



Power Platform

Build your own Power Apps Solution

Module 4: Power Apps Portals

Hands-on Lab Step-by-Step

June 2021

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Power Apps Portals

Lab Prerequisites

Follow the pre-requisite steps described in the document: **00-BYOPAS Labs Overview.pdf**, that is included in the lab package. Before beginning this lab, confirm that you have provisioned an environment where you will save your apps, flows and database entities.

Power Apps Portals

[Power Apps Portals](#) Power Apps makers can now create a powerful new type of experience: external-facing websites that allow users outside their organizations to sign in with a wide variety of identities, create and view data in Microsoft Dataverse or even browse content anonymously. The full capabilities of Dynamics 365 Portals, previously offered only as an add-on to model-driven apps in Dynamics 365, are now available completely standalone inside of Power Apps.

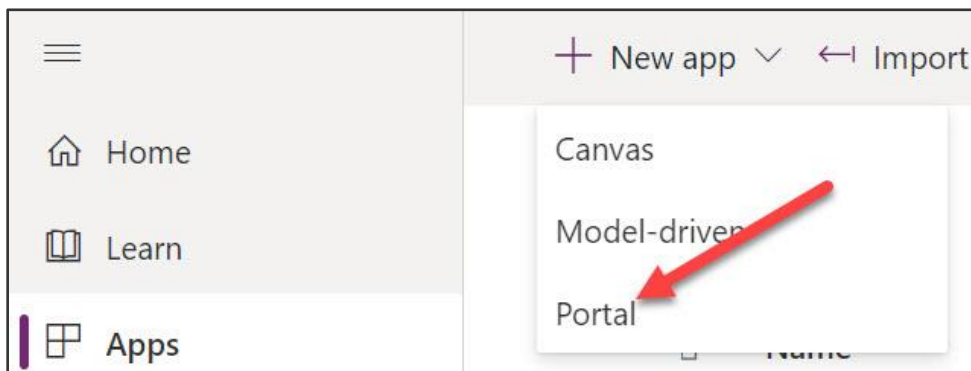
Exercise 1: Provision Portal & Create Form

In this exercise, you will provision the portal and create a new form for the Device Order table.

Task 1: Provision portal

Note: The provisioning process for a portal takes several minutes. Your only action at this point is to get it started. The provisioning will take place in the background while you build out the business card reader in your app. If you do not plan to complete the portal app part of this lab, skip ahead to the next task.

1. Navigate to [Power Apps Maker portal](#) and make sure you are in the correct environment.
2. Select **Apps**.
3. Click **+ New App** and select **Portal**.



4. Enter **Supplier Portal** for **Name**, provide a unique name for **Address**, and click **Create**.

A screenshot of the 'Portal from blank' configuration form. The form has a left sidebar with a globe icon and a plus sign, and a main content area. The main content area contains a text box for 'Name' with the value 'Supplier Portal', a text box for 'Address' with the value 'SuppliersPortal' and a dropdown for '.powerappsportals.com', a checked checkbox for 'SuppliersPortal.powerappsportals.com', a dropdown for 'Language' set to 'English', and a 'Create' button. There is also a 'Cancel' button. A note at the top right says: 'We'd need to install certain prerequisites. If you'd like to quickly try portals, use an environment with portal package already installed or create a new one using this link. Create new environment'. At the bottom, there is a link to 'Terms and Conditions' and a link to 'Privacy Statement'.

5. The portal will provision in the background while you completed the remaining tasks.

Task 2: Create form

In this task, you will create a new main form that will be used in the portal.

1. Navigate to [Power Apps Maker portal](#) and make sure you are in the correct environment.
2. Select **Solutions** and click to open the **Completed Solution**.

Solutions	
Display name	Name
Microsoft Flow Approvals	msdyn_FlowApprovals
Microsoft Flow Approvals Core Solution	msdyn_FlowApprova...
Completed Solution	CompletedSolution
AI Sample Data	msdyn_AIBuilderSam...

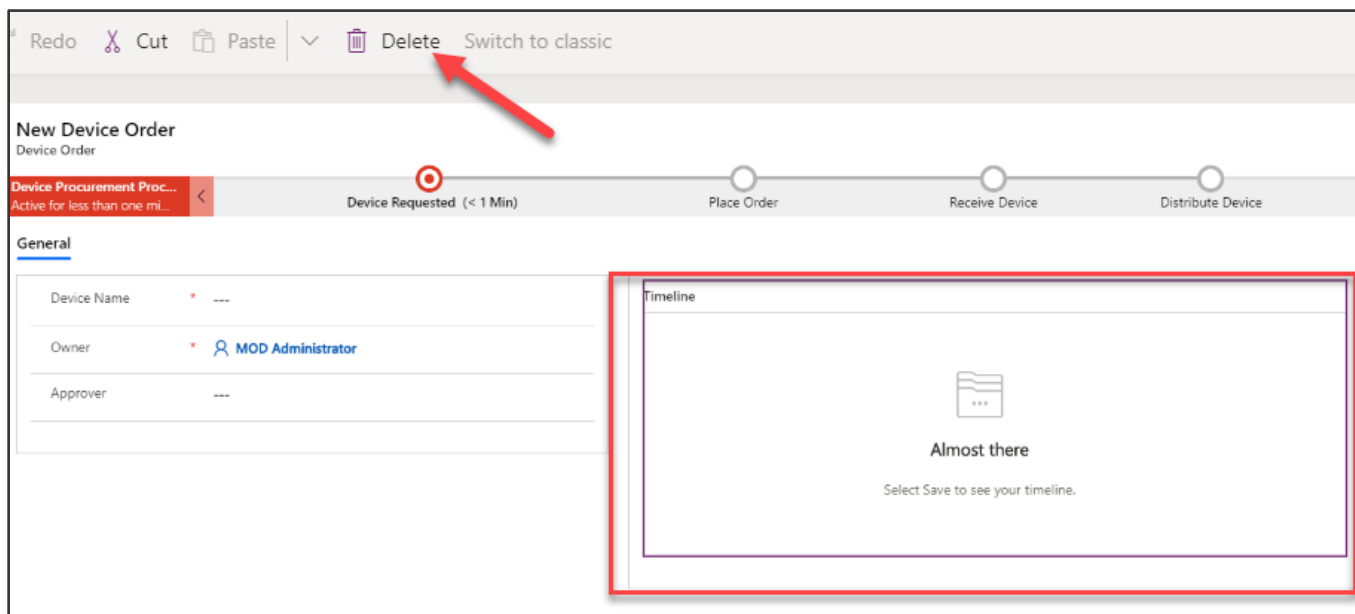
3. Locate and click to open the **Device Order** table.

