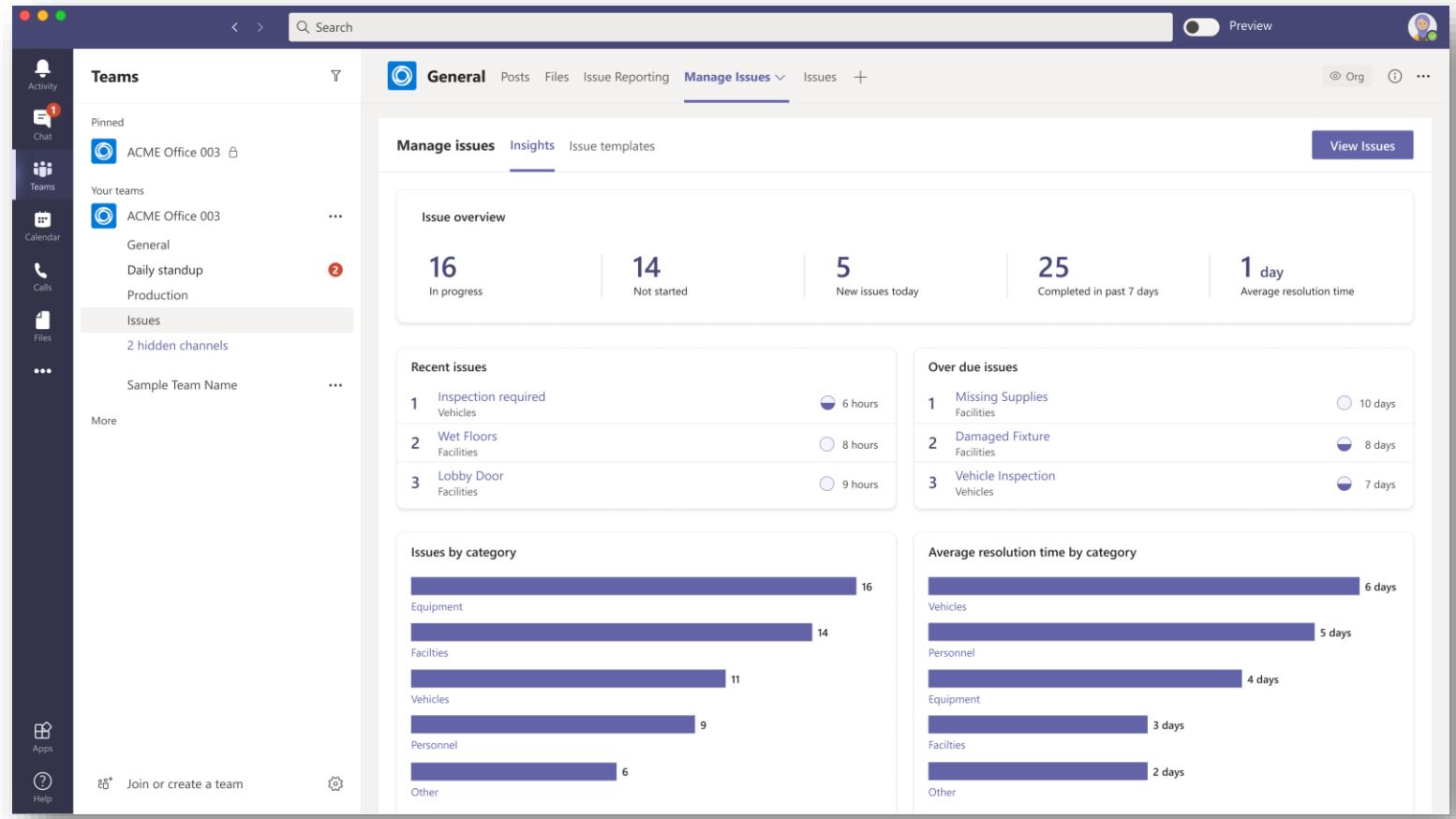
- Enables team members to quickly report common issues related to quality, safety, or other business critical processes
- Easily review, manage, and act upon reported issues to improve resolution time and transparency
- Provides simple reports for managers to expedite issue resolution and highlight trends