Solutions > Completed Solution	
Display name	Name
Approval Status	contoso_approvalstatus
Device Order	contoso_deviceorder
Device Ordering App	contoso_deviceorderingapp_9657b

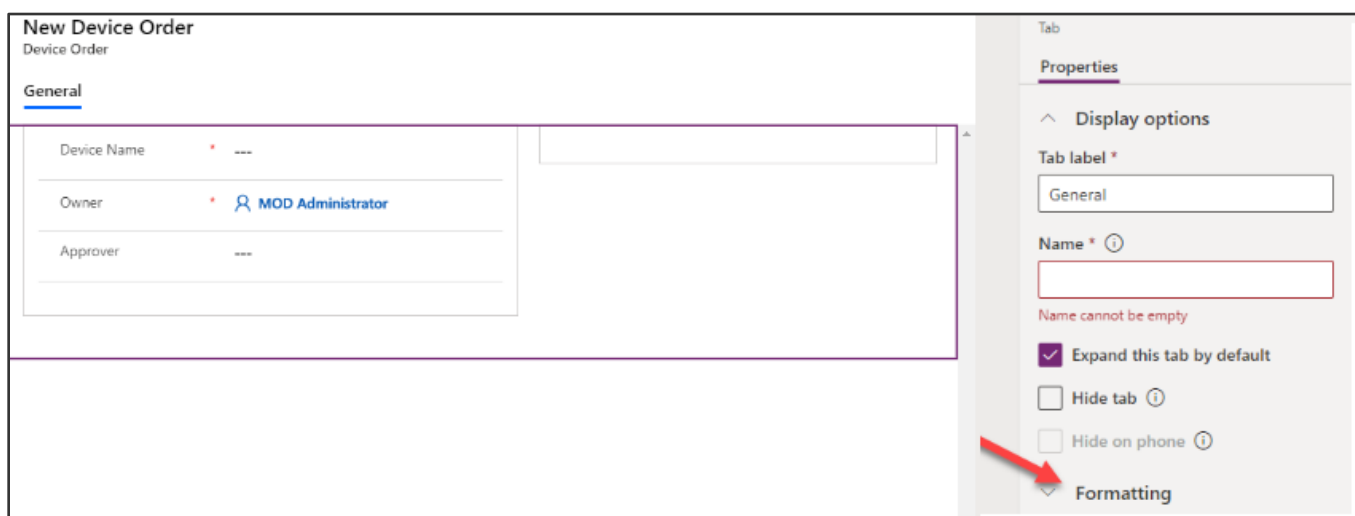
4. Select the **Forms** tab, click **Add Form**, and select **Main Form**.

Power Apps Maker interface showing the **Forms** tab selected. The **Add form** dropdown menu is open, and **Main Form** is selected. The background shows the **Device Order** table with tabs for Business rules, Views, Forms, Dashboards, Charts, Keys, and Data.

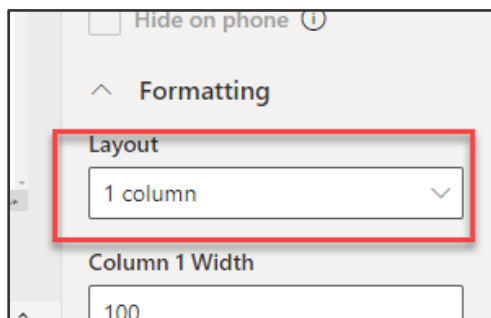
5. Select the **Timeline** control and **Delete**.



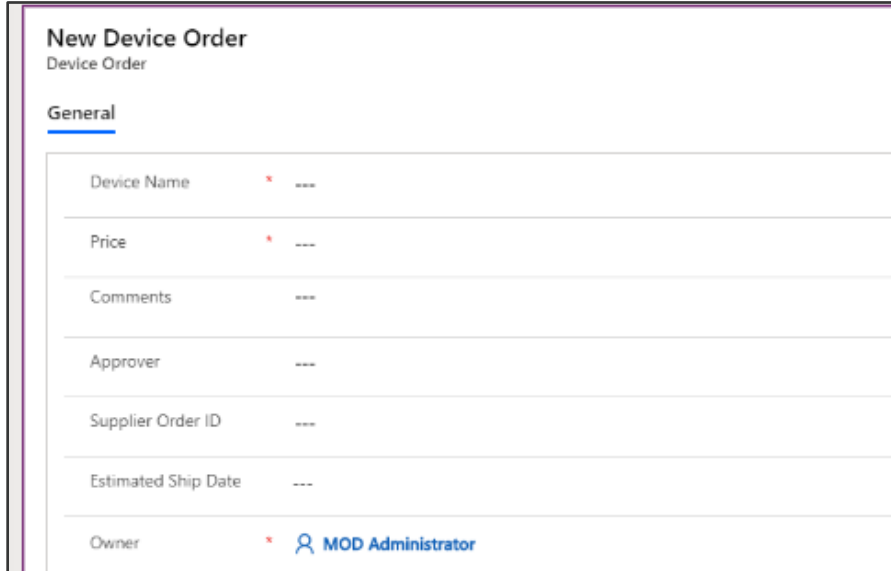
6. Select the **General** tab and click to expand the **Format** section.



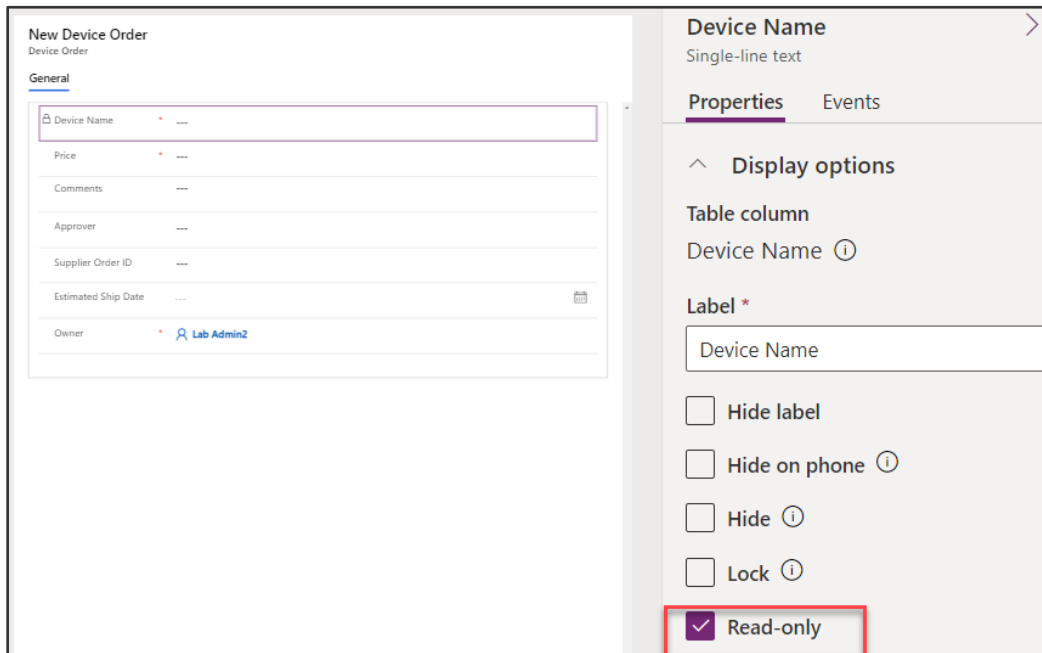
7. Select **1 column** for **Layout**.



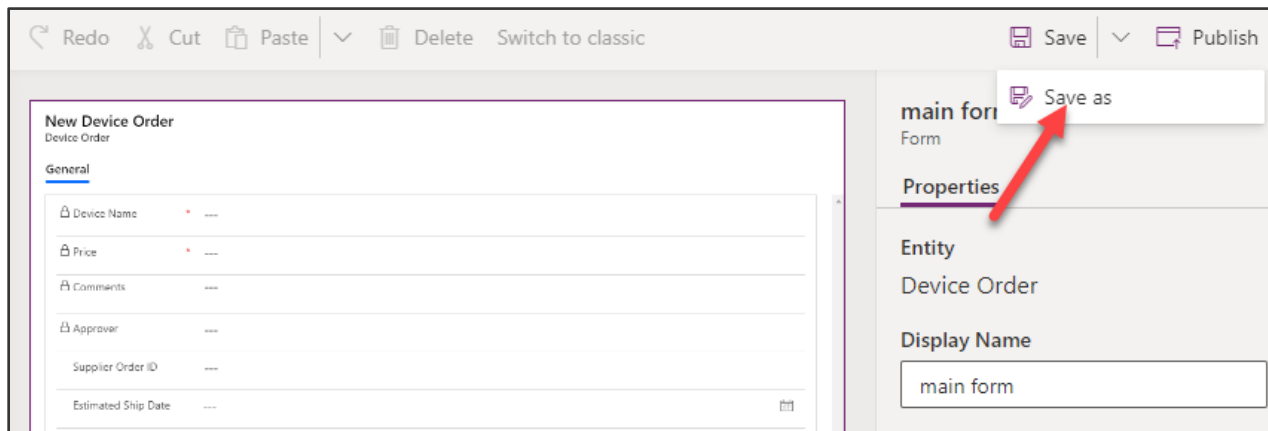
8. Add **Price**, **Comments**, **Supplier Order ID**, and **Estimated Ship Date** columns to the form. Move the **Approver** column below Comments and make sure the **Owner** field is on the bottom of the form by dragging and dropping them into place.



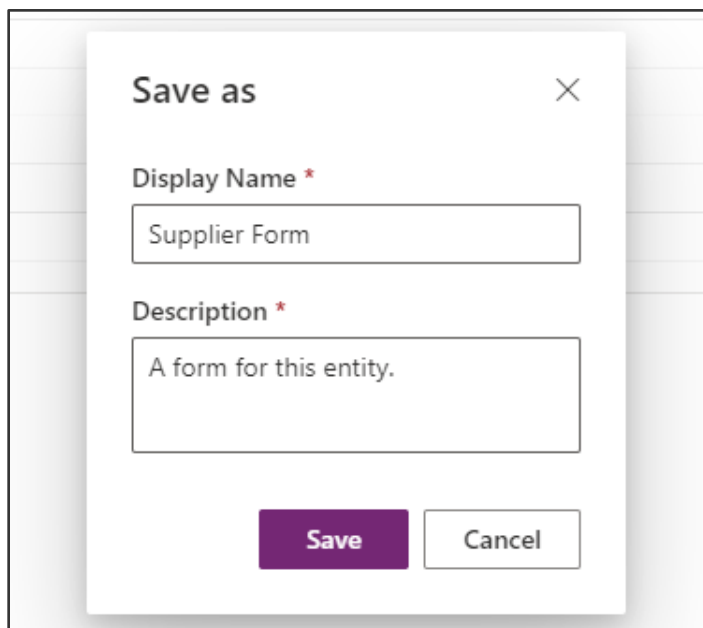
9. Select the **Device Name** field and check the **Read-only** checkbox.



10. Make the **Price**, **Comments**, and **Approver** columns Read-only.
11. Your form should now look like the image below. Click the chevron button next to Save and select **Save as**



12. Enter **Supplier Form** for **Display Name** and click **Save**.



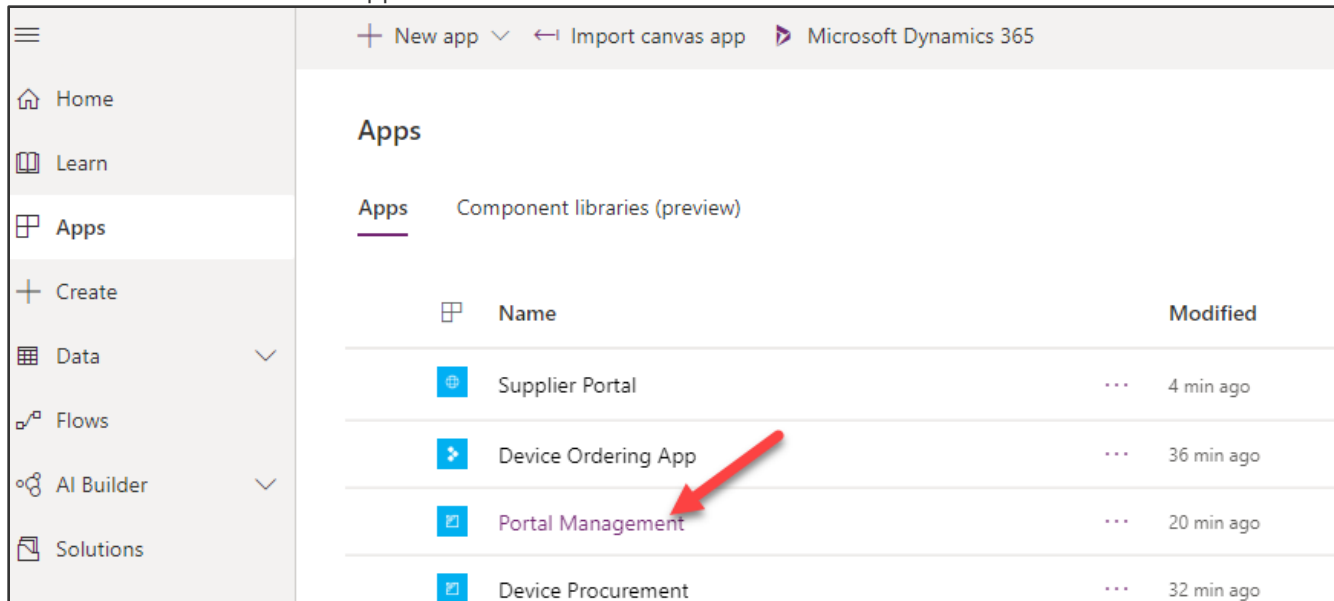
13. Click **Publish** and wait for the publishing to complete.

14. Close the form editor browser window or tab.

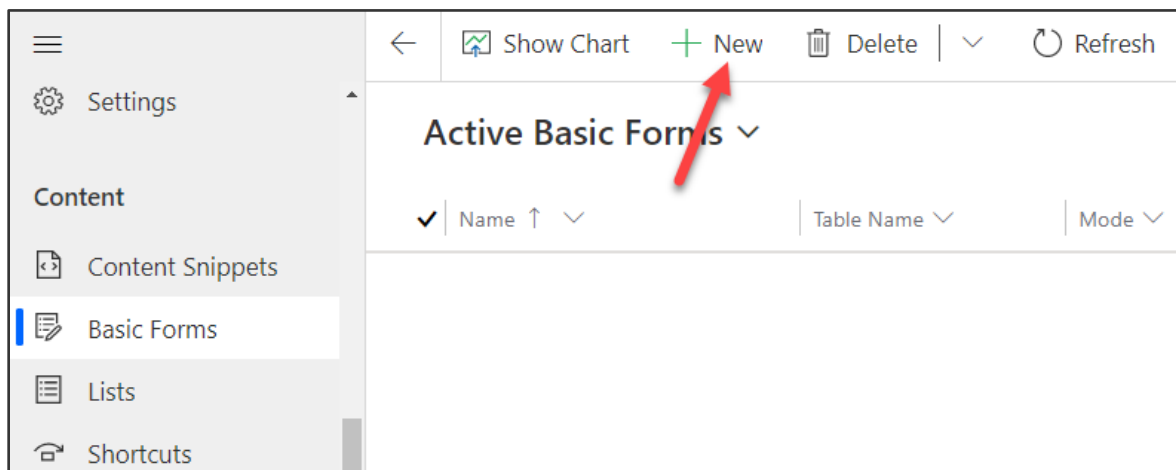
Task 3: Create basic form

In this task, you create a new basic form that will use the supplier form you created.