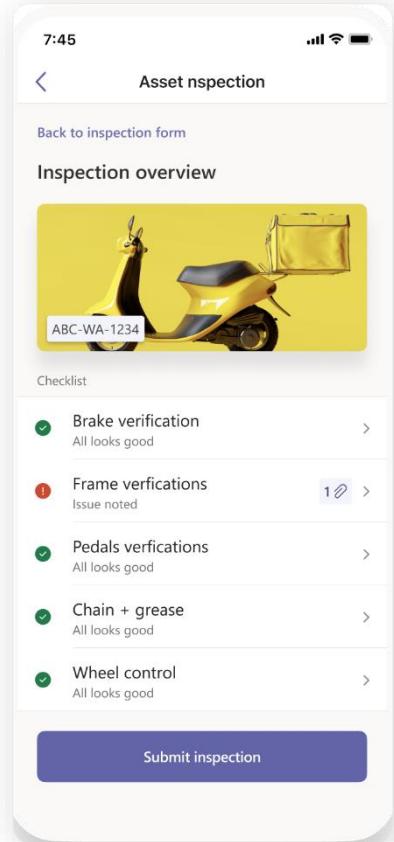
Employee Ideas

aka.ms/TeamsEmployeeIdeas

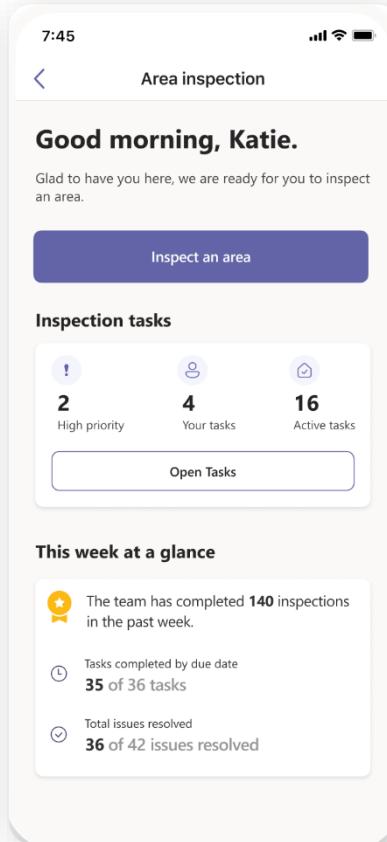
- Enables team members to quickly generate and organize ideas by campaigns
- Easily review, manage, and act upon team's ideas to increase team engagement and morale
- Helps team managers to improve workplace with employee ideas