1. Navigate to [Power Apps Maker portal](#) and make sure you are in the correct environment.
2. Select **Apps**. The Supplier Portal and Portal Management apps should now be ready.
3. Click to open the **Portal Management** applications.



4. Select **Basic Forms** and click **+ New**.



5. Enter **Supplier Portal Form** for **Name**, select **Device Order** for **Table Name**, **Supplier Form** for **Form Name** (you will need to select these from the dropdowns to the right of the required fields), **General** for **Tab Name**, **Edit** for **Mode**, **Query String** for **Record Source Type**, **Starter Portal** for **Website** (click the magnifying glass icon if the Starter Portal doesn't appear at first), and click **Save**.

New Basic Form

General Form Options On Success Settings Additional Settings Associated Table Reference Basic Form Metadata

Name * **Supplier Portal Form**

Table Name * **new_deviceorder** Device Order (new_deviceorder) ▼

Form Name * **Supplier Form** Supplier Form ▼

Tab Name **General** General ▼

Mode **Edit**

Record Source Type * **Query String** Record ID Parameter * **id**
Name

Website * Starter Portal X 🔍

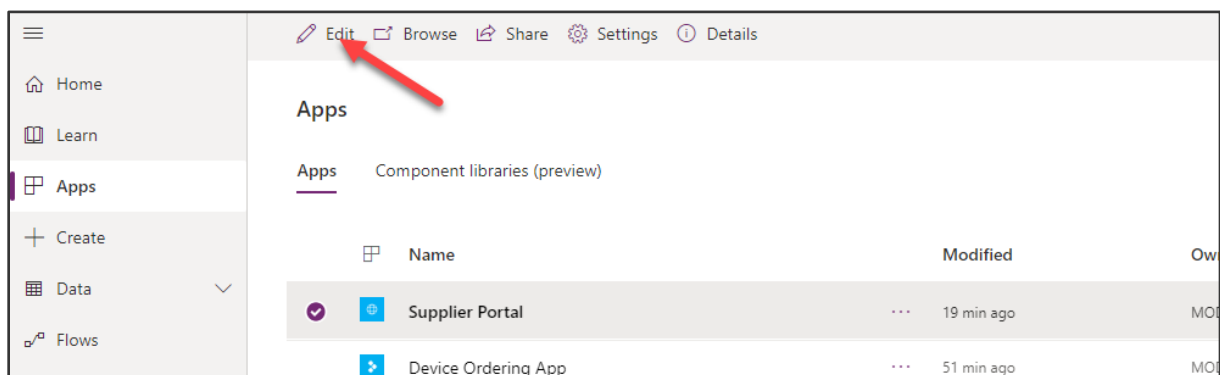
6. Close the **Portal Management** application.

Exercise 2: Personalize portal

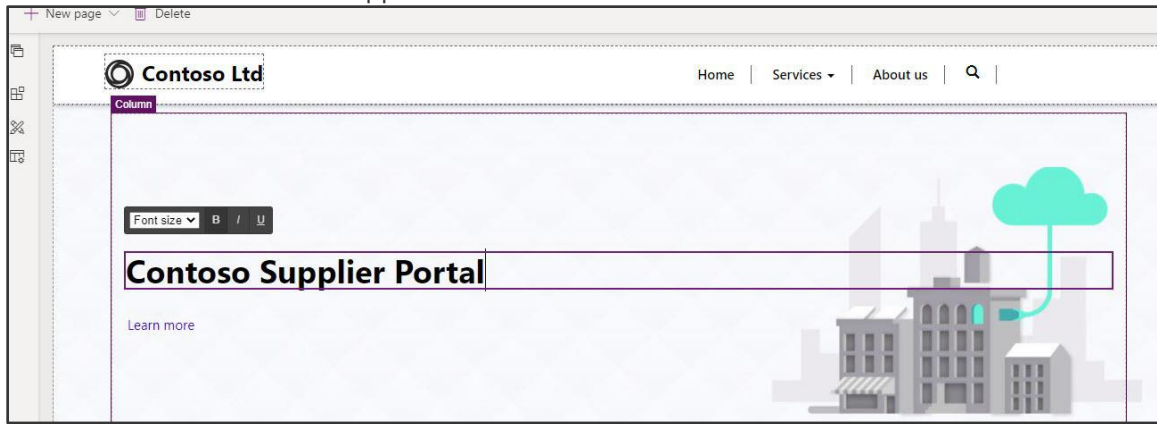
In this exercise, you will edit the home portal web page, create a new page that will show device orders, and use the form you created to edit device order records.

Task 1: Edit home page

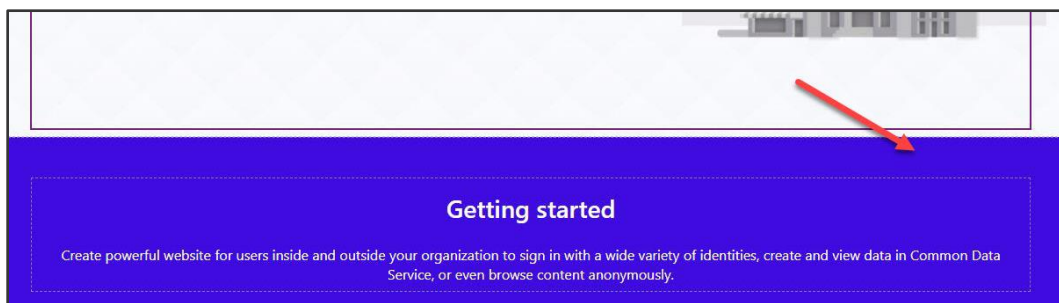
1. Navigate to [Power Apps Maker portal](#) and make sure you are in the correct environment.
2. Select **Apps**, select the **Supplier Portal** application, and click **Edit**.



3. Replace the welcome text with **Contoso supplier portal**.



4. You may replace or remove other sample components.
5. Click on a different component to initiate save.

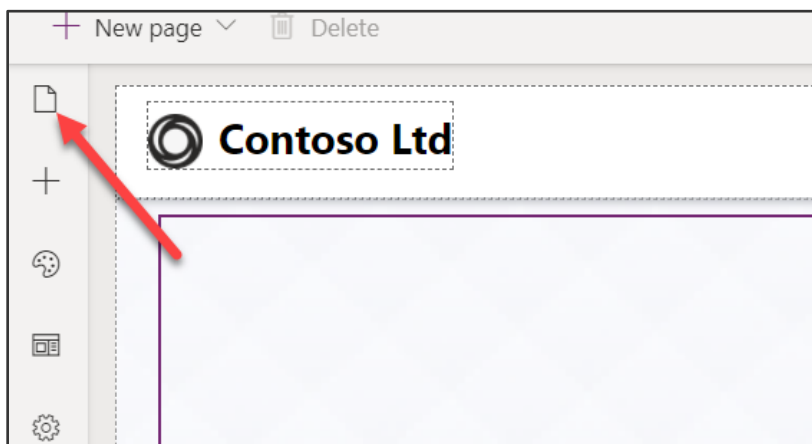


6. Do not navigate away from this page.

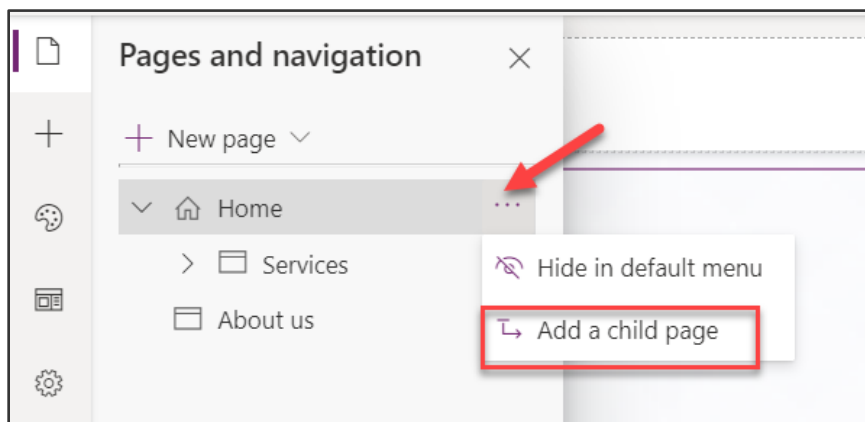
Task 2: Create new web page

In this task, you create a new page that will show list of device orders.

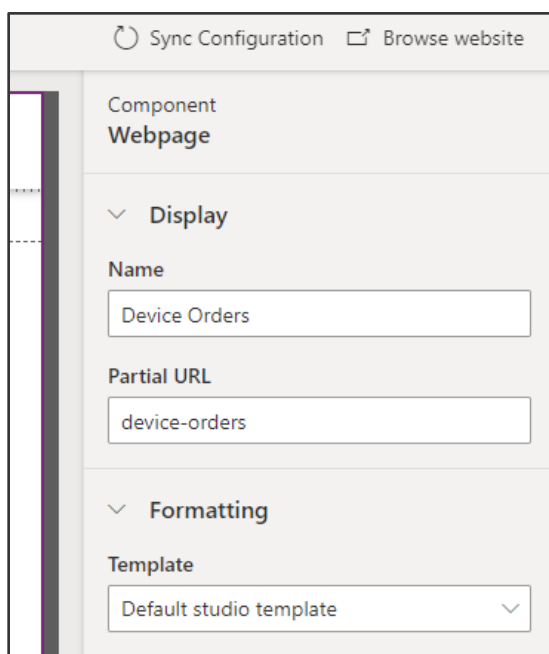
1. Click **Pages and navigation**.



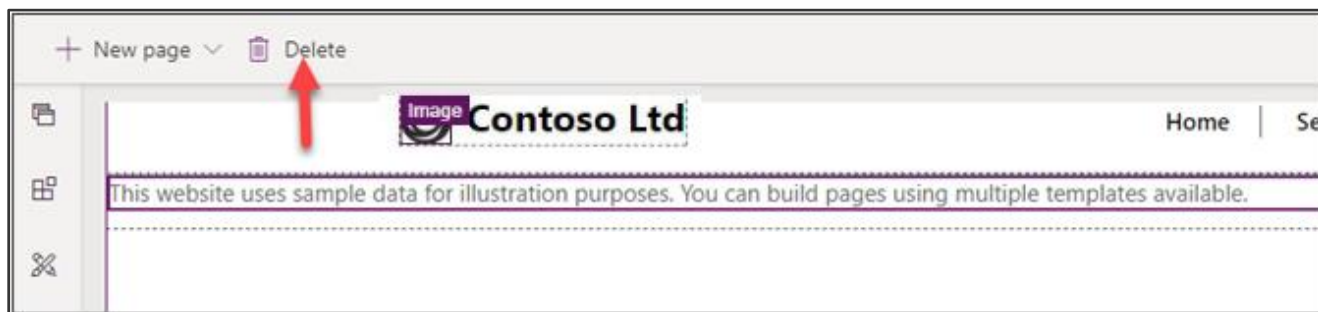
2. Click on the ... button of the **Home** page and select **Add a child page**.



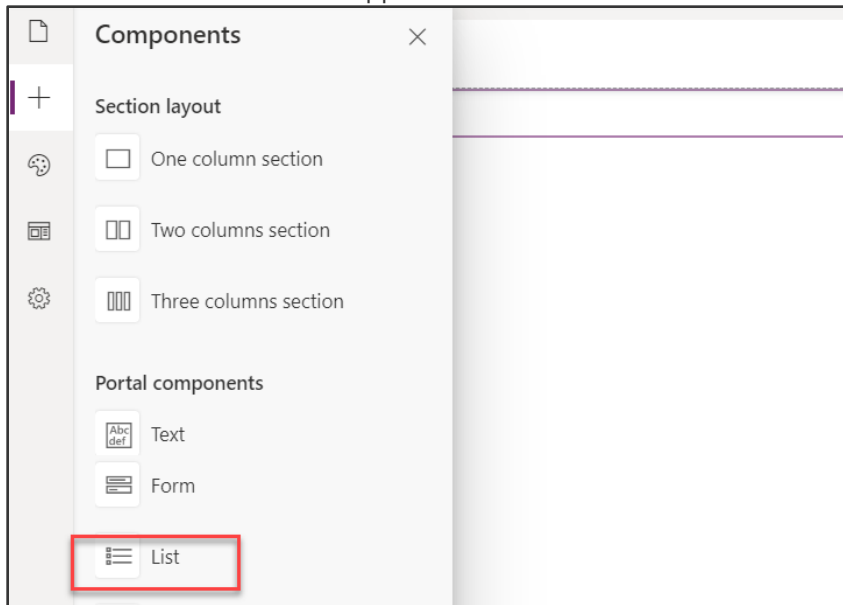
3. Enter **Device Orders** for **Name** and **device-orders** for **Partial URL**.



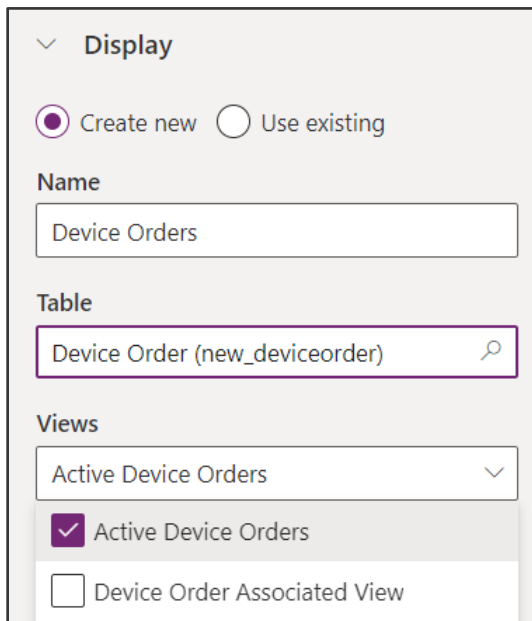
4. Select the place holder text and delete it.



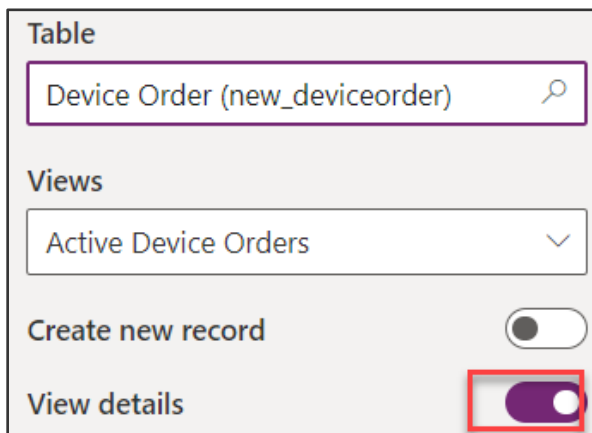
5. Expand **Components** and select **List**.