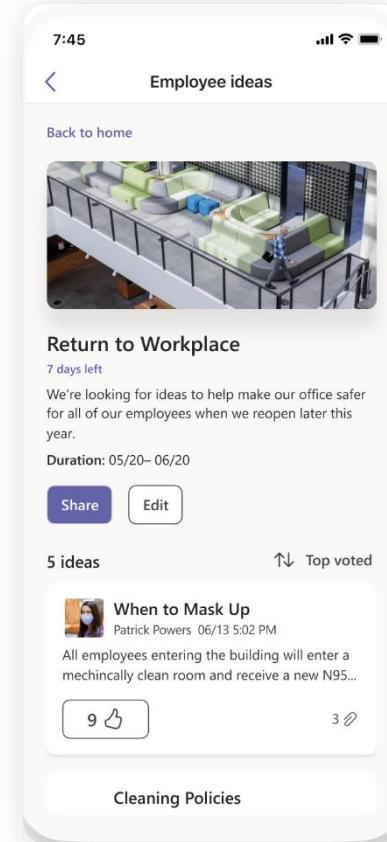
Power Apps in Teams Mobile



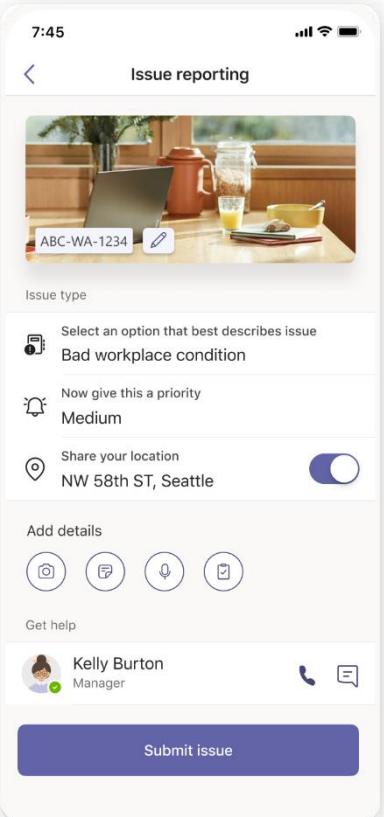
Asset inspection



Area inspection



Employee ideas



Issue reporting

These app templates can be used for multiple scenarios

Level of customization



Ideas

Generate ideas for:

- Hackathon Projects
- Workplace Safety
- Product Backlog

App for front line workers to submit customer feedback



Issue Reporting

Submit issues on:

- Customer escalations
- Safety incidents
- Helpdesk Support

App to submit and track work-orders for:

- equipment request
- system access



Inspection

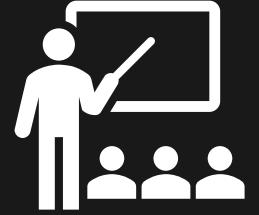
Routine inspections:

- Retail store walk
- Machinery, equipment
- Asset checkout / checkin

App to establish check-list based processes for:

- machine maintenance
- patient check-ins

Demo 05



Add the Issue Reporting sample app to a team

Create and work with issue templates

Create issues

Use the Tasks (Planner) app in teams with this app

Lab 05

30 minutes

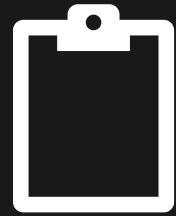


Sample Apps

Lab document: Lab 05 – Sample Apps

1. Install the Issue Reporting sample app
2. Explore the Issue Reporting app
3. Customize the sample app

Resources



App Videos

<https://aka.ms/TeamsEmployeeIdeasVideo>

<https://aka.ms/TeamsIssueReportingVideo>

<https://aka.ms/TeamsInspectionVideo>

Get the Apps

<https://aka.ms/TeamsEmployeeIdeas>

<https://aka.ms/TeamsIssueReporting>

<https://aka.ms/TeamsInspection>

App Docs

<https://aka.ms/TeamsEmployeeIdeasDocs>

<https://aka.ms/TeamsIssueReportingDocs>

<https://aka.ms/TeamsInspectionDocs>

Tip: Power Platform and Teams are evolving at a rapid rate—one of the best ways to keep pace with updates is to subscribe to the Power Platform blogs

DataVerse for Teams in a Day

Module 06

Collaboration Exercise

Let's collaborate

Bringing it all together

Use all the components you have built in a fun collaboration exercise

- Work with others in your tenant, as guided by your trainer
- Add others to your team
- Join other teams
- Create requests using the chatbot or the app
- Approve requests
- View data in your Power BI report (optional)

Lab 06

20 minutes



Collaboration Exercise

Lab document: Lab 06 – Collaboration Exercise

1. Add others to your team
2. Create requests in other teams
3. Manage your team

Dataverse for Teams in a Day Survey

Please complete our survey at the end of this training, share your insights to improve the training and allow us to keep updating

<https://aka.ms/TeamsPPSurvey>

DataVerse for Teams in a Day

Course Close

Questions



Further Learning

Power Platform – more “in a day” training courses



App in a Day – <https://aka.ms/appinaday>

Flow in a Day – <https://aka.ms/flowinaday>

Power Virtual Agents in a Day – <https://aka.ms/PVAinaDay>

Dashboard in a Day – <https://aka.ms/diad>

Power BI in a day courses – <https://aka.ms/pbitraining>