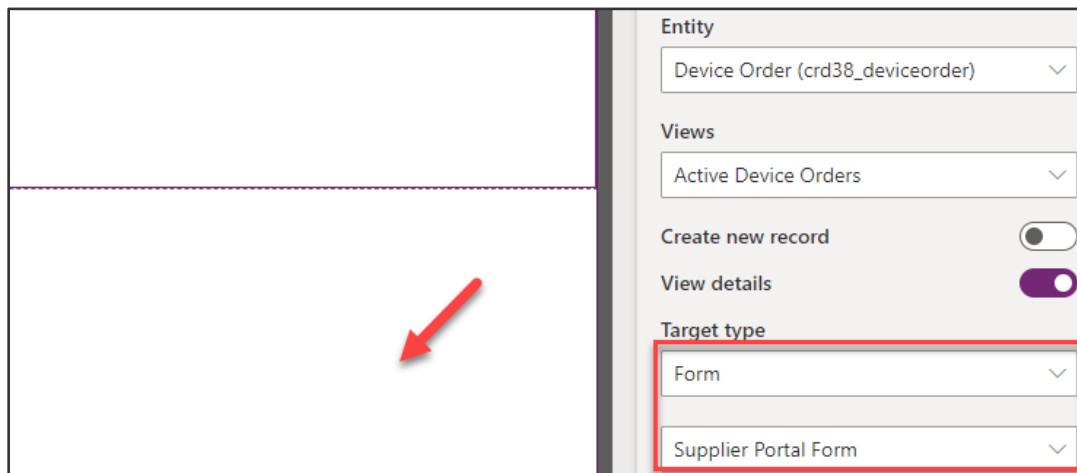
6. Enter **Device Orders** for **Name**, select **Device Order** for **Table**, and select **Active Device Orders** for **Views**.



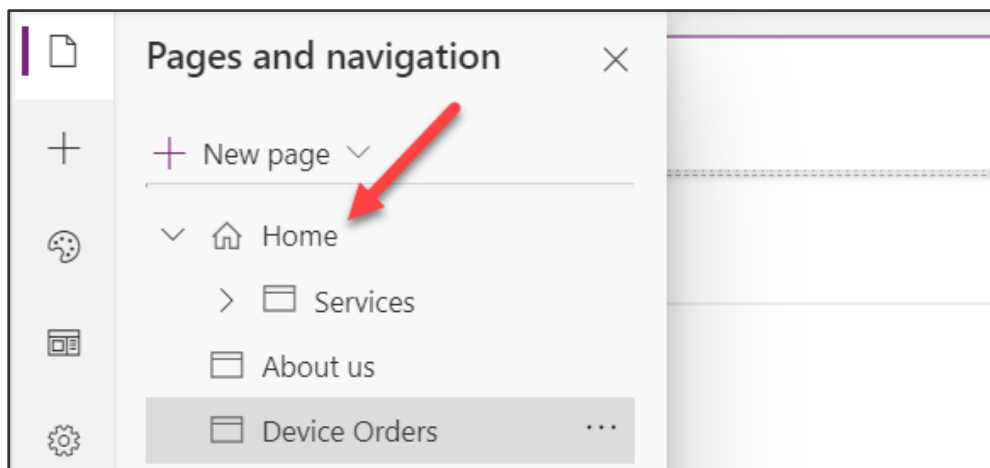
7. Turn on **View details**.



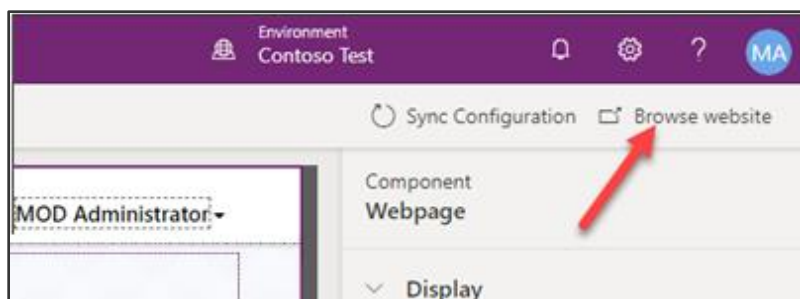
8. Select **Form** for **Target type**, select **Supplier Portal Form**, and click on the canvas to initiate save.



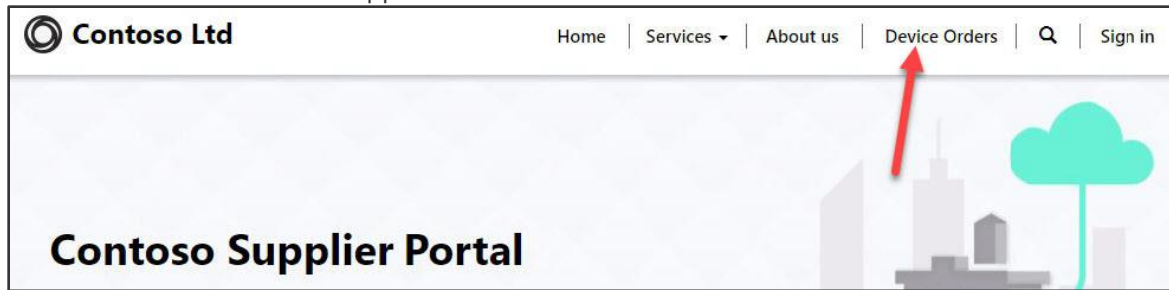
9. Your new page should now look like the image below (this may take a few moments to load). Click **Pages**.
10. Select the **Home** page.



11. Click **Browse website**.



12. The home page should load, and you should see **Device Orders** on the sitemap. Click **Device Orders**.



13. The active device orders view should load. Click to open one of the device orders.

Contoso Ltd					
Home Services About us Device Orders Search Sign in					
Device Name	Created On	Approval Status	Estimated Ship Date	Price	Status
Microsoft - Surface RT 32GB	10/24/2020 11:18 AM	Approve		\$499.00	Active
Acer - Aspire E	10/24/2020 11:54 AM	Approve	12/20/2017	\$379.99	Active
Asus - N56VJ	10/24/2020 11:55 AM	Approve	4/4/2018	\$999.99	Active
Acer - Aspire S7	10/24/2020 11:55 AM	Approve	8/12/2018	\$1,399.99	Active

14. Your record should open in edit mode and only the **Supplier Order ID** and **Estimated Ship Date** should be editable.

View details

Device Name *

Microsoft - Surface RT 32GB

Price *

\$499.000

Comments

I really like this device.

Approver

admin@M365x861323.onmicrosoft.com

Supplier Order ID


Estimated Ship Date

Submit

15. Provide **Supplier Order ID**, **Estimated Ship Date**, and click **Submit**.


Approver
labadmin2@m365x852465.onmicrosoft.com

Supplier Order ID

Estimated Ship Date
 

Submit

16. Record should be update and the form should close.

 Contoso Ltd					
Device Name ↑	Created On	Approval Status	Estimated Ship Date	Price	Status
Acer - Acer - Aspire M	1/28/2021 4:07 PM	Approve	1/13/2021	\$699.99	Active
Acer - Acer - Aspire S3	1/28/2021 4:09 PM			\$628.00	Active
Acer - Acer - Aspire U1	1/27/2021 12:47	Reject		\$1,899.99	Active

17. Close the preview browser window or tab.

18. Close portal editor browser window or tab.

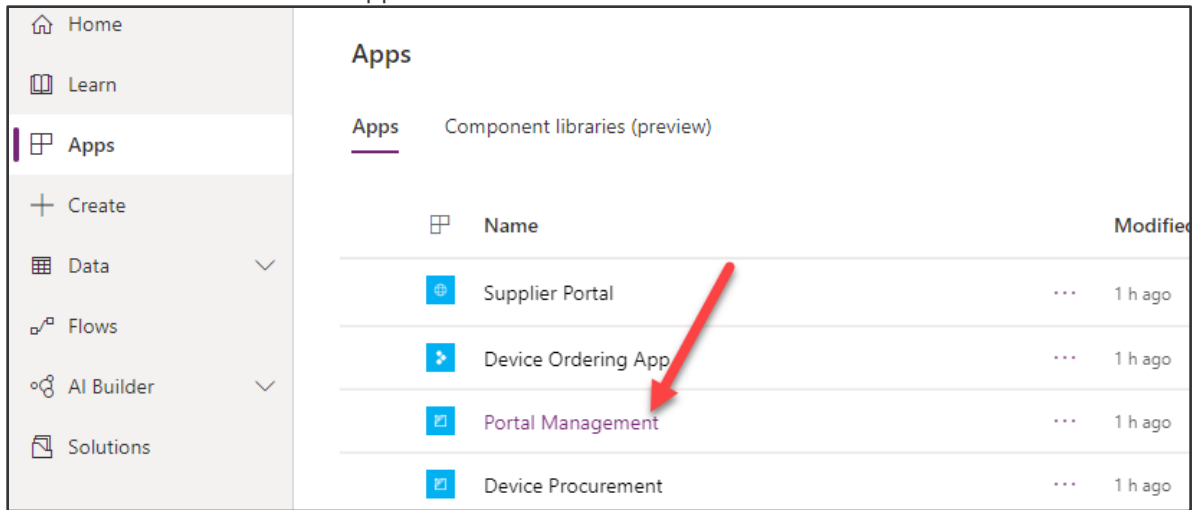
Exercise 2: Restrict anonymous users

In this exercise, you will restrict anonymous users from seeing the device orders page.

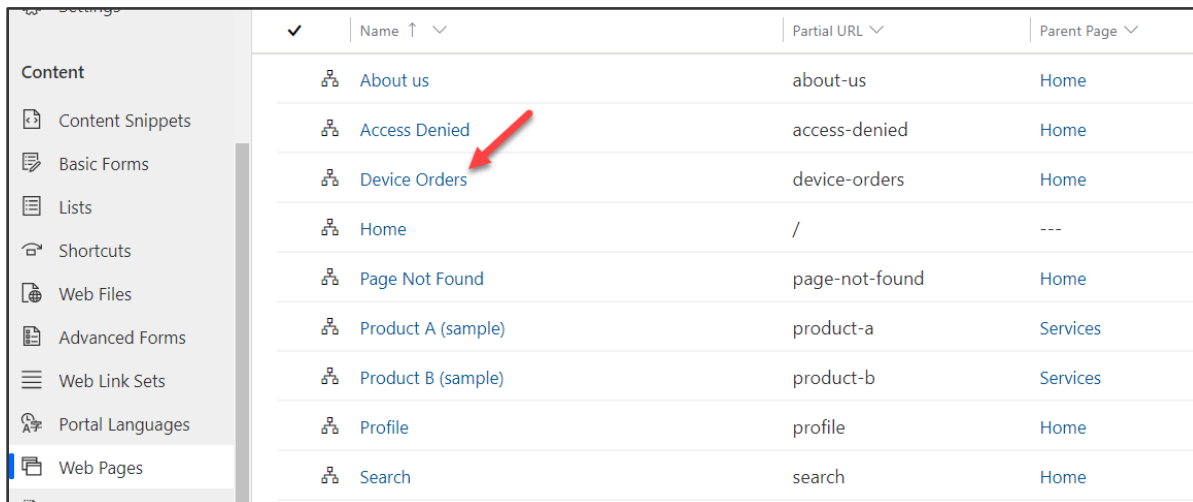
Task 1: Create web page access control rule

In this task, you will create a web page access control rule that will restrict anonymous users from accessing the device orders web page.

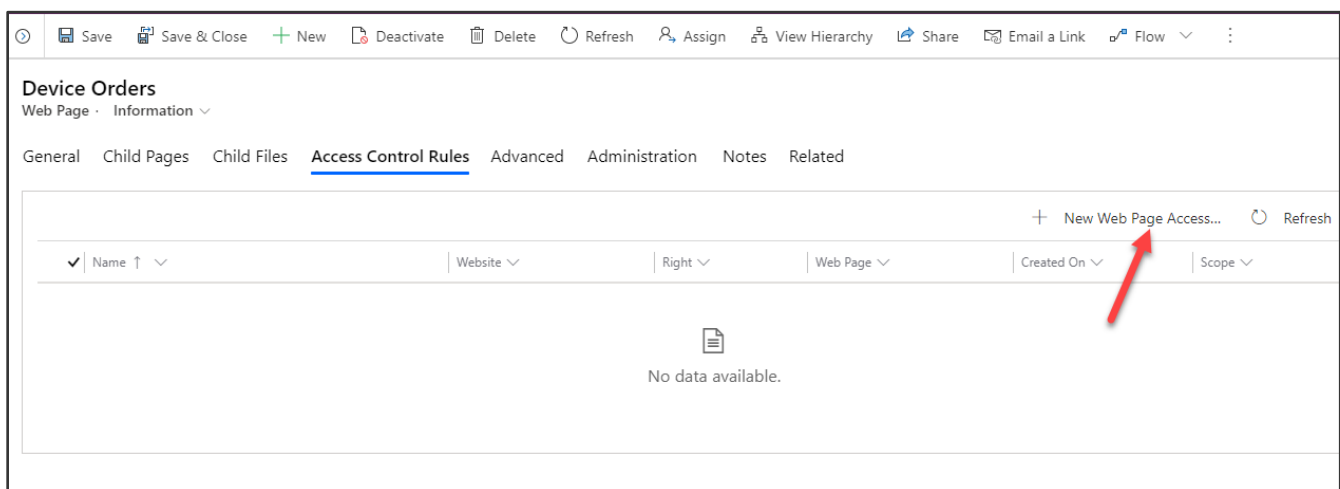
1. Navigate to [Power Apps Maker portal](#) and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Portal Management** application.



3. Select **Web Pages** and click to open **Device Orders**.



4. Select the **Access Control Rule** tab and click **+ New Web Page Access Control Rule**.



5. Enter **Restrict to authenticated users** for **Name**, select **Starter Portal** for **Website**, select **Restrict Read** for **Right**, and click **Save**.

The screenshot shows the configuration page for a Web Page Access Control Rule named 'Restrict to authenticated users'. The 'General' tab is selected. The configuration details are as follows:

Property	Value	Scope
Name	* Restrict to authenticated users	
Website	* Starter Portal	
Web Page	* Device Orders	
Right	* Restrict Read	
Description	---	

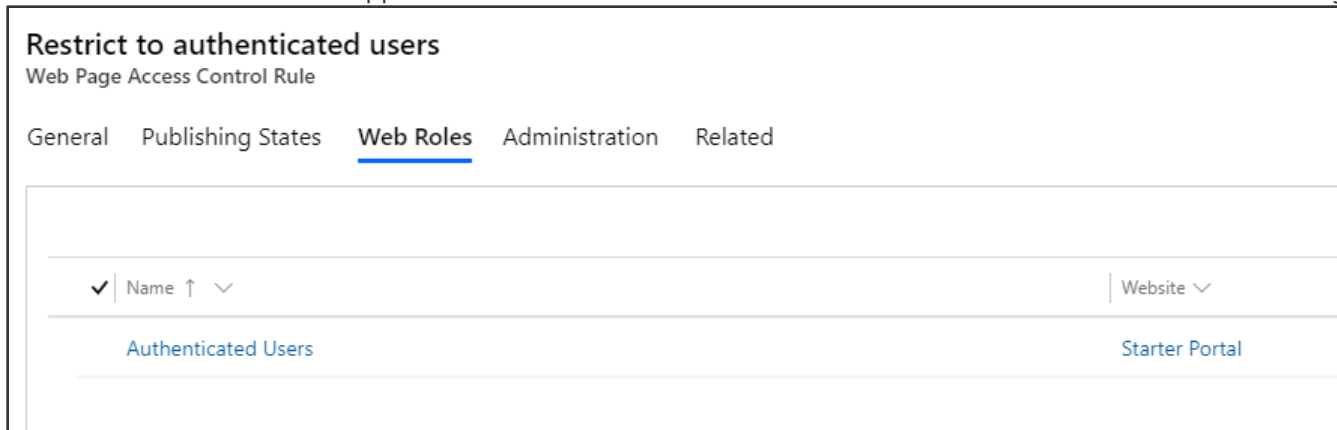
6. Select the **Web Roles** tab and click **Add Existing Web Role**.

The screenshot shows the 'Web Roles' tab for the 'Restrict Anonymous' rule. The 'Add Existing Web Role' button is highlighted with a red arrow. The interface shows a table with columns for Name and Website, but it is currently empty with the message 'No data available.'.

7. Select **Authenticated Users**.

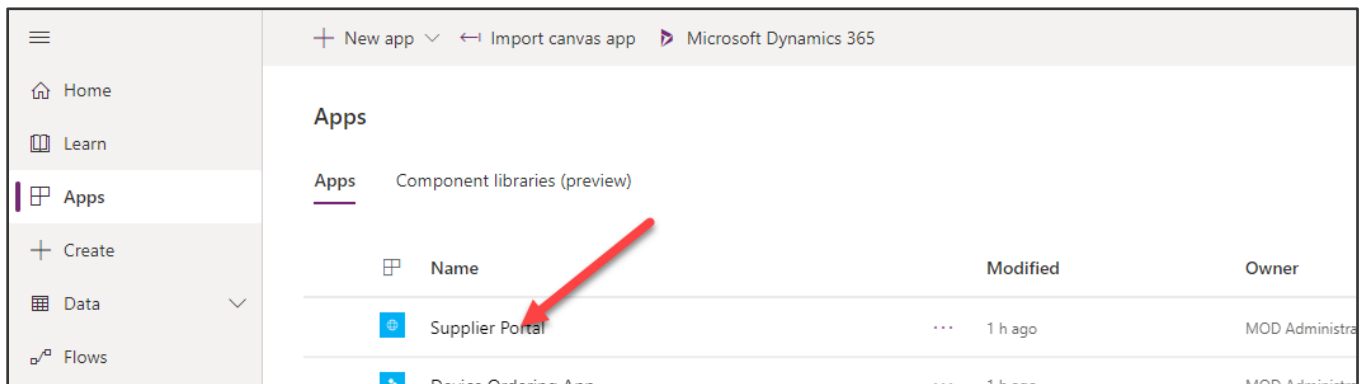
The screenshot shows the 'Lookup Records' dialog box. The 'Select record' section has a search bar with the text 'Look for Records'. Below the search bar, there are two tabs: 'Recent records' and 'All records'. Under the 'Recent records' tab, the 'Authenticated Users' record is listed and highlighted with a red arrow.

8. Click **Add**.
9. You should now have the Authenticated Users web role in the Web Roles tab. Close the Portal Management application browser window or tab.

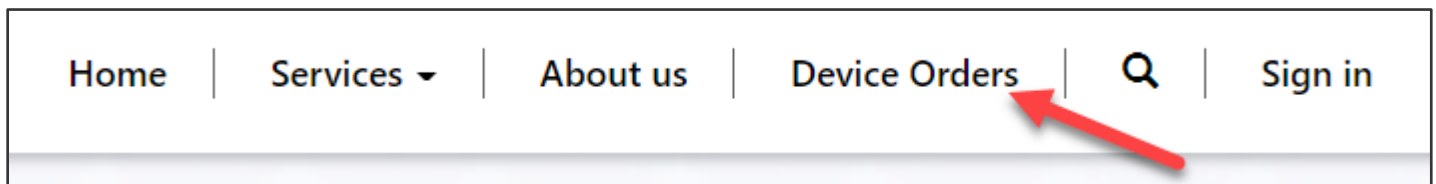


Task 2: Test web page access control rule

1. Navigate to [Power Apps Maker portal](#) and make sure you are in the correct environment.
2. Select **Apps** and click to open the **Supplier Portal** application.



3. Click **Device Orders**.



4. You should be asked to sign in. Select the **Register** tab.

Sign in Register Redeem invitation

Local SignIn

* User name

* Password

☐ Remember Me

Sign in [Forgot your password?](#)

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5. Fill out the registration form and click **Register**.

Sign in Register Redeem invitation

Register for a new local account

* Email

* Username

* Password

* Confirm password

Register

Register using an external account

Azure AD

6. Provide first and last name, and then click **Update**.

7. You should see the list of orders. Click to open one of the orders.

Contoso Ltd						Home	Services	About us	Device Orders	Q	Sign in
Device Name	Created On ↑	Approval Status	Estimated Ship Date	Price	Status						
Microsoft - Surface RT 32GB	10/24/2020 11:18 AM		10/22/2020	\$499.00	Active						
Asus - G75VW	10/24/2020 11:54 AM	Reject	6/5/2018	\$1,699.99	Active						
Samsung - Series 5	10/24/2020 11:54 AM	Reject	3/28/2018	\$799.99	Active						

8. Provide **Supplier Order ID** and **Estimated Ship Date**, and then click **Submit**.

Device Name *
 Microsoft - Surface Pro 64GB

Price *
 \$899.990

Comments
 I need one of these.


Approver
admin@M365x861323.onmicrosoft.com

Supplier Order ID

Estimated Ship Date

Submit

9. The form should close, and the record should get updated.

<div>  <div> Home Services About us Device Orders Q Sign in </div> </div>						
Device Name	Created On	Approval Status	Estimated Ship Date	Price	Status	
Microsoft - Surface RT 32GB	10/24/2020 11:18 AM	Approve	10/22/2020	\$499.00	Active	
Acer - Aspire E	10/24/2020 11:54 AM	Approve	12/20/2017	\$379.99	Active	
Asus - N56VJ	10/24/2020 11:55 AM	Approve	4/4/2018	\$999.99	Active	

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